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«UKRAINE AND CENTRAL ASIA: PROSPECTS FOR SECTORAL COOPERATION AMID REGIONAL TRANSFORMATIONS»

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“Europe — Central Asia: Dialogue Without Borders” Project

This publication was prepared with the support of the International Renaissance Foundation. The opinions, conclusions, and recommendations expressed in this publication are those of the authors and do not necessarily reflect the views of the International Renaissance Foundation.

The International Renaissance Foundation is one of the largest philanthropic foundations in Ukraine. Since 1990, it has supported the development of an open society in Ukraine based on democratic values. Throughout its activities, the Foundation has supported approximately 20,000 projects, providing more than USD 350 million in funding.

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UKRAINE AND CENTRAL ASIA: NEW OPPORTUNITIES FOR SECTORAL COOPERATION

This study was prepared within the framework of the project “Europe and Central Asia: Dialogue Without Borders”, implemented by the Charitable Organisation “International Charitable Foundation for Civil Diplomacy” in partnership with the Non-Governmental Organisation “Centre for Geopolitical Studies KONSTANTA R&D Group”.

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The International Renaissance Foundation is one of the largest charitable foundations in Ukraine and has been contributing to the development of an open society based on democratic values in Ukraine since 1990. Over the course of its activities, the Foundation has supported approximately 20,000 projects with a total value exceeding USD 350 million.

Authors from Ukraine and Central Asian states contributed to the preparation of individual chapters of the study. The assessments, conclusions and recommendations presented in individual chapters reflect the views of their respective authors and do not necessarily coincide with the views of other authors, partner organisations or the project’s donors.

Cooperation between states is not always determined by geographical proximity. Increasing importance is attached to the complementarity of economies, shared development needs, the exchange of knowledge and technologies, and the ability to build long-term partnerships based on practical interests. This is why countries and regions that were not traditionally regarded as natural partners are now opening up new opportunities for cooperation. One such example is the partnership between Ukraine and Central Asia.

Ukraine, the Republic of Kazakhstan, the Kyrgyz Republic, the Republic of Uzbekistan, the Republic of Tajikistan and Turkmenistan have a long history of economic, educational, cultural and people-to-people contacts. However, this experience alone has not resulted in a comprehensive system of cooperation. Interaction has developed unevenly, often relying on individual initiatives, personal contacts or short-term projects, and has not always evolved into sustainable partnerships among institutions, universities, businesses and professional communities.

Over a long period, Central Asia remained an important yet insufficiently systematically represented area of Ukraine’s international and foreign economic engagement. Relations were maintained, but their practical substance did not fully reflect the actual potential of the parties. Ukrainian businesses had limited knowledge of the specific characteristics of the region’s markets, while Central Asian partners did not always have an up-to-date understanding of the opportunities offered by modern Ukraine. Academic and expert ties often remained limited, and successful examples of cooperation were not transformed into the basis for broader joint programmes.

Today, the prerequisites are emerging for reconsidering this approach. Over the past several years, the international economic environment has undergone significant changes. The transformation of production and supply chains, the disruption of established logistics routes, growing attention to food and resource resilience, shortages of skilled labour, energy efficiency and technological development are prompting states to diversify their external relations and seek new formats of cooperation. For Ukraine, these processes are combined with the need to adapt its economy to challenging security conditions, restore its production potential and expand the circle of its international partners. For

Central Asia, they create additional incentives to modernise their economies, develop infrastructure, attract technologies and deepen ties with European markets.

Central Asia is no longer a region that can be viewed exclusively through the prism of its natural resources or its location between major economic centres. The Republic of Kazakhstan, the Kyrgyz Republic, the Republic of Uzbekistan, the Republic of Tajikistan and Turkmenistan have different economic models, market sizes, resource capacities and development priorities. Across the region, the issues of modernising industry, diversifying economies, developing transport infrastructure, ensuring the efficient use of natural resources, training skilled personnel and expanding international cooperation remain relevant for all states. In a number of these areas, Ukraine possesses expertise, technological experience and human capital that may be in demand.

In turn, Central Asia is of interest to Ukraine not only as an export market. The region may become a platform for the establishment of joint ventures, the implementation of infrastructure and investment projects, the development of new production linkages and access to broader Asian markets. Partnership may be built around joint production, technology localisation, specialist training, academic research, the exchange of practices and the development of routes connecting Central Asia with the European economic area.

While working on this study, the project team repeatedly encountered a view shared by representatives of professional communities both in Ukraine and in Central Asia: the potential for cooperation significantly exceeds its current level. The main obstacle is often not the lack of mutual interest but the absence of permanent communication mechanisms. Businesses lack reliable information about markets and partners, universities lack long-term cooperation programmes, expert communities lack regular platforms for the exchange of assessments and civil society organisations lack accessible instruments for implementing joint initiatives.

These challenges are compounded by objective constraints, including complex and costly logistics, an insufficient number of direct transport routes, differences in regulatory environments, limited mutual presence in the media space and a shortage of specialists who understand the specific characteristics of both Ukraine and Central Asia. A significant proportion of potential partners lack sufficient information about the opportunities offered by the other side or do not know through which institutions cooperation can be initiated. As a result, even promising ideas often remain at the discussion stage.

It was the recognition of this gap between the existing potential and the actual intensity of cooperation that became the starting point for this study. Its purpose was not to prepare another general overview of relations between Ukraine and Central Asia or to produce a list of declarative recommendations. Instead, the project team deliberately focused on specific sectors where mutual interest, existing expertise and the possibility of achieving practical results converge.

The sectoral approach makes it possible to view cooperation not as an abstract area of international relations but as a set of specific tasks, partnerships and projects. It helps answer not only the question of why Ukraine and Central Asia should cooperate but, above all, in which areas such cooperation is most promising, what exactly the parties can offer each other, which barriers need to be overcome and which institutions should ensure the transition from ideas to practical implementation.

The structure of this publication reflects this logic. Individual chapters are devoted to trade and new models of economic cooperation; the agricultural sector and food security; critical mineral resources and the extractive industry; labour mobility and human capital development; education and academic ties; transport corridors and logistics; energy and the green transition; water resources,

ecology and sustainable development; cultural diplomacy and humanitarian contacts; institutional partnership and the development of expert networks.

The selected areas do not exist in isolation from one another. The development of trade depends directly on logistics, investment and the quality of inter-institutional communication. The implementation of joint industrial and agricultural projects requires a skilled workforce, academic cooperation and the exchange of technologies. The development of critical mineral resources is impossible without modern geological exploration, processing capacity, environmental standards and access to international value chains. Water, climate and energy challenges also require not isolated solutions but comprehensive cooperation among government institutions, academia, business and civil society.

The preparation of this study was preceded by an extensive process of professional dialogue. Within the framework of the project “Europe and Central Asia: Dialogue Without Borders”, strategic discussions, open lectures, expert consultations and thematic discussions were held with the participation of representatives from Ukraine and Central Asia. These events brought together researchers, academics, diplomats, representatives of think tanks, civil society organisations and professional communities. They helped to gain a better understanding of the issues that are relevant to different stakeholders, where their interests converge and where differences exist in their perceptions of the opportunities and risks of cooperation.

The outcomes of this dialogue became one of the sources for shaping the structure of this publication and its research questions. At the same time, each thematic chapter is based on the independent work of its author, including the analysis of open data, existing programmes and cooperation practices, sectoral trends, existing barriers and promising models of interaction. The combination of Ukrainian and Central Asian expert perspectives makes it possible to avoid a one-sided view and to better reflect the differences among the countries of the region.

The study does not seek to develop a universal model of cooperation that would be equally applicable to all five Central Asian countries. Each of them has its own economic structure, institutional system, development priorities and experience of relations with Ukraine. Therefore, the opportunities and recommendations presented in the individual chapters should be adapted to the specific bilateral context. At the same time, comparing different national approaches makes it possible to identify common challenges and mechanisms that may be relevant across the region.

This publication also does not seek to provide an exhaustive overview of all possible areas of Ukraine–Central Asia partnership. Its purpose is different: to identify the areas with the greatest potential, demonstrate the practical complementarity of the parties and provide a foundation for further work. The success of this cooperation will be measured not by the number of declarations or memoranda signed but by the emergence of joint educational programmes, research initiatives, production projects, logistics solutions, investment partnerships and sustainable professional contacts.

Future interaction between Ukraine and Central Asia will depend not only on economic conditions. Of decisive importance will be the ability of government institutions, businesses, universities, think tanks and civil society organisations to maintain regular dialogue, exchange information and assume responsibility for implementing specific initiatives. The potential for cooperation will not be realised automatically. It requires people and institutions capable of transforming mutual interest into long-term partnerships.

We regard this study not as a definitive answer to all questions but as an invitation to further professional discussion and practical cooperation. We hope that the assessments, ideas and recommendations presented in this publication will contribute to a better understanding of the opportunities for Ukraine–Central Asia partnership, provide a foundation for new contacts and facilitate the development of joint projects that will give cooperation between Ukraine and Central Asia concrete and long-term substance.



NEW OPPORTUNITIES FOR ECONOMIC COOPERATION BETWEEN UKRAINE AND THE CENTRAL ASIAN STATES

Taras MARSHALOK, Economic Expert, Kyiv School of Economics (KSE)

Policy Recommendation. Introduce a differentiated approach towards the five Central Asian states, establish a unified project portfolio and target bilateral trade of USD 1.2–1.5 billion by 2030, subject to full compliance with international sanctions.

Executive Summary

Economic cooperation between Ukraine and Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan and Turkmenistan should evolve from sporadic engagement to a structured portfolio of projects. In 2024, trade in goods with the region amounted to USD 878.0 million, compared with USD 3.96 billion in 2013, representing a decline of 77.8%. At the same time, Ukraine continues to maintain a trade surplus of USD 253.5 million, while preserving recognised strengths in pharmaceuticals, the food industry, engineering and metal products, as well as considerable potential in education, digitalisation, engineering services, water efficiency and civil resilience. In 2025, the region's two largest markets remained the core of bilateral cooperation: trade with Kazakhstan amounted to approximately USD 400.0 million, while trade with Uzbekistan reached USD 315.0 million.

The central policy proposal is to differentiate Ukraine's approach by country, identifying Kazakhstan and Uzbekistan as priority markets for expansion, Turkmenistan as a market for selected infrastructure projects, and Kyrgyzstan and Tajikistan as markets for specialised export and education packages. By 2030, achieving bilateral trade of USD 1.2–1.5 billion remains a realistic indicative target, provided that intergovernmental cooperation mechanisms are restored, access to financing is secured, alternative logistics routes are further developed and strict sanctions compliance is maintained.

1. Dynamics and Structure of Cooperation

Relations have evolved through three distinct phases. Between 1991 and 2013, cooperation was sustained by inherited industrial supply chains, common technical standards, transit through Russia and strong demand for Ukrainian industrial equipment. This model generated substantial trade volumes but remained dependent on legacy infrastructure. During the period from 2014 to 2021, Ukraine's reorientation towards Europe, Russian transit restrictions and inconsistent economic diplomacy led to the fragmentation of economic ties. Although bilateral trade recovered to USD 2.11 billion in 2021, it remained 46.6% below its 2013 level. Since 2022, cooperation has become increasingly selective: logistics costs have risen, payment and sanctions-related risks have intensified, while high value-added sectors have continued to offer viable opportunities.

In 2024, Kazakhstan accounted for 46.9% of Ukraine's total trade with Central Asia, followed by Uzbekistan (31.6%), Turkmenistan (15.8%), Kyrgyzstan (4.0%) and Tajikistan (1.7%). Together, Kazakhstan and Uzbekistan represented 78.5% of regional trade, justifying the concentration of Ukraine's limited economic diplomacy resources on these two priority markets. This concentration remained evident in 2025: trade with Kazakhstan amounted to approximately USD 400.0 million, while trade with Uzbekistan reached USD 315.0 million. Combined, this totalled USD 715.0 million, representing an increase of 3.7% compared with the combined figure for these two markets in 2024.

Country	Ukrainian Exports	Ukrainian Imports	Total Trade	Share
Kazakhstan	291.5	120.4	411.9	46.9%
Uzbekistan	166.3	111.2	277.5	31.6%
Turkmenistan	59.4	79.4	138.9	15.8%
Kyrgyzstan	34.5	0.4	34.9	4.0%
Tajikistan	14.1	0.8	14.9	1.7%

Source: UN Comtrade (2024); official materials of the Embassies of Ukraine in Kazakhstan and Uzbekistan (2025); values are presented in USD millions; author's calculations.

2. Differentiated Models of Cooperation

Kazakhstan is Ukraine's largest partner in the region and the key element in the Trans-Caspian logistics corridor. In 2024, bilateral trade amounted to USD 411.9 million, with Ukrainian exports reaching USD 291.5 million. In 2025, total trade remained close to USD 400.0 million, while Ukrainian exports increased to USD 322.7 million and imports declined to USD 77.4 million, further strengthening Ukraine's positive trade balance. Priority areas include pharmaceuticals, food products, engineering, electrical equipment, energy and water management equipment, agricultural technologies, service centres and logistics pilot projects. Regular project-based dialogue, reliable local partners and solutions for payment and certification issues remain essential.

Uzbekistan is the second-largest partner and the region's most promising market in terms of growth potential. Bilateral trade reached USD 277.5 million in 2024 and increased to USD 315.0 million in 2025, representing growth of 13.5%. Pharmaceuticals and machinery remain Ukraine's leading export categories. Additional opportunities exist in medical products, agricultural processing, cold-chain logistics, water-saving technologies, energy efficiency, information technology and vocational education. According to the Embassy of Ukraine, following March 2022, the cost of certain road freight shipments may have increased by approximately threefold, making logistics the principal constraint on further trade expansion.

Turkmenistan should be viewed as a market for large but selective contracts involving pipeline products, energy, water and urban infrastructure, engineering services and technical support. In 2024, bilateral trade amounted to USD 138.9 million, while Ukraine recorded a negative trade balance. The last publicly reported meeting of the Intergovernmental Commission took place in May 2015, making its reactivation an essential precondition for expanding bilateral cooperation.

Kyrgyzstan and Tajikistan represent smaller markets where Ukraine maintains a positive trade balance. Appropriate areas for cooperation include pharmaceuticals, food products, equipment for small-scale manufacturing, digital services and medical, engineering and agricultural education. In relations with Tajikistan, particular attention should be paid to transforming the numerous educational memoranda into practical cooperation programmes, academic mobility initiatives and joint courses.

3. Sectoral Priorities

Pharmaceuticals and Healthcare. Ukrainian pharmaceutical products are already present in four Central Asian markets. A competitive model should encompass product registration, pharmacovigilance, professional training, reliable supply chains, telemedicine, rehabilitation services and medical equipment.

Agri-food Sector. Future opportunities extend beyond food exports to include food processing technologies, storage solutions, cold-chain infrastructure, laboratory quality control, seed production, precision agriculture and water-efficient irrigation systems.

Engineering, Energy and Water Management. Ukraine should focus on offering modernisation, maintenance and repair services, spare parts, automation solutions, pumps, valves, backup power systems and energy-efficient technologies supported by local service capacity, rather than attempting to compete through large-scale state-backed financing.

Education and Digital Solutions. Promising areas include dual-degree programmes, short-term professional training courses, EdTech, engineering, medical and agricultural education, as well as small-scale GovTech pilot projects, interoperability of public registers and cyber resilience. Success should be measured by the number of active programmes and participants rather than by the number of signed memoranda.

Defence and Dual-Use Technologies. Cooperation should be limited to carefully controlled projects in humanitarian demining, civil protection, cybersecurity, the protection of critical infrastructure and secure connection. Every transaction should require product classification, authorisation by the State Service of Export Control of Ukraine, end-user verification and a re-export ban.

4. Institutional and Geoeconomic Conditions

Ukraine has bilateral free trade agreements in force with all five Central Asian states. However, the formal trade regime does not eliminate technical, sanitary, customs, payment or transit barriers. Intergovernmental commissions should meet annually and function as project management mechanisms, with every decision specifying a responsible institution, a timeframe, required resources and measurable outcomes.

Russia continues to exert influence through transit routes, banking and industrial linkages, Russian-language business infrastructure and the regulatory framework of the Eurasian Economic Union (EAEU), of which Kazakhstan and Kyrgyzstan are members. Since 2022, the principal risk has been the potential re-export of goods to Russia through third countries' jurisdiction. China dominates the region through the scale of its financing, infrastructure packages and equipment supplies. Ukraine cannot compete in terms of financial resources, but it can compete through flexibility, rapid adaptation, high-quality services, workforce development, compatibility with European standards and experience gained under crisis conditions.

The Middle Corridor, running through the South Caucasus and the Caspian Sea, provides an alternative to transit through Russia, although it is not automatically a lower-cost option. Route-specific pilot projects, cargo consolidation, digital documentation, tariff harmonisation and comparisons of total door-to-door logistics costs are required. According to the World Bank, coordinated investments and reforms could triple freight volumes along the corridor and halve transit times by 2030. However, this represents the corridor's regional potential rather than a guaranteed outcome for Ukraine.

5. Risks and Safeguards

The principal risks include sanctions circumvention and the re-export of goods to Russia; high and volatile logistics costs; challenging payment procedures; regulatory barriers; weak implementation of bilateral agreements; excessive concentration of exports in a limited number of product categories; insufficient data on trade in services, investment and certain country-specific indicators; as well as corruption and partner-related risks. Government support should be provided only after thorough verification of product classification codes, beneficial ownership, intermediaries, financial institutions, transport routes, the commercial rationale of the transaction and the end user. For sensitive goods, contracts should include a re-export ban, audit rights and post-delivery monitoring.

Direct investment between Ukraine and Central Asian countries remains limited and volatile, while some statistical indicators are not publicly disclosed for confidentiality reasons. Consequently, policy decisions should not rely on unverified assumptions about an «investment boom.» Priority should instead be given to project financing, export credit insurance, bank guarantees and the involvement of international financial institutions in economically justified projects.

6. Roadmap and Policy Actions

During the initial phase, Ukraine should establish the Ukraine–Central Asia Coordination Platform under the joint leadership of the Ministry of Economy and the Ministry of Foreign Affairs; conduct a comprehensive review of existing agreements, intergovernmental commissions and barriers to cooperation; prepare five country fiches, establish a unified project registry and carry out a transport corridor assessment; and adopt a sanctions compliance and export control protocol.

In the medium term, at least four project-oriented meetings of bilateral cooperation mechanisms should be convened; business and expert missions should be organised in the fields of pharmaceuticals, agricultural processing, engineering, education and GovTech; several logistics pilot projects and insured or guaranteed commercial contracts should be launched; and the implementation of educational programmes should be ensured.

In the long term, only cooperation models with demonstrated market demand should be scaled up; service or demonstration centres should be established without permanent budget subsidies; Ukrainian companies should be integrated into the procurement procedures of international organisations; and an independent evaluation of the government support instruments' complementarity should be conducted.

Key Policy Decisions for the Government

1. Recognise Central Asia as a distinct priority of Ukraine's economic diplomacy, based on five differentiated country-specific cooperation models.
2. Concentrate resources on Kazakhstan and Uzbekistan while maintaining specialised cooperation tracks for Turkmenistan, Kyrgyzstan and Tajikistan.
3. Transform intergovernmental commissions from protocol-oriented bodies into project-driven mechanisms and monitor the implementation of their decisions.
4. Launch financing and insurance mechanisms for verified contracts, introduce transport corridor pilot projects and establish a system of trusted local partners.
5. Ensure comprehensive sanctions compliance and export control screening for all sensitive transactions supported by the state.
6. Use the target of USD 1.2–1.5 billion in bilateral trade by 2030 as a policy objective, rather than as an unconditional forecast.

Conclusion

Central Asia should remain a distinct priority of Ukraine's economic diplomacy as a region for export diversification, technological and service cooperation and the expansion of Ukrainian companies' presence. The stabilisation of trade with Kazakhstan and the growth of bilateral trade with Uzbekistan confirm continued demand for Ukrainian pharmaceuticals, food products, engineering goods and other high value-added products. At the same time, the region is not homogeneous. Kazakhstan and Uzbekistan should be considered as the primary markets for expansion, Turkmenistan as a market for selective infrastructure and engineering projects, and Kyrgyzstan and Tajikistan as markets for specialised export, digital and educational solutions.

The principal risk to the development of cooperation stems from the extensive trade, financial, transport and industrial ties between the Central Asian states and Russia. Particular attention should be paid to Kazakhstan and Kyrgyzstan as members of the Eurasian Economic Union (EAEU), that increases the risks of re-export to Russia, the use of intermediary companies, opaque payment schemes and the circumvention of international sanctions. Consequently, Ukraine's economic engagement with the region should expand only under conditions of comprehensive sanctions compliance and export control screening, particularly with regard to dual-use items, equipment, electronics, machinery and components. As this paper has already emphasised, sanctions compliance constitutes a mandatory precondition for achieving the targeted level of bilateral trade.

For state-supported contracts, due diligence should include verification of product classification codes, ownership structures of counterparties, intermediaries, financial institutions, transport routes, the commercial rationale of transactions and end users. Sensitive transactions should additionally be subject to contractual no re-export bans, audit rights, end-use verification and post-delivery monitoring. Without these safeguards, increased trade could expose Ukraine to sanctions, security and reputational risks that would outweigh the direct economic benefits generated by such contracts.

Ukraine's model of economic cooperation should not rely on restoring Soviet-era production linkages, many of which remain dependent on Russian infrastructure, but rather on building new direct partnerships. Priority should be given to comprehensive commercial solutions combining the supply of goods with engineering services, local maintenance, personnel training, digital solutions and after-sales service. Such an approach would enable Ukraine to compete not through the scale of state financing but through technological adaptability, service quality, compatibility with European standards and experience gained under crisis conditions.

Another essential prerequisite for deeper cooperation is the diversification of logistics routes and the reduction of dependence on transport corridors passing through Russia. The Middle Corridor has the potential to become a strategic alternative, but its success will depend on route-specific pilot projects, cargo consolidation, the digitalisation of documentation, tariff harmonisation and comparisons of total delivery costs. The existence of an alternative route alone does not guarantee its commercial viability.

The target of USD 1.2–1.5 billion in bilateral trade by 2030 should be considered as a policy objective rather than an unconditional forecast. Achieving this objective will depend on the restoration of intergovernmental cooperation mechanisms, access to export credit insurance and contract guarantees, the removal of logistical and regulatory barriers and, above all, Ukraine's ability to ensure comprehensive sanctions compliance.

Ultimately, the success of Ukraine's policy towards Central Asia should be measured not by the number of memoranda signed or by nominal growth in trade volumes, but by additional secure exports, service revenues, implemented projects, diversified transport routes and the absence of cases of re-export to Russia. Economic benefits should not come at the cost of weakening the international sanctions regime, creating indirect channels of support for the Russian economy or undermining Ukraine's relations with its international partners.



COOPERATION POTENTIAL IN THE AGRO-INDUSTRIAL SECTOR BETWEEN UKRAINE AND THE CENTRAL ASIAN STATES

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National University of Life and Environmental Sciences of Ukraine (NUBiP of Ukraine).

Policy Recommendation. Develop a comprehensive and differentiated agro-industrial cooperation framework for the five Central Asian states by integrating agricultural technologies, irrigation solutions, education and joint production models into a single coordinated portfolio of projects aimed at increasing Ukraine's agricultural exports to USD 300–350 million annually by 2030, subject to comprehensive sanctions compliance, diversified logistics and the systematic restoration of intergovernmental cooperation mechanisms.

Executive Summary

The agro-industrial sector represents one of the most promising yet institutionally underdeveloped areas of economic cooperation between Ukraine and Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan and Turkmenistan. All five countries face similar structural challenges, including increasing water scarcity, the urgent need to modernise irrigation infrastructure, limited food processing capacity, chronic dependence on food imports in selected product categories and shortages of qualified agricultural specialists. At the same time, Ukraine is one of the world's leading producers of grain, oilseed crops and food technologies, supported by a well-developed agricultural research base, strong engineering capabilities, extensive experience in precision agriculture and a broad network of agricultural universities.

In 2024, the share of agri-food products in Ukraine's exports to the region remained below its potential, while the technological and educational dimensions of cooperation were not actually institutionalised. Occasional exports of grain or oilseed crops do not create sustainable partnerships or generate lasting demand for Ukrainian solutions. The central policy proposal is to move beyond one-off transactions towards comprehensive cooperation packages integrating agricultural technologies, irrigation solutions, educational programmes and joint production models tailored to the specific needs of each of the five markets. By 2030, a realistic indicative benchmark for the agro-industrial sector is annual exports of USD 300–350 million, being subject to the restoration of intergovernmental mechanisms, access to insurance instruments, development of alternative logistics and mandatory sanctions control.

1. Agricultural Technologies as Foundation of Partnership

Central Asia is a region with acute structural dependence on imported food products and external agricultural technologies in a number of key categories. A common systemic challenge for all five countries is water stress and inefficient water use. For Ukraine, these challenges represent not only a sales market but also an opportunity to position itself as a technological partner in areas where it has real competitive advantages, including adapted seed varieties, grain and oilseed production technologies, irrigation engineering, agrochemicals, food processing equipment and agricultural education. It is important that these advantages are based not on the scale of public funding – where Ukraine cannot compete with China – but on technological flexibility, adaptable solutions, compliance with European Union standards and extensive experience gained under conditions of resource constraints and crisis.

For decades, Ukraine has been developing a technological base in seeds, agrochemicals and precision agriculture, enabling it to offer solutions adapted to the climatic and soil conditions of Central Asia. Ukrainian-developed varieties of wheat, maize and sunflower have already been successfully cultivated in Kazakhstan and Uzbekistan. Ukraine's competitive model for the region should focus not on the large-scale export of agricultural machinery but on comprehensive solution packages combining seeds with agronomic advisory services, crop production technologies, plant protection products and after-sales technical support. Drone-based crop monitoring, digital farm management platforms, soil analytics and agronomic decision-support systems represent particularly promising areas of cooperation. These solutions do not require large-scale capital, are quickly adaptable to local conditions and are appropriate for the prevailing scale of farms in Kyrgyzstan and Tajikistan.

Digitalisation of the Agro-Industrial Sector: Ukraine's Experience (more than 60% of large agricultural enterprises in Ukraine already use digital production management technologies) and Prospects for **Cooperation with the Central Asian States**

Category	Description / Areas
Technologies implemented in Ukraine	• Precision farming • GPS-based machinery monitoring • Satellite data applications • Agricultural drones • Remote crop monitoring systems • Automated fertiliser application
Promising areas of cooperation	• Establishment of joint digital agriculture centres • Transfer of Ukrainian IT solutions • Deployment of Ukrainian agricultural monitoring systems • Development of Smart Farming solutions • Establishment of joint demonstration farms

Source: Ministry of Agrarian Policy and Food of Ukraine.

2. Ensuring Food Security

Food security is an official priority of agricultural policy of all five Central Asian states, creating opportunities not only for sales but also for technological and institutional cooperation. For Ukraine, this means proposals in grain storage infrastructure, including the construction and modernisation of elevators, primary and advanced food processing, laboratory systems for food quality and safety control and the development of national food reserves. Kazakhstan and Uzbekistan implement programmes aimed at increasing self-sufficiency in certain categories, generating direct demand for processing, packaging and cold chain technologies. Particularly promising are solutions in the field of fruit and vegetable storage technologies, given the large-scale expansion of horticulture in Uzbekistan, as well as veterinary control to support the livestock sectors of Kazakhstan and Kyrgyzstan. The compliance of Ukrainian food quality and safety standards with the EU requirements is an additional advantage for Central Asian exporters targeting European markets.

Since 2022, food security has become one of the central issues on the international agenda. Ukraine supplies food to more than 400 million people worldwide.

Central Asian countries are interested in:

- stable grain imports;
- development of their own seed production;
- modernisation of grain storage facilities;
- creation of food reserves.

Potential areas of cooperation may include:

- long-term supply contracts;
- establishment of joint logistics centres;
- development of grain hubs;
- exchange of post-harvest storage technologies.

It is advisable to pay special attention to the development of the transport route across the Caspian Sea (the Middle Corridor), which is gradually emerging as an alternative to traditional logistics corridors.

3. Irrigation Solutions: Cooperation in Water Resources Management

The most acute problem of Central Asia is water shortage. Ukraine has the competences to create:

- drip irrigation systems that minimise water losses;
- technologies for the rehabilitation and modernisation of outdated irrigation canals;
- automated water balance management systems for individual farms and irrigation districts.

Irrigation represents a strategic niche in which Ukraine can compete not with China in terms of financing, but with Israeli and Dutch suppliers in terms of adaptability of its solutions, cost and service. Priority products include drip irrigation systems for horticulture and vegetable production, sprinkler irrigation systems for grain crops, pumping stations, pipeline fittings, automated water metering systems and equipment for the reconstruction of open irrigation canals. An important structural advantage for Ukraine is in its Soviet-era engineering legacy. Ukrainian engineering companies are well aware of the technical standards, configurations and materials used in the region's outdated irrigation infrastructure, which significantly simplifies their modernisation compared to suppliers from Israel, the Netherlands or Spain, who do not have such contextual knowledge. At the same time, market presence will not emerge automatically. It requires concrete pilot projects, for example, the installation of a drip irrigation system for a 200–500-hectare horticultural enterprise in Uzbekistan or the modernisation of a pumping station serving a district irrigation network in Tajikistan, rather than declaratory memoranda.

4. Agricultural Education and Human Capital

Agricultural education is an area in which Ukraine has a significant structural advantage that remains largely underutilised. The country's network of agricultural universities, including the National University of Life and Environmental Sciences of Ukraine (NUBiP of Ukraine), Kharkiv National Agrarian University, Odesa State Agrarian University and other higher education institutions, has decades of experience in educating students from Central Asia and has formed informal alumni networks in all five countries. These networks constitute a ready-made infrastructure for promoting Ukrainian agricultural technologies and solutions, which remain largely unclaimed by state institutions. Promising formats of cooperation include dual-degree programmes with agricultural universities in Kazakhstan and Uzbekistan; short-term professional training courses lasting two to six weeks for agronomists, irrigation engineers and managers of agricultural enterprises; distance learning programmes combined with practical modules at experimental farms; and joint research programmes involving the exchange of soil samples, seed varieties and research methodologies.

The measurable indicator of the effectiveness of an educational direction should not be the number of memoranda signed, but the number of active programme participants, defended diplomas and implemented internships.

NUBiP of Ukraine could serve as a regional platform for the development of international educational programmes with the countries of Central Asia.

Promising areas of cooperation include:

- online courses;
- training programmes for agricultural diplomacy specialists;
- international research laboratories;
- joint projects under the Erasmus+ and Horizon Europe programmes.

5. Joint Production Models

The formal legal framework between Ukraine and the countries of Central Asia includes free trade agreements and a number of sector-specific memoranda in the fields of agriculture and water management; however, their practical implementation remains limited. Intergovernmental agricultural subcommissions should move from a protocol-oriented format to managing specific projects with designated responsible executors, clearly defined deadlines and measurable outcomes. Each meeting should end with specific decisions, not general declarations.

Instead of competition, Ukraine should build partnerships. The establishment of joint ventures would enable:

- local production of spare parts for agricultural machinery;
- joint processing of products, for example, by using Ukrainian processing equipment for fruit and vegetables grown in Central Asia, with subsequent export to third-country markets;
- joint certification centres.

Practice demonstrates that production partnerships, rather than purely trade-based relationships, provide the most sustainable long-term results.

Prospective Production Models for Cooperation in the Agro-Industrial Sector

Partnership Model	Description and Objective
Joint Agro-Industrial Parks	Combining Ukrainian technologies with local resources.
Demonstration Farms	Serving as training and demonstration sites for local farmers.
Seed Production Centres	Production of crop varieties adapted to local conditions.
Agricultural Machinery Manufacturing	Localisation of Ukrainian agricultural machinery production.
Agri-Tech Clusters	Bringing together universities, businesses and governmental institutions.

Source: Analytical reports of the World Bank and the OECD.

Systematisation of the Cooperation Strategy in the Agro-Industrial Sector

Category	Description / Components
Prospective Production Partnerships	Joint Agro-Industrial Parks: combining Ukrainian technologies with local resources. Demonstration Farms: establishment of training and demonstration sites. Seed Production Centres: production of locally adapted crop varieties. Agricultural Machinery Manufacturing: localisation of machinery production. Agri-Tech Clusters: cooperation among universities, businesses and governmental institutions.
Institutional Framework	Memoranda of cooperation, establishment of a Ukraine–Central Asia Agricultural Council, engagement of international financial institutions (IFIs), expansion of trade missions and development of expert platforms.
SWOT Analysis: Internal Factors	Strengths: agricultural potential, well-developed education system, experience in digitalisation. Weaknesses: geographical distance from markets, logistical constraints and regulatory differences.
SWOT Analysis: External Factors	Opportunities: investment projects, new transport corridors and educational partnerships. Threats: climate change, geopolitical instability and water scarcity.
Policy Recommendations	Roadmap (up to 2035), regional forum, international innovation centre, grant programmes, academic mobility, network of demo farms, digitalisation programmes and expert dialogue.

Source: Materials of the Embassies of Ukraine in Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan and Turkmenistan.

Conclusion

The potential for cooperation between Ukraine and the Central Asian states in the agro-industrial sector is substantial and multidimensional. Interaction in the field of agricultural technologies, ensuring food security, modernisation of irrigation systems, development of agricultural education and implementation of joint production models can become the basis for a long-term strategic partnership.

Further development of cooperation requires a transition from isolated projects to a systemic policy that combines scientific research, government support, business initiatives and international technical assistance. Such an approach would contribute to strengthening the economic resilience of both regions, increasing the competitiveness of the agricultural sector and fostering a modern model of interregional interaction focused on innovation, sustainable development and mutual benefit.

Kazakhstan and Uzbekistan should be considered as priority markets for scaling up agro-industrial cooperation through a full range of offers, ranging from seed production to joint production. Turkmenistan should be approached as a market for large irrigation and agricultural infrastructure projects, being subject to the resumption of intergovernmental dialogue. Kyrgyzstan and Tajikistan should be viewed as markets for specialised solutions and agricultural education, where investing in human capital and building alumni networks offer strategic long-term value that outweighs short-term trade gains.

With an appropriate strategy and institutional support, Ukraine has the potential to become a key architect in the modernisation of the agricultural sector in Central Asia, which would ensure a lasting economic effect and strengthen Ukraine's geopolitical influence, opening new markets for Ukrainian technological advances for decades to come.



CRITICAL MINERAL RESOURCES AND EXTRACTIVE INDUSTRIES: PROSPECTS FOR COOPERATION BETWEEN UKRAINE AND CENTRAL ASIA

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Relevance

European policy in critical raw materials in 2025–2026 has shifted from the formulation of strategic priorities to competition for specific projects, their implementation timelines, and financial resources. This shift makes potential cooperation between Ukraine and Central Asia relevant at both the conceptual and practical levels.

According to the International Energy Agency, under the current policy scenario, aggregate demand for key energy minerals will nearly double by 2040. Demand for lithium will more than triple, while demand for nickel, graphite, and magnetic rare earth elements will increase by 50–90%. At the same time, the average share of the largest supplier in the processing of these minerals was around 70% in 2025, while China accounted for more than 90% of global processing capacity for gallium, graphite, manganese, and rare earth elements. For the EU and other developed economies, the issue of the ability to implement energy and industrial policies without critical dependence on a single jurisdiction remains one of the fundamental challenges to security of supply and a factor in maintaining global competitiveness amid geopolitical fragmentation.

The Critical Raw Materials Act (CRMA) has transformed this concern into a regulatory framework with specific benchmarks by 2030: to ensure at least 10% of extraction through own capacities, 40% of processing, and 25% of recycling of strategic raw materials, while limiting dependence on a single external supplier to no more than 65% at any relevant stage of the value chain.

However, in 2026 it became evident that setting quantitative targets alone does not guarantee their achievement. A special report by the European Court of Auditors found that some of the CRMA targets were insufficiently justified and that strategic partnerships with third countries had produced no measurable impact on security of supply. The European Commission's response was the RESourceEU package, presented in December 2025, which provides practical tools for aggregating demand, facilitating long-term procurement contracts, coordinating strategic stockpiles, and mobilising approximately EUR 3 billion in support. Thus, the institutional architecture of EU policy continues to evolve. In the next 12–24 months, competitive advantage will be determined not so much by the mere availability of mineral deposits as by the ability to offer technically, economically, and environmentally sound projects with a proven resource base, a clear distribution model and a realistic financing plan.

Against this backdrop, two parallel tracks of EU cooperation have been activated: one with Ukraine and the other with Central Asia. Following the completion of the second call for applications for Strategic Project status under the CRMA on 15 January 2026, the European Commission reported over 160 applications submitted, of which 66 were related to projects outside the EU. The first EU–Central Asia Summit, held in April 2025, elevated relations to the level of a strategic partnership and was accompanied by the announcement of a Global Gateway package worth over EUR 12 billion to develop transport, raw materials, energy, water, and digital cooperation. Therefore, Ukrainian and Central Asian initiatives will now compete within a broad global portfolio of projects for status, investment, and partners.

For Ukraine, the relevance of this issue also has an additional national dimension. On 27 May 2026, the Cabinet of Ministers of Ukraine adopted the Strategy for the Development of Industries Based on Strategic and Critical Raw Materials and Components by 2056 along with the 2026–2028 Operational Plan for its Implementation – the first comprehensive state policy document that links geological exploration, processing, industrial policy, and rapprochement with the EU within a single framework with quantitative indicators and defined deadlines. It formalises Ukraine’s intention to integrate into international supply chains and creates practical institutional entry points for cooperation.

For Central Asia, the relevance of the issue is determined by the mirror challenge. The region has a large and diversified resource potential, covering uranium, chromium, tungsten, antimony, copper, as well as rare metals. At the same time, part of the region’s mineral and raw material base remains dependent on external processing capacities and traditional export routes, primarily linked to China and Russia. The increased attention from the United States and the EU, particularly through the development of the C5+1 Critical Minerals Dialogue, creates additional opportunities to diversify buyers, funding sources, and technological partners.

The simultaneous opening of institutional opportunities for Ukraine and Central Asia is combined with the lack of a mechanism that would represent their assets and projects as interconnected elements of international value chains. Therefore, the question is no longer whether critical raw materials constitute a strategic interest for Ukraine and Central Asia separately, but whether they are able to transform this interest into a coordinated portfolio of investment-ready projects.

Current State of Cooperation as a Foundation for a Project-Based Model

The real basis of Ukraine’s interaction with the Central Asian states in the extractive industry and related sectors encompasses individual trade flows, engineering services, specialised academic cooperation, and transport mechanisms.

The largest scale of Ukraine’s regional bilateral trade is attributable to the Republic of Kazakhstan and the Republic of Uzbekistan. In 2025, trade turnover between Ukraine and the Republic of Kazakhstan amounted to USD 415.8 million, increasing by 5.4% compared with 2024. Kazakhstan’s main exports to Ukraine included ferroalloys and fertilisers, while Ukrainian exports were predominantly non-raw material. Meanwhile, trade turnover with the Republic of Uzbekistan reached approximately USD 315 million in 2025, of which USD 186.5 million accounted for Ukrainian exports. Bilateral trade already includes machinery and equipment, electrical equipment, pipe products, ferroalloys, ferrous and non-ferrous metals, and inorganic chemicals. However, supplies of tungsten, antimony, graphite, and other rare earth raw materials, or raw materials related to joint processing, have not yet been formalised as an independent track of interstate relations.

The existing legal framework creates general prerequisites for cooperation. There are free trade and mutual investment protection agreements in place with the Republic of Kazakhstan and the Republic of Uzbekistan, and in 2026 the parties intensified their interagency economic dialogue. It is worth noting that most of the relevant documents were concluded in the 1990s. Current issues of geological data exchange, verification of reserves in accordance with international standards, preparation of joint pre-feasibility studies (pre-FS), traceability of raw material origin, and ESG requirements remain beyond their scope.

The most tangible form of industry interaction is declared deliveries and corporate references of Ukrainian suppliers of equipment and engineering services. According to its own corporate materials, GRAVICON supplied and commissioned enrichment facilities in the Republic of Kazakhstan and the Republic of Uzbekistan, in particular for the processing of chrome, manganese, and other ores, as well as technogenic waste. NBS Technology lists Kazakhmys and Sokolov-Sarbai Mining and Processing Production Association among its Kazakhstani partners. These examples confirm the partial presence of Ukrainian expertise in enrichment, modernisation, repair, and maintenance services.

The academic channel is more institutionalised. Dnipro University of Technology maintains a partnership with Satbayev University, and in 2023–2026 the EMINReM project united specialised universities from Ukraine, the Republic of Kazakhstan, and the Republic of Uzbekistan around environmentally responsible mining engineering and natural resource management. Such a network could be used for digitising geological materials, laboratory and technological tests, enriched tailings management (fine-dispersed waste from ore processing which may contain residual valuable metals), training specialists, and adapting reporting to international standards.

The logistics component exists in the form of the Trans-Caspian International Transport Route. In May 2026, Ukraine, Azerbaijan, the Republic of Kazakhstan, the Kyrgyz Republic, and the Republic of Uzbekistan signed an agreement on the TRACECA Single Transit Permit, intended to simplify and digitalise international road transport. However, there is no dedicated flow of critical raw materials through Ukraine, end-to-end tariffs, insurance solutions, and traceability procedures yet. At the same time, there are no jointly selected fields, internationally verified projects, integrated processing assets, long-term offtake contracts, or specialised logistics. Therefore, the first steps should not be large-scale joint ventures, but geodata and competency audits, engineering contracts, pre-feasibility studies, technological pilot projects, and test shipments.

Resource and Industrial Matrix

Ukraine has geological manifestations and deposits of a wide range of critical raw materials, but the most justified medium-term directions remain titanium and natural graphite, as they are materials with a history of extraction, exports, and established assets. Lithium, manganese, and beryllium require additional investments and technological verification, while estimations for rare earth elements (REEs), nickel, cobalt, and several other metals remain subject to greater uncertainty. In 2024, primary exports of titanium and natural graphite to the EU together accounted for less than 0.2% of Ukrainian exports to the EU, illustrating a gap between geological potential and the country's actual market role.

Ukraine's Strategy until 2056 envisages over 30 new special permits, investments exceeding USD 2 billion, at least 20 exploration and production projects, war risk coverage of up to 90% of the corresponding capital expenditures, and the return of at least 100 million tonnes of enrichment tailings and slags to economic circulation by 2031. It also provides for the verification of at least 30 deposits according to internationally recognised systems and the formation of complete domestic value chains for selected materials. It should be noted that updating the classification and methodology for assessing strategic and critical minerals should primarily take into account compatibility with the CRMA.

According to the OECD, Central Asia contains approximately 39% of global manganese ore reserves, 31% of chromium, 20% of lead, 13% of zinc, 9% of titanium, and about 5% of copper, cobalt, and molybdenum. This potential remains largely untapped due to outdated geological data, dominance of state-owned enterprises, regulatory barriers, environmental risks, and weak presence in high value chains.

The Republic of Kazakhstan is the most mature resource and industrial partner. In 2025, it produced about 25,839 tonnes of uranium (approximately 40% of global production), and also identified 38 prospective sites with projected REE resources of 2.6 million tonnes. In addition, 2.4 million tonnes of tungsten and 1 million tonnes of molybdenum are reported as balance reserves. National categories of balance sheet reserves should not be automatically equated with internationally verified reserves. The Republic of Uzbekistan is rapidly expanding its uranium sector. Navoiyuran reported 7,000 tonnes of production in 2025, and in April 2026 began commercial production at the Qizilkok deposit with a designed production capacity of 1,200 tonnes per year, preliminary JORC-compliant reserves of 9.4 thousand tonnes, and an expected mine life of 15 years. The Kyrgyz Republic and the Republic of Tajikistan hold strong positions in the mining of antimony and selected rare metals, but require further strengthening of the regulatory framework, implementation of ESG approaches, and development of transport infrastructure. Turkmenistan currently appears to represent a long-term geological information track due to limited data availability and strict conditions for foreign capital access. Geological digitalisation and modernisation of large state-owned mining and processing enterprises could be an important area of cooperation.

READINESS CLASSIFICATION

Material	Ukraine	Central Asia	Readiness	Complementarity	Initial format
Uranium	Uranium concentrate production; significant nuclear generation capacity; no complete national nuclear fuel cycle	Kazakhstan – 25,839 tU (2025); Uzbekistan – 7,000 tU	High readiness of the extraction stage; downstream processing remains	High for supply, ISR, environmental management, and workforce development; limited for enrichment	Long-term supply agreements, ISR
Graphite	The most commercially ready area; Balakhivka has CRMA Strategic Project status	Sarytogan in Kazakhstan has CRMA Strategic Project status	Medium	Partly competitive, but with a shared shortage of purification and anode technologies	Joint search for

Material	Ukraine	Central Asia	Readiness	Complementarity	Initial format
Titanium	Resource base, extraction, and historical processing assets; significant need for modernisation	Kazakhstan has raw materials, metallurgy, and market links	Medium	Selective	Recycling, powders, alloys, comparative pre-feasibility studies of locations; not large-scale ore transport
Tungsten	Competencies in materials science and hard alloys require assessment	Kazakhstan and Uzbekistan have a substantial resource and project base	Medium	High, subject to the availability of a technology partner	Concentrate → intermediate compounds → powders/carbides → hard alloys
Antimony	Potential chemical and metallurgical competencies require assessment	Tajikistan and the Kyrgyz Republic have a strong resource base	Medium	High for low-volume products	Specialised compounds, environmental technologies, and high-value products
Rare Earth Elements (REEs)	High uncertainty; limited commercial readiness	Kazakhstan has 2.6 million tonnes of estimated resources; the region is actively expanding exploration	Low/Medium	Primarily scientific and technological	Mineralogy, separation testing, tailings, joint laboratories; not a complete value chain
Lithium	Promising deposits without commercial extraction	Exploration and projects in Kazakhstan and Uzbekistan	Low/Medium	Not yet confirmed	Individual national projects, technology exchange rather than an artificial joint cluster

Author's Assessment

PARTNER DIFFERENTIATION

Country	Strengths	Main Constraints	Recommended Role
The Republic of Kazakhstan	Uranium, chromium, tungsten, copper, and rare metals; KAZRC; active investment partners	Differences between national and international classification systems; the role of the state; water and energy constraints affecting certain projects	Primary partner for industrial, logistics, scientific, and financial pilot projects
The Republic of Uzbekistan	Uranium, copper, tungsten, large mining and processing complexes; JORC processes; rapidly growing extraction	Dominance of state-owned companies; need for technological modernisation and ESG implementation	Second key partner: geological data, ISR, equipment, and specialised processing
The Kyrgyz Republic	Antimony, tailings, and selected rare metals	Institutional risk, social sensitivity, and limited scale	Targeted projects in geology, tailings management, land reclamation, and laboratories
The Republic of Tajikistan	Antimony, selected rare metals, and hydropower potential	Mountain logistics, dependence on external technologies, and transparency challenges	Antimony, specialised chemicals, environmental management, and workforce development
Turkmenistan	Potential geological opportunities and chemical raw materials	Limited data availability, state monopoly, and restrictions on foreign participation	Scientific and information track pending improved access and legal conditions

Common Challenges and Risks: From Geology to Logistics

Geological Data and Standards

A common challenge is the large array of Soviet-era geological materials, which do not always meet the requirements of stock and bank financing. CRIRSCO is a system of public reporting principles; JORC, KAZRC, and other national codes are CRIRSCO-compatible reporting codes; UNFC is a separate framework classification of resources. The project documentation should clearly indicate the reporting system used to prepare the assessment and identify the competent person responsible for it. The first joint product should be a programme entitled “From Archive to Investment Passport”: digitalisation, retesting, mineralogy, technological tests, 3D model, hydrogeological assessment, environmental baseline studies, and reporting according to a recognised standard. This kind of

preparation corresponds to the logic of the CRMA, under which a Strategic Project should be technically feasible within a reasonable timeframe and demonstrate an expected production volume and a sufficient level of confidence in the data.

Processing, Technologies, and Personnel

The International Energy Agency (IEA) points to a systemic imbalance: outside the dominant producers, new mining capacity is expanding more rapidly than refining and component manufacturing capacity. For REEs, announced mining projects outside the leading processor until 2035 significantly exceed planned separation capacities, and the production of metals, alloys, and magnets remains even more limited. A similar gap exists for lithium and graphite. Ukraine has certain competencies in titanium metallurgy, mining engineering, materials science, uranium mining, and the chemical industry, but some industrial assets are either idle or outdated. The Republic of Kazakhstan and the Republic of Uzbekistan have a larger scale of basic industry, however, they also seek to move from concentrates to high-value products. The establishment of the Kazakhstan–Korea Rare and Rare Earth Metals Research Centre in 2026 demonstrates that the most viable model combines a resource-rich country with an external technological partner, laboratories and training personnel.

Energy, Water, Waste, and ESG

Deep processing of critical raw materials is both energy- and water-intensive, while REEs may generate complex chemical and radioactive waste. The OECD emphasises that expansion of mining in Central Asia may increase risks to water resources, tailings storage facilities, emissions, and local communities if regulation does not cover the entire life cycle of the mine. For Ukraine, the key issues are damage to the energy system, war-related risks, and the need to update regulations on tailings and waste rock dumps. The circular economy represents a separate shared niche. Ukraine's Strategy sets a goal to return at least 100 million tonnes of industrial tailings and slags to economic circulation by 2031, while the IEA expects that under the current policies, the average share of secondary supply for key energy minerals could increase from approximately 10% to around 20% in 2040. This creates the basis for joint laboratories and pilot projects with enrichment tailings, but each site requires a separate assessment of its mineralogy and environmental safety.

The Middle Corridor as an Infrastructure Opportunity

The World Bank estimates that, with coordinated reforms and investments, the Middle Corridor could triple freight volumes and halve transit time by 2030. In February 2026, the Bank approved an IBRD guarantee of USD 846 million, expected to mobilise USD 1.41 billion in commercial financing for the construction of 322.3 km of new railway infrastructure in the Republic of Kazakhstan, shortening the route by 149 km. In June 2026, the TC-GATE project in Georgia, worth more than USD 750 million, was approved, with USD 372 million financed by the World Bank. For critical raw materials, the full cost of a specific route is crucial, including the number of transshipments, tariffs, transportation of hazardous materials, insurance, customs procedures, traceability, and final processing location. Ukraine could become one of the Black Sea and overland transport hubs. Therefore, high-value concentrates, metals, powders, or specialised chemical products are the most suitable options for an initial pilot project.

Social and Humanitarian Dimension

The discussion of critical raw materials mainly focuses on geology, capital, technology, and logistics, while the human and social prerequisites for project implementation are often left out of the mainstream. The OECD attributes much broader regulatory and institutional barriers to the development of Central Asia's extractive sector. For joint projects, practical constraints may include differences in professional standards, lengthy procedures for recognising qualifications, and administrative requirements associated with business trips. Therefore, educational and engineering initiatives should be accompanied by professional mobility mechanisms, including mutual recognition of qualifications, alignment of requirements for competent persons according to CRIRSCO-compatible standards, and simplification of procedures for short-term business trips and internships.

The second component concerns relations with local communities in extraction areas. The OECD emphasises that the expansion of extractive activities may increase social and environmental risks if regulation does not cover the entire project life cycle – from the issuance of permits and public consultations to mine closure and land reclamation. For Central Asia, this means the need for transparent consultations, communities' access to information, compensation mechanisms, independent impact monitoring, and territorial recovery guarantees. In Ukraine, public acceptance of projects will additionally depend on security conditions, demining, infrastructure recovery, the situation of internally displaced persons, and the trust of communities in regions affected by hostilities.

The most operationalised area of cooperation is workforce development and professional integration of veterans. The Strategy for the Development of Industries Based on Strategic and Critical Raw Materials and Components until 2056 provides for the formation of a workforce reserve, in particular through retraining and employment programmes for veterans in strategic industries within the framework of the Operational Plan for 2026–2028. Joint training modules, faculty exchanges, and industrial internships at specialised universities in Ukraine, the Republic of Kazakhstan, and the Republic of Uzbekistan could simultaneously contribute to the civilian reintegration of Ukrainian veterans and partly address the shortage of qualified geologists, mining engineers, and technologists across the region. Accordingly, professional mobility, interaction with communities and joint training of personnel should be included in the project portfolio as components of the implementation of investment initiatives.

Risk	Manifestation	Mitigation
Geological	Declared resources do not convert into reserves; complex mineralogy	Independent Competent Person, control laboratories, phased financing
Market	Prices and technologies change before the mine enters operation	Offtake agreements, modular production capacity, scenario analysis, stop/go decisions
Technological	Lack of equipment, patents, or operational experience	External technology partner, demonstration plant, performance guarantees
Regulatory	Changes in licensing conditions, state pre-emptive rights, weak arbitration	Intergovernmental framework, transparent ownership structure, political risk insurance
War-related	Damage to Ukrainian assets, energy infrastructure, and ports	Decentralisation of functions, alternative transport routes, insurance, safer locations
Logistics	High costs and delays along the Middle Corridor	Pilot project, electronic documentation, route comparison, focus on high-value products
Water and Energy	Water scarcity in Central Asia; high electricity costs or unstable electricity supply in Ukraine	Closed-loop water systems, energy audit, PPA, location selection based on the resource model
ESG and Social	Tailings, radioactive impurities, conflicts with communities	Environmental Impact Assessment (EIA), consultations, independent monitoring, a financial guarantee for land reclamation

Model and Implementation Format

The economic specifics of working with different materials make it impossible to create a single universal scheme. The optimal approach is a modular model within a distributed value chain, in which extraction and primary enrichment are located as close as possible to the deposit; intermediate processing is located in the Republic of Kazakhstan, the Republic of Uzbekistan, Ukraine, or the EU depending on the availability of energy, water, technology, and logistics; component manufacturing takes place with the involvement of an external technological partner and a guaranteed buyer.

Value Chain Stage	Primary Location	Potential Role of Ukraine	Decision Criterion
Geological data	Country where the deposit is located	Laboratories, modelling, digitalisation, consulting	Access to primary data and independent quality control
Extraction and primary processing	Near the deposit	Equipment, automation, safety, servicing	Production costs, availability of water and energy, permitting regime
Intermediate processing	Regional hub or Ukraine	Specialised metallurgy, chemicals, powders, recycling	Comparative pre-feasibility study for at least 2–3 locations
Components and final materials	Ukraine / EU / Asian technology partner	Joint venture, R&D, product qualification	Long-term offtake agreement, settlement of intellectual property rights, sufficient production scale
Markets and financing	EU, United States, Japan, the Republic of Korea, IFIs	Regulatory alignment, project portfolio	CRMA-ready package, ESG, transparent ownership structure

Sectoral projects include the following:

- Tungsten and hard alloys. Strongest medium-term industrial case: resources of the Republic of Kazakhstan and the Republic of Uzbekistan, primary enrichment near the deposits, Ukrainian competencies in materials science and potentially powder metallurgy, an external technological partner, and buyers in the EU. The first step is an audit of Ukrainian competencies and pre-feasibility studies of the chain from concentrate to carbides and hard alloys.
- Antimony and specialised chemicals. The Republic of Tajikistan and the Kyrgyz Republic have a resource base, while the relatively small production volumes and high cost of products are better suited to complex multimodal logistics. Market audits, purification technologies, environmental risk assessment, and the identification of a potential off-taker are required.
- Graphite and anode materials. Ukraine and the Republic of Kazakhstan already have projects with CRMA status, so cooperation should focus not on combining fields, but on shared access to purification, spheronisation, coating, product qualification, and recycling technologies. A possible format is a joint laboratory programme and coordination of offtake negotiations.
- Titanium and recycling. Ukraine has a resource base and industrial legacy, but the modernisation of its assets requires significant investment and a stable energy supply. It makes sense to compare the modernisation of an existing Ukrainian site, a new site in a safer region, reprocessing in the Republic of Kazakhstan, and a location in the EU. The first pilot project could be titanium scrap, powders or specialised alloys.

- **Uranium track.** The Republic of Kazakhstan and the Republic of Uzbekistan are mature producers, while Ukraine has uranium concentrate production and a large domestic nuclear market. Realistic areas of cooperation include long-term supplies, ISR technologies, water and radiation monitoring, workforce training, and diversification of contracts with Western nuclear fuel companies.
- **REEs – Research Cluster.** The projected resources of the Republic of Kazakhstan and the geological occurrences of other countries require confirmation of mineralogy, extraction technologies, and economic feasibility. Priority actions include joint laboratories, separation tests, tailings analysis and partnerships with technology centres in the Republic of Korea, Japan, the EU, or the United States.

Horizontal Projects:

Project	Content	First Result	Timeframe	Priority Participants
1. From Archive to Investment Passport	Digitalisation, re-sampling, mineralogy, 3D model, technological testing, baseline ESG assessment, alignment with CRIRSCO/UNFC	2–3 investment-ready packages or applications under the CRMA	12–24 months	Ukraine, Kazakhstan, Uzbekistan; selected assets in the Kyrgyz Republic and Tajikistan
2. Engineering and Service Consortium	Equipment, automation, repair, safety, tailings, closed-loop water systems, laboratory services	Register of competencies and 3–5 B2B contracts	6–24 months	Ukrainian companies and universities; Kazakhstan and Uzbekistan
3. CRMA-ready Project Preparation	Standard template: licence, reserves, technology, CAPEX/OPEX, water, energy, ownership, ESG, offtake	Comparable project portfolio and selection without political bias	6–18 months	Ministries, geological surveys, EU / EBRD / World Bank
4. Tailings and Secondary Raw Materials	Screening of technogenic sites, laboratory testing, recovery of associated metals, land reclamation	One laboratory pilot and one demonstration pilot	18–36 months	Ukraine, Kazakhstan, Uzbekistan, the Kyrgyz Republic
5. Digital Logistics Pilot	Pilot shipment of high-value products, electronic documentation, origin, ESG, alternative routes	Comparative actual costs and delivery time	12–18 months	Kazakhstan / Uzbekistan — Caucasus — Black Sea — Ukraine / EU
6. Educational and Technology Platform	Modules on geology, hydrometallurgy, tailings, ESG, project economics; traineeships, including a dedicated track for the professional retraining of veterans for mining and related specialisations (in accordance with the Operational Plan of Strategy No. 569-r)	Joint courses, laboratory schools, exchange of specialists	12–36 months	Universities of Ukraine, Kazakhstan, Uzbekistan, Korea, and the EU

The proposed project portfolio and distributed value chain model have international counterparts. Three cases with different outcomes were selected for comparison: the mature partnership between Australia and Japan in the field of rare earth elements, the gradual institutionalisation of cooperation between Chile and the Republic of Korea, and the cautionary experience of the Democratic Republic of the Congo in its relations with China.

Australia–Japan: long-term financing, offtake, and sharing of production functions. In 2011, a joint venture established by Sojitz Corporation and the state-owned JOGMEC provided the Australian company Lynas with USD 250 million in loans and equity in exchange for a ten-year offtake agreement. Mining and enrichment were located at the Mount Weld deposit in Australia, while separation and refining were carried out in Malaysia. In 2023, the Japanese side invested an additional AUD 200 million in the development of heavy REEs, the first commercial deliveries of which took place in October 2025. The case demonstrates that complex raw material value chains require guaranteed offtake, the participation of a state financial institution and the distribution of production stages across different jurisdictions. At the same time, the path from the initial investment to the supply of an expanded range of products took about 14 years, while the processing facility was accompanied by long-term environmental disputes. Thus, offtake agreements and capital do not replace environmental oversight, engagement with local communities or realistic timeline planning.

Chile–Republic of Korea: an institutional framework built upon existing ties. The Free Trade Agreement between the two countries has been in force since 2004. In 2022, Korea's KOMIR and Chile's ENAMI signed a memorandum of cooperation on sustainable mining and mineral value chains, and in April 2026, the Embassy of the Republic of Korea, together with the Chilean Ministry of Mining, held the Korea–Chile Critical Minerals Connect with the participation of companies and institutions working with copper, lithium, and REEs. The process culminated in the Santiago summit on July 30, 2026, where Presidents Lee Jae-myung and José Antonio Kast signed the Memorandum on Mineral Resources Partnership. This is an example of gradual institutionalisation: an intergovernmental format is more effective when it relies on long-term trade, specialised state institutions, and permanent channels of business interaction.

The Democratic Republic of the Congo–China: the risk of raw material dependence. The 2008 Sicomines deal combined copper and cobalt mining rights with promises of infrastructure financing. More than fifteen years later, the Democratic Republic of the Congo provides over 70% of global cobalt production, while China controls about 80% of its processing, and Chinese companies own a significant share of the country's industrial deposits. Disputes over the fulfilment of infrastructure obligations and benefit sharing demonstrate that the resource base is not converted into added value without independent contract assessment, diversification of buyers and technological partners, and control over processing conditions.

In general, international experience confirms the principles underlying the proposed model: economically prepared projects, offtake, and financing are formed first, followed by a permanent institutional platform; production functions are placed according to comparative advantages; buyers and processing jurisdictions should be diversified. A horizon of 3–7 years is realistic primarily for technologically simpler or partially mastered areas, including tungsten compounds, purified graphite, titanium semi-finished products, recycling and specialised chemicals. For REEs and other complex products, a longer cycle is required, with sequential laboratory, pilot, and industrial stages.

Institutional Format: From the Project Core to “C5+Ukraine”

In June 2026, the C5+1 Critical Minerals Dialogue was held in Astana with the participation of all five Central Asian states and the United States. Its priorities included geological exploration, mining, processing, technologies, workforce development, logistics, and industrial projects. This means that the “C5+Ukraine” format should offer clear added value: engineering competencies, link to European regulatory frameworks, joint pre-feasibility studies, and a project portfolio. To institutionalise it, the following sequence is advisable:

- Stage 1 – an informal project core comprising Ukraine, the Republic of Kazakhstan, and the Republic of Uzbekistan with the option of joining the Kyrgyz Republic and the Republic of Tajikistan to individual projects.
- Stage 2 – two pre-feasibility studies, one geological package, and one logistics pilot; consultations with the EU, the EBRD, the World Bank, and potential offtakers.
- Stage 3 – confirmation of the operating company, the technology partner, the buyer, and the preliminary financial structure.
- Stage 4 – formalisation of “C5+Ukraine” as an annual project and investment dialogue or a working group with a project portfolio.

Conclusions and Recommendations

Cooperation between Ukraine and Central Asia in the field of critical raw materials is promising if it is built as a portfolio of selected projects. The EU creates demand, standards, and de-risking tools, but after the audit by the European Court of Auditors and the launch of RESourceEU, projects will be assessed on data quality, technical readiness, diversification effect, ESG, and the ability to ensure rapid supply. Ukraine should offer concrete competencies: geological verification, engineering, equipment, laboratories, separate metallurgical and chemical processing stages, recycling, digital traceability, and proximity to the EU market. The Republic of Kazakhstan and the Republic of Uzbekistan are priority partners for comprehensive cooperation; the Kyrgyz Republic and the Republic of Tajikistan are suitable for targeted projects, primarily in projects related to antimony, tailings, geology, and environmental management; Turkmenistan is suitable for a long-term information track.

For Ukraine: create an interagency Central Asia track within the implementation of the Strategy until 2056; within six months, conduct an audit of companies, laboratories, and industrial sites; update the national lists of critical raw materials using a transparent CRMA-compliant methodology; launch two pre-feasibility studies.

For Central Asian states: open access to geological data, delineate resources and reserves, generate proposals around the product and the buyer, strengthen ESG and licence predictability, and avoid costly duplication of full production cycles.

For the EU and international financial institutions: finance pre-investment preparation, laboratories, pilot projects, energy and water infrastructure; apply a portfolio logic to multiple jurisdictions; support a digital logistics pilot and offtake structuring.

For business and universities: form consortia instead of entering the market individually; start with services, technology testing and demonstration plants; develop joint programmes on hydrometallurgy, tailings, water resources, ESG, and the economics of mining projects.



CENTRAL ASIA–UKRAINE LABOR MOBILITY PARTNERSHIP FOR POST-WAR RECONSTRUCTION

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Executive Summary

Ukraine's post-war reconstruction will require an unprecedented mobilization of labor, alongside capital and materials. With estimated recovery needs of up to US\$588 billion over the next decade, reconstruction efforts will place sustained pressure on labor markets, particularly in construction, transport and logistics, energy, utilities, and basic manufacturing. At the same time, Ukraine faces a severe labor supply shock, with the workforce reduced by 25–27 percent due to displacement, mobilization, and demographic decline. As a result, labor shortages are emerging as a binding constraint on recovery.

Central Asia presents a timely and strategic solution to this challenge. The region is one of the world's largest labor exporters, with over 4–5 million workers abroad annually, primarily concentrated in Eurasia. These workers possess practical, experience-based skills in sectors that closely match Ukraine's reconstruction needs, particularly construction, logistics, and services. However, Central Asia's migration model is increasingly under strain due to tightening conditions in its current primary destinations. This creates a strong push factor for the diversification of migration destinations.

The analysis finds a high degree of complementarity between Ukraine's labor demand and Central Asia's labor supply. Central Asian workers could realistically fill a significant share of Ukraine's labor gaps, particularly in labor-intensive sectors requiring semi-skilled and practical competencies. Estimates suggest that up to 1.0–1.5 million Central Asian workers could be mobilized over the medium- to long-term if appropriate policies and incentives are in place.

However, current migration systems on both sides are not yet equipped to support such a shift. Central Asian migration remains largely informal and network-driven, with weak job matching and limited skills certification. Ukraine, while facing acute labor shortages, does not yet have a comprehensive framework for attracting foreign labor at scale. Bridging this gap requires developing a structured, rules-based labor mobility partnership aligned with international best practices and Ukraine's trajectory toward EU accession.

Such a partnership should operate throughout the entire migration cycle, including pre-departure preparation, transparent recruitment, skills certification, worker protection, safe transit, and reintegration. It should be supported by bilateral or multilateral agreements, private sector involvement, and dedicated institutional mechanisms.

Large-scale labor mobility can only be operationalized once security conditions improve, reconstruction activities scale up, and cross-border transit routes are restored. The main transit corridor is assumed to go through southern routes via the Caucasus and the Caspian region. Beyond addressing immediate labor shortages, a Central Asia–Ukraine labor mobility partnership has the potential to generate broader economic benefits. International experience shows that migration corridors often evolve into trade, investment, and value chain linkages. Over time, such cooperation could strengthen economic ties between Central Asia and Ukraine, support private sector development, and contribute to regional integration.

Methodologically, this policy brief is based on a mixed-methods desk review that combines quantitative data analysis with qualitative assessments of existing literature, policy documents, and expert insights. The analytical approach focuses on triangulating multiple sources to ensure consistency, reliability, and policy relevance.

I. Demand-side analysis: labor force gaps to support the socio-economic reconstruction of Ukraine

Ukraine's reconstruction challenge is now large enough that labor availability is becoming not only a social issue, but a binding macroeconomic and implementation constraint. The Fifth Rapid Damage and Needs Assessment (RDNA5), prepared by the Government of Ukraine, the World Bank, the EU, and the UN, estimates US\$195 billion in direct physical damage, US\$667 billion in socioeconomic losses, and approximately US\$486–588 billion in reconstruction needs over 2026–2035, equivalent to nearly three times Ukraine's annual GDP (World Bank, 2026). Housing, transport, energy, and industry are among the most affected sectors, requiring a sustained, multi-year mobilization of labor, materials, and services.

At the same time, Ukraine faces a large and widening labor deficit. The Ministry of Economy estimates that 4.5 million additional workers will be required by 2030, while ILO-based projections suggest the gap could reach up to 8.6 million workers by 2032. This shortage is both quantitative and structural. Reconstruction-related demand is particularly acute in construction; in blue-collar trades such as welding, electrical work, plumbing, and machine operation; in energy and utilities, where technical specialists are required for grid repair and modernization; and in transport and logistics, where demand for drivers, mechanics, and logistics operators has surged, as reflected in large vacancy volumes across job postings analyzed by the World Bank. An analysis of more than 240,000 job advertisements shows persistently high vacancies for transport jobs, especially truck and bus drivers and vehicle repair specialists (2025). According to the State Employment Center, the sharpest labor shortages are in education, ground transport, metal-product manufacturing, furniture production, and energy supply. Agriculture and industry are also expected to face labor supply shortages of 30–40 percent by 2030 (Razumkov Center, 2024).

Beyond quantitative shortages, Ukraine faces a deep skills mismatch. Reconstruction requires a workforce with practical, vocational, and technical competencies—such as bricklayers, equipment operators, electricians, surveyors, and engineers—yet existing education and training systems remain insufficiently aligned with these needs. The war has further disrupted training pipelines, while displacement has reduced the availability of experienced workers.

At the same time, Ukraine's wage levels remain only partially competitive in comparison with traditional migrant destinations such as Russia. In Ukraine, average wages in 2025–2026 range from roughly UAH 26,500 to 33,000 per month, equivalent to approximately US\$650–850, while construction and skilled trades can reach around US\$750–1,000 (Ukrstat, 2025). In contrast, average wages in Russia are estimated at RUB 130,000–140,000 per month, equivalent to approximately US\$1,400–1,600, with blue-collar sectors ranging between US\$1,300–1,800 and certain high-demand occupations, such as long-haul truck drivers, reaching up to US\$2,000–2,200 (Rosstat, 2025). This implies a substantial wage differential, with Russia offering significantly higher nominal compensation, particularly in low- and semi-skilled occupations, which remain the primary destination for Central Asian migrants.

This wage gap implies that Ukraine cannot rely on compensation alone to attract foreign labor at scale. Instead, competitiveness will depend on a broader package of non-wage incentives, including legal protection, transparent and predictable contracts, safer recruitment channels, access to social services, and alignment with EU labor standards and certification systems.

Recognizing these challenges, the Government of Ukraine has adopted an Employment Strategy 2030, which aims to expand the effective labor force by approximately 2 million people. The strategy prioritizes the formalization of employment, including the transition of at least 300,000 workers from the informal to the formal sector; increased participation of women, veterans, and persons with disabilities in the labor market; and expanded vocational training and reskilling programs, including initiatives such as the Skills Alliance for Ukraine (Government of Ukraine, 2024). However, while the strategy provides a strong framework for domestic labor mobilization, it does not yet establish a comprehensive approach for attracting foreign labor at scale, and migration policy remains largely focused on return migration rather than structured labor inflows.

From a Central Asia–Ukraine labor mobility perspective, the key demand-side question is where foreign workers can be integrated effectively without displacing domestic labor. This points to sectors with persistent shortages, limited domestic supply response, and tasks that rely more on practical experience than formal qualifications.

The strongest matching potential lies in construction and housing reconstruction, where Ukraine faces significant shortages of workers, including masons, carpenters, welders, and general laborers. This aligns well with the profile of Central Asian migrants — primarily from Uzbekistan, Tajikistan, and Kyrgyzstan — who are predominantly employed in construction, agriculture, and low- to mid-skilled service sectors in Russia and Kazakhstan. Many of these workers possess hands-on, experience-based skills but lack formal certification. Similar alignment exists in transport and logistics (drivers, warehouse workers), utilities and municipal services (maintenance crews, basic technical roles), construction materials production, light manufacturing, and seasonal agro-processing.

At the same time, the matching gap is not only sectoral but also institutional. A key constraint is that Central Asian migrants' skills are largely informal and often under-recognized, while Ukraine, especially in the context of EU alignment, requires greater formalization, safety compliance, and certification. Although there is a growing push in the region for vocational education and training (TVET), including pre-departure training programs (e.g., in Uzbekistan), most migrants still face challenges related to skill recognition and underutilization. Bridging this gap will require fast-track certification systems, targeted upskilling, and employer-linked training mechanisms both pre-departure and on arrival.

Geographically, demand is likely to concentrate in Kyiv and surrounding reconstruction corridors, major urban centers, logistics hubs, and relatively secure western and central regions. Eastern and southern regions will generate the largest reconstruction needs but may absorb labor more gradually due to security constraints. This supports a phased approach, where migrant labor is initially deployed in safer regions and supply-chain activities before expanding into heavily affected areas.

II. Supply-side analysis: Central Asia labor force value proposition for Ukraine's post-war reconstruction

Central Asia represents one of the largest and most structurally embedded labor-exporting regions globally, with migration serving as a core livelihood strategy and a key labor market adjustment mechanism. As of 2024–2025, an estimated 1.6 million citizens of Tajikistan, 1.2 million from the Kyrgyz Republic, and over 1.1–1.3 million from Uzbekistan are working abroad at any given time, with total annual flows significantly higher due to the cyclical nature of migration. Migration plays a critical macroeconomic role, with remittances reaching around 45–50 percent of GDP in Tajikistan and 20–30 percent in the Kyrgyz Republic, among the highest levels globally, underscoring the structural dependence of these economies on external labor markets (World Bank, 2024).

These migration patterns are driven by strong demographic pressures and labor market imbalances. Central Asia has one of the youngest and fastest-growing populations in the Europe and Central Asia region, with a large and expanding working-age cohort entering labor markets each year. However, domestic job creation, particularly in rural and secondary cities, remains insufficient to absorb this labor supply, resulting in persistent outward migration. Labor force participation rates are relatively high among working-age men but lower among women, reflecting both structural constraints and social norms, further shaping migration dynamics (World Bank, 2025).

A defining feature of Central Asian labor supply is its predominantly informal, experience-based skills profile. Migrants are heavily concentrated in construction, agriculture, transport, and low-end services, where they acquire practical, task-specific competencies rather than formal qualifications. This reflects both weak vocational training systems and the structure of demand in destination countries. International assessments consistently highlight skills underutilization and mismatch, with migrants often working below their qualification levels and lacking recognized certification.

This profile, however, aligns closely with the labor requirements of Ukraine's reconstruction. The sectors expected to drive recovery: construction, transport and logistics, utilities, and basic manufacturing are labor-intensive and rely heavily on practical skills that can be deployed rapidly, particularly in early reconstruction phases. This creates strong complementarity between Central Asian labor supply and Ukraine's demand, especially in semi-skilled and manual occupations where domestic shortages are most acute.

Driven by challenges of informality and skill mismatches, and especially geographical concentration, diversifying migration destinations is becoming a strategic priority for Central Asian countries, as reflected in national policy frameworks such as Uzbekistan's Migration Strategy 2025–2030, which promotes expansion of labor corridors beyond traditional destinations; the Kyrgyz Republic's policy agenda under its National Development Program 2030 and regional development strategies, which emphasize safer and more diversified migration pathways; and Tajikistan's National Strategy on Labor Migration to 2030 and the emerging Migration Strategy to 2040, which aim to reduce dependence on a single destination country and strengthen organized and legal migration channels.

Ukraine presents a potential new route for Central Asian migrants seeking alternative labor mobility opportunities, especially in the wake of post-war reconstruction. Although not yet a traditional destination, Ukraine offers the chance for more formalized and regulated labor mobility pathways, particularly as it aligns its labor market institutions with European standards. Compared to existing migration routes, this could lead to better worker protection, more transparent contracts, and smoother integration into formal labor markets.

From an economic perspective, Central Asian labor represents a cost-effective and scalable workforce for Ukraine's reconstruction. Wage expectations of Central Asian migrants, shaped by employment in their primary destinations in Eurasia and in domestic labor markets, remain competitive with Ukraine's wage levels, particularly in construction and services. At the same time, employers benefit from access to a workforce with relevant experience, high labor participation, and flexibility in labor-intensive sectors. For sending countries, expanding migration opportunities beyond Russia can reduce vulnerability to external shocks, sustain remittance flows, and support human capital development.

Furthermore, the scale and intensity of Ukraine's post-war reconstruction are likely to put upward pressure on wages in key sectors, especially construction, transport, and utilities. Even a modest wage increase, around 10–20 percent above current levels, could significantly alter migration incentives and make Ukraine a more competitive destination than traditional markets elsewhere in Eurasia, especially when combined with better working conditions and formal employment arrangements. Additionally, the gradual alignment of Ukraine's labor market institutions with European Union standards introduces an important non-wage incentive. A more transparent, rules-based migration system featuring legal contracts, skill certification, and access to basic social protections could make Ukraine more attractive to Central Asian migrants looking for safer, more predictable, and potentially longer-term employment options beyond informal and higher-risk migration channels.

Table 1: Central Asia Labor Supply Potential for Ukraine's Post-War Reconstruction (Illustrative Estimates) ¹

Sector / Reconstruction Need	Estimated Labor Demand (Ukraine, 2026–2035)	Central Asia Labor Supply Profile	Skills Characteristics	Potential CA Labor Supply (if mobilized)
Construction & Housing Reconstruction	400,000 – 800,000 workers	Large share of Uzbek, Tajik, Kyrgyz migrants currently in construction in Russia/Kazakhstan	Informal, experience-based (masonry, welding, finishing, concrete works)	300,000 – 500,000
Transport & Logistics (drivers, warehouses, supply chains)	150,000 – 300,000	High concentration of CA migrants in trucking, delivery, and logistics service	Practical skills, low formal certification; easily transferable	100,000 – 200,000
Energy & Utilities (grid repair, maintenance, basic technical roles)	100,000 – 200,000	Smaller but relevant pool of semi-skilled workers (electricians, technicians)	Requires upskilling and certification (safety, EU standards)	50,000 – 120,000

Sector / Reconstruction Need	Estimated Labor Demand (Ukraine, 2026–2035)	Central Asia Labor Supply Profile	Skills Characteristics	Potential CA Labor Supply (if mobilized)
Construction Materials & Light Manufacturing	100,000 – 250,000	Experience in basic industrial work, fabrication, assembly, and materials handling	Semi-skilled; adaptable with short training	80,000 – 150,000
Agriculture & Agro-processing	80,000 – 150,000 (seasonal + permanent)	Strong presence of CA migrants in seasonal agriculture and food processing	Low-skilled, experience-based; high adaptability	70,000 – 120,000
Municipal Services & Urban Infrastructure	50,000 – 120,000	Workers with experience in maintenance, cleaning, basic urban services	Low- to mid-skilled; quick deployment possible	40,000 – 80,000
Services (hospitality, retail support, basic care services)	50,000 – 100,000	Increasing participation of women migrants in services and care economy	Informal skills; requires language and basic certification	30,000 – 70,000

III. Making the labor mobility partnership right: potential win-win institutional cooperation mechanisms along the entire migration cycle

Overall, Central Asia offers a substantial labor pool highly relevant to Ukraine's reconstruction needs. However, realizing this potential will require moving from largely informal migration systems toward structured, rules-based labor mobility frameworks that ensure efficiency, transparency, and protection of workers' rights. A well-designed Central Asia–Ukraine labor mobility partnership should therefore operate across the entire migration cycle, combining government-to-government coordination, private sector engagement, and enabling policy frameworks aligned with European standards. Properly implemented, such a system can simultaneously address Ukraine's labor shortages, support economic diversification in Central Asia, and improve outcomes for migrant workers.

At the intergovernmental level, bilateral and potentially multilateral labor agreements will form the backbone of such cooperation. These agreements can define sectoral quotas, priority occupations, recruitment procedures, and minimum standards for employment conditions, wages, and worker protection. They can be embedded within broader economic cooperation frameworks or reconstruction partnerships, including those supported by development partners. Given the

¹ Author's estimates based on official labor markets and migration statistics, IOM estimates and media sources

regional nature of Central Asian labor supply, there is also scope for a coordinated platform involving multiple sending countries and Ukraine, which could help standardize procedures and reduce transaction costs.

At the business level, direct cooperation between employers, chambers of commerce, and industry associations will be critical to ensure effective job matching and responsiveness to market needs. Sector-specific partnerships could be developed in construction, transport and logistics, energy services, and agro-processing. For example, construction associations in Ukraine could partner with vocational institutions and employer groups in Uzbekistan, the Kyrgyz Republic, and Tajikistan to establish dedicated recruitment pipelines. Similarly, logistics companies could develop targeted agreements for driver training and certification, while utilities and infrastructure operators could collaborate on technical workforce development programs. These business-driven arrangements would complement government agreements by ensuring that labor demand is clearly articulated and matched with appropriate supply.

Institutionally, the partnership would require establishing or strengthening dedicated coordination mechanisms in both sending and receiving countries. This could include specialized migration units within relevant ministries, joint coordination platforms, and digital labor-matching systems linking employers with certified workers. Migration support centers in Central Asia could provide pre-departure services, while corresponding institutions in Ukraine could facilitate onboarding, compliance monitoring, and access to services. Development partners could play an important role in supporting these systems, particularly in their initial phases.

Enabling policies aligned with best international practices (such as the EU migration regulatory framework) will be essential to ensure the partnership functions effectively and delivers long-term benefits. A central pillar is the recognition of qualifications and the development of standardized certification systems. Given that many Central Asian migrants possess informal, experience-based skills, mechanisms for recognition of prior learning and fast-track certification will be critical to align their competencies with Ukrainian and European labor standards.

Pre-departure training should be institutionalized as a core component of the migration cycle. This should include not only technical skills upgrading but also legal orientation, occupational safety training, and basic language preparation. Such training can improve productivity, reduce risks, and facilitate integration into host labor markets. Partnerships between vocational training institutions, employers, and public agencies will be key to scaling these programs.

Transparent and regulated recruitment mechanisms are equally important. Moving away from informal, network-based recruitment toward licensed agencies and digital platforms can improve job matching, reduce exploitation, and increase efficiency. Clear contracts, standardized terms of employment, and oversight mechanisms will help ensure that both workers and employers benefit from predictable and fair arrangements.

Worker protection frameworks must be embedded throughout the system. This includes enforcement of occupational safety standards, access to grievance redress mechanisms, and protection against abuse and discrimination. Ensuring that migrants have access to basic services, including healthcare, is also critical, particularly in labor-intensive sectors with higher occupational risks.

The interoperability of social benefits represents another key element of a sustainable labor mobility framework. Agreements that allow migrants to retain or transfer pension rights, access health coverage, and benefit from social insurance systems can significantly enhance the attractiveness of formal migration channels. In parallel, promoting low-cost and formal remittance

channels will help maximize the development impact of migration for sending countries, while reducing reliance on informal financial systems.

In essence, given Ukraine's ongoing alignment with the European Union acquis under its accession pathway, the design of labor mobility partnerships and labor migration regulation policies with Central Asia can draw on key elements of EU migration governance frameworks. This provides both a policy anchor and a credibility signal for migrant workers and sending countries. In particular, Ukraine's gradual approximation to EU labor and migration standards creates an opportunity to embed the partnership within a rules-based system consistent with EU directives on legal migration, working conditions, and worker protection.

Figure 1: Central Asia Labor Mobility Partnership Cycle

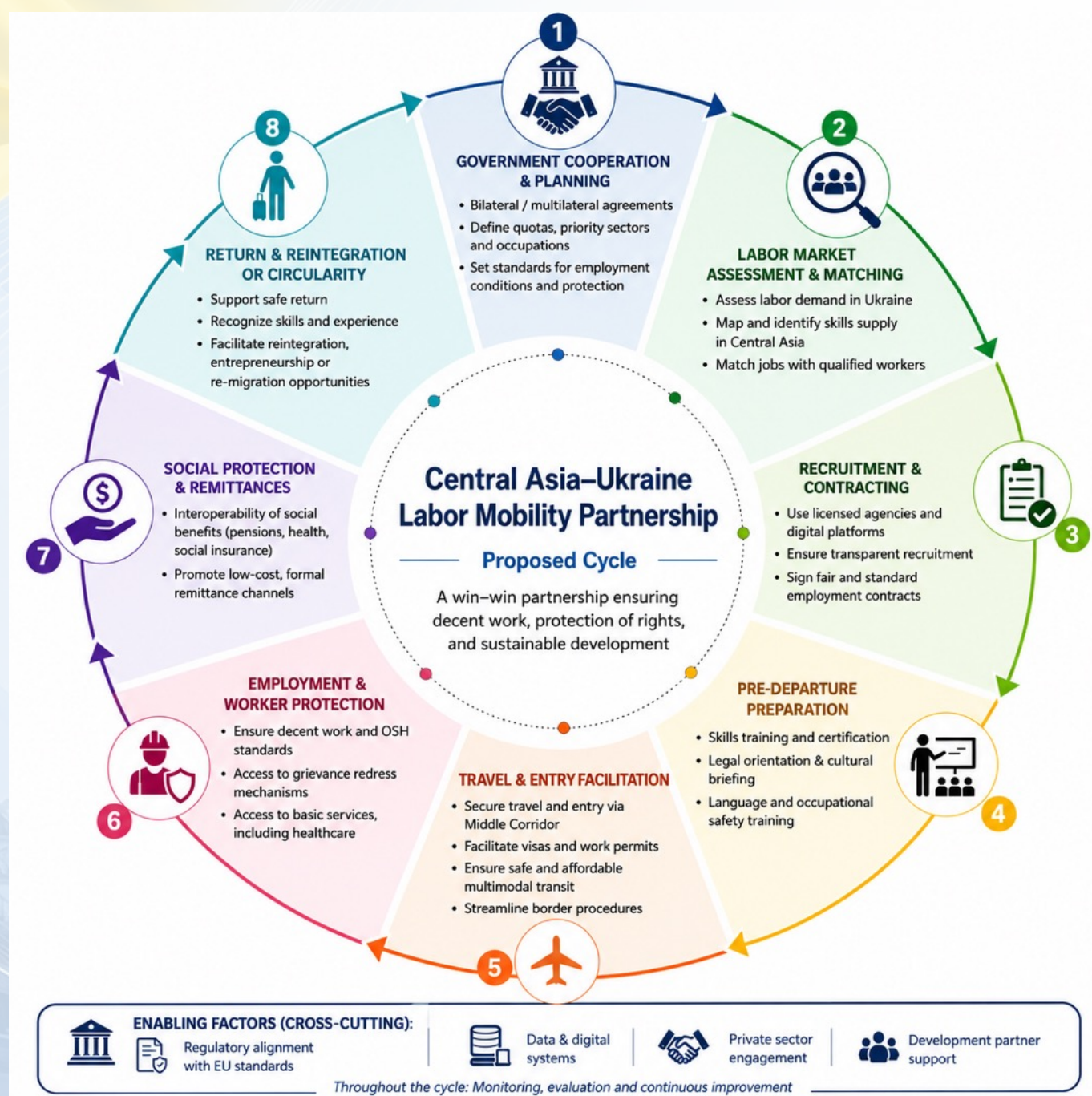


Table 2: EU-aligned enabling policies for a Central Asia–Ukraine labor mobility partnership ²

Policy Area	Relevant EU Framework / Practice	Application to Ukraine–Central Asia Labor Mobility	Expected Benefits
Legal migration channels	EU Single Permit Directive; Blue Card Directive	Introduce unified work and residence permits; streamline application procedures; ensure equal treatment principles	Greater transparency, faster processing, improved legal certainty for workers and employers
Working conditions and labor rights	Seasonal Workers Directive; Posted Workers framework	Ensure fair wages, safe working conditions, and equal treatment with domestic workers; regulate sector-specific employment	Reduced informality, lower risk of exploitation, improved social cohesion
Skills recognition and certification	European Qualifications Framework (EQF); Recognition of Prior Learning (RPL)	Develop fast-track certification and recognition systems for informal skills of CA workers; align with EU-compatible standards	Better job matching, higher productivity, pathways for skills upgrading
Pre-departure preparation	EU best practice in mobility partnerships and legal migration schemes	Provide technical training, language courses, legal orientation, and safety training before departure	Improved readiness, lower risks, faster integration into labor market
Recruitment systems	EU standards on ethical and regulated recruitment	Establish licensed recruitment agencies, standardized contracts, and digital job-matching platforms	Reduced reliance on informal networks, improved matching efficiency
Worker protection and grievance systems	EU labor law and occupational safety standards	Implement monitoring, inspection, and grievance redress mechanisms; enforce occupational safety compliance	Protection of worker rights, reduced abuse and disputes
Social protection and portability	EU social security coordination principles	Enable portability of pensions and social contributions; provide access to healthcare and insurance	Increased attractiveness of formal migration, long-term security for workers
Remittance systems	EU financial inclusion and payment systems frameworks	Promote low-cost, formal remittance channels and digital payments	Higher development impact for sending countries, reduced transaction costs
Institutional coordination	EU mobility partnerships and bilateral agreements	Establish joint coordination platforms, data-sharing systems, and intergovernmental oversight mechanisms	Improved governance, policy coherence, and scalability
Economic spillovers	EU integration and regional cooperation frameworks	Link labor mobility with trade, investment, and value chain development between CA and Ukraine	Stronger long-term economic ties, private sector development

² Adapted based on the EU legal migration framework (2025)

Beyond immediate labor market benefits, a structured labor mobility partnership can generate broader spillover effects for Central Asia–Ukraine economic relations. Over time, such cooperation can strengthen trade links, facilitate investment flows, and support the development of cross-border value chains, particularly in sectors such as construction materials, agriculture, and services. Migrant networks can also play a catalytic role in fostering business partnerships, knowledge transfer, and regional integration.

International experience shows that well-managed labor mobility can serve as a powerful channel for economic integration. World Bank and IOM analyses highlight how migration corridors often evolve into trade and investment linkages. For example, labor migration between Mexico and the United States has been associated with increased bilateral trade and the emergence of cross-border business networks, particularly in agriculture and light manufacturing. Similarly, migration flows from South Asia to Gulf countries have supported the development of service exports, construction supply chains, and investment backflows into home countries, including in housing and small-scale enterprise development.

In Europe, intra-EU labor mobility has demonstrated how movement of workers can contribute to economic convergence and value chain integration. Workers from Central and Eastern Europe employed in Western European construction, manufacturing, and services have facilitated the transfer of skills, standards, and business practices, while also creating networks that support subcontracting, outsourcing, and investment flows back to their home countries. These dynamics have been particularly visible in sectors such as construction materials, logistics, and agro-processing.

In practical terms, a Central Asia–Ukraine labor mobility partnership could be operationalized through transport and logistics connectivity along the Middle Corridor (Trans-Caspian International Transport Route), using multimodal transit networks through the South Caucasus and Türkiye. This would require developing affordable, efficient air, rail, road, and maritime transport links to facilitate the organized movement of workers between Central Asia and Ukraine. Strengthening connectivity infrastructure and transit coordination along the corridor would not only support labor mobility but could also stimulate broader trade, logistics, tourism, and business integration among Central Asia, the South Caucasus, Türkiye, and Ukraine over the longer term. This could be further reinforced through business-to-business partnerships, diaspora engagement, targeted investment promotion initiatives, and the gradual development of broader regional connectivity among Central Asia, the South Caucasus, Türkiye, and Ukraine.

In this sense, a labor mobility partnership should be viewed not only as a short-term response to labor shortages but as a strategic instrument for building longer-term economic linkages between Central Asia and Ukraine. By combining labor mobility with trade, investment, and skills development policies, both sides can maximize the developmental impact of migration and support more resilient and diversified economic relationships.

Case Study 1: Adapting Lessons from Germany's Post-War Reconstruction and the Turkish Guest Worker Program

One of the most relevant historical examples of large-scale reconstruction-driven labor mobility is West Germany's "guest worker" (Gastarbeiter) program during the post-World War II economic recovery. In the 1950s and 1960s, Germany saw rapid industrial growth, known as the Wirtschaftswunder, but faced serious labor shortages that threatened to slow down reconstruction and economic progress. To address this issue, the West German government signed a series of bilateral labor recruitment agreements with several countries, including Italy (1955), Greece and Spain (1960), and Türkiye in 1961, allowing German companies to hire foreign workers for the industrial and construction sectors.

The German-Turkish recruitment agreement created a government-regulated system for hiring workers abroad, with placement managed by government labor agencies and liaison offices responsible for screening, matching, and transporting workers. The initial plan was for temporary employment based on a "rotation principle," where workers would stay for one or two years before returning home and being replaced. However, as Germany's economy grew and employers invested in training migrant workers, many contracts were extended, and the rotation system gradually diminished.

Between 1961 and the halt of recruitment in 1973, hundreds of thousands of Turkish workers migrated to West Germany, fulfilling critical labor shortages in manufacturing, construction, mining, and infrastructure sectors. By the early 1970s, foreign workers had become a vital part of Germany's labor force and contributed to the country's rapid industrial growth during the reconstruction era.

Several lessons from this experience are relevant for Ukraine's future reconstruction also in attracting and leveraging Central Asian labor force and migration:

1. Bilateral labor mobility frameworks are critical.

Germany's agreements with labor-sending countries created structured recruitment channels, ensured worker screening, and facilitated coordination between governments and employers. A similar government-to-government labor mobility framework between Ukraine and Central Asian countries could ensure transparent recruitment and protection of worker rights.

2. Reconstruction labor demand is often underestimated.

Germany initially expected migrant labor to be temporary, yet reconstruction and economic expansion sustained demand for foreign workers for more than a decade. Ukraine's reconstruction, likely lasting 10–15 years or more, may similarly require sustained external labor participation.

3. Skills compatibility reduces transition costs.

Turkish workers were able to integrate relatively quickly into German industry because many had experience in construction, manufacturing, and manual trades. Likewise, Central Asian migrant workers already possess relevant skills in construction, utilities maintenance, logistics, and

infrastructure services, making them well-suited for reconstruction projects with limited retraining.

4. Migration can generate development benefits for sending countries.

Guest worker programs enabled Turkish migrants to accumulate savings, send remittances, and acquire technical skills that later contributed to Türkiye's economic development. A similar dynamic could generate remittance inflows, skills upgrading, and reintegration opportunities for Central Asian economies.

5. Institutional design matters.

The German experience also highlights risks, including social integration challenges, and policy adjustments when temporary migration becomes long-term. For the Ukraine–Central Asia labor mobility partnership, this suggests the importance of clear migration governance, skills certification systems, and temporary or rotational migration mechanisms aligned with EU labor standards.

IV. Conclusions and recommendations

The analysis across the previous chapters points to a clear conclusion. Ukraine's reconstruction will be constrained not only by financing and infrastructure capacity, but increasingly by labor availability and skills mismatches. At the same time, Central Asia represents a large, experienced, and underutilized labor pool that is currently concentrated in a single, increasingly constrained migration corridor. This creates a strong case for a structured Central Asia–Ukraine labor mobility partnership that can address immediate reconstruction needs while supporting longer-term economic diversification and regional cooperation.

Policy recommendations

A first set of policy options relates to establishing formal migration channels. Ukraine and Central Asian countries can develop bilateral or multilateral labor agreements that define priority sectors, recruitment mechanisms, and worker protection standards. These agreements should be supported by clear institutional arrangements and coordination platforms.

A second priority is improving job matching and recruitment systems. This includes moving away from informal networks toward regulated recruitment agencies, digital labor-matching platforms, and direct partnerships between employers and training institutions.

A third policy area focuses on skills and human capital. Governments and development partners should invest in pre-departure training, vocational education, and systems for recognition of prior learning, ensuring that informal skills can be certified and aligned with Ukrainian and EU standards.

A fourth set of measures relates to worker protection and inclusion. This includes ensuring fair wages, safe working conditions, access to grievance mechanisms, and portability of social benefits. Strengthening these frameworks will be critical for both attracting workers and maintaining public support.

A fifth priority is enhancing Ukraine's overall attractiveness as a destination. This includes addressing administrative barriers, ensuring transparent migration procedures, and promoting non-wage incentives such as legal security, access to services, and potential pathways for longer-term employment.

A sixth priority is to strengthen transport and connectivity infrastructure along the Middle Corridor (Trans-Caspian International Transport Route) through coordinated investments in multimodal transport systems, affordable air connectivity, streamlined border and customs procedures, and improved maritime, rail, and road logistics across Central Asia, the South Caucasus, Türkiye, and Ukraine. Enhanced connectivity would facilitate organized labor mobility flows while also supporting longer-term trade integration, business partnerships, tourism, and regional supply-chain development linked to Ukraine's reconstruction.

Finally, migration policy should be integrated with broader economic strategies. Linking labor mobility to trade, investment, and private-sector development initiatives can maximize spillover effects and support more sustainable economic outcomes.

Table 3: Matrix of Recommendations

Policy Area	Key Actions	Lead Actors	Time Horizon
Migration governance	Develop bilateral/multilateral labor agreements; establish coordination platforms	Governments of Ukraine and CA countries	Short term
Recruitment and matching	Introduce licensed recruitment systems; develop digital job-matching platforms; engage private sector	Ministries of labor, private sector, chambers of commerce	Short-medium term
Skills and training	Scale up TVET, pre-departure training, and recognition of prior learning systems	Governments, training institutions, development partners	Medium term
Worker protection	Enforce labor standards; establish grievance mechanisms; ensure occupational safety	Labor inspectorates, regulators	Short-medium term
Connectivity and transport infrastructure	Strengthen connectivity along the Middle Corridor through investments in multimodal transport, affordable air links, streamlined border procedures, and improved rail, road, and maritime logistics across Central Asia, the South Caucasus, Türkiye, and Ukraine to support labor mobility, trade, and reconstruction-related supply chains.	Governments of Central Asia and Ukraine; transport and customs authorities; ADB; EU; World Bank; EBRD; private logistics and transport operators	Medium-term

Policy Area	Key Actions	Lead Actors	Time Horizon
Social protection	Enable portability of benefits; expand access to healthcare and insurance	Governments, social protection agencies	Medium term
Attractiveness of destination	Simplify migration procedures; improve transparency; enhance non-wage incentives	Government of Ukraine	Short term
Economic integration	Link migration with trade, investment, and value chain development initiatives	Governments, private sector, IFIs	Medium–long term
Development partner coordination and financing support	Coordinated donor platforms; joint programming; financing of TA and pilot operations; alignment with reconstruction priorities and national strategies	World Bank, IOM, ILO, EU, bilateral donors, Governments of Ukraine and CA countries	Medium–long term

UKRAINE–KAZAKHSTAN COOPERATION: ECONOMIC, EDUCATIONAL, HUMANITARIAN, AND TECHNOLOGICAL DIMENSIONS

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Introduction: Why Kazakhstan Matters for Ukraine

Kazakhstan occupies a distinctive position in Ukraine's Central Asian calculus. It is the region's largest economy, its most institutionally developed state, and the country that has most visibly navigated the tension between its historical ties to Russia and its pursuit of an independent foreign policy. Since February 2022, Kazakhstan has refused to recognise Russia's annexation of Ukrainian territories, abstained on relevant UN resolutions rather than voting with Moscow, and repeatedly reaffirmed its commitment to the principles of territorial integrity, thereby implicitly extending that commitment to Ukraine. At the same time, Kazakhstan has not imposed sanctions on Russia and continues to participate in Russian-led integration structures, including the Eurasian Economic Union (EAEU) and the Collective Security Treaty Organization (CSTO), although it has politically distanced itself from both organisations since 2022.

This ambiguity is not evasion but strategy. Kazakhstan's multi-vector foreign policy seeks to balance relations with Russia, China, the West, and regional partners simultaneously, creating both constraints and opportunities for cooperation with Ukraine. The constraints are real: Kazakhstan will not become an anti-Russian partner, and Astana is sensitive to any framing that portrays cooperation with Ukraine as alignment against Moscow. The opportunities are equally significant: Kazakhstan is actively diversifying its economic partnerships, its higher education institutions are becoming increasingly internationalised, and its public – particularly the younger, Kazakh-speaking generation – has shown measurable sympathy for Ukraine's position since 2022. Ukraine's task is to develop frameworks for cooperation that align with Kazakhstan's multi-vector approach rather than challenge it.

This report focuses on four key areas of cooperation: the economic, educational, cultural, and technological dimensions of Ukraine–Kazakhstan relations.

Economic Cooperation: Trade, Transit, and the Middle Corridor

Current state

Ukraine–Kazakhstan bilateral trade was modest before 2022, reaching approximately USD 1.2 billion in 2021, with Ukrainian exports concentrated in machinery, ferrous metals, and agricultural products. The war has disrupted traditional trade routes and patterns but has simultaneously created new incentives. Kazakhstan has emerged as a key transit hub for goods moving between Europe and Central Asia while bypassing Russian territory through the so-called Middle Corridor, formally known as the Trans-Caspian International Transport Route (TITR). The route runs from China through Kazakhstan, across the Caspian Sea to Azerbaijan and Georgia, and onward to Europe.

Opportunities

The Middle Corridor offers Ukraine a structural opportunity. As a significant agricultural and industrial exporter seeking to reduce dependence on Black Sea routes exposed to Russian military threats, Ukraine has an interest in developing overland and multimodal transit connections eastward. Kazakhstan, as the corridor's central node, is investing heavily in transit infrastructure: the expansion of the Aktau and Kuryk ports on the Caspian Sea, the modernisation of rail links, and the development of logistics centres. Ukrainian logistics companies and port operators have relevant expertise that could be deployed in partnership with Kazakhstani counterparts.

Agricultural cooperation is a second priority area. Ukraine is one of the world's leading grain, sunflower oil, and fertiliser exporters; Kazakhstan is a significant importer of processed food products and has its own large agricultural sector with modernisation needs. Before 2022, Ukrainian agricultural machinery, particularly from Kharkiv-based manufacturers, was present in the Kazakhstani market. Rebuilding these supply relationships, adapted to wartime conditions, is a practical near-term goal. Ukrainian agri-tech companies, several of which have relocated their operations to EU countries since 2022, could also find a market in Kazakhstan's agricultural modernisation programme.

Industrial cooperation in metallurgy and engineering has historical roots: Soviet-era industrial complementarities linked Ukrainian steel and machinery production with Kazakhstani mining and raw materials. Reconstructing these links on a commercial rather than a Soviet planned-economy basis is more complex but not impossible. Such cooperation has continued on a modest scale, but it could be intensified. Kazakhstan's expanding mining sector, including copper, uranium, rare earth elements, has growing demand for specialised equipment in areas where Ukrainian manufacturers retain competitive capacity.

Post-war reconstruction of Ukraine is another opportunity for mutual cooperation. Kazakhstani companies have operated ports in Georgia and have undertaken large industrial, infrastructural, and residential projects in Kazakhstan and internationally.

Institutional mechanism: A bilateral Ukraine–Kazakhstan Trade and Investment Council, modelled on Kazakhstan's existing frameworks with Türkiye and South Korea, would provide the institutional infrastructure for economic cooperation, which currently lacks a dedicated channel.

Educational Cooperation: Universities, Student Mobility, and Academic Partnerships

Current state

Educational ties between Ukraine and Kazakhstan are deeper than is commonly recognised. Before 2022, Kazakhstan was among the top source countries for international students in Ukraine, with approximately 8,000–10,000 Kazakhstani students enrolled in Ukrainian universities, concentrated in medicine, engineering, and IT. The war has disrupted this flow severely: most Kazakhstani students in Ukraine were evacuated or transferred to institutions in other countries in 2022. Ukrainian universities, many of which have relocated or restructured their operations, are now competing to re-attract international students, including students from Kazakhstan. Ukrainian students have also studied at universities in Kazakhstan across a range of disciplines.

Opportunities

Three specific opportunities are identifiable.

First, the re-engagement of Kazakhstani students with Ukrainian higher education. Ukrainian medical and technical universities retain strong reputations in Kazakhstan. Several Ukrainian universities, including Kyiv Polytechnic Institute and Kharkiv National University of Radio Electronics, have developed significant online and hybrid teaching capacity since 2022. Targeted scholarship programmes for Kazakhstani students, potentially co-funded by the Ukrainian government and diaspora organisations, would signal commitment and rebuild the student pipeline.

Second, academic research partnerships. Kazakhstan's universities, particularly KIMEP University, Nazarbayev University, and Al-Farabi Kazakh National University, are actively internationalising their research profiles. Ukrainian academics, many of whom are now based in EU institutions, bring expertise in areas of direct relevance to Kazakhstan's research priorities: security studies, post-Soviet political economy, engineering, and agricultural science. Joint research projects, co-authored publications, and shared graduate supervision provide a low-cost, high-visibility cooperation format that does not require political commitment from either government.

Third, the Ukrainian Studies and Central Asian Studies nexus. The war has generated enormous international interest in Ukrainian history, politics, and culture. Kazakhstani academics studying Russia's imperial practices, post-Soviet identity, and Central Asian sovereignty have natural intellectual convergences with Ukrainian scholars working on analogous questions from the Ukrainian perspective. A Ukraine–Kazakhstan academic exchange programme focused on post-imperial studies, sovereignty, and historical memory would serve both sides' research agendas while building the people-to-people connections that underpin durable bilateral relations.

Institutional mechanism: A Ukraine–Kazakhstan Academic Cooperation Agreement at the intergovernmental level, establishing a joint commission to coordinate student mobility, research partnerships, and curriculum development, would formalise what is currently a dispersed set of individual institutional relationships.

Humanitarian Cooperation: Diaspora, Cultural Ties, and War Legacy

Current state

Kazakhstan hosts a small but established Ukrainian diaspora, concentrated in the northern regions and in Almaty. Historically, this community traces its origins to Soviet-era labour migration and the Holodomor-era deportations, a shared traumatic history that has acquired new political salience since 2022. The Kazakhstani government has not officially recognised the Holodomor as a genocide, but public awareness of it has increased significantly among the Kazakh-speaking population, partly through social media and partly through the parallels that many Kazakhs draw between the Soviet famine in Kazakhstan and the Ukrainian experience.

The Ukrainian community in Kazakhstan is fragmented regionally, demographically, and even religiously, and much of it is Russified. However, it includes a core group of strong supporters of Ukraine who organise support and humanitarian assistance.

Opportunities

Humanitarian cooperation between Ukraine and Kazakhstan operates in a politically sensitive environment. Astana is careful not to allow bilateral humanitarian initiatives to be read as anti-Russian positioning. Within these constraints, three areas offer practical potential.

First, Holodomor and Soviet famine commemoration. Kazakhstan experienced its own catastrophic famine in 1931–1933, the Asharshylyk, in which an estimated 1.5 million Kazakhs died. Proportionally, it is one of the largest demographic catastrophes of the Soviet period. Ukrainian and Kazakhstani civil society organisations have begun to develop commemorative and scholarly connections around this shared history of Soviet-inflicted famine. Joint academic conferences, travelling exhibitions, and co-produced educational materials on Soviet-era famines represent a humanitarian cooperation format with genuine resonance in both societies and with no direct political cost for Astana.

Second, support for Ukrainian refugees and displaced persons transiting Kazakhstan. Since 2022, Kazakhstan has hosted Ukrainian citizens in transit, primarily those with family connections or professional ties to the region. Ukraine's consular infrastructure in Kazakhstan, combined with Kazakhstani civil society organisations, could develop more systematic support frameworks for this population.

Third, cultural exchange. Ukrainian cultural presence in Kazakhstan – including theatre, cinema, literature, and music – was minimal before 2022 and remains limited. The war has generated international interest in Ukrainian culture to which Kazakhstan's internationalising cultural institutions could respond. Ukrainian film festivals, literary translation initiatives (translations of Ukrainian literature into Kazakh), and performing arts exchanges represent low-cost, high-impact formats for building cultural familiarity.

Institutional mechanism: A Ukraine–Kazakhstan Humanitarian and Cultural Cooperation Fund, administered jointly by the two countries' ministries of culture with civil society participation, would provide a sustainable framework for initiatives that are currently ad hoc and underfunded.

Technological Cooperation: IT, Digital Economy, and Green Energy

Current state

Ukraine's IT sector is one of its most internationally competitive industries, with a large pool of skilled developers, designers, and engineers, many of whom have relocated to EU countries or continued working remotely since 2022. Kazakhstan has identified the digital economy and the development of the IT sector as strategic priorities, investing in technoparks, startup ecosystems, and digital government infrastructure. The complementarity is obvious but has not yet been systematically developed.

Opportunities

Ukrainian IT companies are now on the rise. Those working particularly in fintech, cybersecurity, agri-tech, and e-government solutions have a demonstrated capacity to operate in post-Soviet institutional environments and to develop solutions adapted to the specific conditions of transitional economies. Several Ukrainian IT firms already have regional offices in Central Asia. A structured programme connecting Ukrainian IT exporters with Kazakhstani government and private sector clients would capitalise on existing capacity.

Cybersecurity cooperation is a specific priority. Ukraine has acquired unparalleled practical experience in defending critical digital infrastructure against sophisticated state-sponsored attacks since 2014 and particularly since 2022. Kazakhstan, which faces its own cybersecurity challenges, including the documented vulnerability of state digital systems, has an evident interest in this expertise. A bilateral cybersecurity cooperation framework, covering information sharing, joint training, and technical assistance, would serve Kazakhstan's genuine security interests while positioning Ukraine as a knowledge partner rather than a political ally.

Green energy and sustainable technology are a third area. Kazakhstan has committed to carbon neutrality by 2060 and is developing its renewable energy sector, particularly wind and solar energy. Ukraine has significant expertise in renewable energy project development, accumulated through its own energy transition process. Joint projects in renewable energy technology transfer, adapted to Kazakhstan's specific geographic and grid conditions, represent a medium-term cooperation opportunity that aligns with both countries' declared development priorities.

Institutional mechanism: A Ukraine–Kazakhstan Digital and Technology Partnership, modelled on Kazakhstan's existing technology cooperation frameworks with Estonia and South Korea, would provide a structured channel for IT, cybersecurity, and green energy cooperation that currently operates informally, if at all.

Conclusions and Recommendations

Ukraine–Kazakhstan cooperation across economic, educational, humanitarian, and technological dimensions is underdeveloped relative to its existing potential. The political constraints are real but manageable: Kazakhstan will not position cooperation with Ukraine as anti-Russian alignment, and Ukraine should work within that constraint rather than against it. The practical opportunities, however, are substantial and do not require political transformation on either side.

Realising this potential still depends on political will on both sides and on addressing a significant institutional weakness. Corruption remains a structural risk in both countries' post-Soviet governance systems, and any formal partnership needs to be built with this in mind from the start. This is precisely where the two mechanisms proposed above – the Trade and Investment Council and the Digital and Technology Partnership – matter most: moving from informal, personality-dependent arrangements to formal institutions is itself a way of reducing corruption risk, not just a bureaucratic upgrade. The technology sector is where this can move fastest. Ukrainian firms have real, tested experience in building e-government, fintech, and cybersecurity systems specifically for transitional economies, and applying that expertise in Kazakhstan would serve two purposes: it would deepen bilateral cooperation while also helping build more transparent administrative systems in Kazakhstan.

Four priority recommendations follow from this analysis.

First, strengthen dedicated bilateral institutional mechanisms that give cooperation a sustainable infrastructure beyond individual initiatives. This could include updating the existing Agreement between the Ministry of Education and Science of Ukraine and the Ministry of Education and Science of the Republic of Kazakhstan on Cooperation in Education and Science to reflect current priorities, while also establishing mechanisms such as a Trade and Investment Council, a Humanitarian and Cultural Fund, and a Digital and Technology Partnership.

Second, prioritise formats with low political cost and high practical value: student mobility, academic research partnerships, IT sector connections, and cultural exchange. These build the people-to-people relationships and institutional habits that make deeper cooperation possible over time.

Third, develop the Middle Corridor transit connection as a strategic economic priority, investing in logistics infrastructure and commercial relationships that would make Ukraine a meaningful participant in Kazakhstan's emerging role as a transcontinental transit hub.

Fourth, engage Kazakhstan's civil society and academic community as partners, not only its government. The generational shift in Kazakhstan's population creates a civil society constituency for Ukraine–Kazakhstan cooperation that diplomatic channels alone cannot reach. This shift is towards a younger, Kazakh-speaking population with less Soviet nostalgia and greater sympathy for Ukraine's position.

Kazakhstan will not be Ukraine's ally in the conventional or legal sense. But it can be a genuine partner across the sectors analysed here, and building that partnership, patiently and practically, serves Ukraine's long-term interests in the region.



TRANSPORT AND LOGISTICS COOPERATION BETWEEN UKRAINE AND CENTRAL ASIA

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In recent years, the international transport and logistics system has undergone profound transformation driven by shifting geopolitical dynamics, the reconfiguration of global trade routes and the growing demand for the diversification of international transport corridors. Against this backdrop, the development of transport routes linking Ukraine and Central Asia via the Black Sea, the South Caucasus and the Caspian Sea, as well as overland corridors through Türkiye and European countries, has become increasingly important. Our countries share common economic interests and possess considerable potential for the development of a mutually beneficial partnership.

The trade turnover between Ukraine and Central Asia has evolved as follows:

2013 – USD 13 billion;
2016 – USD 1.7 billion;
2022 – USD 1.4 billion;
2023 – USD 1.1 billion;
2024 – approximately USD 1 billion.

It is evident that there remains significant potential for expanding cooperation, which is currently experiencing a deep decline due to political, security and logistical challenges. Russia's deliberate tightening of customs procedures after 2016, followed by the complete suspension of transit through its territory from 2016 and the 2022 invasion, has significantly undermined trade relations between Ukraine and Central Asia.

Not all areas of cooperation require direct overland connectivity. For example, Ukraine and Central Asian countries, particularly Uzbekistan, maintain active cooperation in the pharmaceutical sector. Within this industry, goods can be transported by air with only a limited negative impact on trade flows. However, for the vast majority of other products, transportation is feasible only by sea and/or overland routes.

High-value-added containerised cargo offers the greatest potential for expanding freight volumes. Ukraine could increase exports to Central Asian countries in such sectors as processed agricultural products, sunflower oil, machinery, railway equipment, metal structures, IT solutions for the transport industry and equipment for the agriculture sector. In turn, Kazakhstan, Uzbekistan, Turkmenistan and other countries of the region could expand their exports to Ukraine of non-ferrous metals, polymer products, mineral fertilisers, textiles, cotton, fruit, vegetables and other light-industry products. Containerised transport is the most cost-effective option for moving such goods along multimodal routes.

The Trans-Caspian International Transport Route (TITR) represents the most promising corridor for expanding transport and logistics cooperation, as overland routes through Russian territory are no longer viable. The corridor is already operational; however, Ukraine's participation has yet to reach its full potential. The main idea of Ukraine's involvement in the project is to leverage its strategic transit capacity as a link between Europe and Asia. Moreover, according to the Trans-Caspian International Transport Route Association, total freight volumes along the Middle Corridor have demonstrated a sustained overall increase, reaching 2.76 million tonnes in 2023, 4.48 million tonnes in 2024 and 4.12 million tonnes in 2025. These figures further underscore the project's considerable potential.



*Map of the Trans-Caspian International Transport Route.
Source: <https://middlecorridor.com/en/route>*

An additional driver for the route's development is the European Union's policy of diversifying transport links with Central Asia. Under the Global Gateway initiative, the EU is investing in the development of the Middle Corridor as an alternative to Russian transport routes. For Ukraine, this creates opportunities to integrate its transport system into emerging Eurasian logistics chains and attract European investment in the modernisation of its port and railway infrastructure.

Continuing with this point, it is worth noting that the development of transport infrastructure will require substantial investment, which could be provided both by the countries participating in the route and by international financial institutions. This includes not only European institutions but also the World Bank and the Asian Development Bank, which are already financing selected projects to modernise ports, railway infrastructure, and border crossing points along the Middle Corridor. For Ukraine, attracting these resources is essential for post-war recovery, given the severe damage sustained by its economy. China's interest can also be expected to increase, as Beijing is a main advocate of this logistics corridor and views Ukraine as a promising partner.

The route from Central Asia runs through the ports of Kazakhstan and Azerbaijan on the Caspian Sea, a railway through the territory of Azerbaijan and Georgia in the South Caucasus, and then a sea route to Ukraine's Black Sea ports near Odesa. At present, two ferries operate between the Ukrainian port of Chornomorsk and the Georgian port of Batumi, providing both passenger and freight services. For now, this remains the only available transport link to connect Ukraine and Central Asia, which naturally constrains logistics capacity. However, these are not the only problems affecting the route today. The main challenges are:

- **Military operations and threats in the Black Sea.** Maritime navigation in this region is significantly complicated due to the deteriorating security environment. The recent intensification of military operations at sea only increases the risks. The only viable route for avoiding the most dangerous areas runs along the coastlines of Romania, Bulgaria, Türkiye and Georgia, which increases cargo transit times. Full-fledged cooperation can only be achieved after active hostilities have ceased or when a full-fledged protected route is established.
- **Insufficient Black Sea traffic.** Ukraine needs to expand ferry services and adapt its ports to reach new levels of cooperation with Central Asia. Oleksandr Pertsovskiy, Chairman of the Management Board of JSC "Ukrainian railways", stated that the resumption of ferry services

with Georgia will allow not only to extend the TITR to European markets via transit through Ukraine but also to revive former economic ties. Consequently, further expansion of cooperation in this area should be expected.

- **The problem of onward transportation.** Ukraine can act as a transit hub for the movement of Central Asian goods to Europe. However, its railway network and seaports are currently unable to handle such volumes. This requires further development of the Danube port infrastructure, whose strategic importance has increased significantly since the beginning of the full-scale war, as well as railway connection in the south. In the medium term, Ukraine could regain its status as one of the key transit hubs between Europe and Asia. The geographical location allows the Trans-Caspian route to be connected with the European Union's transport networks through the Polish, Slovak, Hungarian and Romanian directions. This would create opportunities for the formation of logistics hubs in the ports of Odesa, Chornomorsk, Pivdennyi and the Danube port cluster (Izmail and Reni), as well as the development of container rail services to Central Europe.
- **Complicated customs procedures.** Passing through customs checkpoints in at least four countries significantly complicates trade. The way to overcome this problem is to introduce convenient digital tools that are already being actively implemented by the countries participating in the Trans-Caspian route. This includes electronic document management systems, digital consignment notes (e-CMR), advance electronic cargo declarations and real-time container tracking systems. Such solutions allow customs clearance times to be reduced, minimise bureaucratic procedures and enhance the transparency of transport operations.
- Due to the previous point and the different tariff policies of countries, the cost of transporting goods is increasing. **It is necessary to implement a unified tariff policy by all countries along the entire route of transporting goods to optimise this process.**
- **Limitations of the Caspian Sea.** It is getting shallower, requiring coastal states, particularly Azerbaijan and Kazakhstan, to undertake extensive dredging operations. To address this challenge, Kazakhstan, for example, is constructing a new deep-water seaport. This will allow it to be less dependent on seasonal fluctuations in water levels and increase transportation volumes.

Another promising option is the so-called Southern route, which does not pass through the Black Sea, but overland via Türkiye and European countries to Ukraine. It faces similar challenges related to customs and tariff policies, as well as the constraints associated with the Caspian Sea, while also increasing the time for transporting goods compared to the Black Sea analogue. At the same time, it offers a significant advantage by eliminating the need for potentially hazardous maritime transport, which may offset these disadvantages.

Another challenge is the difference in railway gauge standards between Türkiye, European countries and the post-Soviet states. This increases transport times and requires the deployment of automatic gauge-changing systems. This drawback is absent for the maritime option, as Ukraine, Georgia, Azerbaijan and Kazakhstan all have the same railway gauge parameters of 1520 mm.

Considering the abovementioned, the following measures are recommended to unlock the potential of transport cooperation between Ukraine and the Central Asian states:

- increase the number of ferry services between Ukraine and Georgia;
- modernise the ports around Odesa and the Danube cluster;
- establish a common digital platform for customs clearance;
- introduce a unified tariff policy within the Trans-Caspian International Transport Route (TITR);
- further develop container transport and logistics hubs;
- attract financing from international financial institutions for transport infrastructure development;
- develop modern overland infrastructure that will meet the logistical requirements of the route.

It is important that the development of transport cooperation is of strategic importance not only for Ukraine but also for the countries of Central Asia. The Ukrainian route provides an additional gateway to the markets of Central and Eastern Europe while contributing to the diversification of export routes. For Ukraine, deepening cooperation creates opportunities to restore pre-war trade relations, increasing exports of high value-added products and strengthening the country's role as a transit hub between Europe and Asia. Such cooperation meets the interests of both sides and reduces their dependence on traditional transport routes through the territory of Russia.

Despite significant security and infrastructural challenges, the development of the Trans-Caspian International Transport Route (TITR) and other alternative routes has the potential to diversify trade flows by bypassing Russia and to integrate Ukraine into the emerging architecture of Eurasian transport corridors. In the long term, the modernisation of transport infrastructure, the digitalisation of logistics processes and the coordination of tariff policies may provide the foundation for restoring and expanding trade between Ukraine and Central Asia, while also facilitating the development of new supply chains linking Europe and Asia.



PROSPECTS FOR ENERGY, ECONOMIC, EDUCATIONAL AND INSTITUTIONAL COOPERATION BETWEEN UKRAINE AND TAJIKISTAN IN THE CONTEXT OF UKRAINE'S ENGAGEMENT WITH CENTRAL ASIA

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Abstract

Under conditions of transformation of the international system and the growing role of Central Asia, the development of new models of cooperation between Ukraine and the countries of the region has become increasingly relevant. The Republic of Tajikistan is of particular interest due to its substantial hydropower potential, abundant water resources and its drive to economic modernisation. Despite the consequences of the war, Ukraine retains significant scientific, engineering, educational and industrial potential that could become the foundation for a long-term partnership.

This study examines the prospects for energy, economic, educational and institutional cooperation between Ukraine and the Republic of Tajikistan within the broader context of Ukraine's engagement with the countries of Central Asia. The main attention is devoted to hydropower development, renewable energy, increasing energy efficiency, agro-industrial complex, digital economy, training of personnel and development of institutional cooperation mechanisms. The paper argues that the most promising model for bilateral relations lies in shifting from traditional trade toward a partnership based on innovation, knowledge exchange, scientific and educational cooperation and the development of a green economy.

The study concludes that deeper Ukrainian-Tajik cooperation can contribute to Ukraine's economic recovery, support the modernisation of Tajikistan's economy and strengthen Ukraine's engagement with the countries of Central Asia. International financial institutions, joint infrastructure projects and expert dialogue in the areas of sustainable development, energy security and climate change should play a pivotal role in realizing this potential.

Introduction

The modern international political and economic system is undergoing profound transformation driven by geopolitical competition, shifts in global supply chains, energy transition and armed conflicts. In such conditions, states seek to diversify their foreign economic relations and develop new formats of regional cooperation. Central Asia is emerging as one of the key regions of the global geoeconomy, with significant energy and mineral resources, high transit potential and increasing investment attractiveness. The growing interest in the region from the European Union, China, Türkiye, the Gulf States, Japan and the Republic of Korea confirms its expanding strategic importance.

For Ukraine, cooperation with the countries of Central Asia has become particularly relevant in the context of diversifying external economic relations, accessing new markets and expanding scientific and technological cooperation. A special place in this strategy is occupied by the Republic of Tajikistan, which has one of the largest hydropower potentials in the world. The country's total hydropower potential is estimated at 527 billion kWh per year, of which 317.82 billion kWh are technically feasible for development, while only a small fraction of these resources is utilised. This creates substantial opportunities for energy-sector modernisation, industrial development and international cooperation.

In recent years, the Republic of Tajikistan has been consistently implementing energy sector reform aimed at developing renewable energy sources, improving the regulatory framework and attracting investment. According to current national plans, by 2040 the installed solar power capacity should reach 4.5 GW, while wind power capacity is projected to increase to 2 GW. Despite the consequences of the war, Ukraine retains powerful scientific, engineering, educational and industrial capacities, as well as extensive experience in energy infrastructure modernisation, digitalisation of public administration and training of engineering professionals, which is of practical interest for the Republic of Tajikistan.

The prospects for Ukrainian-Tajik cooperation extend far beyond traditional trade and economic relations. The most promising model of partnership is based on human capital development, scientific and educational cooperation, technology exchange, digital transformation, the development of green energy and the formation of sustainable institutional mechanisms. At the same time, bilateral cooperation should be considered as an integral component of Ukraine's broader strategy of engagement with Central Asia. Leveraging multilateral cooperation frameworks and programmes of the European Union, the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development and other international organisations could significantly expand the opportunities for implementing joint projects while enhancing their long-term sustainability.

The purpose of this study is to provide a comprehensive analysis of the prospects for energy, economic, educational and institutional cooperation between Ukraine and Tajikistan in the context of strengthening Ukraine's engagement with Central Asia, as well as to develop practical recommendations for establishing a sustainable model of bilateral partnership.

1. Ukraine and Central Asia: Current State and Strategic Directions of Cooperation

Central Asia in the Emerging Architecture of International Relations

Over the past two decades, Central Asia has emerged as one of the key regions of Eurasia due to its substantial energy and mineral resources, high transit potential and growing role in ensuring energy and transport security. The changing global economic architecture, driven by geopolitical competition, supply chain disruptions and energy transition, has enhanced the region's importance as a connecting link between Europe and East Asia.

Today, Central Asia participates in the implementation of large-scale international initiatives, including China's Belt and Road Initiative (BRI), the European Union's Global Gateway strategy, the Trans-Caspian International Transport Route (Middle Corridor), the Central Asia Regional Economic Cooperation (CAREC) Program and projects supported by the World Bank, the Asian Development Bank and the European Bank for Reconstruction and Development. In 2024, the European Commission announced its intention to invest approximately €10 billion in the development of the Trans-Caspian Transport Corridor, creating additional opportunities for the integration of the countries of the region into international production and transport chains.

The substantial hydropower potential of the Republic of Tajikistan and the Kyrgyz Republic, the hydrocarbon resources of the Republic of Kazakhstan and Turkmenistan and the rapid expansion of solar and wind energy in the Republic of Uzbekistan create the prerequisites for the formation of a new regional energy architecture. Against this backdrop, Ukraine's cooperation with the countries of Central Asia acquires strategic importance and extends beyond traditional trade, encompassing investment, scientific and technological and infrastructure projects.

Evolution of Ukraine's Relations with the Countries of Central Asia

After restoring independence, Ukraine focused its main attention on the European direction of foreign policy, while cooperation with the countries of Central Asia developed unevenly. The most active ties were maintained with the Republic of Kazakhstan and the Republic of Uzbekistan, while interaction with the Republic of Tajikistan was limited mainly to the educational and humanitarian spheres.

Since 2022, Ukraine's interest in Central Asia has increased considerably, driven by the need to diversify export markets, identify alternative logistics routes and expand cooperation with the Global South. Under current conditions, the priority is shifting from trade in goods toward interaction in education, digital technologies, engineering solutions, scientific research, workforce training and the innovative economy, which corresponds to the global transition to a knowledge-based economy.

The Republic of Tajikistan in Ukraine's Strategy

Among the countries of Central Asia, the Republic of Tajikistan has several strategic advantages. The country has the region's largest hydropower potential – 527 billion kWh annually, of which 317.82 billion kWh are technically available, while only about 5% of this potential is used. At the same time, a large-scale programme for the development of renewable energy is being implemented, with plans to commission approximately 4,500 MW of solar capacity and 2,000 MW of wind capacity by 2040.

Additional advantages include a young demographic profile, which creates strong demand for modern education and highly qualified professionals, as well as a consistent reform of the energy sector with legislative improvements, electricity market liberalisation and the creation of favourable conditions for investment. Together, this creates solid preconditions for the development of long-term cooperation between Ukraine and the Republic of Tajikistan.

From Trade to the Knowledge-based Economy

The modern model of Ukrainian-Tajik cooperation should be based not only on trade but also on the principles of Knowledge Partnership – a model centred on knowledge exchange, innovation and human capital development. Priority areas are joint scientific research, engineering developments, professional training, energy-sector digitalisation, development of Smart Grid technologies, artificial intelligence, innovative infrastructure and inter-university cooperation.

The establishment of joint research centres in the areas of energy transition, climate policy, water resources management and digital transformation would allow for creating a sustainable model of cooperation built upon long-term institutional partnerships among universities, research institutions, public authorities and business.

2. Energy Cooperation Between Ukraine and Tajikistan as a Strategic Foundation for Bilateral Partnership

2.1. Energy Diplomacy as a New Direction of Ukrainian-Tajik Cooperation

In modern international relations, energy is not only a branch of the economy but also an instrument of foreign policy, regional integration, national security and sustainable development. The global energy transition and the shift toward a low-carbon economy enhance the importance of energy diplomacy as a direction of international cooperation.

For Ukraine and the Republic of Tajikistan, advancing energy diplomacy is of particular importance. Ukraine has extensive experience in operating complex energy systems, a strong engineering tradition and competencies in hydropower, nuclear energy, power grids and infrastructure digitalisation. In wartime, Ukrainian specialists have also gained unique experience in enhancing energy system resilience and restoring critical energy infrastructure.

The Republic of Tajikistan is undergoing a transition from a predominantly hydropower-based model toward a more diversified energy system incorporating solar and wind generation, distributed energy resources, digital technologies and modern market mechanisms. This creates complementarity of interests: Ukraine can offer engineering solutions, scientific research, educational programmes and expert support, while Tajikistan provides opportunities for the practical implementation of energy transition projects. Energy cooperation can become the foundation for a broader strategic partnership between the two states.

2.2. Tajikistan's Hydropower Potential as a Driver of Regional Development

One of the Republic of Tajikistan's principal competitive advantages is its unique hydropower potential. Its total theoretical capacity is estimated at 527 billion kWh per year, of which approximately 317.82 billion kWh can be technically developed. At present, only about 5% of this potential is utilised, indicating substantial untapped opportunities for economic growth.

Hydropower provides about 94% of the country's total electricity generation and constitutes the cornerstone of its national energy security. At the same time, dependence on river runoff makes the power system vulnerable to seasonal fluctuations in river water levels and the effects of climate change.

The annual winter electricity deficit is estimated at approximately 2.13 TWh and the economic losses due to electricity shortages exceed USD 640 million, equivalent to roughly 5% of the country's GDP. Therefore, the key task of national energy policy is not only to expand installed generation capacity but also to ensure the stable functioning of the energy system throughout the year.

2.3. Rogun Hydropower Plant as a System-forming Project for Central Asia

The construction of the Rogun Hydropower Plant (Rogun HPP) occupies a central place in Tajikistan's energy strategy. Once completed, it will become the largest hydropower plant in Central Asia, with a design installed capacity of approximately 3,780 MW. The commissioning of the plant will allow almost doubling the country's existing generating capacity and significantly reshape the regional electricity market.

The Rogun HPP is expected to help overcome seasonal electricity shortages, stimulate industrial development, increase export capacity, provide the energy basis of the digital economy and strengthen the interconnection of Central Asian energy systems. For this reason, the World Bank considers this HPP as one of the region's most important infrastructure projects.

For Ukraine, the Rogun HPP represents an important opportunity primarily in the fields of engineering and scientific-technical cooperation. Ukrainian universities and research institutions have expertise in hydraulic engineering, dam monitoring, hydroturbine operation, automated control systems, power system modelling and engineering training. Ukraine could contribute to the implementation of this project by exporting knowledge and engineering solutions without directly financing construction.

2.4. Energy Diversification: From Hydropower to a Mixed Generation Model

The Republic of Tajikistan is gradually transitioning from hydropower dominance toward a diversified generation mix. According to current projections, by 2040 it is planned to build 4,500 MW of solar and 2,000 MW of wind power plants and an additional 500 MW of distributed rooftop solar generation.

Solar generation will cover daytime load, wind generation will help offset evening consumption peaks, while hydropower plants will perform a balancing function. This combination contributes to increasing the resilience of the national energy system.

Using solar generation during the winter season will also save water in reservoirs. This mechanism has been called a “virtual battery” because daytime solar generation allows the storage of hydropower potential for meeting evening demand during the winter season.

2.5. Energy Efficiency as a New Source of Economic Growth

Within Tajikistan’s energy policy, energy efficiency is considered as an independent source of energy resources. The main tasks are to reduce the energy intensity of the economy, minimise technical losses in networks, modernise pumping stations, implement intelligent control systems, digital energy consumption monitoring and stimulate energy conservation.

Particular attention is devoted to the irrigation sector. Pumping stations consume nearly 18% of the country’s total electricity generation. Equipment replacement, automated control systems, use of frequency converters and introduction of solar-powered pumps could reduce energy consumption by 10–50% while simultaneously lowering operating costs.

Ukraine has substantial experience in conducting energy audits, modernising municipal infrastructure, implementing automated management systems and training energy management specialists. A practical direction for cooperation could be the development of joint energy efficiency programmes for municipalities, universities, water management organisations and enterprises.

2.6. Institutional Reform of the Energy Sector

The institutional modernisation of Tajikistan’s energy sector envisages a transition from a centralised administrative model to a modern market management system. The main areas of reform are the adoption of a new Energy Code, the separation of the functions of generation, transmission and distribution of electricity (unbundling), the introduction of competitive market mechanisms, tariff policy reform, the creation of favourable conditions for independent electricity producers, simplifying the connection of renewable energy facilities, developing Net Metering and Net Billing mechanisms, as well as the improvement of the regulatory framework for investors.

These changes are aimed at improving the efficiency of the energy sector and establishing a transparent investment climate. For Ukraine, this process is of interest from the point of view of sharing experience in adapting energy legislation to European standards, training energy regulation specialists and implementing joint educational programmes.

3. Economic Cooperation Between Ukraine and Tajikistan: New Growth Areas Amid the Transformation of the Global Economy

3.1. Economic Cooperation as the Basis of Long-Term Partnership

In modern conditions, economic cooperation is determined not so much by the volume of bilateral trade as by investment, industrial cooperation, technology transfer, human capital development and integration into international production chains.

For Ukraine and the Republic of Tajikistan, this approach appears particularly promising. Ukraine implements a post-war reconstruction programme and integration into the European economic space, while Tajikistan modernises its industrial and energy sectors focusing on a green economic growth model.

The economies of the two states are highly complementary. Ukraine possesses a developed engineering school, industrial technologies and scientific capacity, while Tajikistan has substantial natural resources, affordable clean electricity, a young population and a growing domestic market. These factors create the prerequisites for the formation of a long-term economic partnership.

3.2. Green Industrialisation as a New Model of Economic Development

One of the most promising areas of development for the Republic of Tajikistan is a transition toward green industrialisation based on clean electricity, digital technologies, energy efficiency and low-carbon production.

After the commissioning of new hydropower plants and renewable energy facilities, the country could move from seasonal deficit to a sustainable electricity surplus. The long-term economic effect would be maximised if this resource is used to support industrial development, raw material processing, digital economy and high-tech industries rather than solely for electricity exports.

Ukraine could become a partner for Tajikistan due to its expertise in industrial facility design, energy-efficient production, materials science, industrial energy engineering, automation and training of engineering personnel. Practical cooperation may include the creation of joint ventures, technology transfer and professional training.

3.3. Development of the Digital Economy

Digital technologies become one of the principal drivers of modern states' competitiveness. A stable surplus of affordable electricity would create the prerequisites for the Republic of Tajikistan to deploy energy-intensive digital infrastructure, including data centres, high-performance computing facilities and artificial intelligence infrastructure.

The development of this dimension will allow diversifying the economy, increasing tax revenues, creating highly skilled jobs, modernising telecommunications infrastructure, expanding the training of IT professionals and forming new export services.

Ukraine has one of the most developed IT sectors in Eastern Europe. Despite the consequences of the war, Ukrainian companies retain a high level of competence in software development, cybersecurity, digitalisation of public administration, artificial intelligence and data processing.

Therefore, cooperation in the digital economy could become a distinct area of bilateral engagement and include the establishment of joint research laboratories, training of specialists, startup ecosystem development, introduction of digital solutions in public administration and implementation of GovTech projects.

3.4. Agro-Industrial Cooperation

Tajikistan's agricultural sector generates about 22% of gross domestic product, provides approximately 19% of exports and remains the primary source of employment for more than 60% of the country's population. However, its development is hampered by high dependence on irrigation, insufficient level of mechanisation, limited storage and processing capacity, as well as high energy intensity of water management systems.

Ukraine has extensive experience in agricultural production, storage, logistics, processing and digitalisation of agriculture. Promising areas of cooperation include the modernisation of irrigation infrastructure, the introduction of energy-efficient and solar pumping stations, the digitalisation of water resource management, the development of agricultural logistics and processing, the creation of product quality control systems and the training of agricultural engineers. Combining Ukrainian engineering expertise with the needs of the Republic of Tajikistan could significantly increase the efficiency of water and energy resources.

3.5. Investment Cooperation

Investment cooperation should be developed on the basis of multilateral financing mechanisms. Tajikistan actively cooperates with the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development, the European Union, the Islamic Development Bank and other international financial institutions that implement projects in energy, transport, digitalisation of public administration and climate change resilience.

For Ukraine, participation in such programmes creates opportunities to act as a provider of technologies, expert knowledge and educational services. The most promising are projects implemented with the support of the European Union, the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development, the United Nations Development Programme (UNDP), the CAREC Program and the Global Gateway initiative. This approach makes it possible to reduce financial risks while expanding the scale of cooperation.

3.6. Knowledge-based Economy as the Basis of Long-Term Growth

In modern conditions, the main sources of competitive advantages are knowledge, technology and innovation. Therefore, the long-term strategy for Ukrainian-Tajik cooperation should be focused on building a knowledge economy based on the interaction of universities, research institutions, technology companies, startups and governmental institutions.

Key elements of such a model are joint research projects, scientific and technological consortia, training programmes, technology transfer, joint applications for international grants, establishment of sector-specific centres of excellence and development of innovative entrepreneurship. Such a cooperation model is characterised by high sustainability, as it is based on long-term institutional ties between academia, business and the state.

4. Educational, Scientific and Innovation Cooperation as a Foundation for Human Capital Development

4.1. Human Capital as a Strategic Resource for Ukrainian-Tajik Partnership

In the 21st century, the competitiveness of states is determined primarily by the quality of human capital, the level of education, scientific potential and the ability to generate innovations. Investments in education, research and development ensure long-term economic growth and adaptation to technological change.

For Ukraine and the Republic of Tajikistan, human capital development represents one of the most promising areas of bilateral cooperation. Both countries are interested in training qualified professionals for the energy sector, industry, the digital economy, public administration and sustainable development.

Educational cooperation is particularly important in the context of Tajikistan's economic modernisation. The development of hydropower and renewable energy, the digitalisation of the energy sector and improvements in energy efficiency require a new generation of specialists. Ukrainian universities have significant potential for training professionals, designing educational programmes and conducting joint research.

4.2. Current State of Educational Cooperation

Ukraine has traditionally been one of the leading educational centres for students from Central Asia, particularly in engineering, medicine, construction, agriculture and natural sciences.

After 2022, the scale of cooperation has objectively decreased, however, digital technologies open up new opportunities for developing academic ties regardless of geographical distance.

The modernisation of Tajikistan's economy is accompanied by an increasing demand for engineers, energy specialists, IT professionals, managers and experts in environmental policy. Under these conditions, educational cooperation should move from training of individual students to forming a sustainable system for joint human capital development.

4.3. Priority Areas for Professional Training

The socio-economic development needs of the Republic of Tajikistan make it possible to identify several key areas for professional training.

In the energy sector, priority areas include hydraulic engineering, hydropower plant operation, renewable energy, smart grids, energy storage systems, energy management and energy market regulation.

In the digital economy, there is a demand for specialists in the fields of artificial intelligence, big data analytics, machine learning, cybersecurity, cloud technologies, digital public administration, software development and enterprise digital transformation. Ukraine has significant experience in training professionals in these fields.

The training of public administration professionals is also becoming increasingly important, particularly in strategic planning, project management, public-sector digitalisation, public finance, anti-corruption policy and international project management.

An equally important direction is the green economy, which requires training specialists in sustainable development, climate policy, water resources management, circular economy, ESG, green finance and environmental law.

4.4. Joint Educational Programmes

The most effective form of cooperation is the establishment of joint educational programmes between universities in Ukraine and the Republic of Tajikistan. Such initiatives may include dual-degree programmes, joint master's and PhD programmes, academic mobility, summer schools, professional courses and advanced training programmes for civil servants.

Promising areas include energy systems management, hydropower, renewable energy, international energy policy, green diplomacy, sustainable development, digital economy, Smart City and infrastructure project management. These programmes could be implemented with the support of international organisations and European universities.

4.5. Research Cooperation

The establishment of joint research consortia should become an important area of bilateral cooperation.

Priority research areas are the development of hydropower, renewable energy, smart energy systems and energy-sector digitalisation; climate change, water security and climate adaptation; green industrialisation, digital economy, innovation policy, small business development and resilient supply chains; regional integration, energy and economic diplomacy, transport connectivity and international cooperation. The implementation of such projects can be carried out with the support of international grant programmes.

4.6. Establishment of the Ukrainian-Tajik Centre for Sustainable Development

A promising institutional initiative could be the establishment of a Ukrainian-Tajik Centre for Sustainable Development and Green Economy.

Its main areas of activity may be joint research, preparation of analytical materials, implementation of educational programmes, advanced professional training, development of project proposals, organisation of international conferences, expert support of governmental programmes, business consulting and interaction with international organisations. The Centre may unite universities, think tanks, state authorities and business representatives from both countries.

4.7. Development of an Innovation Ecosystem

An important area of cooperation is the formation of a joint innovation ecosystem that will ensure the commercialisation of scientific developments.

Promising initiatives include the creation of startup incubators, technology parks, university innovation laboratories, acceleration programmes, implementation of joint patent research and development of digital platforms for technology commercialisation.

The most promising areas of cooperation remain energy technologies, digital public administration, artificial intelligence and agricultural technologies. The combination of the energy potential of the Republic of Tajikistan with the engineering and IT competencies of Ukraine creates the prerequisites for the emergence of new high-tech companies targeting both Central Asian and international markets.

5. Institutional Cooperation and Mechanisms for Implementing the Ukrainian-Tajik Partnership

5.1. Institutional Dimension of Bilateral Cooperation

The sustainability of bilateral relations is determined not only by the political will of the states and the level of economic engagement but also by the quality of the institutional infrastructure supporting cooperation. Permanent mechanisms for coordination, expert dialogue, scientific exchange and joint projects ensure the long-term nature of international partnership.

At present, Ukrainian-Tajik cooperation is based mainly on individual projects implemented by international organisations and professional contacts between representatives of academia, business and state authorities. A transition to a strategic partnership requires the formation of permanent institutions that will ensure the development of joint projects, professional training, information exchange and attraction of international financing.

5.2. Intergovernmental Cooperation

The interaction of public authorities of the two countries should remain the basis of institutional engagement. Priority areas may include energy, industry, investment policy, agriculture, education, digitalisation, transport and sustainable development.

It makes good sense to establish permanent sector-specific working groups that will develop cooperation roadmaps, coordinate participation in international programmes and support the implementation of joint projects. The use of digital tools would enable regular online consultations while reducing administrative costs.

5.3. The Role of International Financial Institutions

International financial organisations are key sources of funding for joint initiatives involving Ukraine and the Republic of Tajikistan. The most important partners are the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development, the European Investment Bank, the Islamic Development Bank, the United Nations Development Programme and the European Commission.

Most of the areas of cooperation examined in this study are aligned with the priorities of these organisations. In particular, the World Bank and the Asian Development Bank support the reform of Tajikistan's energy sector, hydropower development, improvements in energy efficiency, modernising public administration and improving the regulatory framework, including reforming tariff policy and developing renewable energy. The participation of Ukrainian organisations in such projects would significantly expand the scope of bilateral cooperation.

5.4. Academic Diplomacy

Academic diplomacy represents one of the most promising areas of institutional engagement. Modern universities perform the functions of research centres, expert platforms, analytical institutions, technology incubators and international communication hubs.

A promising initiative would be the establishment of a consortium of Ukrainian and Tajik universities with the participation of research institutions, think tanks, businesses and international organisations. Its main areas of activity could include joint research, dual-degree programmes, academic mobility, preparation of expert assessments, organisation of international conferences and development of project applications.

5.5. Think Tanks and Expert Diplomacy

Think tanks play an increasingly important role in international practice forming the expert basis of government policy and supporting the implementation of reforms.

To advance the development of Ukrainian-Tajik cooperation, a Ukraine–Tajikistan permanent expert platform should be established, which will have tasks to monitor bilateral cooperation, prepare analytical reports, conduct expert consultations, organise an annual forum, develop recommendations for state authorities and assess the effectiveness of joint projects. Particular attention should be paid to the involvement of young researchers as a basis for the long-term development of the partnership.

5.6. Regional Dimension of Cooperation

An important direction of engagement is the usage of existing regional platforms. Significant potential is offered by the CAREC Program, which promotes transport and energy integration, the CASA-1000 project, aimed at developing a regional electricity market, the World Bank's CAWEP programme, focused on cooperation in water resources, climate change and energy, as well as the Global Gateway initiative, which expands the opportunities for Ukrainian organisations to participate in infrastructure and digital projects in Central Asia.

5.7. The Role of Business

Business associations should become a key component of the institutional system, in particular chambers of commerce and industry, sectoral associations and companies operating in the energy, IT, construction and agro-industrial sectors.

Particular importance should be attached to the development of small and medium-sized enterprises as some of the most active participants in international innovation projects. To stimulate cooperation, joint business incubators, acceleration programmes, digital partner-matching platforms, investment forums and industry-specific exhibitions should be created.

5.8. Roadmap for Institutional Cooperation

A phased model is proposed for the transition to a strategic partnership.

First stage: 2027–2028

The primary objective is to establish the institutional base.

Priority activities include:

- establishing an expert platform;
- launching a university consortium;
- holding the first Ukrainian-Tajik Economic Forum;
- creating a database of joint projects;
- preparing grant applications.

Second stage: 2028–2030

The main objective is to implement pilot projects.

Priority areas include:

- energy efficiency;
- professional training;
- digitalisation;
- agricultural technologies;
- scientific research.

Third stage: after 2030

The main task is the transition to a strategic partnership.

The following measures are envisaged:

- establishing joint research centres;
- expanding investment cooperation;
- participating in major international projects;
- developing resilient value chains.

Conclusion

This conducted research gives grounds to assert that modern cooperation between Ukraine and the Republic of Tajikistan has considerably greater potential than the current level of bilateral relations reflects. Ongoing transformations in the global political and economic system, the acceleration of energy transition processes, digital transformation and the emergence of new transport and logistics corridors create favourable conditions for rethinking the role of Central Asia in Ukraine's foreign economic strategy.

This analysis indicates that the most promising model of interaction lies in moving from a narrow understanding of cooperation exclusively through the prism of foreign trade. Contemporary international relations demonstrate a gradual transition to a model based on the joint creation of knowledge, innovation, human capital and technological solutions. Such an approach can ensure the sustainable nature of the Ukrainian-Tajik partnership while minimising the impact of foreign policy conjuncture.

Energy cooperation occupies a special place within the framework of bilateral relations. Tajikistan has one of the world's largest hydropower potentials, which is complemented by ambitious plans for the development of solar and wind energy, improving the regulatory framework and reforming the energy market. The implementation of these transformations generates demand for advanced engineering solutions, professional training, digital technologies for energy system management and scientific support for sectoral reforms. Ukraine, which has maintained a high level of engineering expertise, scientific potential and educational infrastructure, can become one of Tajikistan's key partners in these areas.

At the same time, the study demonstrates that energy represents only one component of a broader cooperation model. Equally promising areas include the development of the digital economy, modernisation of the agro-industrial sector, joint scientific research, training of a new generation of professionals, development of academic diplomacy and formation of a shared innovation ecosystem.

Particular attention is paid to the institutional dimension of bilateral cooperation. The analysis shows that the existing limitations of bilateral relations stem not from a lack of mutual interest but from the insufficient development of mechanisms for implementing joint initiatives. The establishment of permanent expert platforms, university consortia, sector-specific working groups, centres of excellence and mechanisms for preparing joint projects would significantly enhance the effectiveness of interaction between the two countries.

The SWOT analysis confirms that the advantages of Ukrainian-Tajik cooperation substantially outweigh its current constraints. The principal competitive advantages include the complementarity of the two economies, Ukraine's strong scientific and educational capacity, Tajikistan's abundant energy resources and the coincidence of the two countries' strategic priorities in sustainable development, digitalisation and energy transition.

International financial institutions and multilateral initiatives should play a central role in advancing the partnership. Using the mechanisms provided by the World Bank, the Asian Development Bank, the European Union, the European Bank for Reconstruction and Development, the United Nations Development Programme and other international institutions would ensure the financial sustainability of joint projects while integrating Ukrainian-Tajik cooperation into the broader context of Ukraine's engagement with Central Asia.

In conclusion, Ukrainian-Tajik cooperation should be considered as an important component of the emerging architecture of Ukraine's relations with Central Asia. Its further development corresponds with the long-term interests of both countries and contributes to achieving the Sustainable Development Goals, strengthening energy security, advancing human capital development and deepening regional economic integration.



MAJOR CHALLENGES TO SUSTAINABLE DEVELOPMENT: WATER RESOURCES AND ENVIRONMENTAL COOPERATION BETWEEN KYRGYZSTAN AND UKRAINE IN CENTRAL ASIA

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Water Security, Climate Change and New Opportunities for Regional Partnership

Sustainable development in Central Asia has become inseparable from the issues of water security, climate resilience and regional cooperation. The region is home to more than 80 million people whose economies, agriculture, energy systems and ecosystems depend on the effective management of shared transboundary water resources. Accelerating glacier retreat, increasing frequency of droughts, population growth and rising energy demand are placing unprecedented pressure on the existing governance mechanisms. These challenges require not only the modernisation of national policies but also the development of new regional and international partnerships capable of combining scientific knowledge, technological innovation and inclusive governance.

For both Kyrgyzstan and Ukraine, cooperation in the fields of environmental governance, water management and sustainable energy presents an opportunity to strengthen resilience while contributing to broader regional stability. Although the two countries are geographically distant, they face comparable challenges related to climate change, infrastructure modernisation, environmental degradation and the need to improve institutional capacities. Consequently, cooperation between Kyrgyzstan and Ukraine should not be viewed solely through a bilateral perspective but as part of a broader framework aimed at strengthening sustainable development throughout Central Asia.

An important feature of contemporary sustainable development is that environmental security can no longer be separated from economic development, disaster risk reduction, human rights protection and energy transition. International practice increasingly demonstrates that integrated approaches generate significantly better long-term outcomes than isolated sectoral policies. Therefore, cooperation between governmental institutions, scientific organisations, financial institutions, civil society organisations and local communities should become the cornerstone of future regional initiatives.

Water Resources as a Strategic Foundation for Sustainable Development in Central Asia

Central Asia remains one of the world’s most water-dependent regions. The Syr Darya and Amu Darya river basins support agriculture, hydropower production, drinking water supplies and ecosystem services across several countries simultaneously. However, climate change is fundamentally altering the hydrological cycle.

According to international climate assessments, glaciers in the Tien Shan and Pamir mountain systems are retreating at an accelerating pace, creating short-term increases in river runoff followed by long-term reductions in available freshwater. This process directly threatens irrigation systems, food production, biodiversity conservation and regional energy security.

Kyrgyzstan occupies a particularly significant position within this regional water system. As the source country for many of Central Asia’s major rivers, it possesses substantial freshwater reserves that support downstream economies. This strategic position also creates considerable responsibility for ensuring the sustainable management of water resources while balancing domestic development priorities with regional cooperation.

The traditional approach to water governance in Central Asia has often focused primarily on seasonal water allocation and irrigation management. However, contemporary climate risks require a far more comprehensive model that integrates water, energy, biodiversity conservation, disaster risk reduction and socio-economic development into a unified planning framework. The concept of Integrated Water Resources Management (IWRM) therefore becomes increasingly relevant. It encourages the coordinated development of water, land and related resources while maximising economic and social welfare without compromising the sustainability of ecosystems. For Central Asia, this approach is no longer simply a policy recommendation but an operational necessity.

Climate Change as a Multiplier of Regional Risks

Climate change significantly amplifies existing vulnerabilities throughout Central Asia. Rising temperatures contribute to glacier melt, increase evaporation rates, intensify desertification processes and create greater variability in seasonal precipitation. Extreme weather events, including floods, mudflows, droughts and landslides, have become more frequent, generating growing economic losses and humanitarian challenges.

These environmental changes directly affect national development priorities. Agriculture remains highly dependent on predictable water availability, while energy production increasingly requires adaptive infrastructure capable of responding to changing hydrological conditions.

The consequences extend beyond environmental degradation. Water scarcity can reduce agricultural productivity, increase migration pressures, intensify competition over natural resources and place additional burdens on public finances through disaster response and infrastructure rehabilitation.

For this reason, sustainable development strategies should increasingly emphasise climate adaptation rather than merely responding to climate change. Governments, international financial institutions and development partners need to invest in resilient infrastructure, modern hydrological monitoring systems, digital forecasting technologies and ecosystem-based adaptation measures.

The Strategic Importance of Kambarata HPP-1

Against this background, the construction of Kambarata-1 Hydropower Plant (Kambarata HPP-1) represents one of the most strategically important infrastructure initiatives for both Kyrgyzstan and Central Asia. The project should be viewed not only as a national energy investment but as a regional sustainable development initiative capable of generating long-term benefits across multiple sectors.

First, Kambarata HPP-1 has the potential to substantially increase the production of renewable electricity, contributing to regional decarbonisation efforts and reducing dependence on fossil fuel generation. Expanded access to clean electricity supports industrial development, economic diversification and improved living standards throughout the region.

Second, additional hydropower capacity could strengthen regional energy cooperation by improving electricity exchanges between Central Asian countries, particularly during periods of seasonal demand fluctuations. Enhanced energy connectivity contributes to greater resilience of regional power systems while supporting long-term economic integration.

Third, modern hydropower infrastructure can also improve water regulation capacities when implemented in accordance with international environmental and social safeguards. Properly designed reservoir management systems can contribute to more predictable seasonal water releases, flood mitigation and climate adaptation planning.

Equally important is the opportunity to attract international engineering expertise, scientific cooperation and technological innovation throughout the implementation process. Kyrgyzstan could benefit from broader engagement with international specialists in hydropower engineering, hydraulic infrastructure, environmental impact assessment, digital monitoring systems, dam safety management, ecological restoration and climate-resilient infrastructure planning. In this context, Ukrainian universities, engineering institutions, hydraulic engineering specialists and energy experts may represent valuable partners through knowledge exchange, applied research, professional training and technical cooperation. Such collaboration could strengthen institutional capacities while facilitating the transfer of practical experience in energy infrastructure modernisation, environmental assessment methodologies and engineering education.

Regional Transformation, New Models of Cooperation and the Role of Civil Society

The geopolitical and economic transformations taking place across Eurasia have fundamentally reshaped the development environment for Central Asian states. Among the most significant external factors is Russia's full-scale war against Ukraine, which has disrupted long-established trade routes, logistics networks, investment flows and regional energy markets.

Although Central Asian countries are not parties to the conflict, they have experienced indirect consequences through increased transportation costs, fluctuations in commodity markets, changes in labour migration patterns, inflationary pressures and greater uncertainty surrounding regional supply chains. The energy sector has also been affected by volatility in fuel markets and changing patterns of electricity trade across the wider Eurasian region.

These developments demonstrate an important lesson for sustainable development: excessive dependence on limited economic corridors, traditional markets or single-sector development models creates systemic vulnerabilities. Consequently, Central Asian countries increasingly require diversified international partnerships capable of strengthening economic resilience, technological modernisation and environmental sustainability.

Within this context, cooperation between Kyrgyzstan and Ukraine should be viewed as a forward-looking investment in knowledge exchange rather than solely as a bilateral diplomatic initiative. Ukraine possesses considerable scientific expertise in environmental engineering, hydrology, water management, digital technologies, higher education and energy infrastructure. At the same time, Kyrgyzstan offers practical experience in integrated mountain ecosystem management, climate adaptation, hydropower development and regional water governance. The combination of these complementary strengths creates opportunities for long-term cooperation despite the challenging international environment.

New Approaches to Water Governance under Climate Change

Climate change requires a transition from conventional water management toward adaptive, science-based governance models.

Future cooperation between Kyrgyzstan and Ukraine could focus on several innovative approaches.

First, both countries should promote digital water governance based on real-time hydrological monitoring, satellite observations, geographic information systems (GIS), artificial intelligence and predictive climate modelling. Digital decision-support systems can significantly improve water allocation, drought forecasting and disaster preparedness.

Second, ecosystem-based adaptation should become an integral component of water management strategies. Healthy forests, wetlands, mountain ecosystems and river floodplains provide essential ecosystem services that improve water retention, reduce erosion and enhance resilience to climate-related disasters.

Third, integrated planning should replace fragmented sectoral decision-making. Water resources cannot be managed independently from agriculture, renewable energy, biodiversity conservation, urban planning and disaster risk reduction. Cross-sector coordination should therefore become a guiding principle for national development strategies.

Fourth, local communities should participate systematically in decision-making processes. International experience demonstrates that infrastructure projects become more sustainable when local populations are involved throughout the planning, implementation and monitoring stages.

Fifth, stronger cooperation between universities, research institutes and technical experts is essential for generating innovative solutions. Joint research programmes, academic exchanges, professional training and applied scientific cooperation between Kyrgyz and Ukrainian institutions could significantly strengthen regional capacities.

Sustainable Energy and Green Economic Transformation

The transition toward low-carbon economies represents another critical dimension of sustainable development. Central Asia's growing electricity demand requires substantial investments in renewable energy infrastructure capable of supporting industrial development while reducing greenhouse gas emissions. Hydropower remains one of the most important renewable energy resources available to Kyrgyzstan. When developed in accordance with international environmental standards, modern hydropower contributes simultaneously to climate mitigation, energy security and economic development.

For this reason, Kambarata HPP-1 should be considered not simply as an engineering project but as a strategic platform for regional cooperation.

Its implementation may stimulate:

- regional electricity integration;
- expansion of renewable energy production;
- modernisation of transmission infrastructure;
- attraction of international investment;
- development of highly qualified engineering personnel;
- introduction of modern environmental monitoring technologies;
- improvement of water regulation capacities under changing climatic conditions.

Importantly, the project also creates opportunities for wider international professional cooperation.

Kyrgyzstan could actively involve Ukrainian specialists in hydropower engineering, hydraulic engineering, environmental impact assessment, geotechnical monitoring, digital modelling of hydraulic systems, dam safety management, power system modernisation and vocational engineering education.

Such cooperation would not merely facilitate technology transfer. It would contribute to building long-term institutional partnerships between engineering universities, research centres, civil society organisations and governmental agencies responsible for sustainable infrastructure development.

The Importance of Inclusive Governance: The Experience of Bir Duino and the View from the Frontline

Infrastructure development alone cannot guarantee sustainable development. Equally important is ensuring that development policies genuinely reflect the needs of communities most exposed to environmental and climate risks.

Since 2018, the human rights organisation Bir Duino has accumulated substantial practical experience through participation in the global View from the Frontline (VFL) research programme implemented in partnership with the Global Network of Civil Society Organisations for Disaster Reduction (GNDR).

The VFL methodology represents one of the world's largest community-based assessments of disaster risk governance. Rather than relying exclusively on governmental statistics, the research directly collects the experiences, priorities and recommendations of local communities living in areas exposed to floods, landslides, droughts and other climate-related hazards.

The findings consistently demonstrate that one of the principal barriers to sustainable development is the persistent gap between national policy formulation and the everyday realities faced by vulnerable communities.

The research has enabled the voices of local populations to reach national decision-makers, thereby strengthening evidence-based policymaking and promoting more inclusive governance processes.

For Kyrgyzstan, this experience has particular significance because many rural communities remain highly vulnerable to climate change, natural hazards and water-related risks. Community knowledge frequently provides valuable insights into local environmental dynamics that are not fully reflected in official planning documents.

The VFL methodology therefore offers practical lessons that could also benefit future Kyrgyz-Ukrainian cooperation.

Joint research initiatives based on participatory methodologies would enable experts, policymakers and civil society organisations from both countries to identify local priorities, improve climate adaptation policies and strengthen trust between governments and citizens.

Perhaps most importantly, the VFL experience demonstrates that sustainable development cannot be achieved solely through infrastructure investments or technological innovation. It requires continuous multi-stakeholder dialogue among governments, scientists, engineers, financial institutions, civil society organisations and local communities.

This principle should become one of the foundations of future cooperation between Kyrgyzstan and Ukraine in the fields of environmental governance, climate adaptation and sustainable water management.

Towards a New Model of Kyrgyzstan–Ukraine Environmental Partnership: Conclusions and Recommendations

The future of sustainable development in Central Asia will depend not only on the availability of financial resources but also on the ability of governments, academic institutions, international organisations and civil society to establish new forms of cooperation capable of responding to increasingly complex environmental challenges.

Climate change is transforming the traditional understanding of water security. Managing water resources can no longer be approached exclusively as a technical or engineering issue. It has become closely interconnected with food security, energy transition, environmental protection, disaster risk reduction, public participation and long-term economic resilience.

Within this context, Kyrgyzstan and Ukraine possess considerable opportunities to develop mutually beneficial cooperation despite the difficult international environment. Their partnership should increasingly focus on practical solutions that strengthen institutional capacities, encourage innovation and improve evidence-based policymaking.

Particular attention should be devoted to developing joint expert platforms that bring together engineers, hydrologists, economists, environmental scientists, universities, governmental agencies, civil society organisations and development partners. Such multidisciplinary cooperation can facilitate knowledge exchange while generating innovative approaches to water governance under rapidly changing climatic conditions.

An equally important direction involves expanding cooperation in higher education and professional capacity building. Joint master's programmes, scientific exchanges, professional internships, online educational platforms and collaborative research projects would contribute to preparing a new generation of specialists capable of addressing the interconnected challenges of climate adaptation, renewable energy and integrated water management.

International financial institutions, including the World Bank, the Asian Development Bank, the European Bank for Reconstruction and Development and other development partners, may also play an important role by supporting infrastructure investments together with institutional reforms, environmental safeguards and community participation mechanisms.

Civil Society as a Driver of Sustainable Development

Experience from many countries demonstrates that sustainable development is most successful where governments maintain constructive partnerships with civil society organisations.

Civil society contributes unique strengths that complement governmental policies. Local organisations often possess detailed knowledge of community needs, maintain long-term relationships with vulnerable populations and are capable of facilitating dialogue between decision-makers and citizens.

For water governance, this contribution is particularly valuable.

Community organisations can support public consultations, environmental monitoring, social impact assessments, climate adaptation planning and awareness-raising campaigns. They also help ensure transparency and accountability throughout the implementation of large infrastructure projects.

The experience accumulated by Bir Duino through community-based research illustrates how participatory methodologies can strengthen public policy. Since 2018, the implementation of the View from the Frontline methodology together with GNDR has demonstrated that local communities are not merely beneficiaries of development programmes but essential partners in identifying risks, proposing solutions and evaluating policy effectiveness.

This participatory approach could become one of the foundations for future Kyrgyz-Ukrainian cooperation. Joint research programmes involving universities, civil society organisations and local authorities could generate valuable evidence for improving climate adaptation strategies, strengthening disaster preparedness and promoting inclusive governance across both countries.

Looking Beyond Traditional Cooperation

The growing complexity of environmental challenges requires moving beyond traditional models of bilateral cooperation.

Future partnerships should increasingly emphasise innovation ecosystems rather than isolated projects.

Several promising areas deserve particular attention:

- development of digital platforms for integrated water resource management;
- application of artificial intelligence for hydrological forecasting and early warning systems;
- expansion of climate services supporting agriculture and disaster preparedness;
- modernisation of hydrometeorological observation networks;
- development of nature-based solutions for river basin management;
- promotion of circular economy principles within water-intensive industries;
- establishment of regional centres for climate adaptation research;
- support for youth innovation programmes focused on sustainable water governance;
- increased participation of women scientists, engineers and community leaders in environmental decision-making;
- stronger collaboration between academic institutions and the private sector in developing environmentally sustainable technologies.

Such initiatives would strengthen not only bilateral cooperation between Kyrgyzstan and Ukraine but also broader regional resilience throughout Central Asia.

Conclusions

Sustainable development in Central Asia is entering a new phase shaped by climate change, demographic growth, increasing water scarcity and profound regional transformations. These interconnected challenges require equally integrated responses combining environmental protection, economic modernisation, renewable energy development and inclusive governance. Water resources remain one of the most strategically important assets for the region. Their sustainable management will determine future food security, energy stability, ecosystem resilience and economic prosperity.

In this context, the implementation of Kambarata Hydropower Plant-1 represents a strategic opportunity for Kyrgyzstan and Central Asia. Beyond expanding renewable electricity generation, the project can strengthen regional energy cooperation, improve climate resilience and stimulate technological modernisation. Its successful implementation would also create favourable conditions for broader international scientific and engineering cooperation, including engagement with Ukrainian experts, universities and research institutions possessing valuable expertise in energy infrastructure, hydraulic engineering and environmental management.

Equally important is the recognition that infrastructure alone cannot ensure sustainable development.

Long-term resilience depends on transparent institutions, evidence-based policymaking, meaningful public participation and continuous dialogue among governments, academia, civil society and international partners.

The experience of Bir Duino through the View from the Frontline research implemented in partnership with GNDR demonstrates that sustainable solutions emerge when the voices of local communities are systematically incorporated into national decision-making processes. This methodology provides a valuable framework that could inform future cooperation between Kyrgyzstan and Ukraine in addressing shared environmental and climate-related challenges.

Ultimately, the future partnership between Kyrgyzstan and Ukraine should be based on shared commitments to sustainable development, scientific cooperation, technological innovation, environmental responsibility and respect for community participation. Such cooperation has the potential not only to strengthen bilateral relations but also to contribute meaningfully to long-term stability, climate resilience and sustainable prosperity across Central Asia.

Recommendations from Civil Society Organisations of Kyrgyzstan to the Ukrainian Expert Community

1. Establish a permanent Kyrgyzstan–Ukraine Expert Platform on Water Security and Sustainable Development.

A structured dialogue involving researchers, engineers, policymakers, universities and civil society organisations should be institutionalised to facilitate regular exchange of expertise, joint analytical work and coordinated responses to emerging environmental challenges.

2. Develop joint research and innovation programmes on climate adaptation and integrated water resources management.

Universities, research institutes and civil society organisations from both countries should cooperate on applied research addressing glacier monitoring, hydrological forecasting, ecosystem restoration, renewable energy integration and climate resilience.

3. Expand professional cooperation in sustainable energy and hydraulic engineering.

The implementation of strategic infrastructure projects, including Kambarata HPP-1, would benefit from broader participation of international experts, including Ukrainian specialists in energy infrastructure, hydraulic engineering, environmental impact assessment, digital monitoring technologies and engineering education.

4. Promote participatory governance by integrating community-based methodologies into environmental policymaking.

The practical experience gained through the View from the Frontline methodology demonstrates that effective climate adaptation requires systematic engagement of local communities. Similar participatory approaches should become an integral component of future bilateral cooperation.

5. Strengthen long-term partnerships between civil society organisations, academic institutions and international development partners.

Future cooperation should prioritise joint educational programmes, expert exchanges, policy dialogue, youth engagement, environmental diplomacy and collaborative initiatives that advance the Sustainable Development Goals while fostering resilience, innovation and mutual trust between Kyrgyzstan and Ukraine. This comprehensive approach would create a durable foundation for environmental cooperation that extends beyond immediate challenges and contributes to a more resilient, sustainable and interconnected future for both countries and the wider Central Asian region.



CULTURE AS AN INSTRUMENT OF MUTUAL UNDERSTANDING BETWEEN UKRAINE AND CENTRAL ASIA

Olena MELKONOVA, Public Diplomacy Expert at the “CONSTANTA R&D GROUP” Center for Geopolitical Studies.

Culture is no longer a peripheral dimension of foreign policy. In an era of strategic competition, it has become an instrument of influence, resilience and long-term geopolitical positioning. For Ukraine, engagement with Central Asia through culture represents not only an opportunity to strengthen mutual understanding but also a strategic investment in reducing the region's informational dependence on the narratives of third actors, expanding people-to-people ties and creating favourable conditions for deeper political and economic cooperation.

Despite a shared historical legacy and the existence of bilateral legal frameworks, Ukraine's cultural presence in Central Asia remains fragmented, insufficiently institutionalised and constrained by the dominance of well-established cultural ecosystems developed by other external actors.

This section examines the current state of cultural and humanitarian cooperation between Ukraine and the five Central Asian states, assesses the effectiveness of existing legal, educational, media and humanitarian mechanisms and identifies the principal structural gaps limiting Ukraine's strategic influence in the region.

Culture should be considered as a component of national security and strategic communications rather than solely as an instrument of public diplomacy. Strengthening Ukraine's cultural presence in Central Asia would not only reinforce bilateral relations but also contribute to the development of a more resilient, sovereign and diversified regional order founded on mutual respect, cultural sovereignty and long-term partnership.

Legal Framework

The legal framework governing cultural cooperation between Ukraine and the Central Asian states was formed between the early 1990s and the 2010s and since that period has not been substantially revised. These agreements regulate exchanges of artists, museum exhibitions and literary translations, focusing on heritage preservation and support for diaspora communities. However, their practical implementation remains limited, while some documents have become outdated after 2014 and especially 2022.

Cultural and humanitarian relations between Ukraine and Kazakhstan are regulated by a number of basic bilateral agreements. At present, there are 10 agreements defining cooperation in education, including military education, science and technology, physical culture and sport, youth policy, tourism, information and archival affairs. It is important to note that our countries have a corresponding agreement on the mutual recognition and equivalence of educational qualifications, academic degrees and academic titles, which directly facilitates academic mobility between the two countries.

The legal framework with Kyrgyzstan includes nine agreements, led by the Treaty of Friendship and Cooperation (1996), which is supplemented by sector-specific arrangements covering the archival sector, information, television and radio broadcasting, healthcare, the certification of academic and scientific-pedagogical personnel, physical culture and sport, science and technology, as well as tourism, mountaineering and the hotel industry.

The general political framework for the development of cultural, educational, scientific and humanitarian relations between Ukraine and the Republic of Tajikistan is the Treaty of Friendship and Cooperation. The core legal framework also includes five bilateral agreements covering culture and art, education,

scientific and technological cooperation, healthcare, pharmaceuticals, medical equipment, medical science, professional training and tourism.

The legal framework for cultural and humanitarian cooperation between Ukraine and Turkmenistan is based on the Treaty of Friendship and Cooperation, which explicitly provides the basis for cultural and humanitarian collaboration. In addition, it includes 12 bilateral agreements of either a sector-specific or framework nature, as well as three additional agreements in related humanitarian fields. Based on the analysis of international documents with the Republic of Uzbekistan, 12 bilateral agreements were identified. These agreements represent four principal areas: culture and archives; education and science; sport, tourism and healthcare; and the rights of national minorities and the return of deported persons. At the same time, the agreements on national minorities and deported persons have a distinctly humanitarian and human rights-oriented nature.

Comparative analysis revealed considerable differentiation in both the scope and substantive content of the bilateral legal frameworks. The most comprehensive treaty architecture has been established with Turkmenistan and Uzbekistan. Kazakhstan is distinguished by the most functionally rich content. By comparison, the legal base with Kyrgyzstan and Tajikistan is comparatively narrower, although both rely on treaties of friendship and cooperation as a general political framework.

At the same time, Ukraine remains part of the Commonwealth of Independent States (CIS) regulatory and legal field shared with the countries of Central Asia in cultural and humanitarian cooperation, in particular, in the field of book publishing, book distribution and printing, cinematography, protection of copyright and related rights, as well as in the field of training of academic and scientific-pedagogical personnel and nostrification of documents on their qualification within the CIS. Against the backdrop of Ukraine's systematic denunciation of multilateral CIS agreements, this temporary legal linkage contradicts the general vector of deconstruction of the post-Soviet legal framework and exacerbates the need to conclude updated bilateral agreements.

Cultural Exchanges and Intercultural Dialogue

Beyond the framework of intergovernmental agreements, the actual state of cultural interaction between Ukraine and Central Asia is best assessed through cultural exchanges and intercultural dialogue, including concerts held, literary translations conducted, monuments installed, educational initiatives and participation in sporting events. Musical performances, translated literary works and commemorative events dedicated to figures such as Taras Shevchenko and Chingiz Aitmatov demonstrate genuine sources of mutual interest. However, these interactions remain centred around national holidays and anniversaries as part of government programmes rather than embedded in interinstitutional joint programmes.

At the same time, the presence of the Ukrainian diaspora, as of 2019, over 465,000 people in the region, makes the Ukrainian community a significant but underutilised resource for cultural diplomacy in the region. Meanwhile, a number of NGOs founded by representatives of Central Asia are registered in Ukraine. Due to the lack of official censuses and migration processes caused by the war, the exact number of diasporas from Central Asian countries in Ukraine is currently unknown. The figure of Taras Shevchenko remains the most enduring symbol of Ukrainian cultural presence in the region, primarily in Kazakhstan, where one of the earliest museums dedicated to the Ukrainian artist operates in the city of Fort Shevchenko. The Embassy of Kazakhstan in Ukraine regularly

¹ In March 2026, Ukraine adopted a decision to withdraw from the respective agreement. However, according to the official notification of the Ministry of Foreign Affairs of Ukraine (MFA Letter No. 72/14-612/2-56429 of 29 April 2026), the agreement will cease to be legally binding for Ukraine on 5 May 2030. As of July 2026, it formally remains in force for Ukraine but is already in the process of termination.

participates in commemorative events commemorating Shevchenko. In Tajikistan, the Ukrainian community, with the support of the Embassy of Ukraine, holds Shevchenko Readings.

Literary translations are an important pillar of intercultural dialogue and ensure mutual familiarity with the national cultural heritage, history and worldview of peoples. A special place is occupied by the work of Abai Kunanbayev, the Kazakh poet and philosopher, who is considered the founder of modern Kazakh literature. His works have been translated by a number of Ukrainian authors, while his figure is commemorated in a sculptural composition in Kharkiv alongside Hryhorii Skovoroda and Mirza Akhundov.

The work of Kyrgyz writer Chingiz Aitmatov is quite well represented in Ukraine. In 2018, the first translation directly from the Kyrgyz language (by Mykola Vaskiv) was presented at the Book Forum in Lviv, and to mark the writer's 95th anniversary, the Embassy of the Kyrgyz Republic published the collection Chingiz Aitmatov: Selected Works.

Persian-Tajik classical literature is represented by specific examples of translations, including the poetry of Abu Abdallah Jafar Rudaki, published in the collections Selected Works (1962) and West and East (1990) translated by Vasyl Mysyk, as well as Selected Works by Sadriddin Ayni, while the legacy of other prominent Tajik figures – the scholar and philosopher Abu Ali ibn Sina, the founder of Tajik statehood Ismoil Somoni, the philosopher Nosiri Khusraw and the historian Bobojon Ghafurov, author of the fundamental book The Tajiks – is practically unknown to the Ukrainian audience.

The legacy of the Turkmen poet Magtymguly has its place in the Ukrainian cultural landscape. Turkmen culture is represented through the Magtymguly Library-Museum in Kyiv, operating since 1969, the exhibition of which features rare editions of Magtymguly's works in the original language, household items of the Turkmen people and a numismatic collection of Turkmenistan. The first Ukrainian-language collection of Magtymguly's works was presented at the International Book Exhibition-Fair in Ashgabat in 2010.

Uzbek classical literature is represented primarily by Mykola Bazhan's translation of Alisher Navoi's epic poem Farhad and Shirin (1947), which is considered a benchmark reproduction of Ukrainian renderings of classical Eastern literature.

Despite these examples, literary translation is generally fragmented and largely concentrated on a limited number of symbolic figures – Taras Shevchenko, Abai Kunanbayev and Chingiz Aitmatov – without systematic translation coverage of the region as a whole, while the literary heritage of the most Central Asian thinkers is known only to a narrow audience in Ukraine.

The music sphere demonstrates the most intensive nature of contacts with Kazakhstan, for example, the concert of iconic Kazakh performer Dimash Qudaibergen at Kyiv's Palace of Sports in 2020 and a performance by Ukrainian artists Tina Karol, MONATIK and DOROFEEVA at the charity concert Voice of Peace in Almaty in 2022. Interaction with Kyrgyzstan, Uzbekistan and Tajikistan was implemented mainly through the activities of diplomatic missions and diaspora associations. In the Kyrgyz Republic, one of the notable examples was the 2014 concert "Music – Soul of the Nation: Ukraine" held in Bishkek with the participation of Ukrainian artistic groups, the Ukrainian diaspora ensembles "Vinka" and "Vechornytsi" and Kyrgyz performers. In the Republic of Uzbekistan, the music festival 'Ukrainian Song in Uzbekistan' was organised in 2019. In the Republic of Tajikistan, concerts by Honored Artist of Ukraine Oksana Nikitiuk were held in Dushanbe in 2013, organised by the Embassy of Ukraine. Despite the fact that musical events between Ukraine and the Central Asian countries took place, most concerts were organised to coincide with national holidays or took place as a part of Days of Culture.

An important element of intercultural dialogue is the promotion of the Ukrainian language through the introduction of Ukrainian-language audio guides in museums around the world as part of the initiative of First Lady of Ukraine Olena Zelenska. In Central Asia, such audio guides are already available at three institutions: the ALZHIR Memorial Museum Complex of Victims of Political Repression and Totalitarianism (Kazakhstan), the Gapar Aitiev National Museum of Fine Arts (Kyrgyz Republic) and the Savitsky State Museum of Arts of the Republic of Karakalpakstan (Uzbekistan).

Educational exchanges are a separate direction of humanitarian cooperation. Despite the war, Ukrainian education remains attractive for applicants from Central Asia. Several private universities in Central Asia have offered scholarships for Ukrainian applicants. At the same time, the academic and scientific dimension of the dialogue is significantly influenced by the political environment. Sports diplomacy represents an additional, but limited, tool for intercultural engagement between Ukraine and the Central Asian states. Among the precedents are the participation of 15 Ukrainian boxers in a tournament in Shymkent in 2024, the participation of 23 Ukrainian athletes in the III World Nomad Games in Kyrgyzstan in 2018 and the victory of a Kharkiv fencer at the World Cup in Astana in 2026. However, such interactions are isolated and take place mainly at international sports venues.

Humanitarian Projects

Since the beginning of Russia's full-scale invasion, the humanitarian dimension has actually become the most active and practically oriented area of cooperation between Ukraine and the Central Asian states. The key format was humanitarian aid, including medical assistance, programmes for the recovery and psychological rehabilitation of Ukrainian children.

Despite the fact that no official humanitarian aid was provided at the state level, since the beginning of the full-scale invasion, representatives of the business circles and non-governmental organisations from almost all countries in the region have provided humanitarian support in one form or another. Kazakh business has donated more than 40 high-capacity electricity generators for the uninterrupted operation of healthcare facilities. In 2023, there were already statements about the readiness of Kazakhstani business to develop a long-term medical partnership. In December 2025, Kazakhstani philanthropists donated 3 ambulances to the Cherkasy region. In March 2023, 19 tonnes of humanitarian aid were donated, including medicines, food and children's clothing, through the Gurbanguly Berdimuhamedov Children's Charitable Foundation.

Uzbek circles were among the first to send humanitarian aid to Ukraine. The first tranche of humanitarian cargo was delivered in March 2022. In June 2022, Uzbek businesses and non-profit organisations sent Ukraine the second tranche of humanitarian aid for more than 19 tonnes of medicines worth over USD 1 million. In 2023, philanthropists from Uzbekistan also transferred humanitarian aid for adults and children, including 2,000 first-grader sets.

In August 2023, Uzbekistan hosted the first group of Ukrainian children for a holiday, initiating the practice of similar rehabilitation programmes. In June 2025, two similar initiatives took place: 45 children from the Cherkasy region visited the Republican Educational and Health Center "Baldauren" in Kazakhstan, while another group of children from war-affected regions completed a 12-day rehabilitation programme in Uzbekistan. In January–February 2026, a group of children from the Sumy region were welcomed in Aktau, Kazakhstan, for health and psychological rehabilitation.

Humanitarian cooperation demonstrates the highest level of effectiveness among all areas of cultural and humanitarian interaction, having significant potential for further transformation from individual projects into long-term sustainable cooperation.

Media

The contemporary media landscape of Central Asia is characterised by a high degree of state regulation, vulnerability to hostile information influence and propaganda. Direct interaction between Ukrainian and Central Asian media outlets is complicated by the informational and cognitive dimensions of Russia's war against Ukraine.

The media environment across Central Asia remains largely closed to Ukrainian themes. According to the 2026 Reporters Without Borders (RSF) World Press Freedom Index, Kazakhstan ranks 149th, Kyrgyzstan 146th and Turkmenistan 173rd out of 180 countries in terms of press freedom. According to IREX data for 2024, despite high public demand, Kazakhstani media devote only 5–10% of their content to the Russia-Ukraine war. Tajikistan maintains a neutral position and avoids this topic, although some content creators disseminate Russian narratives. Meanwhile, Uzbekistan demonstrates a different trend: the active use of Facebook and Telegram enabled fundraising campaigns for humanitarian aid to Ukrainian displaced persons in 2023, illustrating how social media can partially compensate for the limitations of traditional media.

Contacts between the state-owned media of Ukraine and the Central Asian countries have almost ceased since 2014, and with the outbreak of full-scale war, they have been put on indefinite pause. The presence of some state media of Ukraine in the CIS Information Council is formal and is not accompanied by any practical cooperation. The Ukrainian perspective in the region is broadcast mainly by private Central Asian media holdings and YouTube projects inviting individual representatives of the Ukrainian authorities.

Representatives of Central Asian media did not participate in the annual press conferences held by the President of Ukraine to mark the anniversaries of the full-scale invasion. The only precedent of direct engagement was the press conference held on 24 May 2024 at the destroyed Factor-Druk printing complex in Kharkiv. Among those present were two journalists from Kazakhstan (Vlast.kz and Orda.kz) and three representatives of the Kyrgyz media community (Radio Azattyk, the 24.kg News Agency and the Shaman TV YouTube project). At the same time, representatives of state media were absent.

The most common format of cooperation at the moment is isolated initiatives. Despite the growing interest, the appearance of Ukrainian experts in the Central Asian media is episodic and on topics that do not relate to the Russian-Ukrainian war. At the same time, sustained direct cooperation between Ukrainian and Central Asian journalists remains absent. Representatives of Ukrainian media are not accredited to the relevant governmental institutions in the region, and there are no resident correspondents or editorial bureaus in the Central Asian states.

Ukraine is at the stage of calibrating its own messages for Central Asian audiences. Despite attempts to actualise the region in the information landscape of Ukraine, Central Asia is still frequently presented through the prism of third countries. Recognising Central Asia as an autonomous information and cultural space, rather than interpreting it through external narratives, has a much higher potential for the success of Ukraine's cultural diplomacy.

Challenges and Gaps

Culture has increasingly become an arena of strategic competition. For example, the Goethe-Institut (Germany), Alliance Française (France) and Instituto Cervantes (Spain) and others systematically implement language education and cultural programmes in all countries of the region. A network of thirteen Confucius Institutes, together with the Chinese Language Education Centre in Turkmenistan, provides China with a structured presence in the educational sector. Russia still maintains its dominance in the region thanks to the Russian language, its extensive media ecosystem, entertainment industry, accessible educational opportunities, labour migration networks and the institutional infrastructure of “Rossotrudnichestvo” and the Russian Houses. A 2025 Gallup poll found significantly higher approval ratings for Russia’s leadership than for Ukraine’s leadership in Uzbekistan, Kyrgyzstan and Tajikistan, with a smaller Russian advantage in Kazakhstan, confirming the cumulative effect of Russian “cultural tools” and migration ties. Against this long-term systemic work, Ukraine’s presence in the region remains minimal.

The lack of a strategic vision that recognises culture as a tool for bringing Ukraine closer to the Central Asian states and a basis for implementing mutually beneficial economic projects, together with the lack of a balanced information policy towards the region, constitutes one of the principal challenges. A separate challenge is the inertial promotion of the “Soviet version” of Ukrainian culture with limited promotion of contemporary Ukrainian cultural figures since 2014.

Cultural issues are an interinstitutional component of bilateral relations, for which an appropriate infrastructure should be created. Cultural dialogue between Ukraine and Central Asia is conducted mostly at the level of diplomatic missions. Among the main challenges are weak coordination between relevant Ukrainian institutions and the lack of a minimal institutional presence directly in the countries of the region by analogy with the relevant institutions of European countries, China or Russia. Neither the Ukrainian Institute of National Remembrance nor the Ukrainian Institute currently have representative offices in any Central Asian country. In accordance with the Decree of the President of Ukraine No. 142/2006 and the Resolution of the Cabinet of Ministers of Ukraine No. 213-r of 19 April 2006, Cultural and Information Centres were established within the Embassies of Ukraine in Kazakhstan, Uzbekistan and Turkmenistan. In practice, however, in the vast majority of cases, the activities of these centres are limited to holding formal events. Another structural problem is the organisation of Ukrainian communities abroad and the preservation of diaspora cohesion.

An indirect but tangible challenge is the absence of direct international air connectivity between Ukraine and the world due to active hostilities, which complicates the logistics of personal contacts.

Conclusions and Recommendations

Ukraine’s engagement with Central Asia through culture remains an underutilised strategic asset at a time when the region is becoming an increasingly important arena for geopolitical competition. While the legal framework for cultural and humanitarian cooperation already exists, and individual initiatives have yielded tangible results, these efforts remain reactive. Humanitarian projects launched after Russia’s full-scale invasion have strengthened Ukraine’s image as a reliable partner; however, sustained impact cannot rely solely on crisis-driven engagement. Long-term success requires a shift from isolated cultural events to a coherent strategy that integrates culture, education, media, research and public diplomacy into a unified framework of foreign policy.

Cultural cooperation with Central Asia remains one of the most promising and at the same time least sensitive to geopolitical conjuncture areas of bilateral interaction. The most effective model is a partnership based on cultural sovereignty, meaning a dialogue that respects Central Asian identity.

Lasting impact is achieved through sustained institutional presence rather than episodic activities. Ukraine therefore faces the challenge of transforming cultural diplomacy into an instrument of national resilience and regional partnership. This requires the modernisation of the bilateral legal framework, stronger institutional coordination, expanded educational and cultural exchanges, enhanced cooperation in translation and media and closer engagement with the Ukrainian diaspora and local partners. Kazakhstan and Uzbekistan offer the best opportunities for scaling up such initiatives, while broader regional engagement should be based on respect for the sovereign identity of Central Asian societies rather than inherited post-Soviet frameworks.

Cultural dialogue can reduce the vulnerability of societies to third-party interpretations, strengthen institutional ties and expand the space for cooperation in education, technology and trade. Local languages are of strategic importance. Successful interaction should present Ukraine and the Central Asian states as sovereign societies that are jointly restoring historical memory and identity that have often been interpreted through the prism of third countries.

Ukraine can also build upon its partnerships with Western countries to develop joint initiatives in museum work, cultural studies, as well as in the fields of cinematography, archival science, art, historical science and creative industries. Such an approach would simultaneously strengthen sovereign decision-making in Central Asia, reinforce societal resilience against information manipulation and create favourable conditions for broader cooperation in other sectors. By investing in long-term cultural ties, Ukraine can strengthen its position in Central Asia, enhance regional resilience to external information influence and contribute to the emergence of a more diversified, interconnected and stable Eurasian security environment.

Among the recommendations:

update the bilateral legal framework for cultural and humanitarian cooperation;

- establish a full-fledged representative office of the Ukrainian Institute of National Remembrance in Kazakhstan;
- restore the work of intergovernmental instruments devoted to culture, education and science;
- create an online platform for cooperation among artists, researchers and educators, including educational webinars and multilingual digital libraries and media repositories in the languages of Central Asia;
- organise joint music festivals and artistic residency programmes involving participants from both regions;
- produce joint content and ensure the systematic translation of cultural diplomacy materials into the national languages of Central Asia;
- develop educational programmes for young people through specialised institutions in Ukraine and Central Asia;
- form permanent professional ties between Ukrainian and Central Asian media organisations.



THINK TANKS AND THE DIPLOMACY OF KNOWLEDGE

A reflection on expert cooperation between Central Asia and Ukraine

Tlegen KUANDYKOV, Program Coordinator at CAPS Unlock (Almaty, Republic of Kazakhstan).

Ukraine and the countries of Central Asia have spent three decades peripheral to one another. The two emerged from the same collapse into different orbits and still know relatively little about each other. Based on the available information, no sustained dialogue exists among their experts, research institutions and think tanks. It would not be fair to say that such exchanges do not exist — there may well have been contacts that went undocumented, but shared research practices and continuous exchange have yet to emerge. Trade and transit issues, intergovernmental meetings and the broader public and cultural engagement of recent years remain some distance from a foundation for sustained cooperation within the expert community.

It might sound obviously simple, but perhaps what is missing is simply the habit of talking to one another. Jürgen Habermas traced the origins of the public sphere to coffee houses and reading circles — places where people debated public affairs, with institutions emerging only later to formalise a practice that already existed. The Ukrainian and Central Asian expert communities have a great deal to discuss, but the practice of discussing these issues has yet to develop. The obstacle is a genuine lack of familiarity and, consequently, the absence of a shared research agenda. There is no established setting in which an argument made in Astana is taken up and debated on its merits in Kyiv; it is more likely to be received as a curiosity from elsewhere.

That is beginning to change, slowly, for a reason that has little to do with either government. Research capacity in both regions has grown, and with it the ability to collaborate directly.

A natural place to begin an interregional conversation is through people-to-people connections: analysts who have met tend to call one another; those who have not, do not. Left to chance, such contacts produce relationships without institutional memory, where each encounter begins anew and the connection disappears with the people who created it. Institutions matter here for a specific reason: they give conversations somewhere to accumulate — in co-authored publications, shared datasets, younger researchers who have come up together and a record that outlasts its individual contributors.

This sequence also suggests where broader engagement begins. Governments tend to formalise relationships that already exist in some working form, and the groundwork is often laid by people who have been talking to one another for years before anything is signed. An expert dialogue between the two regions would be valuable on its own terms; it could also become the layer on which a broader diplomatic and social relationship eventually rests. Diplomacy, after all, extends well beyond states.

What follows argues four things: 1) think tanks are well suited to sustaining that layer; 2) the right framework for the relationship is the exchange of knowledge; 3) that framework has practical consequences in a politically delicate environment; 4) the cost of beginning is low.

Can think tanks do diplomacy?

Diplomacy was once associated with a relatively narrow group of actors — ambassadors, foreign ministries, cultural attachés. That landscape has expanded considerably, drawing in artists, athletes, business leaders, civil society organisations and academics, each contributing in different ways to how countries communicate and are perceived abroad.

Professional diplomats were slow to welcome the involvement of non-state actors in foreign affairs, but Track II diplomacy is now widely recognised as a complement to official channels, offering cost-effective and politically flexible forms of engagement. Within that ecosystem, think tanks have become increasingly prominent, owing to their spread, their outreach and the widening range of activities they undertake alongside the research that remains at the core of their work.

The think tank was originally an American and British invention, conceived as a brain trust in the service of government. It has since become a genuinely global phenomenon. The On Think Tanks Open Directory now counts roughly 4,000 such institutes worldwide, across Latin America, Africa, the MENA region, Southeast Asia and the former Soviet space. Central Asia has developed a growing and young community of its own over the past decade, mixing state-affiliated bodies with genuinely independent research organisations. Ukraine built strong and numerous think tanks after independence, and that community became more vibrant still after Russia's full-scale invasion.

Few of these institutes operate at a global or even regional level: 85% of Central Asian think tanks surveyed by On Think Tanks report a primarily national focus. For the purpose at hand, that is an asset. An interregional conversation runs on institutions with genuine national depth — organisations that know how a ministry in Tashkent actually reaches a decision, or which Ukrainian agency holds the data. A field once run almost entirely out of Washington and London now has grounded institutions in nearly every place where two countries might need to speak to one another. In many of those places, the think tanks are already positioned to speak to each other. The range of what these institutions do has widened in step. An institute founded to write memoranda for its own government now works with international organisations, private companies, universities, civil society groups and the media at once, and its output has diversified accordingly: research sits alongside advisory work, expert dialogues, training programmes, public events and commentary aimed well beyond the world of policy specialists.

Perhaps their greatest value lies in creating space for candid policy discussion outside the formalities and political sensitivities of official diplomacy. By bringing policymakers, experts and practitioners together in a setting that encourages trust — often under the Chatham House Rule — think tanks host conversations that require exactly that degree of latitude. It is this capacity to build trust and sustain dialogue that Conley Tyler and her co-authors describe as the promotion of friendly relations, and on which they rest the case for think tanks as diplomatic actors.

Capability settles one question. The next is which kind of diplomacy Ukraine and Central Asia actually need from them.

Public diplomacy or knowledge diplomacy

The current state of relations between Central Asia and Ukraine is particularly delicate. Ongoing discussions regarding sanctions compliance and re-export flows through the jurisdictions of Central Asian states have placed their governments in a complex position, balancing between different markets and strategic partners. Despite these challenges, cooperation remains both possible and necessary. This also means that interactions between the two regions are often interpreted through a political lens and are closely scrutinised. Consequently, the choice of a conceptual framework for expert-level engagement becomes an important consideration.

Public diplomacy is the usual umbrella for such engagements, covering a wide range of actors and activities, from strategic communication and cultural exchange to academic and societal outreach by state and non-state bodies alike. Its underlying logic is attraction: the projection of a national

image, via Nye's soft power, in order to shape how a foreign public feels. Applied here, that logic is a liability. An expert exchange presented as image-building invites the question of whose image, and on whose instruction; in an environment where governments are already managing their exposure, that question is expensive to answer and easy to avoid by simply not taking part.

Knowledge diplomacy is narrower and, in this setting, more usable. As Jane Knight conceptualises it, it refers to international engagement built on the reciprocal exchange, circulation and joint production of knowledge. Its object is a shared problem of a humanitarian nature or unexplored opportunity (financial, cultural, etc.), and its instruments are unremarkable: joint research, co-authored publications, methodological exchange, shared datasets, institutional partnerships. It is modest in financial terms next to most diplomatic initiatives, and slow to show results. What it produces is durable relationships between individuals and institutions, and a body of work that neither side would have produced alone.

The practical advantage is that such work is defensible on its own terms. A jointly built dataset on trade flows is a jointly built dataset, and it commits neither government to a position. It survives a bad month in the bilateral relationship because it was never a statement about that relationship in the first place. In sensitive environments, this counts for a great deal.

Reciprocal exchange presupposes that each side holds something the other wants and it is worth asking whether that is true here.

Towards a common research agenda

Central Asian and Ukrainian expert communities have not met because both have been looking in the same direction. For good reason, Ukrainian think tanks have oriented themselves overwhelmingly towards Western partners, funders and audiences, with almost no sustained attention paid to Central Asia. Central Asian institutes have done much the same: the big names in the think tank world are the big names. Two communities facing outward along the same axis will pass each other without ever making contact, despite a long list of policy issues and opportunities to discuss.

Ukraine's think tank community offers the clearest recent evidence that a layer of this kind can be built quickly. When domestic conditions made convening difficult at home, Ukrainian institutes reassembled the same function abroad, demonstrating remarkable diplomatic potential. Central Asia's research field is younger, and access and autonomy tend to reside in different institutions: state-affiliated bodies hold the first, independent ones the second. Across the region, think tanks have found room to cooperate on issues of shared relevance — water security, energy transition, trade and digital development. That regional habit is the one to extend.

The same exercise can be applied to interregional dialogue: more people-to-people contact and, as a starting point, sustained brainstorming around a shared research agenda. Everything begins with a first year, and that first year should be inexpensive enough that no one has to seek permission simply to give it a try.

Begin with a mapping: a working list of who in each region actually works on which of these issues, with names attached to topics. Two research assistants from organisations that already work together can compile it in a few months. It is useful the moment it exists, because at present the most common obstacle to interregional contact is not knowing whom to write to, and on which topic.

The mapping exercise makes a first convening possible, and that convening should be small. Fifteen or twenty people, somewhere inexpensive and politically unremarkable, closed, under the Chatham House Rule, with no urgent need to produce a communiqué or any other public output. The purpose of a first meeting between communities that have never met is acquaintance, and acquaintance comes from talk that nobody has to clear in advance. What it produces is a group of people who now have reason to telephone one another, which is precisely what is currently missing.

Then the exchanges. A researcher from Kyiv spending six weeks at an institute in Almaty, Tashkent or Bishkek, and the reverse, transfers method effectively and costs little. The personal tie is the durable part; the methodological transfer is the justification that makes it fundable. A standing practice of keeping one another informed is the precondition for a common research agenda: collaboration starts from knowing what is already on the other side's list. Some initial exploration has already been done within the project "Europe and Central Asia: Dialogue without borders".

The first joint product should be narrow. Take a single issue on which both sides hold half the evidence — mutual trade and business relations are among the obvious candidates — and produce one paper, or even a long-read, co-authored, with the data published alongside it. Before that paper is begun, three unglamorous questions should be settled in writing: who is named first and on what basis, who chairs and who owns the dataset. Shared resources require rules written down at the start, which is the point Elinor Ostrom made about commons of every kind.

The right structure is a network of institutions that remain national or regional. The value of these institutes lies in how well they know their own systems, and a supranational body would dilute exactly that while adding an entity for governments to hold opinions about. What is needed is a thin connective layer — a standing list, a rotating annual meeting, an agreed convention on co-authorship and a shared repository. Almost none of that costs money, which matters, because funding cycles are consistently shorter than the relationships they are meant to build.

Two practical points are easy to overlook. The first is language. Russian still remains the medium in which these two communities can most readily read one another's working material, and English the one in which they publish for everyone else; both are needed, and a project assuming only one will quietly exclude half the people it means to include. The second is age. The researchers who will still be in contact in twenty years are the ones who are junior now, and a fellowship or a joint cohort is the least expensive long-term investment available. Institutional memory is, in practice, a group of people who came up together.

None of this waits on a summit, a memorandum, or a line in anyone's budget. The mapping needs two researchers and a spreadsheet. The first meeting needs a room and twenty curious people — or, if held online, costs virtually nothing. The first paper needs two authors who have agreed in advance how they will share the credit. For directors on both sides, the ask is one line in next year's work plan. For funders, it is a small and patient grant that outlives its own reporting cycle. For individual researchers, it is a single email to someone whose work overlaps with their own and whom they have never met.

That last point is the one worth holding on to. The researchers who could close this gap are already at work — in Almaty and Bishkek, in Kyiv and Lviv, in Tashkent and Astana — on overlapping problems, unaware of one another. Introducing them costs very little. The rest follows from deciding that the conversation is worth having, and then having it.

CONCLUSIONS

The rapid global economic, political, and technological changes of recent years have significantly transformed the architecture of international cooperation across Eurasia. The reconfiguration of international transport routes, the reorientation of trade flows, intensifying competition for new logistics corridors, and the acceleration of economic diversification have created fundamentally new conditions for the development of international cooperation. Under these conditions, Central Asia is increasingly establishing itself as an independent centre of regional development, whose decisions increasingly determine the functioning of transport, energy, and production links between Europe and Asia.

Against this backdrop, Central Asia is becoming not merely a separate regional priority of Ukraine's foreign policy, but also an integral component of Ukraine's broader strategy for integration into the new economic architecture of Eurasia. This is not a temporary reorientation driven by the war, but a long-term shift in the region's role within the global economy. The Republic of Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan, the Republic of Uzbekistan, and Turkmenistan are actively diversifying their foreign economic relations, modernising their national economies, attracting international capital, and expanding their participation in global value chains. For Ukraine, this means the need to move from individual initiatives to a systematic, consistent, and long-term presence in Central Asia.

At the same time, Central Asia is not a homogeneous region, either economically or politically. Despite their geographical proximity, the countries of the region differ significantly in their models of economic development, foreign policy priorities, the structure of their national economies, and the degree of integration into global markets. Under such conditions, a universal model of cooperation cannot be sufficiently effective. Ukraine's practical policy should be based on separate bilateral strategies tailored to the specific characteristics of each country, its economic potential, and its place in contemporary regional processes.

Despite the positive developments of recent years, the current level of cooperation between Ukraine and Central Asia still does not correspond to the existing potential for interaction. The main potential for further development lies no longer so much in increasing trade turnover as in building sustainable production, investment, and technological links. Ukraine retains significant competitive advantages in the fields of agri-food production, mechanical engineering, transport engineering, digital transformation, education, healthcare, and post-war reconstruction. For Central Asia, these sectors are increasingly determining the pace of economic modernisation, the development of human capital, and the diversification of national economies. It is precisely these areas that offer the greatest potential for establishing mutually beneficial production and technological partnerships capable of generating long-term economic benefits.

The transport and logistics dimension of cooperation is becoming particularly important. The reconfiguration of international routes is effectively shaping a new configuration of economic links between Europe and Asia, in which multimodal transport, the development of the Trans-Caspian International Transport Route, the Middle Corridor, the digitalisation of customs procedures, and the modernisation of port infrastructure play a key role. For Ukraine, participation in these processes means not only restoring its transit potential after the end of the war, but also the opportunity to become integrated into the development of a new transport system across Eurasia as one of its important components.

At the same time, the economic substance of the partnership between Ukraine and Central Asia is also changing. Whereas until recently it was based primarily on trade in individual groups of goods, today sectors with high added value are becoming increasingly important, including digital technologies, education, innovation, agri-processing, transport engineering, the pharmaceutical industry, energy modernisation, water resources management, and the development of small and medium-sized enterprises. It is these sectors that provide the foundation for long-term economic interdependence, which is considerably more resilient than traditional trade relations and creates opportunities for the joint development of production, technologies, and human capital.

Another important trend of the current stage is the growing importance of the institutional dimension of cooperation. The competitiveness of international partnerships is increasingly determined not only by transport infrastructure or the volume of investment, but also by the quality of human capital, the level of professional interaction, academic mobility, and the ability to build sustainable expert networks. University cooperation, joint research programmes, professional exchanges, and expert diplomacy can no longer be regarded merely as the humanitarian dimension of international relations. They are becoming one of the key instruments for building trust, without which large-scale economic projects, technological partnerships, and long-term political cooperation cannot be achieved.

The growing international attention to Central Asia is creating new opportunities for Ukraine while at the same time significantly increasing the level of competition. Today, the region is at the centre of the strategic interests of the European Union, the People's Republic of China, the Republic of Türkiye, the Gulf states, the United States of America, the Republic of India, Japan, and the Republic of Korea. Each of these actors is developing its own model of long-term engagement by combining investment, infrastructure development, technological cooperation, educational programmes, and political dialogue. Under these conditions, Ukraine is competing not only for access to individual markets but also for the opportunity to offer its own long-term model of economic and institutional partnership.

In this context, the consistency of state policy becomes of decisive importance. The experience of recent years demonstrates that, even where there is mutual interest, individual economic or humanitarian initiatives are unable to deliver lasting results without a predictable state policy, a stable diplomatic presence, and effective coordination among government authorities, business, universities, diplomatic missions, and the expert community. Only the combination of these elements makes it possible to establish a coherent system of cooperation.

Equally important is the need to rethink the very model of interaction with Central Asia. It can no longer be viewed solely as an export market or a transit space between Europe and Asia. Instead, a model of equal partnership based on the joint creation of added value, the localisation of production, technology transfer, the development of human capital, and the implementation of joint innovative projects appears far more promising.

The prospects for cooperation between Ukraine and Central Asia are increasingly extending beyond the bilateral format. The transformation of the Eurasian space is creating the conditions for the development of broader multilateral mechanisms of cooperation involving Ukraine, Central Asia, the European Union, and other international partners. The greatest potential for such cooperation lies in the fields of transport connectivity, energy security, digital transformation, food security, water resources management, climate adaptation, the development of the innovation economy, and the establishment of new international value chains in the field of critical raw materials. An important area for the further development of cooperation may be the establishment of modern mechanisms for international labour mobility capable of contributing to Ukraine's post-war recovery, meeting

the needs of its labour market, and creating new opportunities for the professional development of citizens of Central Asia on the basis of transparent, secure, and mutually beneficial rules. At the same time, the long-term effectiveness of these processes will largely depend on the development of institutional partnerships among government authorities, business, universities, think tanks, and expert communities, which provide workforce training, knowledge exchange, the development of common approaches, and the strengthening of mutual trust. It is precisely the comprehensive combination of economic, technological, humanitarian, and institutional cooperation that will shape the new agenda for cooperation between Ukraine and Central Asia.

At the same time, the further development of relations between Ukraine and Central Asia will take place in an environment of high geopolitical turbulence. The persistence of security risks, competition among major international actors, the reconfiguration of global value chains, the accelerating pace of technological change, and the growing role of economic diplomacy will require greater adaptability.

Overall, cooperation between Ukraine and Central Asia is already moving beyond the traditional understanding of bilateral relations and is gradually becoming part of a broader transformation of the economic, transport, and political architecture of Eurasia. In these circumstances, it will not be individual projects or short-term agreements that prove decisive, but rather the ability to build long-term institutional ties, maintain continuous political dialogue, develop shared human and technological potential, and foster a partnership based on mutual trust, pragmatism, and a shared vision for the future.

It is precisely this model of cooperation that creates the opportunity for Ukraine and Central Asia to move from situational interaction to a fully-fledged strategic partnership. In the context of the profound transformation of the global economy and international relations, such a partnership is capable of becoming one of the factors contributing to stronger economic resilience, the development of new value chains, enhanced regional connectivity, and the formation of a modern architecture of cooperation across Eurasia.



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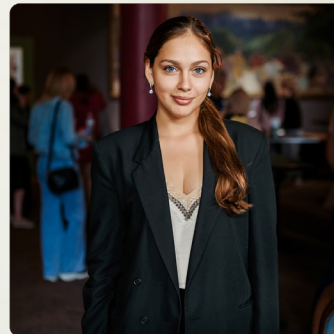
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