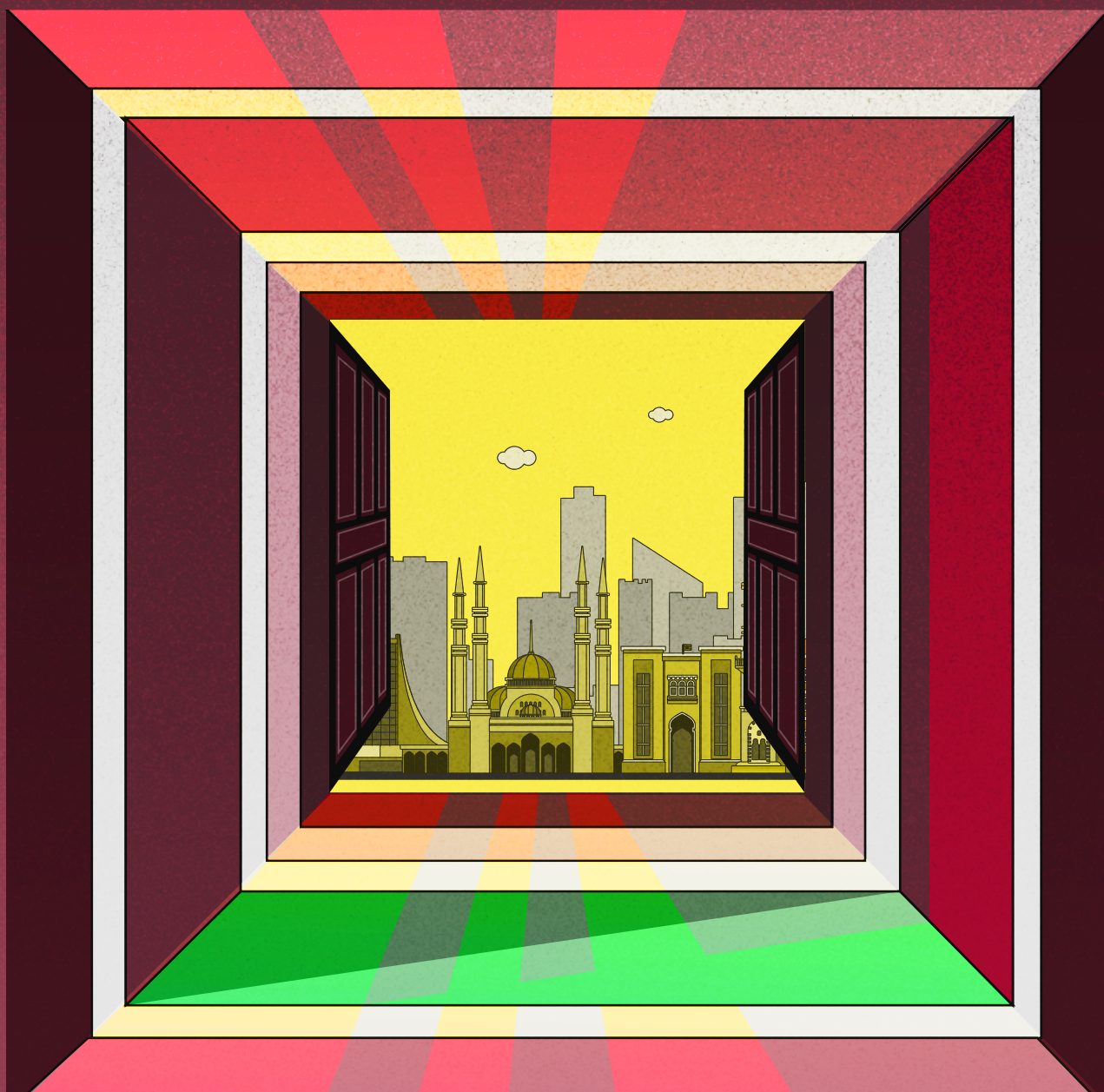


CLOSING WINDOW OF OPPORTUNITY

India's Central Asia Policy in a new Eurasian security context

Dr. Sidharth Raimedhi



About this report

India's Central Asia (CA) policy had acquired greater momentum and focus before Russia's war on Ukraine in early 2022. However, the sudden eruption of the Russia-Ukraine war led to uncertainty in New Delhi about the future political trajectory of Central Asia in light of growing Russian weakness in the region. The report discusses India's trajectory of opportunities and constraints vis-à-vis CA, especially in light of recent changes. In particular, the report focuses on the emerging role of Chabahar port in driving India's CA policy and illustrating India's geopolitical challenges in the region. The report also takes stock of Chinese economic, security, and political influence in CA and notes adaptations in China's approach in recent years. Finally, the report discusses the broader policy approach India should adopt, in light of emerging trends. It recommends actionable measures India can take to broaden and augment its engagement with CA.

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CONTENT

**Executive
Summary** **05**

Introduction **07**

**India Central
Asia Policy:
2000-2022** **08**

*Bilateral Engagement: Beyond Connectivity
Constraints in India's CA outreach and policy
Business ties and access
Connectivity constraints
Impact of The Russia-Ukraine War*

**Chabahar
and shifting
Geopolitics in
the region** **15**

*Recent shifts amidst Greater Russian and Chinese interest in Chabahar
Geopolitical shadow over Chabahar
Iran's strategic choices and India's CA policy
Pakistan's geographic advantages*

Emerging challenges in Central Asian geopolitics **22**

China's new inroads in a new Central Asia **25**

Geopolitics

Economic Entrenchment

Emerging sectors

Green sector

Soft Power and societal linkages

India's (closing) window of opportunity **33**

Recommendations **37**

Socio-development aid

Language training, Visas and academic, media, and Think Tank exchange

Renewables sector

Knowledge-sharing mechanisms and Track 2 engagement

Skill training

Critical minerals

Conclusion **42**

Endnotes **43**

Executive Summary

- > Recent shifts in Central Asia have placed the region at the center of global politics, fostering greater linkages, and a flurry of diplomatic summitry with an ever-widening number of partners.
- > The Russia-Ukraine war has increased the region's uncertainties, leading Central Asian countries to seek opportunities for cooperation with new and emerging partners.
- > This endeavor is driven by the region's need for economic diversification, technological assistance, self-reliance, political security, green and sustainable growth, and opportunities in the critical minerals sector.
- > Chinese economic engagement and heft in the region, coupled with its proximity to the region, has placed it in the most advantageous position to benefit from recent shifts, raising concerns about long-term impacts.
- > India's Central Asia policy has received a boost in recent years, especially since this year, when it signed a long-term agreement with Iran over operationalizing the deep-water Chabahar port.
- > India seeks to enhance its political and economic presence in Central Asia because of the region's importance to India's long-term economic and geopolitical objectives. Meanwhile, India's linkages with the region are lagging behind its stated interests and political will. However, recent economic shifts in the region offer new opportunities for re-engagement.
- > At the same time, a growing trend towards geo-economic cooperation—centering around connectivity—between China, Russia, Pakistan, and Iran will pose further challenges to Indian policy objectives in the region.
- > India's ability to improve port infrastructure in Chabahar and strengthen trade ties with the region will be crucial to its success or failure of its policy objectives in the coming years.

- > Hence, India needs a new policy for the region based on greater economic cooperation through B2B exchanges, government support through grants and diplomatic efforts, and cooperation with like-minded partners.
- > India needs to focus on emerging sectors such as manufacturing, renewable energy, critical minerals, and socio-developmental aid through assistance in sanitation, language training, and overall trade enhancement. Such efforts need to be complemented by a focus on gaining greater local knowledge and access and by creating institutions such as dedicated research departments and information portals.
- > Central Asia is an emerging region with strong growth rates but faces acute governance and climate-change-related challenges. The region's importance to India lies in its natural resources, opportunities for energy diversification, access to critical minerals, broader market opportunities, role in stabilizing Afghanistan, counter-terrorism cooperation, and cooperation within the SCO. These factors call for greater attention from India. Without such investments, the region will increasingly become over-dependent on the Chinese economy, leading to the corrosion of its ties with India and a loss of opportunities for both sides.

Introduction

India's Central Asia (CA) policy had acquired greater momentum and focus before Russia's war on Ukraine in early 2022. Just before the start of the war, in January, Prime Minister (PM) Narendra Modi had invited Central Asian leaders as chief guests for India's Republic Day parade. In the same month, India hosted the first-ever India-Central Asia summit (virtual). This occurred against the backdrop of establishing the India-Central Asia dialogue mechanism in 2019 and India's entry into the Shanghai Cooperation Organization (SCO) in 2017. However, the sudden eruption of the Russia-Ukraine war led to uncertainty in New Delhi about the future political trajectory of Central Asia in light of growing Russian weakness in the region.

This report assesses the scope and nature of recent shifts in CA and growing regional geopolitical trends. Its objective is to analyze India's CA policy as it stands and the potential need for re-adjustments.

In a new Eurasian security context, CA is undergoing both internal and external changes. Internal changes include CA's increasing focus on market liberalization, diversification, regional integration, and a greater diplomatic push towards partnering with numerous geopolitical actors. External changes include increasing uncertainty about Russia's role and influence, China's growing assertiveness and confidence, and enhanced cooperation among revisionist powers like Russia, China, Pakistan, and Iran. This cooperation focuses on trade, connectivity networks, and creating a more self-sufficient regional order that relies less on the West.

The report discusses India's trajectory of opportunities and constraints vis-à-vis CA, especially in light of recent changes. In particular, the report focuses on the emerging role of Chabahar port in driving India's CA policy and illustrating India's geopolitical challenges in the region. The report then takes stock of Chinese economic, security, and political influence in CA and notes adaptations in China's approach in recent years. Finally, the report discusses the broader policy approach India should adopt, in light of emerging trends. It recommends actionable measures India can take to broaden and augment its engagement with CA.

India Central Asia Policy: 2000-2022

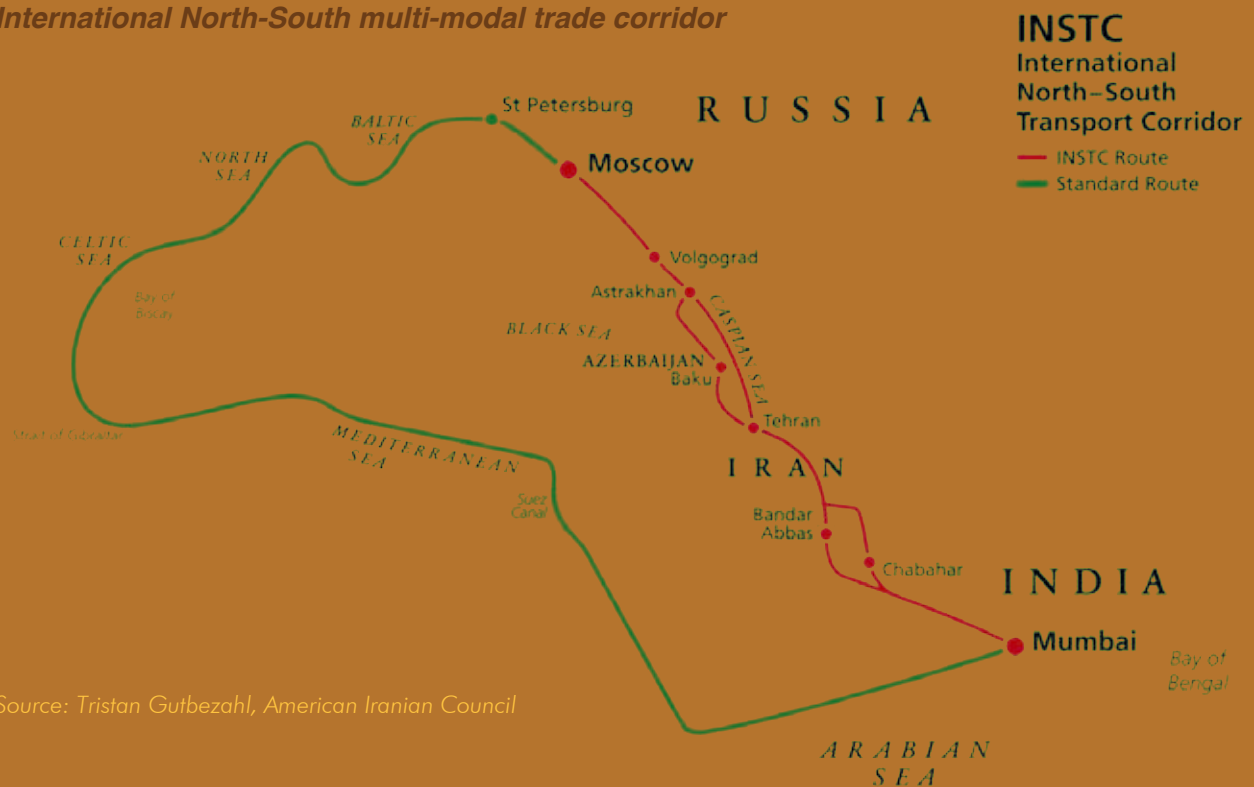
India's contemporary CA policy was conceived in, and around, the early 2000s and centered on enhancing trade with the region based on achieving physical connectivity.

The policy was based on the following assumptions:

- > *The future salience of Central Asia as a region for global trade and regional geopolitics,*
- > *India's assured and growing global economic footprint and its need to diversify energy and minerals imports,*
- > *and the need for stability and peace in the region, given the rise of transnational fundamentalist terror groups.*

To achieve these objectives, India constantly sought bilateral cooperation with each country in the region. New Delhi also relied on its robust ties with Iran and Russia to jointly conceive of and operationalize the International North-South multi-modal trade corridor (now known as the INSTC). The 7200 km trade corridor would connect Indian and European markets through Eurasian land routes and, in the process, enhance India's connectivity with the whole region, especially with Central Asia and later Afghanistan. As such, the first agreement was signed in 2000, followed by its ratification in 2002.

International North-South multi-modal trade corridor



In the 2000s, India had conceived of another physical linkage with CA. The Turkmenistan–Afghanistan–Pakistan–India (TAPI) gas pipeline was supposed to link the gas fields of Turkmenistan with increasingly energy-hungry South Asian markets of Pakistan and India, supplying 33 bcm annually through an 1800 km pipeline. Although it began primarily as a Turkmenistan–Pakistan initiative in 1995, its true potential lay in India’s assent and participation. However, ever since, the project has faced innumerable obstacles with minimal progress. This has changed to an extent in recent years due to coalescing

interests between an energy-starved Pakistan, a Taliban-led Afghanistan’s need for legitimacy and revenues, and Turkmenistan’s need to diversify its exports away from Russia and China.¹ This time, despite much nudging from Turkmenistan, India appears less enthusiastic about the project. It cites concerns including commercial viability, security, and bilateral relations with Pakistan. The change of leadership in Kabul in 2021 has certainly not increased New Delhi’s enthusiasm either.

Ceremony on completion of the Turkmen section of the Turkmenistan-Afghanistan-Pakistan-India natural gas pipeline, Serhetabat, Turkmenistan



Source: Wikimedia Commons

India's interest (mainly in the 2010s) in offering Afghanistan an alternative trade and connectivity route had led to India's strong stakes and involvement in the Chabahar port in Iran. This interest was only significantly reinforced when news of the operationalization of the Gwadar port through the much-controversial China-Pakistan Economic Corridor (CPEC) program began in 2016. In Delhi's strategic circles, Chabahar and the planned India-constructed rail line towards Afghanistan from the port became India's main 'response' to Gwadar and CPEC. From the beginning, the project was also seen as the crucial and final node in the INSTC, linking the Indian port of Mumbai to Europe via Central Asia and Russia. However, the development of the port, along with its operationalization, has not progressed satisfactorily so far (see below).

For long, India's Central Asia policy has been contingent on its ability to achieve physical connectivity to the region, whether through pipelines, railways, or ports. Insufficient progress in this direction, however, has had a debilitating effect on the breadth and scope of overall relations with the region.

Bilateral Engagement: Beyond Connectivity

Outside of India's experience with various bottlenecks and challenges in establishing connectivity with the region, New Delhi has relied on robust political relations with all five Central Asian states to explore and establish different forms of cooperation. India maintains a substantial security partnership with Tajikistan, having renovated and occasionally utilized the Ayni airbase, primarily in a civilian capacity, such as during evacuation missions related to Afghanistan in 2021.² In Tajikistan, India is spending USD 20 million on construction work on the Dushanbe-Chortut highway project. Meanwhile, India and Kazakhstan have been engaging in high-level talks on defense, trade, space, and counter-terrorism cooperation.

Both sides are exploring the possibility of joint development of next-generation satellites and a space communication system (satellite) KazSat-2R.³ The two sides have also set up a Joint Business Council to promote trade, economic and investment cooperation. As part of a civilian nuclear agreement, India sources nearly 80% of its uranium requirement from Kazakhstan.⁴

India has also assisted in training the Kazakh Caspian fleet, participated in counter-terrorism exercises with Kyrgyz special forces, and helped construct the Zaranj-Delaram and Zaranj-Milak roads linking Iran and Afghanistan. India has established IT centers in Bishkek, and more

than 800 Kyrgyz professionals have received training through the prestigious Indian Technical and Economic Cooperation (ITEC) program.

Narendra Modi being briefed about the gifts of medical equipment from India to Field Hospital, Kyrgyzstan, in Bishkek on July 12, 2015. The Prime Minister of Kyrgyz Republic, Mr. Temir Sariyev is also seen.



Source: Press Information Bureau image ID 67628

India's engagement with Central Asia was boosted in 2017 when, along with Russia's help, it formally joined the SCO. However, anticipating fresh challenges, China sought to counter India's influence and insisted on Pakistan's simultaneous induction into the organization.

In the years before 2022, India made significant political-diplomatic investments in the region.

In January 2022, India organized and conducted the first-ever India-Central Asia Virtual Summit. Notably, it came within two days of China's own China-Central Asia Summit (a format repeated in person the following year in Xian). The virtual summit occurred within two months of President Putin's visit to India in December 2021, during which the two sides discussed avenues of cooperation and joint co-production of weapons systems in Central Asian countries.⁵

According to analysts, India's uptick at the time in engagement with Central Asia 'had the backing of Russia' as both powers shared similar concerns about China's rise in the region.⁶

Despite various efforts by Delhi to enhance linkages with the region, India's overall trade with the region has hovered around 2 billion USD over the last ten years. In comparison, China's trade amounted close to 90 billion USD in 2023. More crucially, overall trade increased by 20 billion USD within just a year since 2022.⁷ India's bilateral engagements over the last two decades do, however, create the foundation for a significant uptick in trade ties in the coming years. This will require India to overcome constraints, actively pursue opportunities, and deftly navigate emerging geopolitical shifts.

Constraints in India's CA outreach and policy

Business ties and access

Bilaterally, Indian companies have been wary of investing in the region due to apprehensions about the rule of law, arbitration mechanisms, and corruption. Public companies, backed by the government, also struggled to secure contracts and projects throughout the 2000s (and later) in the energy sector, often losing out to bids by Chinese companies. The latter, in turn, were often advantaged by persistent diplomatic efforts by Chinese embassies, government financial support, and subsidies.

According to an estimate, in this period, India lost bids to Chinese companies totaling USD 12.5 billion.⁸ India has always struggled to access, nurture, and develop robust working relations with key Central Asian ministries and companies, often owing to less-than-perfect local knowledge and information. Building such ties and linkages will be critical, including utilizing the Chabahar Port as India's 'gateway to Central Asia'.

Connectivity constraints

For the last two decades, India's CA policy has been based on achieving physical connectivity or access to the region through three main projects (INSTC, TAPI, Chabahar). Only in recent months has the agreement between India and Iran injected fresh optimism and impetus into such initiatives. In an ideal world, all three projects would have taken off by now, undergirding India's connectivity with the region, facilitating exchanges, and allowing a rising democratic India to emerge as a key player in the strategic region. However, the projects have been impeded by several factors. A common factor has been Western sanctions on Iran. Other factors include bilateral disagreements, financial constraints, questions on commercial viability, and low volumes of existing (if not declining) trade among key stakeholders.

Impact of the Russia-Ukraine War

Russia's war on Ukraine has had a paradoxical impact on India's connectivity plans in the Eurasian and Central Asian region. On the one hand, for several players, it has increased the value of such linkages (thereby leading to a rush of agreements, visits, and discussions). On the other hand, the war and its resultant economic isolation of a sanctioned Russia have also complicated India's attraction towards the INSTC, given that one of its core rationales was India's access to European markets through Russia. Furthermore, Russia, Iran, China, and Pakistan are discussing fresh connectivity

initiatives; a growing convergence between these four states threatens to constrain India's maneuvering space in the region further.

Russia has shown greater interest in all three projects as an immediate recourse in order to compensate for trade losses vis-à-vis Europe.⁹ Moscow increasingly sees India as the long-term substitute for Europe in terms of its gas exports, which had plummeted from 167 bcm to 45 bcm since the war. Moscow and Tehran have also expedited cooperation in enhancing rail linkages as part of INSTC (Rasht-Astara

rail link).¹⁰

Since the war, Central Asian republics, in turn, have found more reasons to diversify their trade and political relationships and partly reduce dependency on Russia. Under the new regime, Afghanistan is in desperate search of revenues and has shown great interest in TAPI to benefit from transit levies. It has also been working towards the Trans-Afghan railway that seeks to connect China, Iran, Afghanistan, and Pakistan.¹¹

A constellation of interests between China, Russia, Iran, and Pakistan already threatens India's foothold and strategic interests in the Port of Chabahar (as discussed in the next section). This concern has driven India's recent efforts to expedite the resolution of long-standing disagreements with Iran and port infrastructure-related issues.

Chabahar and shifting geopolitics in the region

The Chabahar project, conceived in the early 2000s, aimed to invest in the Iranian port by redeveloping and refurbishing it, thereby connecting India directly with Afghanistan and bypassing Pakistan. The idea rested on operationalizing an oceanic port in South-East Iran and connecting it by railway links to Zahedan in Afghanistan, and eventually towards Uzbekistan and Central Asia. After a period of stagnation, the project was revived in 2016 due to the signing of the Joint Comprehensive Plan of Action (JCPOA) between Iran and the permanent members of the UNSC and the European Union. The JCPOA lifted sanctions

on Iran and permitted the acquisition of bank assistance and credits for the project. For New Delhi, the project also acquired great political and strategic significance as a riposte to the China-Pakistan-Economic Corridor (CPEC) and China's much-accelerated involvement in the Gwadar port in Pakistan, in the same year. By facilitating access to and from Central Asian markets through the port and its auxiliary rail links, the project is also expected to enhance India's saliency to the region and direct trade flows towards South Asia and the wider world.

Chabahar Port



Source: Amohammadid, Wikipedia Commons

However, the resumption of sanctions on Iran in November 2018 further damaged the prospects despite an exemption extended by the U.S. The project also struggled due to differences between India and Iran over matters of arbitration as well as over Iran's insistence on the participation of a construction company under the controversial and sanctioned Iranian Revolutionary Guards.¹² Moreover, India had contracted the Chinese company Shanghai Zhenhua Heavy Industries to acquire four crucial Rail-Mounted Quay Cranes (RMQCs) for on-loading and offloading operations. However, the border skirmish in Eastern Ladakh in June 2020 led India to establish new procurement rules that, in effect, debarred the Chinese company from the project. India issued several tenders for similar cranes from global manufacturers immediately following the cancellation, without much success ever since.¹³ This has led to the Port terminal's strong under-capacity and delays in initiating the ten-year contract between India and Iran.

Recent shifts amidst greater Russian and Chinese interest in Chabahar

However, over the last year, India has shifted its strategy and opted for six mobile harbor cranes instead of four RMQCs as a less-than-optimal recourse to prevent further delays.¹⁴ This approach of greater urgency is also reflected in the strong emphasis that India has placed on enhancing trade flows through Chabahar during a visit of an Indian delegation to Afghanistan. A spokesperson from the Indian Ministry of External Affairs

noted, "The delegation held discussions on India's humanitarian assistance to the people of Afghanistan and also discussed the use of Chabahar port by Afghan traders".¹⁵ Echoing similar sentiments, a Taliban veteran leader recently observed, "Fortunately, Chabahar is exempted from American sanctions on Iran. Therefore, India should expedite the completion of this connectivity project."¹⁶

Geopolitical shadow over Chabahar

Russian uptick in its interest in the project has also been clear since the war and was reflected in a high-profile visit by officials to the port in November 2022. Russian analysts also routinely note Iran's dissatisfaction with India over the pace of project development and have offered Russian and Chinese companies opportunities to invest in the project.¹⁷

Russia could significantly increase its investments in the Chabahar project; in terms of investments in the port (incl. Free Trade Zone) and the railway line to Afghanistan that India was supposed to construct earlier. Whereas New Delhi would prefer Russian involvement (instead of Chinese collaboration), the prospect of Russo-Chinese cooperation in the project has only been growing.

It is worth noting that China opened a shipping line to Chabahar last year, and Moscow will not look unfavorably upon the prospect of greater synergy between Chabahar and Gwadar.

This convergence took a worrying shape for India in recent months. In March 2024, amid fears of escalation in the Red Sea, a joint naval exercise between Iran, China, and Russia took place in the Gulf of Oman to enhance maritime cooperation in contingencies resembling the then-ongoing piracy and Houthi-linked threats in the Red Sea. Notably, Russian, and Chinese vessels chose Chabahar port as the starting point for the exercises.¹⁸

A Russian warship is seen during a joint naval military drill between Iran, Russia, and China in the Gulf of Oman, Iran, in this picture obtained on March 15, 2023.



Source: Amohammadid, Wikipedia Commons

Iran's strategic choices and India's CA policy

Geopolitical pressures have been nudging Iran towards shifts in perspective and policies about the Chabahar port. Tehran is more inclined viewing Chabahar as an international port, rather than a strategic asset for India. This implies future opportunities for cooperation with both China and Pakistan in the project. This is generally indicated by Tehran's decision to ease India out of the railway project and extend contract offers to Chinese companies.¹⁹ In response, India has insisted that Indian companies remain active and essential in contributing to the railway link project, a characterization that Iran's Ambassador to India failed to support.²⁰ Even as Tehran eased India out of the crucial railway project, it continued to request India to provide equipment such as cranes and signaling systems since imports from elsewhere proved difficult due to sanctions.

Iranian President Hassan Rouhani poses during the inauguration a newly built extension of the port of Chabahar, near the Pakistani border, on the Gulf of Oman, southeastern Iran (Dec. 3, 2017).



Source: AP Photo/Ebrahim Noroozi

Iranian scholars and officials believe that Tehran can benefit from India-China geopolitical competition in the region while preventing New Delhi from politicizing connectivity projects for its geopolitical pursuits. For instance, a former CEO of Iran's Ports and Maritime Organization stated that China could turn Chabahar into a 'gateway of the landlocked Central Asian countries to the ocean.' He also suggested concrete ideas of cooperation, such as ground transportation between Chabahar and Gwadar, and that there are 'no barriers' if Pakistan is interested.²¹

This is a factor that New Delhi will increasingly have to consider. Without increased investments and prompt operationalization of the port, India's influence and role in Chabahar could face greater risks and challenges. At the same time, Pakistan has been offering Central Asian states access to the Indian Ocean through its ports, including Gwadar. Such offers have the full support of Beijing. The China-Iran strategic 25-year Cooperation Program has brought the two countries economically and strategically closer. Indian analysts have also expressed

concern about the naval dimension of the relationship.²² China's mediation efforts during the recent crisis in Iran-Pakistan relations further reflect Tehran's growing dependency on Beijing and the latter's enhanced diplomatic profile in the region.²³

Pakistan's geographic advantages

There is a discernible trend of increasing linkages between CA and Pakistan, spurred in part by common concerns over instability in Afghanistan. In February 2024, the World Bank sanctioned funds for the Afghanistan section of CASA-1000 – a project that would export surplus electricity (hydropower-based) from Tajikistan and Kyrgyzstan to power-starved Afghanistan and Pakistan. Islamabad has been actively lobbying with the two Central Asian countries for the initiation and

operationalization of the project. Recent multi-modal MoUs signed by SCO states' Transport Ministers include Pakistan but leave out India.²⁴ In recent months, Pakistan's efforts to implement a decades-long gas pipeline agreement with Iran could undermine TAPI. Even Russia has been evocative in its willingness to support both projects.²⁵ Such developments increase Pakistan's leverage over Turkmenistan as well as Afghanistan.

TashKömür Hydro Power Plant on the river Naryn in Tash-Kömür, Kyrgyzstan.



Source: AP Photo/Ebrahim Noroozi

Pakistan has also made some headway in talks with Uzbekistan, Kazakhstan, Gulf states, and Afghanistan on constructing a 780 km Trans-Afghan railway to connect Central Asian markets with Pakistan's ports on the Arabian Sea.²⁶ From the ports, the goods will travel only a short distance to the UAE and Qatar.²⁷ However, continuing political differences between Uzbekistan and Afghanistan will likely pose serious challenges to the project.

In various multilateral and bilateral meetings with leaders from CA, India has been strongly advocating using the Chabahar port for maritime-based trade. However, India's connection to Central Asia has been held hostage for too long due to geopolitical uncertainties. While this has led to stagnation, Pakistan and China have been able to promote Central Asia's linkages towards Pakistan, CPEC, and Gwadar. Russia's interest in new energy markets has incentivized it to endorse and support such linkages towards Pakistan – contributing to Russia's support for Pakistan's membership into INSTC.²⁸ In a regional conference in Tashkent in 2022, China surprised many observers by announcing its willingness to integrate Central and South Asia by offering support for a rail line between Peshawar in Pakistan and Mazar-e-Sharif in Afghanistan. Notably, such initiatives undermine India's role in the region by favoring linkages to South Asia and the Indian Ocean Region (IOR) through Pakistan instead of India.²⁹ Highlighting such trends of connectivity cooperation between Russia and China, prominent policy expert Frederick Starr noted, "This will leave those two powers in control of the entire heart of Eurasia, creating a single band of dependent states stretching from the Pacific to the Middle East and from the White Sea to the Arabian Sea."³⁰

Growing Eurasian convergence is also likely to increasingly shape the agenda of the SCO, where India could find itself undermined in the coming years. A Russian analyst recently stated, "Russia perceives the SCO as an important platform in terms of security, whereas India sees it as a tool for maintaining a political presence in the Eurasia region. The discrepancy derives from the confines of political maneuvers in the organization faced by India and caused by a political confrontation with China and Pakistan. Russia does not share India's apprehensions regarding China's dominant role in the SCO".³¹ In this context, India would need to significantly improve its relations with Central Asian countries to enhance its position within the organization.

Emerging challenges in Central Asian geopolitics

Ever since the fall of the Soviet Union, Central Asian countries have sought to preserve and enhance their national independence and strategic autonomy. At the same time, their status as land-locked societies close to Eurasian giants (Russia and China) has limited their agency. The elites of the five countries continued to have strong linkages with Russia. Soviet-era pipelines and energy networks were kept in place and continued to play a role in determining the space for independent energy policies. Russia continues to rely on such networks to further increase its leverage in the region.³² Aware of Russia's sensitivities and interests in the region, Central Asian countries cooperated closely (except Uzbekistan and Turkmenistan) with Russia in the security sphere. Russia has maintained a military and security presence in most countries, and Kazakhstan, Kyrgyzstan, and Tajikistan have remained members of the Russia-led Collective Security Treaty Organization (CSTO).

In the 1990s, the region gained significance due to its abundant natural resources (hydrocarbons and minerals), leading U.S. corporations like Chevron and Exxon Mobil to secure and expand their presence there. After the September 11 terror attacks, the region's geopolitical importance increased as the U.S. sought bases, airfields, and the cooperation of the region in conducting its counterterrorism operations. Greater U.S. presence, in turn, helped shape the SCO's character and helped establish a new working consensus between Russia and

China on consultations-based management of the region's security and political landscape. Certain events have cumulatively realigned or accentuated several trendlines. These events include the U.S.' somewhat abrupt pullout from Afghanistan in 2021, The Russia-led CSTO intervention in Kazakhstan in January 2022, the Kyrgyzstan-Tajikistan border conflict, and most importantly, the Russia-Ukraine war in February 2022.

First, such events have promoted a stronger regional identity and greater diplomatic coordination between the five Central Asian countries. Since 2022, these states have sought to enhance their strategic autonomy from Russia by expanding linkages with partners such as the U.S., the European Union, France, Turkey, the Gulf states, India, Singapore, Japan, and South Korea. More importantly, they have also looked to China to play a more stabilizing role in the region, almost as a counterweight to perceived Russian instability and recklessness.

Second, anxieties relating to the impact of climate change on the region and the region's vulnerability to fluctuations in the global commodities market have driven the region towards a strong focus on diversification. The emphasis has moved towards manufacturing, assembly, skill training, small-scale and more sustainable green investments, and pressure on investors to 'localize' production. This has happened in lockstep with the drive towards liberalization, economic reforms, and cross-border trade facilitation.

The region is looking to integrate more closely with global supply chains and create economies that generate sustainable employment for local populations. Growing concerns over socio-political instability are also responsible for strengthening such trends.

Central Asia's attempts at shifting its economic trajectory and related new areas of focus are meant to help address at least two other challenges.

Firstly, the above-mentioned economic shift is expected to help reduce the region's systemic dependence on Russia and China. One of Russia's key leverages remains its influence within the energy sector. Meanwhile, over a decade of experience with Chinese investments in infrastructure, coal, and energy pipelines has caused enough wariness over rising debt, over-dependency on Chinese demand, environmental impact, corruption, and related public anger. Central Asian states seek to alter the nature of economic interaction with China (towards a more sustainable pathway), as well as enhance their strategic autonomy by integrating with global markets.

Secondly, the region has been witnessing growing citizen-led protests over the years. The uprising in Kazakhstan in January 2022 and in the semi-autonomous region of Karakalpakstan in Uzbekistan are reminders that political systems in the region may not be as stable as they appear.

The prospect for socio-political instability is heightened by the states' limited ability to cater to some of the citizens' basic needs. Economic outmigration from the region attests to the region's relative failure to generate a sufficient number of high-paying jobs and its heavy dependence on Russia for both employment and revenue from remittances. In this context, Central Asian countries are increasingly drawn towards cooperative mechanisms that address socio-developmental objectives (health, education, access to clean water, skill training, sanitation) and help localize production to achieve a balanced economy.

Protesters take part in a rally over a hike in energy prices in Almaty, Kazakhstan, on Jan. 5 2022.



Source: Abduaziz Madyarov/AFP via Getty Images

Significantly, China is the largest beneficiary of these trends in CA and has successfully presented itself as the most viable partner. China has offered cooperation in helping the region achieve its evolving objectives, from localization to green tech investments to skill training and greater connectivity through investments in railway links. The region values Chinese involvement and assistance in this regard but is also aware of the dangers of overdependency.

China's new inroads in a new Central Asia

Geopolitics

China's growing influence in Central Asia has long been based on a tacit social contract with Russia, whereby the latter took primary responsibility for political and security issues while Beijing expanded its economic foothold. Both Eurasian powers cooperated in the 2000s and 2010s to counter U.S. military presence in the region. Their joint institutional management of SCO also represented a somewhat new conflict and competition management model to limit foreign influences in the region. In recent years, especially since the Ukraine war, China has become less than content to remain straight-jacketed as only an economic power in the region. For most of 2022 and 2023, the war raised the prospect of Central Asia significantly moving away from Russia's orbit and towards the West. This led China to step up its security and diplomatic role to counter such trends. Additionally, the growing conflict between Kyrgyzstan and Tajikistan over access to water resources, as well as between Azerbaijan and Armenia, have emerged as signs of corroding regional stability.

The civil unrest in Kazakhstan in January 2022 and China's absence from the resultant developments also caused concern in Beijing, highlighting the vulnerability of Chinese investments (close to USD 28 billion as of 2022) in the region due to socio-political instability.

Before the SCO summit in Samarkand in 2022, President Xi Jinping decided to visit Kazakhstan and Uzbekistan. Most notably, President Xi seemed to extend strategic-level political assurances to Kazakhstan regarding its sovereignty and territorial integrity.³³ This could only have been aimed at Russia in the then-prevailing political climate. In fact, Chinese officials made similar statements within two months of the war in a joint meeting with a visiting Kazakh delegation.³⁴

However, such statements are geared more towards bolstering China's reputation as a responsible leader in the region rather than a statement of actual intent.³⁵ Beijing remains very reluctant to be embroiled in complicated security matters in the region, with its focus set on narrower interests vis-à-vis Afghanistan and Xinjiang-related terror groups. What it seeks to do, however, especially through initiatives such as the Global Security Initiative (GSI), is to present itself as a more stable and credible political force in Central Asia.

Chinese President Xi Jinping (center) and his wife Peng Liyuan (fourth from right) hold a welcome ceremony for Central Asian leaders and their wives in the city of Xi'an, north-west China's Shaanxi Province, on the evening of May 18, 2023.



Source: Xinhua

Similar reassurances were repeated by President Xi during the Xi'An summit in May 2023, even as Beijing adopted a more cooperative (albeit unequal) approach towards Russia, as signified in the March summit between the two Presidents.³⁶ During the latter, Beijing seemed to pull back from its earlier tone of reassurance towards Central Asia by emphasizing cooperation with Russia in achieving the same.

The joint statement released after the Putin-Xi summit in March 2024 mentions, "The two sides are willing to strengthen cooperation, support Central Asian countries in safeguarding their national sovereignty, guarantee national development, and oppose external forces' promotion of 'color revolutions' and interference in regional affairs."³⁷ Russia's greater unstable position in the region may

have facilitated these prospects for Sino-Russian joint action (to Beijing's advantage) and allowed Beijing to take on a bigger political role in the region on its own (outside of cooperation with Russia). In Xi'an, for instance, Xi Jinping also spoke of assisting the CAR in improving "law enforcement, security, and defense capability". Kazakhstan, in particular, is likely to welcome such a role as it is threatened by Russian revisionism and cannot solicit security partnerships with Western countries. The Xi'an summit also represented a growing trend of Beijing changing the terms of engagement towards the region, relying more on a 5+1 format than through the SCO. In line with the same and taking a leaf out of India's suggestion in 2022, China is in talks to open a C+C5 secretariat with 'nineteen channels of direct engagement' with the region.³⁸

Economic entrenchment

Even as Beijing calibrated its political position on Russia-Central Asian relations, it accelerated its efforts to foster closer economic interlinkages between itself and Central Asian republics. This has taken the form of a diplomatic push towards new railway lines (Kazakhstan-China; Kyrgyz-Uzbek-China), new investments in alternative energy and green transition (wind and solar), enhancing people-to-people contacts, greater cooperation between CA and Chinese media, new mining contracts (gold mines in Tajikistan)³⁹, and military exports such as drones and air-defense systems (especially Turkmenistan and Uzbekistan).⁴⁰ China also recently entered a long-term agreement with Kazakhstan to import uranium. The quantity and specifics of the contract "cannot be disclosed due to confidentiality and commercial sensitivity," according to a statement by Kazatomprom.⁴¹

China's ability to win numerous tenders and contracts in various key sectors of the economy has naturally led to an outsized influence. While, in many cases, Chinese companies have won such projects based on pure merit, the dangers of such outsized influence cannot be ignored. An instructive example is the thermal powerplant explosion in Bishkek, Kyrgyzstan in 2019. Faced with a Soviet-era, aging thermal power plant that needed reconstruction, officials from various ministries received numerous letters from the Chinese embassy 'recommending' a Chinese company, TBEA, for the bid. Combining the recommendation with a loan offer, China managed to win the bid for the company.

However, the company's limited experience in the sector coalesced negatively with corruption among Kyrgyz officials. When the plant broke down, citizens in the capital

suffered for weeks through the freezing winter. The episode received intense scrutiny by a then noisy and active media coverage that shed light on China's sway within government departments through financial inducements.⁴² This influence applies to even energy companies, as the total debt of such companies was calculated to be at USD 1 billion as of May 2022, almost 3/4ths of total debt owed to foreign entities.⁴³ Notably, such accumulated influence has not deterred Kyrgyzstan from increasing its cooperation in the energy sector with China since then. However, new investments are increasingly channeled towards the renewables sector, mostly wind and small hydropower plants.

Description: President Emomali Rahmon, right, inaugurates Talco Gold, a new gold processing plant built by a Chinese investor at a cost of \$136 million.



Source: Presidential administration press service

Similar concerns had appeared in Tajikistan, where a report accused President Emomali Rahmon's son-in-law, Shamsullo Sohibov, of receiving money from a Chinese mining company in exchange for help securing a gold-mining license in Tajikistan. Chinese companies are involved, through joint projects, in mining more than 80 pc of Tajik gold and silver.⁴⁴ According to a Tajik economist, Chinese investments take off in Tajikistan because Chinese companies

know the local "rules of the game".⁴⁵ In Kazakhstan, Chinese companies have stakes in over 20 oil and gas companies, ranging from 8 to 100%.⁴⁶ Notably, when China's CNPC sought to purchase Petrokazakhstan in 2005 (controversial at the time), Indian oil company ONGC Videsh announced its intention to put forward a rival bid. However, with long-term interests in mind, CNPC made an extremely generous offer.⁴⁷

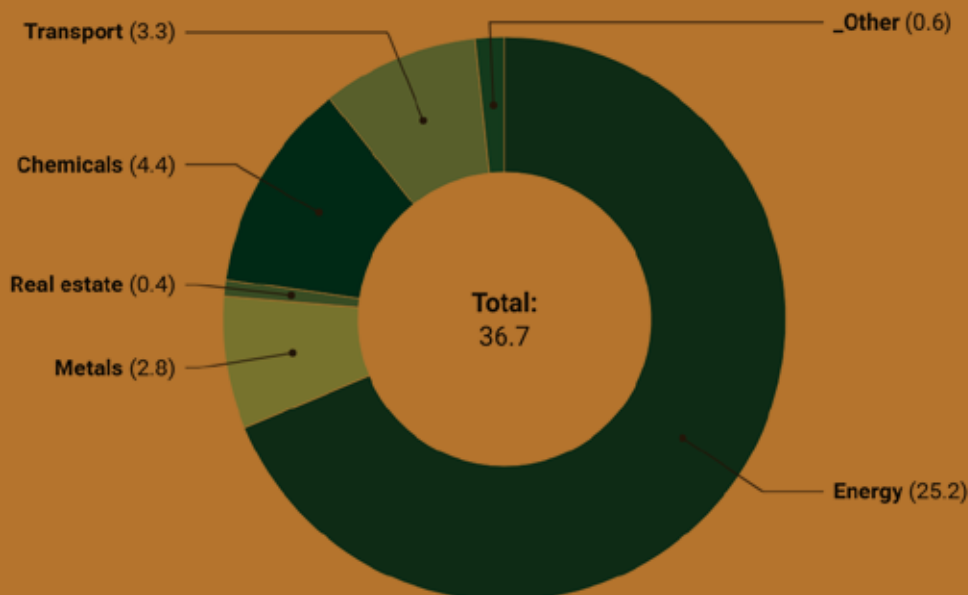
Emerging sectors

A critical shift in China's approach has been to avoid large-scale debt-ridden infrastructure investments and instead focus on helping build CA industrial capacity, boost the manufacturing sector, promote FDI in key emerging commercial sectors, and increase CA exports to China. This shift has been timely and represents China's attempts to calibrate its approach according to priorities set by CA governments in light of their long-term challenges. Such a shift is also likely to help entrench Chinese economic influence in emerging sectors while offering opportunities for profits and increased trade. For instance, there are indications that Beijing may leverage CA's desire to increase exports to China to induce regional industries to align with China's standardization architecture. This could have far-reaching impact in sectors such as renewable energy, agriculture, and

energy transmission, as well as technology training and transfer.⁴⁸

Beijing has also been focusing on mapping new opportunities in emerging sectors to help connect Chinese and regional businesses. In March 2024, during a trade forum in Astana, the two sides announced the launch of an 'interactive investment map' to help "find ways to create a favorable environment for entrepreneurship, closer trade relations and the implementation of investment projects".⁴⁹ Beijing, at present, has more than a hundred industrial tech and skill transfer programs in the region, with fifty-six of them just with Kazakhstan.⁵⁰ Such programs are highly valued as they align with CA's need to increase the localization of manufacturing and production units.⁵¹

The total amount of China's investments in Kazakhstan for 2005-2023 (\$billion)



Due to rising incomes, Central Asian countries are witnessing strong growth in the automobile sector. Sensing opportunities, the Chinese industry (especially EV giant BYD) has sought to turn the region into an auto-export hub with the strong backing of Uzbekistan's President Shavkat Mirziyoyev.⁵² However, Uzbek local media on occasions have red-flagged such plans by accusing BYD (along with its local Uzbek partner Uzavtosanoat) of seeking 'market dominance' in Uzbekistan, thereby leading to stifled competition and price-gouging.⁵³

Uzbek President Shavkat Mirziyoyev inspecting components of BYD cars at the company's Shenzhen HQ.



Source: Uzbekistan presidential administration)

In the latest instance, such fears have arisen owing to BYD Uzbekistan's appeal "to the government to impose restrictions on the unlawful importation of electric vehicles", citing unsuitable local road and climate conditions. The controversy further highlights the role of 'standards-setting' in enabling Chinese domination in key sectors of the economy.⁵⁴ Meanwhile, in December 2023, A Chinese firm (Henan Suda) signed an agreement with Uzbekistan's Energy Ministry to build 50,000 EV charging stations all across the country by 2033, indicating China's grip over the country's EV infrastructure as well.⁵⁵

Beijing has entered similar (albeit less grand) arrangements with Kazakh automobile companies.⁵⁶ Indicative of a pan-regional push, in August 2023, Chinese Deputy Prime Minister He Lifeng met high-level officials from Tajikistan and discussed a joint venture to produce close to 1,500 electric vehicles annually.⁵⁷ Incidentally, Chinese car companies are quickly replacing their Russian counterparts in the two countries.

Green sector

Bandwagoning on Central Asian leaders' growing concerns over climate change and the need to reduce dependence on hydrocarbons, China has become the primary partner in the Renewable Energy sector in the region even as its oil, gas, and coal investments remain intact. In fact, if present trends continue, most CA countries are likely to become more dependent on coal production for their energy needs, heightening long-term socioeconomic costs.⁵⁸ China has been forging green energy cooperation in the region. China's State-Owned Enterprises (SOEs) have invested massively in solar and wind projects. Adopting a nimbler approach, China has taken up the role of project

developers and constructors in the region and also relied on both international financing (such as the European Bank for Reconstruction and Development) as well as private equity firms (including from the Gulf). In fact, Chinese companies in Uzbekistan have been receiving tough competition from Gulf companies such as Masdar (UAE) and ACWA Power (Saudi Arabia) in terms of winning contracts through tenders and open bidding processes.⁵⁹ The existence of such players has also led China to actively seek collaboration with Gulf companies in the sector, often taking up the role of suppliers.⁶⁰

Description: Risen Energy's 40 MW solar photovoltaic plant in Karaganda



Source: Company handout

According to a recent report, China's efforts to promote its exports of renewable energy projects are also meant to help address domestic overcapacity issues. This, in turn, gives Chinese companies a huge cost-competitive advantage, especially in solar component exports. China's position as a global leader in the green energy sector "may lead to its control over the regional green energy market, creating obstacles for other countries to enter and establish their presence."⁶¹ Such investments also enable CA countries to cater to their energy needs while continuing to cater to China's energy import needs (gas and oil) from Central Asia.

Soft power and societal linkages

China seems increasingly sensitive to the idea that it needs to focus beyond economic cooperation to enhance its regional influence and credibility. As such, there is a discernible uptick in its efforts to expand and deepen societal linkages with Central Asia. This has taken the form of fostering greater think tank collaboration, enhancing visa-free agreements, establishing new air routes, enhancing tourism and cultural exchanges, including the establishment of cultural centers, and promoting art and film cooperation.

There has been a greater focus on academic exchanges, Chinese language training, and a concerted attempt to increase media cooperation. For instance, in May 2023, China Central Television (CCTV) entered into a content-sharing agreement with Business Kazakhstan news agency to disseminate news/content through the latter's platforms. In meetings with news agencies and media specialists from Central Asia, the CCP shares 'media strategies' and 'President Xi Jinping's Economic thinking'.⁶²

Labor and civil society groups have often challenged and opposed Chinese projects in the region.⁶³ Kyrgyz demonstrators on horseback virulently protested the planned construction of a Chinese logistic center in February 2020, leading to the project's cancellation.⁶⁴ According to Niva Yau from the Atlantic Council, such concerns have led China to replicate its "public memory management" framework in Central Asia to "co-opt elites and suppress independent voices."⁶⁵

China's push toward setting up 'small yet smart' Luban vocational workshops and larger engagement with civil society and media is also meant to secure Chinese projects and investments from future shocks and instability.⁶⁶ Such linkages are meant to diversify influence beyond ruling elites and safeguard China's broader interests for the long haul. Even as China has been assisting governments in the region in tracking and monitoring citizens through surveillance equipment and capabilities, Beijing is also reaching out to ordinary citizens and civilian elites to foster closer relations.

India's (closing) window of opportunity

As China attempts to become more central to key political and economic decisions in CA, it still has to reckon with certain limitations. Despite increasing reliance on China, Central Asian states are keen to avoid over-dependence in order to retain and enhance their national autonomy and independence. Mistrust of Chinese investments and influence at the social level is meaningful (even if inconsistent and unpredictable). It is a factor that both local governments and China are very wary of. CA's enhanced engagement with multiple players, ranging from Gulf states to Turkey to the West, opens up the space for Indian diplomacy. The emergence of such a multiplicity of actors widens the opportunities for flexible issue-based cooperation. Crucially, it is impossible for China to help address all existing crises and challenges the region faces. CA may need China's investments and technologies, but it also requires cooperation with everyone else.

While India may not be able to provide the kind of investments and large-scale infrastructure projects that China does, it offers a more equal and cooperative partnership in enhancing the well-being of societies through its growing market and rich experience in addressing

socio-developmental challenges of a country with a population size of 1.4 billion people. India's varied and growing network of global relationships can also be an asset as it enables Delhi to work with like-minded partners in strategic sectors such as critical minerals. India, additionally, promises a stable polity and market for Central Asian exports of processed and manufacturing goods and could also emerge as a source of investments. The latter is aided by growing trends both in India and the region.

Central Asia's key challenges in the future are likely to be energy sustainability, upskilling and job creation, economic inclusion of its remote and disconnected citizens, and diversifying an economy that has remained overly reliant on hydrocarbons and natural resources.

India is increasingly aware of these needs and has ways to help the region meet them. With the signing of a long-term agreement with Iran over the Chabahar port, India plans to invest USD 370 million to improve port infrastructure and transform Chabahar into a “dynamic regional hub for trade transit”.⁶⁷ The port’s potential as a ‘gateway to Central Asia’ is likely to receive a boost once Iran completes the Chabahar-Zahedan-Mashhad-Sarkhs railway that snakes its way from Chabahar all the way to Afghanistan and then Turkmenistan. Incidentally, Kazakhstan and Turkmenistan have also reached an agreement (Nov 2023) to develop the China-Kazakhstan-Turkmenistan-Iran corridor during a working group meeting on developing transport, transit, and logistics.⁶⁸ The development of the port appears destined to be advancing in parallel to greater regional integration and the increasing influence of China in such processes.

India needs to enhance its economic and diplomatic presence in Central Asia to maximize gains from investments in the Chabahar port. This will be crucial to increase trade flows through Chabahar. India’s CA policy over the last two decades has suffered because of connectivity constraints and the Indian government and private industry’s inability to access and form connections with CA ruling elites and government ministries. In the current context, Central Asian politics and societies are undergoing changes that promise opportunities for India. Uzbekistan’s reforms since 2016 have aided these trends. The region has witnessed a growth rate of upwards of 5% over the last decade and is expected to touch 6% in 2025.⁶⁹ It has made significant strides in upskilling its labor force, improving manufacturing capabilities, and implementing long-term visions based on green and sustainable economic growth.

India could also generate goodwill, establish valuable linkages, and increase the prospects for greater trade with the region through brand recognition and market familiarity. Through such cooperation, India can establish itself as a key player in the region and seize greater opportunities in the future, especially in terms of energy diversification, access to critical minerals, and high-impact security cooperation. Such initiatives could strengthen India’s hand within the SCO after all. A more patient, consistent, and realistic strategy of establishing presence, trade, and contacts stands a greater chance of yielding dividends and helping India achieve its regional goals. This non-connectivity-dependent approach would resemble the approach of countries such as Japan and South Korea, which have been able to deepen linkages with the region despite a lack of connectivity and proximity. Delhi could pay greater attention to investment opportunities in emerging economies such as Uzbekistan and Kazakhstan. Inviting such investments from India, the Ambassador of Uzbekistan to India recently noted attractive conditions in his country in “such areas as information technology, textiles, electronics, medicine, pharmaceuticals” and, more notably, in “renewable energy” and “mineral resources processing”.⁷⁰

The Indian private industry's ability to succeed in this regard will require strong government support and diplomatic and financial assistance. Even as India makes efforts to enhance Indian companies' image and credibility in the region, it should explore greater cooperation in socio-development sectors such as sanitation, skill training, water treatment, and school reconstruction (especially Kyrgyzstan), among others. Such initiatives can also be configured to promote the brand of Indian companies, products, and services. In this endeavor, India can also work in close cooperation with organizations such as USAID, UN Bodies, as well as the European Bank for Reconstruction and Development (EBRD). Such organizations have been intensely active in the region over the years. They are in a position to assist India in meeting financing gaps, local knowledge, and access.

Enhancing societal linkages through cultural, media, academic and think tank exchanges will also be key. There is room for greater diplomatic coordination and sharing of information between embassies in the region and business-to-business ties. Both Saudi Arabia and the UAE have emerged as key players in the RE sector over the last few years. Similarly, Japan and the U.S. have strong interests in finding opportunities for cooperation in the Critical Minerals sector.

In recent years, India has redoubled its efforts to bid for and utilize leases on mines in various regions (such as South America, Australia, and Africa) and to secure its production of and access to critical minerals, an increasingly strategic and geopolitical area of concern. Meanwhile, the exploration and study of such resources in Central Asia—key to the growth of the renewables sector and defense and advanced manufacturing—has also progressed rapidly. India's National Security Advisor Ajit Doval had even suggested greater cooperation between India and Central Asia in this sector.⁷¹ India's close cooperation with the U.S. and its membership in the Minerals Security Partnership positions it advantageously.⁷² There exists great compatibility between the minerals that India has identified as crucial for its economic security and progress and the ones found in the Central Asian region.⁷³ However, significant challenges in terms of processing capabilities will limit India's ability to win contracts on its own in the region—especially given the availability of significant and capable partners such as South Korea, Australia, France, and Japan in the region.⁷⁴ This requires India to have more modest goals and seek to achieve at least an entry into the complex, evolving, and still relatively nascent race for critical minerals in the region.

An approach that emphasizes India's geopolitical fault lines with established regional powers is likely to work to India's disadvantage. Regarding its broader foreign policy approach, India needs to adopt a narrower 'economy first' approach towards the region rather than having a China-centered discourse. This approach would focus on establishing a greater presence in the region through socio-developmental aid as well as trade and investments. Such presence and its related access to elites and local knowledge should, in turn, be used as a jumping-off point to achieve greater cooperation in sectors such as critical minerals, energy diversification, and defense. CA countries are more likely to value tangible benefits that they can derive from cooperation, which in turn is more likely to lead to greater leverage over time. As a starting step, immediate investments are needed in terms of language training programs, building information dashboards, as well as facilitating visas and exchanges.

Recommendations

Socio-development aid

There is scope for Indian government initiatives—in cooperation with the private sector and international agencies—to address the socio-developmental needs of Central Asian countries. India can, for instance, help Tajikistan address its challenges related to sanitation, clean water, and the availability of modern toilets.⁷⁵ India's bold initiatives since 2015 in constructing over 100 million household toilets can serve as the institutional and experiential base from which such assistance in planning, personnel training, and construction can be achieved. The government's Swachh Bharat mission also incentivized several innovative start-ups to contribute to the national effort by using sustainable solar-powered portable and vandal-proof smart toilets.⁷⁶ Such initiatives also help India build its developmental brand image. India can partner with USAID in such an initiative, given the latter's experience in Tajikistan's sanitation and health sector.

Similarly, access to safe drinking water is an abiding concern in Kyrgyzstan and

Tajikistan. At the same time, Kazakhstan and Uzbekistan are increasingly interested in conserving water through efficient usage and water-saving technologies. Small-scale Innovative Indian start-ups such as Ecodew have made significant headway in recent years (through commercially viable water-treatment technologies), won contracts in various countries such as Maldives and UAE, and are interested in the Central Asian market.⁷⁷ As India renews its engagement with a new Central Asia, it should leverage its start-up industry and facilitate the exchange of ideas.

Additionally, there is scope for India to assist Tajikistan in the domains of drug interception as well as drug rehabilitation. India can assist Tajikistan through Digital investigative support due to the increased digitalized nature of the drug trade, with the Darknet, social media, and cryptocurrency playing an important role. Indian agencies such as the Narcotics Control Bureau and the National Investigative Agency have significant experience in this field.⁷⁸

India can also participate in the construction of rehabilitation centers in countries such as Kyrgyzstan and Tajikistan, which have a large number of drug addiction cases but very few rehabilitation facilities.⁷⁹ Several Indian organizations (Kripa Foundation, for example) have decades of experience addressing the challenge in India. The National Institute of Social Defence (NISD),

an autonomous organization under the Ministry of Justice and Social Welfare, has rich experience conducting capacity-building programs and sensitization workshops. India can partner with the United Nations Office on Drugs and Crime (UNODC) to help achieve this.

Language training, visas and academic, media, and think tank exchange

The government can expand and invest in the Central Asian Program within the Ministry of Culture to institute a language training program in each CA national language. Similar investments could be made in the Centre for Persian and Central Asia Studies at the prestigious Jawaharlal Nehru University, New Delhi. Along the same lines, India can explore ways of imparting English language training in Central Asian institutes and language training exchange programs. Given that India advocates using English as one of the primary languages within the Regional Anti-Terrorist Structure (RATS) of SCO (and not just Russian and Mandarin), Delhi has an interest in the promotion of the language, which will also help enhance ties outside of the SCO.⁸⁰

Closer media cooperation could be explored and established with MoUs to highlight the attraction of India's market and the achievements of Indian companies and start-ups. Think tank exchanges could be facilitated to deepen joint policy and academic research and exchanges.

Renewables sector

The solar and wind energy sectors will likely expand in the coming years. In this context, India is also seeing a gradual emergence of capable private-sector companies. Given the UAE's investments and experience in this sector, India can propose joint bids for investments bilaterally or by devising a strategy within the I2U2. Indian companies

such as Suzlon Energy have demonstrated their capabilities in this sector and have been increasing their presence globally.⁸¹ The company's substantial investments in R and D (leading to extended lifespan of wind turbines, for instance), stable finances, and efficient supply chain have also positioned it as an attractive partner.

Knowledge-sharing mechanisms and Track 2 engagement

India could institutionalize information portals either through the India-Central Asia Secretariat or an Indian think tank that is tasked and financed by the government. The portal could compile and update information regularly on the following –

Regulatory landscape in each country and in the region

Sector-wise information, especially tenders and project offers

Information on key international companies and their presence and capabilities in the region

Key government ministries, departments, and their agendas

Market trends in the region

Socio-developmental needs of the region

Information on key Indian companies and start-ups that are interested or have plans for the region.

The Indian government could work with think tanks, which could coordinate with prominent businesses and embassies of like-minded countries and international banks and organizations such as ADB, USAID, etc. This effort could lead to a yearly conference inviting prominent experts, academics, entrepreneurs, and company representatives from the region to present and share insights on the region and ways to enhance India-Central Asia ties.

Financial measures and incentives

Given that Indian companies will find it challenging to offer cost-competitive offers in the early phases, GOI could institute a funding scheme within the MEA that consists of a board that receives, reviews, and rewards offers and bidding plans by industry partners. A starting sum of 100

million USD per year can be used to kickstart the scheme, and the initiative can be reviewed internally or by a private consultancy firm after three years. Other incentives, such as GST waivers and tax breaks, can also be explored.

Skill training

With central administrations' strong support and backing, CA economies are diversifying with increasing speed towards manufacturing, assembling, and processing industries. The region is betting on generating sustainable growth and improving the skill levels of its workforce for jobs in the emerging sectors.⁸² CA countries are also motivated by the need to reduce their dependency on Russia for employment and remittances. Persecutory attacks against CA workers following the Crocus City Hall terror attack in Moscow have only reinforced this trend.⁸³ The Indian government's capabilities in setting up diversified vocational and skill training workshops under the policy framework of Skill India can be instrumental in this regard. India can explore setting up such training workshops in various regional cities through joint financing mechanisms.

There is also room for adopting some of the best practices from the program (Skill India) and applying them to Central Asia. Such centers, supported by India, the host government, and a third partner, will offer niche courses tailored to reliant and emerging sectors – particularly Project management, office management, Packaging, Automotive Service Technician, and food processing. A database of trained workers can easily be tapped into by Indian small-scale manufacturers and the program can be used to promote Indian manufacturing as well.

Critical Minerals

India can make joint investment bids with partners (U.S., South Korea, UK) and, in exchange for investments, negotiate its entry into a part of the supply chain. India could also bargain for assured export contracts as a return on investment. Investments can help earn India a foot in the door, a valuable achievement given the prospect of rare earth mining and production in CA and India's growing demand. India has been stepping up its focus on Critical Minerals mining-related Research and Development.⁸⁴ A U.S.-India-CA trilateral mechanism can begin by establishing institutionalized linkages between relevant departments and organizations. Such initiatives can focus on sharing best practices, technologies, and scientific research in sustainable and cost-effective mining, energy efficiency and circular economy related to mining.

Relevant organizations in such a plurilateral body could include NITI Aayog, the Ministry of Mines, and KABIL from India. Central Asian expert bodies could include Almalyk Mining and Metallurgical Combine of Uzbekistan (Central Asia's sole dedicated research department for the study of Critical Minerals in the region), the National Center for Technology Foresight (Kazakhstan), as well as the main Directorate of Geology (Tajikistan). India could also offer to help Tajikistan survey its territories for REE deposits, even as China appears primed to help Dushanbe fulfill this task.⁸⁵

Conclusion

Central Asia is at a crossroads. The region is transitioning from an inward-oriented, commodities-dependent, land-locked region to one that seeks liberalization and takes its place in the global economic order based on future-oriented and pragmatic cooperation with multiple partners. It sees such a trajectory as a grand strategy to secure internal political stability and retain its political and economic sovereignty. At the same time, however, it is also drawn into China's economic and geopolitical orbit, potentially compromising the nature and extent of its internationalist outreach and objectives. For India, this new geopolitical context (as well as the growing convergence between Russia, China, Iran, and Pakistan) both raises the costs of insufficient engagement through isolation and offers new and unprecedented opportunities for cooperation and mutual benefit. A new approach to the region based on greater investments, a concerted deepening of linkages, and creative forms of partnership with like-minded partners in the region through available forums and institutions is the need of the hour.

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