

## **No. 13 Central Asia in 2030: SEnECA forecasts for the region and the role of the European Union**

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## POLICY PAPER

No. 13

### Central Asia in 2030: SEnECA forecasts for the region and the role of the European Union

May 2019



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## Executive Summary

It is likely that the current positive trends in political, societal and economic development will continue in all five Central Asian countries, though at a different pace. A decade from now, the Central Asian countries probably will be slightly better off and most of them will be economically more open, while freedoms and liberties will progress much slower. However, sudden and unexpected changes can also occur and change the course of development of one or more countries of the region.

Intra-regionally, Central Asia in 2030 will most likely be a more cooperative region, if the development of the region continues on the current path. Bilateral and multi-lateral relations could improve if new domestically and externally facilitated engagements develop. The enhanced cooperation, however, will most likely not amount to regional integration. Issues of tension among the region's countries will remain, especially regarding water and borders.

In 2030, the EU will still be an important player in Central Asia. Economic engagement will remain a central driver for cooperation, having impact also on other sectors. At the same time, the EU's comparative role in the region will decrease due to the growing economic and political influence of the People's Republic of China and the persistent political, economic, military and cultural influence of Russia. Growing influence of both will predominantly shape the region. The role of other external powers, especially of India, Turkey, Iran, Arab countries is set to rise.

## List of abbreviations

### General abbreviations:

BRI – the Belt and Road Initiative

CASA-1000 – the Central Asia South Asia Electricity Transmission and Trade Project

CIS – the Commonwealth of Independent States

CSTO – the Collective Security Treaty Organisation

EAEU – the Eurasian Economic Union

EU – the European Union

GSP+ – the Generalised Scheme of Preferences Plus

PfP – the NATO Partnership for Peace programme

SCO – the Shanghai Cooperation Organisation

### Abbreviations related to the SEnECA consortium:

CAISS – the Central Asian Institute for Strategic Studies

KNU – the Kyrgyz National University named after Jusup Balasagyn

UWED – the University of World Economy and Diplomacy

CIFE – Centre international de formation européenne

IEP – Institut für Europäische Politik

LIIA – the Latvian Institute of International Affairs

RUSI – the Royal United Services Institute for Defence and Security Studies

## 1. Introduction

The new EU Strategy for Central Asia is expected to be approved in 2019.<sup>2</sup> It will set the EU's approach to Central Asia for another decade or so. But how will the region look in 2030? Will the changes be similar to those experienced from 2007 to 2019, i.e. from the current<sup>3</sup> to the upcoming EU strategy for the region, or can Central Asia be expected to change more dramatically? In other words, the operational environment for the EU in 2030 is unclear.

Within a timeframe of around one decade, the circumstances under which policies are implemented in order to achieve goals set out in a strategy can change considerably. Therefore, defining policy instruments to achieve strategic objectives in a mid- to long-term perspective is a challenging task for policy-makers and advisors. They need to anticipate future developments and changing circumstances. This paper provides a set of scenarios on how Central Asia and its cooperation with the EU could develop by 2030. This task is complex and related to many certain and uncertain factors.

The paper is based on experts' opinions – semi-structured interviews with experts from the SEnECA network, including from all five Central Asian countries, and a focus group discussion among SEnECA and other Central Asian experts at the Scenario Workshop held on 29-31 January 2019 in Almaty, Kazakhstan. It is reinforced by analysis of literature and other sources.

This policy paper is part of the final of the three phases of the SEnECA project – recommendations, with the first two having been mapping and analysis. It is based on and serves as a successive mapping and analysis exercise on the political and security relations, economic relations and trade, as well as cultural and other relations between the EU and Central Asia presented in the first twelve SEnECA policy papers.<sup>4</sup> This paper, number 13, precedes the two final papers which will focus on the suggestions of how to better implement the upcoming EU strategy for Central Asia.

The second chapter provides a set of forecasts of all five Central Asian countries in a decade in terms of demography, as well as political, economic and societal development, while the third chapter similarly provides forecasts on the intra-regional cooperation. Finally, chapter four looks at the possible future role of the EU in Central Asia.

## 2. Central Asian countries in 2030

This chapter consists of two subchapters which provide versions on how Central Asian countries might look like in 2030. First, available statistical forecasts are provided and explained, followed by versions of SEnECA experts on the political, economic and societal development of Central Asian countries until 2030.

### 2.1. People of Central Asia in prospective numbers

To understand how the region could develop and how Central Asian countries would shape their societal and socio-economic realities and policies, it is necessary to explore the existing forecasts. Such data is vital for understanding future paradigms in the region.

Various future forecasts are available on most of the countries of the world, including the ones in Central Asia. Each of the forecast is subject to various given factors, such as wars, revolutions, epidemics, man-made or natural catastrophes. Nevertheless, some of the forecasts can be considered more precise and are subject to less unpredictability, for example, those related to

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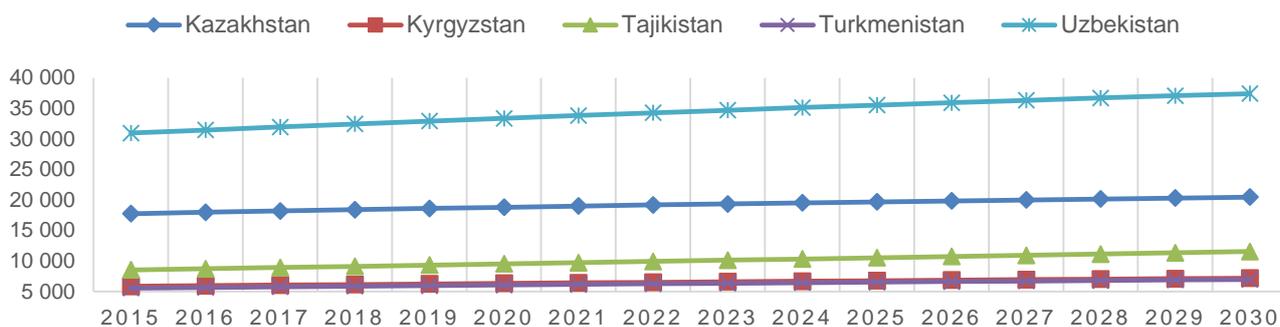
<sup>2</sup> Council of the European Union, *Council Conclusions on the EU strategy for Central Asia*, No. 10387/17, June 19, 2017, <https://www.consilium.europa.eu/media/23991/st10387en17-conclusions-on-the-eu-strategy-for-central-asia.pdf>

<sup>3</sup> Council of the European Union, *The EU and Central Asia: Strategy for a New Partnership*, No. 10113/07, May 31, 2007, [https://eeas.europa.eu/sites/eeas/files/st\\_10113\\_2007\\_init\\_en.pdf](https://eeas.europa.eu/sites/eeas/files/st_10113_2007_init_en.pdf)

<sup>4</sup> All SEnECA policy papers are available here: "Policy Papers & Briefs," SEnECA, <https://www.seneca-eu.net/policy-papers-briefs/> and [https://duepublico2.uni-due.de/receive/duepublico\\_mods\\_00047232?q=SEnECA](https://duepublico2.uni-due.de/receive/duepublico_mods_00047232?q=SEnECA)

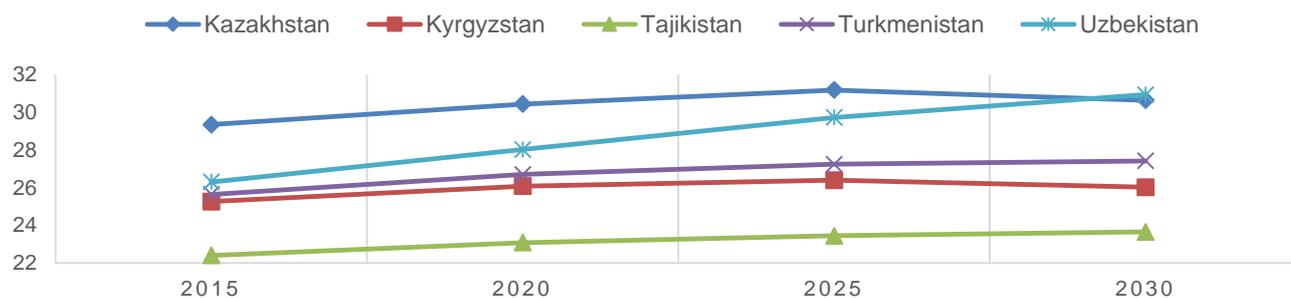
population. Also, they depend on the aforementioned unpredictable factors, though less so than other forecasts such as the growth of national economies, which can be impacted by current and future trade agreements, the situation of the global economy, technological advances, sanction regimes, international competition, etc.

According to the forecasts of the United Nations, Central Asia in 2030 can be expected to be more populous, though populations would be slightly older (still younger than in the EU) and more urban. In terms of total population, based on constant-fertility and constant-mortality data, in 2030 the total population of Central Asia could reach 83.7 million people: Uzbekistan – 37.5 million, Kazakhstan – 20.5 million, Tajikistan – 11.6 million, Kyrgyzstan – 7.2 million and Turkmenistan – 7 million people (please see Figure 1; the lines of Kyrgyzstan and Turkmenistan largely overlap in Figure 1).



**Figure 1:** Total population in each of the Central Asian countries from 2015 until 2030, “no change variant (constant-fertility and constant-mortality):” thousands/year (the United Nations).<sup>5</sup>

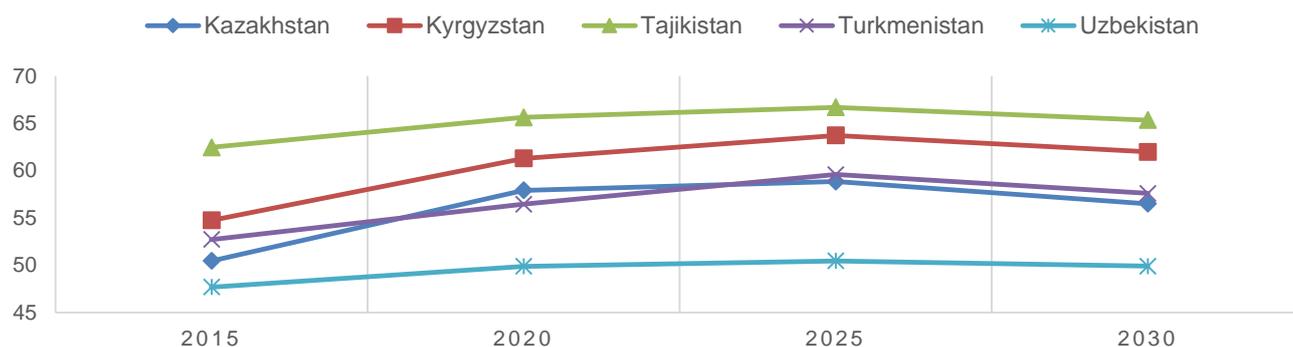
At the same time, the median age under constant-fertility and constant-mortality forecasts would increase in all five countries with the highest expected median age in Uzbekistan, followed by Kazakhstan, Turkmenistan, Kyrgyzstan and Tajikistan (the youngest populations in the reverse order). The average median age in the region could reach 29.1, which would be approximately only at two-thirds of the projected number forecasted for Europe (please see Figure 2). At the same time, it is expected that the total dependency ratio, or the ratio of the population below 14 years and above and 65 years of age, will rise up to 55.1 (please see Figure 3).



**Figure 2:** Median age in each of Central Asian countries from 2015 until 2030, “no change variant (constant-fertility and constant-mortality):” age/year.<sup>6</sup>

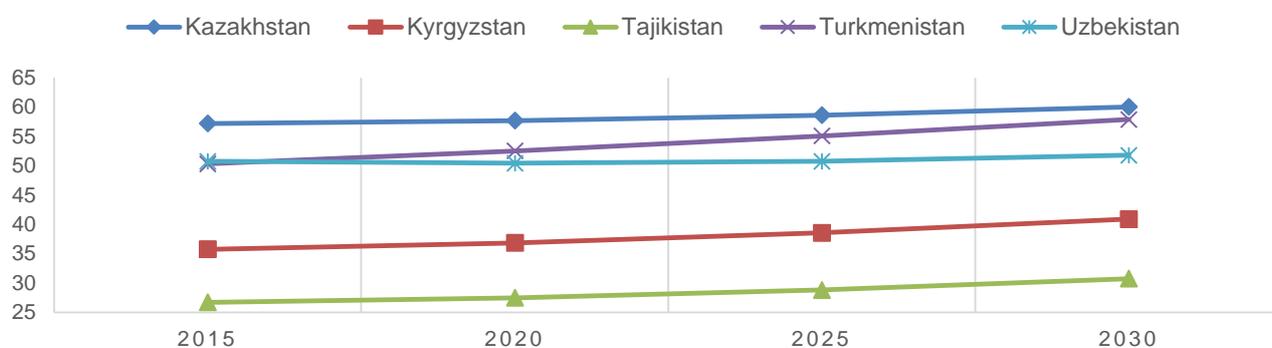
<sup>5</sup> United Nations, Population Division, Department of Economic and Social Affairs. *World Population Prospects: The 2017 Revision. File POP/1-1: Total population (both sexes combined) by region, subregion and country, annually for 1950-2100 (thousands). No change variant (constant-fertility and constant-mortality), 2015 - 2100*, [https://population.un.org/wpp/DVD/Files/1\\_Indicators%20\(Standard\)/EXCEL\\_FILES/1\\_Population/WPP2017\\_POP\\_F01\\_1\\_TOTAL\\_POPULATION\\_BOTH\\_SEXES.xlsx](https://population.un.org/wpp/DVD/Files/1_Indicators%20(Standard)/EXCEL_FILES/1_Population/WPP2017_POP_F01_1_TOTAL_POPULATION_BOTH_SEXES.xlsx)

<sup>6</sup> United Nations, Population Division, Department of Economic and Social Affairs. *World Population Prospects: The 2017 Revision. File POP/5: Median age by region, subregion and country, 1950-2100 (years). No change variant (constant-fertility and constant-mortality), 2015 - 2100*, [https://population.un.org/wpp/DVD/Files/1\\_Indicators%20\(Standard\)/EXCEL\\_FILES/1\\_Population/WPP2017\\_POP\\_F05\\_MEDIAN\\_AGE.xlsx](https://population.un.org/wpp/DVD/Files/1_Indicators%20(Standard)/EXCEL_FILES/1_Population/WPP2017_POP_F05_MEDIAN_AGE.xlsx)



**Figure 3:** Total dependency ratio in Central Asian countries from 2015 until 2030, “no change variant (constant-fertility and constant-mortality):” dependency ratio/year (the United Nations).<sup>7</sup>

Finally, also the rate of urbanisation will be on the rise in all five countries, with the highest expectations in Kazakhstan and Turkmenistan, followed by Uzbekistan; significantly lower levels of urbanisation are projected in Kyrgyzstan and Tajikistan (please see Figure 4).



**Figure 4:** Population in urban areas in Central Asian countries from 2015 until 2030: percentage/year (the United Nations).<sup>8</sup>

## 2.2. Political and economic development of Central Asian countries

The overall SEnECA experts’ outlook on Central Asian countries and the region as a whole in 2030 is optimistic. When it comes to political systems and policies, including such issues as human rights and the rule of law, and economics, the current vectors are likely to continue and to determine the situation also in 2030.

Anna Gussarova from the Central Asian Institute for Strategic Studies (CAISS) in Almaty expects continuity in respect to the governance and political development of Kazakhstan. The level of political freedoms in 2030 is likely to remain low and the country most likely will not be even partly free (according to the methodology of the Freedom House on the freedom measurement in the world<sup>9</sup>). She also assumes that tensions among elite groups – geographically and identity-wise – will remain

<sup>7</sup> United Nations, Population Division, Department of Economic and Social Affairs. *World Population Prospects: The 2017 Revision. File POP/11-A: Total dependency ratio (<15 & 65+)/ (15-64) by region, subregion and country, 1950-2100 (ratio of population 0-14 and 65+ per 100 population 15-64). No change variant (constant-fertility and constant-mortality), 2015 – 2100.* [https://population.un.org/wpp/DVD/Files/1\\_Indicators%20\(Standard\)/EXCEL\\_FILES/1\\_Population/WPP2017\\_POP\\_F11\\_A\\_TOTAL\\_DEPENDENCY\\_RATIO\\_1564.xlsx](https://population.un.org/wpp/DVD/Files/1_Indicators%20(Standard)/EXCEL_FILES/1_Population/WPP2017_POP_F11_A_TOTAL_DEPENDENCY_RATIO_1564.xlsx)

<sup>8</sup> United Nations, Population Division, Department of Economic and Social Affairs. *World Urbanization Prospects: The 2018 Revision. File 2: Percentage of Population at Mid-Year Residing in Urban Areas by Region, Subregion, Country and Area, 1950-2050.* [https://population.un.org/wup/Download/Files/WUP2018-F02-Proportion\\_Urban.xls](https://population.un.org/wup/Download/Files/WUP2018-F02-Proportion_Urban.xls)

<sup>9</sup> For more information, please see: “Methodology 2019,” Freedom House, <https://freedomhouse.org/report/methodology-freedom-world-2019>

high, while identity and nation-building will still be in process. Security threats are likely to remain the same as at the present time, namely extremism, radicalisation, and cybercrime.

According to Gussarova, Kazakhstan's foreign policy concept will remain the same as it is 2019 – the country is expected to continue its multi-vector approach. Notwithstanding this, Russia and the People's Republic of China (hereafter – China) will have grown in importance: economic cooperation with China will continue through loans and credits as a part of the Belt and Road Initiative (hereafter – BRI); and political/military ties with Russia will also persist, as Kazakhstan is likely to remain part of the Collective Security Treaty Organisation (hereafter – CSTO), the Commonwealth of Independent States (hereafter – CIS), the Eurasian Economic Union (hereafter – EAEU) and the Shanghai Cooperation Organisation (hereafter – SCO). Gussarova does not completely exclude that Kazakhstan could withdraw from the CSTO, however, in practice, such a step would take more time, resources and courage than available. The expert also thinks that deeper cooperation with other political-military organisations such as NATO is unlikely.

Nazira Momosheva from the Kyrgyz National University (KNU) in Bishkek suggests that in 2030 Kyrgyzstan will still be a secular democratic state with a developed civil society and parliamentary-presidential form of governance. Civil society development and digitalisation will set the pace for growing political freedoms. At the same time, political stability will still have place for progress, though the change of leadership is certain. Kyrgyzstan will steadily progress in terms of economy, though not as intensively as its neighbours with larger economies and more resources. Tourism, mining, hydropower production and textiles are set to be the key contributing sectors to the economic development, while export primarily be generated by agriculture, textiles and gold industries. Key security issues for Kyrgyzstan in 2030 would include environmental issues, large external debt, water management with neighbours, food safety, rural poverty, emigration, Islamic radicalisation and extremism, terrorism, and the situation in Afghanistan.

In 2030, according to the prognosis of Momosheva, Kyrgyzstan will still be a member of the CIS, CSTO, EAEU, SCO, and also will continue its participation in the NATO Partnership for Peace programme (hereafter – PfP). However, the influence of China and Russia will increase as a result of the operation and cooperation in the frameworks of the EAEU and the BRI. China's influence and importance will have grown also as a result of the Kyrgyzstan's external debt to its eastern neighbour. At the same time, the expert expects that the influence of the US and the EU will decrease, while Turkey will remain an important economic and political partner due to the affinities of religion and language.

Abdugani Mamadazimov from the "Silk-Road of Consolidation" National Foundation and Zerkalo in Dushanbe foresees a gradual economic development of Tajikistan. He expects China to be the main foreign investor in Tajikistan, contributing especially to the domestic labour-intensive industry (cement, metallurgy, etc.) via an assertive promotion of the BRI. In the case of the post-conflict reconstruction of Afghanistan, more economic activity of external partners can be expected also in Tajikistan. He concludes that the situation in Afghanistan will remain an important issue in Tajikistan under any circumstances.

Mamadazimov thinks that Russia will maintain its military presence in Tajikistan in the future, also increasing cooperation in education and migration issues, etc. Thus, Tajikistan will still be a CIS and CSTO member. The US will retain its presence through CASA-1000<sup>10</sup> and educational projects. At the same time, after the probable withdrawal of Western troops from Afghanistan, it will be problematic for Tajikistan to continue cooperation in the NATO's PfP. Turkey will remain an important actor in trade, while Iran will remain active in the region and Tajikistan in particular. India's role is to rise in Central Asia and in Tajikistan, given its intentions of reorienting connectivity vectors from the Indian Ocean to other regions in the proximity and beyond.

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<sup>10</sup> For more information on CASA-1000, i.e. Central Asia South Asia Electricity Transmission and Trade Project, please see: CASA-1000 Project, <http://www.casa-1000.org>

An expert from Turkmenistan considers that the future development of Turkmenistan will foremost be determined by the reforms undertaken by the Turkmen government. The optimistic (and official) outlook foresees economic development via state-controlled introduction of market mechanisms (including a wider opening up to external economic actors), with a shift in emphasis from export of raw materials to processed goods, as well as increasing investment in the people. Notwithstanding the changes in economy, no significant changes in political freedoms and leadership of Turkmenistan are definitively expected until 2030.

In regard to Turkmenistan's foreign policy, the expert thinks that the country will stick to its neutrality tradition which would also in the future result in abstaining from membership in alliances. It is also likely that Turkmenistan will continue to put emphasis on bilateral relations instead of multilateral formats. In general, the expert thinks, Turkmenistan will engage more openly with other countries, however, at different levels of intensity. Although the current level of cooperation between Turkmenistan and other partners is to some extent at the same level, the expert ranks the actors with most engagement in future (from the highest growth to the lowest growth in intensity): the Arab countries, Iran, China, the US, Turkey, Russia and the EU.

Khulkar Karimova from the University of World Economy and Diplomacy (UWED) in Tashkent argues that by 2030 Uzbekistan will continue its economic development and economic opening to the outside world. In her opinion, in 2030, Uzbekistan will have become "the economic engine of Central Asia": Uzbek products will be better recognised abroad, while more raw material will be domestically processed, thus having higher value added to the local economy. This in turn would lead also to higher living standards in the next decade. Also, in regard to foreign policy, Karimova expects Uzbekistan to become more open. At the same time, the expert believes that Uzbekistan will also be more active and assertive in Central Asia and beyond.

### **3. Intra-regional cooperation of Central Asia in 2030**

The following chapter assesses the future intra-regional cooperation or engagement among all five Central Asian countries. It starts with a theoretical assessment of possible scenarios of regional cooperation and prospective models on regional cooperation. The final part of the chapter provides views from the Central Asian experts on how the cooperation could unfold.

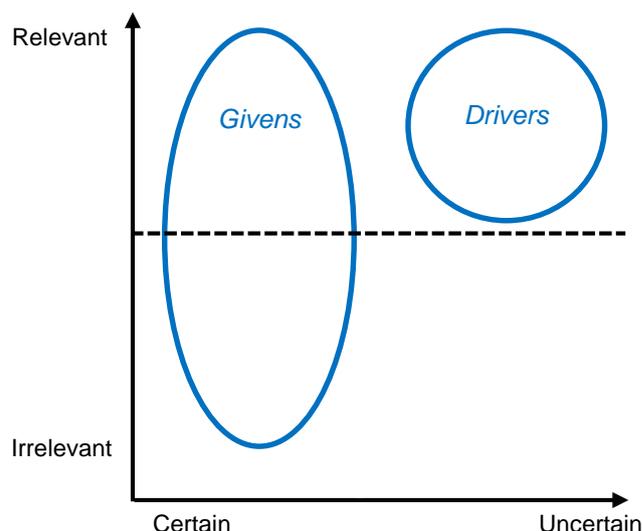
#### **3.1. Scenario building of intra-regional cooperation: givens and drivers**

Scenario building is a method which can help adapt policy-making to changing circumstances and future developments. Scenario building is not a prediction of the future. It does not try to calculate the probability of a certain development becoming a reality. Scenario building imagines possible alternative developments and changing circumstances. It is flexible in the sense that it models multiple scenarios, which all might become a reality. Such alternative scenarios for Central Asia are useful to recommend different policy options in order to implement the forthcoming EU Central Asia strategy. The major shortcoming of this approach is that it cannot capture the real world in all its complexity, instead having to focus on one specific topic, a given timeframe and a limited number of factors that influence the future developments.

The method is specifically designed to reflect on the influence of the selected factors in depth. In general, scenario building differentiates between the so-called givens and drivers. Both types of factors can be classified along two dimensions (see Figure 5).<sup>11</sup> The first dimension is relevance. Is a factor relevant for a scenario? Does it have an impact on it? The second dimension is certainty. How certain is the development of a factor in the future? How likely is it that it will develop in another direction than the assumed one?

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<sup>11</sup> Sascha Meinert, *Denken in Alternativen: Szenario-Übungen als didaktischer Ansatz in der politischen Bildung*, January 2004, [https://www.researchgate.net/publication/255598012\\_Denken\\_in\\_Alternativen\\_Szenario-Übungen\\_als\\_didaktischer\\_Ansatz\\_in\\_der\\_politischen\\_Bildung](https://www.researchgate.net/publication/255598012_Denken_in_Alternativen_Szenario-Übungen_als_didaktischer_Ansatz_in_der_politischen_Bildung)



**Figure 5:** Drivers and givens in the context of relevance and certainty.

Factors that have an impact on the scenario, but lack certainty as to how they will develop, are called drivers. Factors with a clear and certain path of development are called givens. There are relevant and irrelevant givens. Only relevant ones will be considered for the scenarios. They have a similar impact on all scenarios as they do not change, while for the drivers it is necessary to define how they change and what kind of impact they have on the scenarios.

SEnECA experts and other Central Asian experts from the academia, think-tanks and non-governmental organisations met at the SEnECA Scenario workshop on 29-31 January 2019 in Almaty, Kazakhstan. During the workshop, the most relevant givens and drivers for the future of Central Asia with emphasis on intra-regional cooperation were discussed and assessed and can be summarised as follows.

The most relevant givens:

- *Geography* – territory, borderlines, incl. exclaves and enclaves, hardly accessible mountainous sub-regions, will influence the future development of Central Asian countries, as well as the intra-regional and extra-regional cooperation vectors;
- *Climate* – global warming most likely will bring higher temperatures in Central Asia and thus will have effects not only on the environment, e.g. melting ice caps of mountains, but also on societies and economies;
- *Population* – population and urbanisation growth rates are set to increase across the region, having more pressures on infrastructure, social and economic and other policies. Also, current identity, incl. the impact of religion, culture, nation-building processes, will evolve and will influence many other factors beyond the population per se;
- *Culture* – on the one hand, the common historical heritage, shared experiences during the rule of the Russian Empire and the Soviet Union, similarities of most of the titular languages as well as the widespread use of the Russian language facilitate cooperation in the region. On the other hand, efforts of national identity building which underline the distinctiveness of each Central Asian country and current processes of religious identity building can limit prospects of regionalisation;
- *Institutions* – the relative though uneven weakness of institutions over the region will determine their subjugation to possible political turmoil instead of serving as factors of long-term stability, while their mostly limited efficiency will not sufficiently foster the development of the countries;

- *Afghanistan* – the current security situation and instability in Afghanistan, which is bordered by Tajikistan, Turkmenistan and Uzbekistan, with the compatriots of these countries residing in their southern neighbouring country, will directly influence the security situation in the entire Central Asia (from smuggling of drugs to radicalisation and terrorism risks);
- *Expat workforce* – Central Asian labour force, most notably from Tajikistan and Kyrgyzstan, working mainly in Russia (increasingly also in Turkey), will determine not only the dependence of Central Asian countries on remittances and good relations with the host countries, but also the cultural connections with the respective cultures, which will in turn impact the situation at home.

The most relevant drivers for the future cooperation among the five Central Asian states are:

- *Development of domestic political systems* – the domestic situation of the Central Asian countries' political systems is considered to be the key factor that will influence their cooperation on a bilateral or regional basis. The changes in leadership in Uzbekistan and most recently in Kazakhstan have demonstrated both the relative unpredictability of such occurrences, as well as the opportunities they provide. It is essential for the two engines of Central Asia to continue to reflect and adopt to the current trends and challenges;
- *Influence of external actors* – Russia, China, the US and the EU have been active as external actors in the Central Asian region since the five countries' independence. Their engagement is currently changing – a generally stable position of Russia and a growing presence of China while the Western powers gradually lose their positions. The degree of their impact on the region as well as their policy priorities will strongly influence how the five Central Asian countries cooperate.

Other drivers were discussed, but were considered as having less influence on the future cooperation among the five Central Asian states:

- *Natural resources* – the lack of natural resources or access to them, their price and demand on the global markets, ways of extracting and exporting them (i.e. mines, pipelines), as well as the overreliance on them or diversification of economies, will be crucial to most of the Central Asian countries' development in the foreseeable future;
- *Infrastructure* – enhancing the existing and building new infrastructures such as roads, railroads, pipelines, electricity grids, power-plants, dams will determine not only the connectivity within Central Asia and with external partners, but also that within the countries, some of whom are vast, while others are even hardly connected within their borders. At the same time, building of unnecessary, unaffordable and/or low-standard infrastructure can worsen the direct and indirect effects of infrastructure development;
- *Digitalisation* – the expected progress in connectivity – expansion of broadband and mobile networks, e-governance, private e-services, integration into the “global e-village” etc. – is expected to provide better services and communication within the countries, within the region and beyond Central Asia. Digitalisation can also serve as a driver for economic and societal development and, consequently, also political changes (as the use of social media has demonstrated elsewhere, most notably during the so-called Arab Spring).

The above-mentioned givens and drivers will interact with each other and other givens and drivers not elaborated here. The above-mentioned ones, at different degrees, will be assessed in forecasting the future of Central Asia in the following chapters.

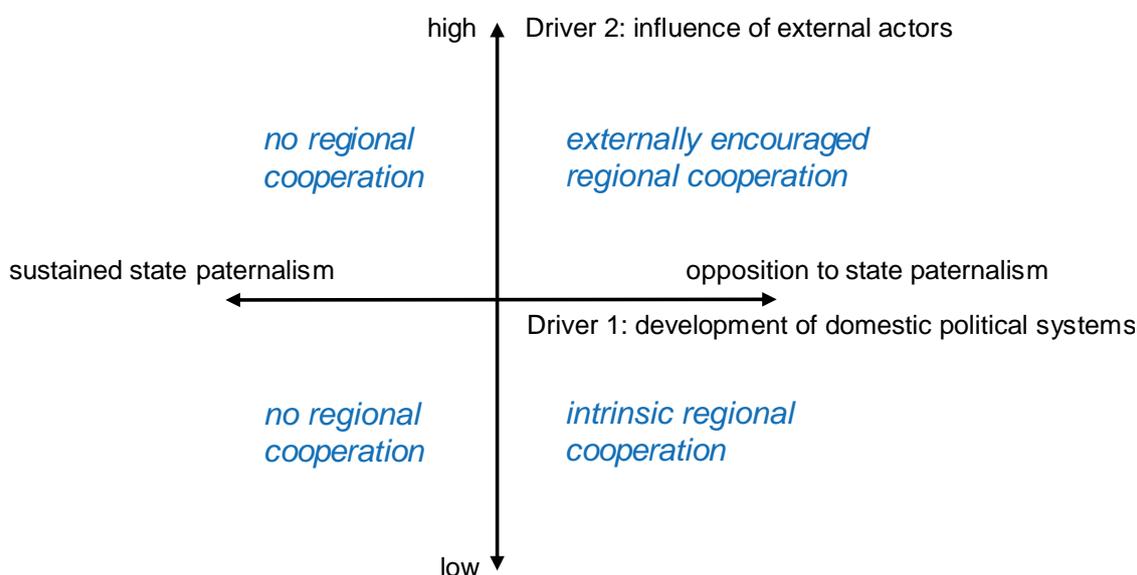
### 3.2. Models and vectors of prospective regional cooperation

Using the two most relevant drivers which influence the future cooperation among the five Central Asian states, a two-dimensional space can be drawn (Figure 6). The x axis displays the first driver – development of domestic political systems – and the y axis displays the second driver – influence of external actors.

In case of Driver 1, i.e. the development of the domestic political systems, four of them are presidential systems, while Kyrgyzstan has a parliamentary system. Kyrgyzstan is currently the only

country in the region where changes in power following elections function well. In the other four countries, a transition from one leader to another has happened, though in a less transparent and open way. One reason behind the seldom changes in power is state paternalism, a feature common to all five political systems. As Morgan Y. Liu explains, post-Soviet state paternalism “means that the state reserves for itself the nearly exclusive prerogative for directing the economic, political, and social course of a country. [...] the nation properly falls under the care and guidance of a state that knows what is good for it.”<sup>12</sup> If cooperation with other countries reaches a certain intensity, it challenges the narrative of a just leader, who is the only person capable of guaranteeing its loyal subjects’ wellbeing. Thus, paternalism can become a major obstacle to cooperation in Central Asia.

With regard to Driver 2, the most relevant external actors in Central Asia are Russia and China. Utilising formats such as the EAEU, CIS, CSTO or the BRI, both of them have fostered regionalisation projects, which reach out beyond the narrow definition of Central Asia. These multilateral formats complement Russian and Chinese bilateral relations with the five countries. While the Central Asia policy of the current US administration is less visible, the former administration initiated the C5+1 format, which specifically addressed the core region of Central Asia. The EU is also interested in fostering closer cooperation between the Central Asian states in a smaller format which focusses on the five Central Asia countries.



**Figure 6:** Possible scenarios and the development of drivers.

Within this two-dimensional space, four scenarios can be located. For a first scenario – externally encouraged regional cooperation – it is assumed that the influence of external actors in the region is high and that the domestic political systems change. The opposition to state paternalism increases and leaders initiate reforms. This results in externally encouraged regional cooperation among the five Central Asian states. The shape of cooperation would depend on the external actors’ policies. Which policy areas are covered and to what degree cooperation is institutionalised will also depend on the external actors.

A second scenario – intrinsic regional cooperation – is also driven by increasing opposition to state paternalism, while the influence of external actors in the region is rather low. A regional cooperation initiative can even survive an external actor’s engagement in Central Asia. Lacking the help of external actors in dealing with cross-border issues, the five Central Asian states are forced to address these challenges on their own. If state paternalism is sustained, that will be a major obstacle

<sup>12</sup> Liu, Moran Y., Post-Soviet Paternalism and Personhood: Why “Culture” Matters to Democratization in Central Asia, In: Schlyter, Birgit (Ed.), *Prospects of Democracy in Central Asia*, Stockholm/London, 2005, pp. 225.-238.

to cooperation in Central Asia. Assuming that the domestic politics are key to regional cooperation in Central Asia, the influence of external actors in Central Asia is neither a necessary nor a sufficient precondition to achieve regional cooperation, while change in domestic political system is considered necessary.

The other two scenarios result in “no regional cooperation”. In the case of a continued high influence of external actors in the region and no change of domestic political systems, there is no incentive for regional cooperation. The relevant external actors furthermore consider bilateral relations to be more fruitful than a regional approach to Central Asia. This scenario resembles the situation prior 2016 very much. The other “no regional cooperation-scenario” assumes that there is no interest from the outside world in Central Asia, which results in a lack of incentives for regional cooperation. In this scenario, neither incentives from outside the region nor from within it persist.

Regarding the intra-regional cooperation of Central Asian countries, SEnECA experts are optimistic. Anna Gussarova considers that cooperation among the five countries will increase both politically and economically. At the same time, she does not expect regional integration. Although, facilitating issues regarding visas and borders will stay on the agenda, the development of a single space for travelling is unlikely.<sup>13</sup> Also, diplomatic tensions in the region will remain. Still, the expert does not expect significant complications regarding territorial issues, rather issues related to water management.

Nazira Momosheva underlines that further regional cooperation vectors will primarily depend on the developments in Uzbekistan, i.e. whether there will be a continuation of the current cooperative approach towards its neighbours or not. She expects more joint regional projects in such spheres as tourism, energy and trade, while problematic issues will remain in water management. She thinks that, while economic integration will continue under the EAEU and BRI auspices, Central Asia could become a common transit area between the EU and China.

Abdugani Mamadazimov sees a tendency towards a closer Central Asian political cooperation that with fluctuations could continue up until 2030. In his view, this tendency will mainly depend on the political changes in the region. A single market between Uzbekistan and Tajikistan could be established by 2030 with the involvement of other countries (e.g. Turkmenistan, Kyrgyzstan, Kazakhstan and Afghanistan), though probably not including all Central Asian countries. Such regional cooperation could be facilitated by various “5+1” formats where countries and actors such as the US, India, Japan, the EU, and others interact with all five at a time, and also by Russia (via EAEU) and China (via BRI). Last but not least, the interest of external powers could also position Central Asia as a Eurasian hub for energy and transport, which could also facilitate the intra-regional cooperation.

An expert from Turkmenistan considers that in 2030 situation in Afghanistan and threats of radical Islam ideologies, such by the so-called Islamic State of Iraq and the Levant (ISIL or ISIS), will lead to a closer cooperation among the Central Asian countries. At the same time, the expert notes that Turkmenistan has no border conflicts with its Central Asian neighbours, but the traditional disputes among the countries will not disappear. The expert also underlines that it would be rational to strengthen the Turkmen-Uzbek relations, as the latter is on the path of strengthening its regional leadership across various sectors.

Last but not least, Khulkar Karimova goes further and suggests that under favourable circumstances by 2030 Central Asia may become a single economic, political and cultural power based on common features, historical ties, territorial and cultural closeness. At the same time, she also underlines that the role of external powers, especially of Russia, China, the US, Turkey and Iran is unavoidable in the intra-regional cooperation vectors.

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<sup>13</sup> Introducing a silk-visa initially to travel to Kazakhstan and Uzbekistan while adding other Central Asian countries in the long run, similarly to the Schengen visa. Please see the following source for additional insight to the developments in Central Asia in this regard: Khamza Sharifzoda, “Can a ‘Silk Visa’ Boost Tourism in Central Asia?” *The Diplomat*, January 15, 2019, <https://thediplomat.com/2019/01/can-a-silk-visa-boost-tourism-in-central-asia/>

## 4. The EU and Central Asia in 2030

In the next decade, the role and presence of the EU in Central Asia will depend not only on the developments in the region itself and on other external powers – it will significantly depend also on the activity or passivity of the EU member states both at their bilateral endeavours in Central Asia and through their role in the EU. Therefore, in this chapter, the possible role of some of the currently most active EU member states in Central Asia in 2030 is assessed, followed by the vision of SEnECA experts both from Central Asia and the EU on the role of the EU in Central Asia by 2030.

### 4.1. EU member states and Central Asia: France, Germany, Latvia, Poland and the United Kingdom

SEnECA experts from the EU countries are cautious about the future role of the EU member states in their Central Asian policy vectors both in bilateral affairs and at the EU level. However, the economic interests are likely to prevail and impact also other priorities.

Susann Heinecke from Centre international de formation européenne (CIFE) considers that the relations between France and Central Asian states will have slightly intensified by 2030, with the most likely sectors of intensive cooperation to be trade and investment. The expert also expects French companies to become driving factors of improved business climate and general stability in the region. At the same time, France is also likely to continue promoting democracy and human rights in the region, notwithstanding the economic engagement.

As Julian Pottka from Institut für Europäische Politik (IEP) in Berlin notes, by 2030 there will be no major shifts in Germany's policy towards the region. Germany will continue uploading its Central Asia foreign policy to the EU level, and the Union will have become an instrument for a more active German Central Asian policy (while foreign engagement will remain contested within the domestic public, i.e. German foreign policy will remain self-restricted for historical reasons). Pottka underlines that the economic development of Germany will remain a significant determining factor in the upcoming decade – if the German economy will continue growing and expanding, it is likely that German interests and presence will increase in Central Asia as well. The economic development, in turn, will determine other Germany's involvement overall.

Māris Andžāns from the Latvian Institute of International Affairs (LIIA) in Rīga reminds that Central Asia has been one of specialisations of the Latvian foreign policy. In his view, Latvian-Central Asian relations will much depend on economic and normative drivers. If Latvian entrepreneurs will see further potential, the officials are likely to be pressured for an active approach towards Kazakhstan and Uzbekistan, the main economic partners in the region. The normative drivers will depend on the policy makers, as well as non-governmental organizations. Some of them have been actively involved in the region, and they might further push for a more active engagement. However, they also exercise other cooperation vectors and they depend on governmental and the EU support for their Central Asian activities; thus, meaningful pressures are not likely on their behalf. Until 2030, much will depend on whether the Ministry of Foreign Affairs pushes for a more active approach, which is likely. Latvia's activity or passivity will also influence the EU policy towards Central Asia, as the country is one of the few with a particular emphasis on the EU role-building in the region.

Adam Balcer from WiseEuropa in Warsaw thinks that Poland currently is underperforming, and it has a significant potential in strengthening relations with Central Asian countries. He currently sees a lack of political will which in turn leads him to be sceptical about Poland's future role in the region. At the same time, global and regional connectivity will probably lead to an increase of Polish ties with the region. According to Balcer, much will depend on the position of Poland inside the EU. In case of further disagreements inside the EU, Poland can also become more tied to the US and its approach to Central Asia; or Poland can align more with Germany and its position towards the region. Balcer also notes that cooperation in the mining and energy sector (expansion of large Polish companies externally) might fuel more interest in the region in upcoming decade.

Finally, Emily Ferris from the Royal United Services Institute for Defence and Security Studies (RUSI) in London expects that relations between the United Kingdom (hereafter – UK) and Central

Asia are likely to be relatively positive in 2030. As a result of the expected departure of the UK from the Union, the country would be obliged to forge more individual partnerships, including with Central Asian countries. This, however, means that the UK's engagement with Central Asia will not be uniform across all countries, and the UK is likely to prioritise one or two countries, such as Kazakhstan, over others. Ferris also notes that not only natural resources, but also tourism opportunities can continue to be a lure for closer future cooperation.

#### **4.2. The EU in Central Asia**

While the interviewed experts from the EU are more optimistic about the EU's role in Central Asia in a decade, Central Asian experts are more cautious. All of SEnECA experts underline that the cohesion of the EU, including approaches and interests of the Union, will be one of the basic factors determining its role towards other powers and other regions: a more cohesive and integrated EU would be a more visible and active EU in Central Asia. Heterogeneity of the EU member states will complicate achieving more consolidation in the Common Foreign and Security Policy. In this constellation, as noted by Julian Plottka, the European Commission and the European External Action Service will remain the most relevant actors of the EU policy.

Susann Heinecke considers that the EU's role will grow in the region by 2030, given the limited attractiveness and cooperation potential with Russia and ephemerality of engagement of China. However, as underlined above, the role of the EU will be influenced by the internal issues in the Union, leading the EU to "economise" its external policy vectors. The EU is likely to focus on raw materials and export market while also promoting stability and security, as well as democracy and human rights. The EU will also pursue intensified security cooperation to prevent human trafficking, drug trafficking and terrorism.

Julian Plottka thinks that the EU will be more active in 2030, compared to 2019, given the growing self-reliance in external affairs motivated by such factors as the complex transatlantic relations and need to answer to China's initiatives. Nevertheless, Central Asia will not become a priority of the EU external affairs but will remain an important niche topic. In its approach to the region, according to Plottka, the EU will consider the Russian position to avoid new conflicts. Like the previous expert, he also notes that economic issues will remain top priority for the Union which can help to promote good governance and the rule of law. In the area of the so-called low politics, education and science will be an important win-win area. Security will also remain on the agenda (such as border security, trafficking) and the EU's focus will not change significantly.

As other experts mentioned above, also Adam Balcer underlines the role of internal cohesiveness of the EU in respect to its future policy towards Central Asia. In his view, economic problems in Russia could open more space for the EU, while China's role will grow faster, nevertheless. Stronger economic relations with the EU and the weakening role of the Russian language will probably result in more cooperation in culture between the EU and Central Asian countries, though Russia's role will still remain strong. Balcer does not expect that the EU could become a hard security player in Central Asia.

Māris Andžāns thinks that the EU will continue its current course, though it will narrow down its focus and ambitions by 2030. Given the internal challenges of the EU and many external engagement priorities, from the Transatlantic link to East Asia and enlargement, eastern and southern neighbours, Central Asia will clearly not be in the core of the Union's external action, though possible turbulences in the region might slightly change priorities. Without an active approach, it is likely that the smaller Central Asian countries will gradually drift towards the orbits of other external powers, while in the foreign policy of bigger Central Asian countries the EU will retain a significant role, though smaller compared to Russia and China.

Emily Ferris thinks that in 2030 the EU is unlikely to be a major player in security and economic sphere, as she points to the growing role of Russia and China. Similarly to Balcer, Ferris believes that shrinking oil prices could, however, hamper Russia's economy and could provide more space for the EU; further economic liberalisation could offer more space for the EU as well. She deems that

in 2030 China and Russia will compete for dominance in the security sector, including offering military training, equipment or even constructing new military bases to Central Asian countries.

Pierre Borgoltz from EU LOGOS Athena in Brussels is more optimistic. He considers that the rapid transformation of the region will widen the scope of cooperation. The EU will have spent considerably in assistance for development of countries in need, also contributing to an enhanced intra-regional cooperation on trade, anti-trafficking, environmental sustainability and education. EU norms and values will have contributed to more favourable business climate and social stability. Growing connectivity of the region established during the decade with Eurasian space, East Asia, Iran and Turkey, supported by the EU, will have triggered growth in foreign investments and exports, especially in the larger Central Asian countries, contributing to the socio-economic development, with possible spill-over impact on the poorer Central Asian countries. EU's know-how will be appreciated in dealing with environmental issues such as water and air quality, energy efficiency. EU's support will have been significant in education and the younger generation in general. Finally, according to Borgoltz, in 2030, the EU's approach will have become more differentiated regarding each of these countries. In economic relations, geographically closer countries will have taken the upper hand and the EU's economic clout will have decreased.

SEnECA experts from Central Asia are more cautious on the role of the EU in Central Asia in 2030. Anna Gussarova thinks that the EU is likely to decrease its presence in Kazakhstan and the region at large. The region might remain important to the EU in regard to the situation in Afghanistan. At the same time, under Russia's propaganda in Central Asia, she expects that the EU's public image will remain poor and rather negative.

Nazira Momosheva considers that the EU will continue to have the same role in the region as in 2019 – an important partner and key donor. The role of the EU will depend on the success of its development cooperation policy and assistance in the region, modernisation of infrastructure, energy and security. In regard to Kyrgyzstan, the GSP+<sup>14</sup> will remain an important trade facilitator. Given the trade volumes between the EU and China, Central Asia might become a more important transit region for both sides and a ground for enhancing common cooperation. Thus, she thinks, the EU might benefit from China's infrastructure projects in Central Asia.

Abdugani Mamadazimov thinks that despite the new 2019 Central Asia Strategy of the EU, the Union's activity will decrease in Tajikistan. One of the main issues to be considered is the difference in political culture: different approaches to human rights and freedoms and social behaviour of citizens. He underlines that Tajiks, especially the youth, will keep looking at the EU with interest, particularly in terms of education and free lifestyle. Therefore, generational transition, i.e. possible reorientation of values as the Soviet-born generation passes, might pave the way for not only retaining but also increasing EU's attractiveness in Tajik society.

An expert from Turkmenistan notes that the EU countries are currently seen as reliable, interested and well-off partners, cooperation with whom is perceived positively. At the same time, attractiveness of the EU (especially of its values and culture) in Turkmenistan gradually decreases, while attractiveness of the Islamic countries is on the rise. As mentioned before, the expert thinks that Turkmenistan will engage more with other external partners, however, the relative role of the EU will grow slower than the role of other external actors, especially of the Arab countries, Iran, China, the US, Turkey and Russia.

Khulkar Karimonva thinks that in 2030 the role of the EU in Central Asia will remain significant. She expects the EU's continued engagement in education, agriculture, manufacturing; also, cooperation in education and tourism could be on the rise. At the same time, she admits, that the EU is already now less visible than such countries as China, Russia, Turkey, Kazakhstan, or the US. In her view, this trend is likely to continue in the next decade.

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<sup>14</sup> Generalised Scheme of Preferences by the EU. For more information, please see: "Generalised Scheme of Preferences (GSP)," European Commission, <http://ec.europa.eu/trade/policy/countries-and-regions/development/generalised-scheme-of-preferences/>

## 5. Conclusions

It is clear that various certain and uncertain factors will influence the future development. Notwithstanding many uncertainties, SEnECA experts consider that the current positive trends in political, societal and economic development will continue in all five Central Asian countries – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan. The levels of progress will differ, depending on political, economic and societal reforms, availability and use of natural resources, internal and external turbulences, the role of the external powers, etc. As a result, SEnECA experts consider that in 2030, Central Asian countries will be slightly better off and most of them will be more economically open to the outside world. However, freedoms and liberties will progress at a much slower pace and their levels will be different in each of the five countries. At the same time, sudden and unexpected changes in political, societal and economic issues with profound impact on one or more countries – both for the good and for the worse – cannot be excluded.

In 2030, Central Asia will be a more cooperative region. SEnECA experts expect that bilateral and multilateral relations will improve as new domestically and externally facilitated engagements will develop in such spheres as travel facilitation, water management, cross-country regional engagement. An enhanced Central Asian cooperation, however, will not amount to regional integration. Issues of tension among the regional countries will remain, especially regarding water management and borders. Also, as a result of internal or externally facilitated developments, some of the countries might become less “Central Asian” and follow a more individualistic path instead or choose to align with some other countries or regions. Therefore, despite positive trends in intra-regional cooperation, in 2030 it might become more problematic to denote the current five countries as one region. Gaps in the economic development, trade vectors, external political and economic engagements, development rate of societies, the state of freedoms and the rule of law, as well as other factors can alienate some of the countries from others.

Finally, in 2030 the EU will remain an important player, though it will be only one of several important players in the region. Economic engagement will remain the central driver for cooperation (though currently the EU is the biggest trade partner of Central Asia, it is the biggest trade partner only of Kazakhstan)<sup>15</sup>, having impact also on other sectors, e.g. as a facilitator for political and societal engagement and development. The EU’s comparative role in the region will be smaller against the backdrop of the growing Chinese economic and political influence and persistent Russia’s political, economic, military and cultural influence. Neighbouring China will continue its assertive investment programmes, whereas the external debt to China of some of Central Asian countries will continue to grow and will have an impact on political processes as well. Russia will strive to develop its dominated CIS, EAEU and CSTO, whereas its military presence and pervasive cultural influence will guarantee it a central role in the region. Both of these countries are likely to coordinate their policies at a certain extent. Meanwhile, the role of other external powers, especially that of India, Turkey, Iran, Arab countries, will strengthen. They lie geographically closer compared to the EU and have specific interests apart from the economic engagement, such as strengthening the common linguistic, religious or cultural engagement, or to counter other powers striving for influence in Central Asia.

Given both the internal changes and the role of external actors, in a decade’s time, the operational environment for the EU will have shifted: Central Asia will be different from today and the EU’s approach has to be adjusted accordingly. First of all, the EU has to define more clearly what Central Asia means to it – is it one of the adjoining regions of EU neighbours, or is it a region with specific and distinctive interests? Secondly, the EU has to define values upon which its new approach would be based – will it prioritise promotion of freedoms and the rule of law, or will stability and economic cooperation take the central role? Thirdly, the EU has to comprehend what it is able and what it is not to achieve in Central Asia in a decade. Last but not least, the EU has to establish a clear approach as to how to interact with other external powers in the region – which countries and organizations

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<sup>15</sup> European Commission, European Union, Trade in goods with Kazakhstan, April 16, 2018, 8, [http://trade.ec.europa.eu/doclib/docs/2006/september/tradoc\\_113406.pdf](http://trade.ec.europa.eu/doclib/docs/2006/september/tradoc_113406.pdf)

are partners and which are rivals, and how the interaction with others could best serve the interests of the EU and Central Asia.

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