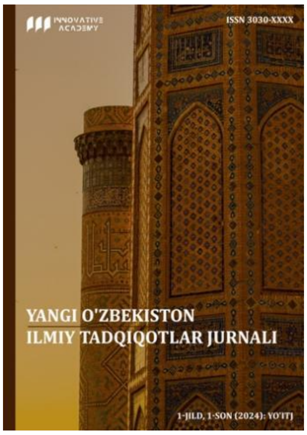

THE LIMITS OF GOOD-NEIGHBORLINESS: TRADE INTEGRATION AND STRUCTURAL FRICTION IN POST-2017 CENTRAL ASIA

Ibrokhim Murodjon

Independent Researcher

Tashkent, Uzbekistan

Orcid №: 0009-0004-1528-4808

+998903218036,ibroximmurodjon2000@gmail.com

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ABSTRACT

Since 2017, Central Asia has changed how its countries deal with each other. This is the biggest shift in the region since independence. President Shavkat Mirziyoyev's reforms in Uzbekistan opened borders, restarted stalled talks, and led to a yearly meeting of Central Asian leaders. Reported trade between the countries has grown sharply since then. But this friendly diplomacy has not solved the older problems that have limited regional trade since the Soviet collapse. These problems include: countries belonging to different trade blocs (the Eurasian Economic Union, the World Trade Organization, and the Commonwealth of Independent States free-trade area), many non-tariff barriers, slow and unpredictable border crossings, a shared water-and-energy system that causes conflict, and transport routes built to link the region to outside markets rather than to each other. This article reviews trade, policy, and institutional information published between 2017 and 2026 to see how much political friendliness has actually turned into real structural integration. It argues that Central Asia's trade growth since 2017 is real, but shallow. It depends heavily on diplomatic goodwill and one-on-one deals, not on shared rules, connected infrastructure, or solved resource disputes — all of which lasting integration requires. These findings matter for policymakers, international financial institutions, and researchers who study regionalism.

1. Introduction

For most of the years after the Soviet Union ended, Central Asia was seen as an odd case. Its five countries are neighbors. They share old Soviet infrastructure, mixed ethnic populations, and one major river system. Yet they traded very little with each other. From the 1990s through the 2000s, trade between Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan stayed lower than trade models predicted. Researchers blamed this on closed borders, incompatible customs systems, and unresolved water and energy disputes left over from the Soviet economy (Pomfret, 2005; Batsaikhan & Dabrowski, 2017). Uzbekistan is the region's biggest country by population and sits at its geographic center. For two decades, it was also the main reason the region stayed closed. Under President Islam Karimov, Uzbekistan kept a strict currency system, placed mines and fences along parts of its borders, and treated regional cooperation with suspicion.

This began to change after 2016. After Karimov died, Shavkat Mirziyoyev became president and started major reforms. He also reset Uzbekistan's foreign policy around the idea of "good-neighborliness." In September 2017, Mirziyoyev proposed regular meetings between Central Asian leaders at the United Nations General Assembly (Development Strategy Center, 2020). These meetings have happened every year since and are now the region's main diplomatic platform. Uzbekistan settled long-running border disputes with all its neighbors, reopened many border crossings, and signed strategic partnership treaties with Turkmenistan and Kyrgyzstan in 2017, and with Tajikistan in 2018 (Khakimov, 2025). The results came quickly following more people crossed borders, new road and rail links opened, and reported trade between countries grew within just a few years.

The central question of this article addresses is whether this post-2017 political rapprochement has been matched by deepening of the structural conditions that determine whether regional trade is efficient, resilient, and self-sustaining as opposed to trade that is contingent on the goodwill of incumbent leaderships and vulnerable to reversal. "Good-neighborliness," in other words, is a diplomatic posture and regional economic integration is an institutional and infrastructural achievement, and the two do not necessarily move at the same pace. Three structural fault lines are examined: first, the region's fragmented external trade-bloc architecture, in which Kazakhstan and the Kyrgyzstan belong to the Russian-led Eurasian Economic Union (EAEU) while Uzbekistan, Tajikistan, and (with observer status only) Turkmenistan do not, producing divergent tariff schedules and regulatory trajectories; second, persistent non-tariff barriers and trade-facilitation deficits at borders, including opaque licensing, informal payments, and slow customs clearance; and third, the region's unresolved water-energy nexus, in which upstream hydropower ambitions in the Kyrgyzstan and Tajikistan structurally conflict with downstream irrigation needs in Kazakhstan, Turkmenistan, and Uzbekistan. The article also considers the region's landlocked transport geography as a compounding constraint that limits how much intra-regional gains can substitute for the deeper problem of distance from global markets.

The argument advanced here is that the post-2017 period has produced genuine but shallow integration. Political goodwill has removed the most visible obstacles that are closed borders, absent air and rail links, unresolved border demarcation and this has yielded a substantial rise in reported intra-regional trade turnover. But, the deeper architecture of regional commerce remains fragmented: tariff and regulatory regimes have not converged, non-tariff barriers remain extensive, transport corridors are being built primarily to connect Central Asia to external markets like China, Europe and the Gulf rather than to each other, and the water-energy nexus continues to generate recurring friction that spills over into trade relations. This shallow-integration thesis has implications both for how the region's trajectory should be read by external partners and for the design of future cooperation instruments.

2. Materials and Methods

This article adopts a qualitative, document-based comparative policy analysis, a method well suited to a period (2017–2026) that is too recent and too heterogeneous in national data quality for a single harmonized quantitative dataset to be constructed with confidence. Three categories of secondary sources were triangulated. First, multilateral institutional reporting from the World Bank, the Asian Development Bank (ADB) and its Central Asia Regional Economic Cooperation (CAREC) program, and the Organisation for Economic Co-operation and Development (OECD) was reviewed for trade-facilitation indicators, corridor performance data, and non-tariff barrier assessments published between 2017 and 2025. Second, academic research on Central Asian trade, on the effects of EAEU membership (using gravity-model methods), and on water politics in the Amudarya and Syrdarya river basins was reviewed. This grounded the discussion of trade-bloc differences and the water-energy conflict in established research. Third, government and think-tank reporting on the Consultative Meeting process and bilateral treaty-making since 2017 was used to reconstruct the diplomatic and institutional timeline of the "good-neighborliness" policy.

Reported trade-turnover figures cited in this article are drawn from national and multilateral sources as published they are not independently reestimated, and known limitations in Central Asian trade statistics inconsistent re-export accounting, incomplete capture of informal cross-border trade, and differing valuation methods across national statistical agencies are treated as an interpretive caveat rather than a problem this article resolves. The analysis is therefore structural and comparative rather than econometric: it asks which categories of friction (institutional, regulatory, physical, and resource-based) persist alongside the reported trade expansion, and what that persistence implies for the depth and durability of regional integration.

3. Results

3.1 The Post-2017 Diplomatic Reset and Its Institutional Expression

The Consultative Meeting of Central Asian Heads of State, first proposed in 2017 and held in Astana (March 2018) and Tashkent (November 2019) among subsequent iterations, has become the primary indigenous platform for regional coordination, addressing trade, water and energy, transport connectivity, and security in a single recurring forum *(Development Strategy Center, 2020; American Foreign Policy Council, 2025)*. This is a notable institutional departure from the preceding two decades, during which regional cooperation was channeled mainly through externally sponsored or Russia-centered structures such as the Commonwealth of Independent States (CIS), the Eurasian Economic Community, and its successor the EAEU, rather than through a Central Asia–only format. Uzbekistan's bilateral treaty-making has reinforced this shift: strategic-partnership treaties were concluded with Turkmenistan and the Kyrgyzstan in 2017 and with Tajikistan in 2018, followed by an alliance treaty with Kazakhstan in 2022 and a further upgrade with Tajikistan in 2024 *(Khakimov, 2025)*. Border demarcation, long a source of friction, particularly between Uzbekistan and the Kyrgyzstan, and Uzbekistan and Tajikistan has substantially advanced, for example, reporting on the Uzbek–Kyrgyz border, for instance, records daily crossings rising from a few hundred people five years earlier to more than 30,000 by the early 2020s, while all seventeen crossing points on the Uzbek–Tajik border have been reopened *(The Diplomat, 2023)*. Visa facilitation and expanded air, road, and rail links between Uzbekistan and its neighbors accompanied this normalization, with arrivals in Uzbekistan from Kazakhstan, Kyrgyzstan, Tajikistan, and Turkmenistan all registering substantial increases in the years immediately following the reset *(The Diplomat, 2023)*.

Yet, this initial surge was primarily a recovery of historic, localized cross-border social and informal commercial ties rather than the birth of an integrated market. Reopening of borders lets people and light passenger vehicles cross.

3.2 Trade Metrics: Growth Masking Asymmetry

Reported intra-regional trade turnover has grown substantially across the period under review, though the precise magnitude varies by source and baseline year. Uzbek and regional reporting places the region's combined intra-regional trade turnover at roughly $2.4 billion in 2016, rising to around $11 billion by the mid-2020s an increase on the order of four- to four-and-a-half-fold while Kazakhstan's trade turnover with its Central Asian neighbors is reported to have grown by 42 percent over a comparable five-year window, reaching approximately $6.3 billion *(Vivekananda International Foundation, 2022; The Diplomatic Insight, 2024; American Foreign Policy Council, 2025)*. The region's combined economic output is reported to have surpassed $500 billion by the mid-2020s, with mutual investment flows also reported to have nearly doubled over the same period *(American Foreign Policy Council, 2025)*. These figures should be read as directional rather than precise, given the statistical caveats noted in Section 2, but the consistency of the upward trend across independent sources supports the conclusion that political normalization has coincided with a genuine expansion of formally recorded regional commerce.

Even so, this growth has occurred from a low base and remains modest relative to the region's total trade. Kazakhstan alone accounted for approximately 72 percent of Central Asia's total goods exports and 53 percent of its total goods imports between 2017 and 2022, with Uzbekistan a distant second while Kyrgyzstan and Tajikistan each represented only a few percentage points of regional totals *(POLITIK, 2025)*. Aggregate exports from the region rose sharply by roughly 62 percent between the 2020–2021 and 2022–2023 periods, but this expansion was driven substantially by extra-regional commodity demand (minerals, hydrocarbons, cotton, and metals) rather than by a proportionate deepening of intra-regional value chains *(POLITIK, 2025)*. The result is obvious, a region whose trade with the rest of the world continues to grow faster, in absolute terms, than trade among its own members, even as the latter has accelerated since 2017.

3.3 Divergent Institutional Alignments: EAEU, WTO, and CIS

The region's external trade-bloc architecture remains fundamentally divided. Kazakhstan and the Kyrgyzstan are full members of the EAEU customs union with Russia, Belarus, and Armenia, and Tajikistan, Turkmenistan, and Uzbekistan are not. Of the five states, only Kazakhstan (2015), the Kyrgyzstan (1998), and Tajikistan (2013) belong to the World Trade Organization, while Uzbekistan continues active WTO accession negotiations and Turkmenistan only initiated the process in 2022, after decades as a GATT observer *(Cieślik & Gurshev, 2023; Batsaikhan & Dabrowski, 2017)*. Gravity-model analysis of trade flows between 2009 and 2019 finds that this divergence has produced measurably different trajectories that Tajikistan's trade with EAEU members nearly tripled in export terms over the decade, driven substantially by its economic relationship with Russia, whereas Uzbekistan and the Kyrgyzstan, despite the latter's own EAEU membership, saw considerable relative trade divergence away from the bloc and toward China, Iran, and Turkey *(Cieślik & Gurshev, 2023)*. In other words, formal bloc membership has not reliably predicted the direction of a country's actual trade reorientation, which suggests that informal and bilateral channels of exchange are, in practice, at least as consequential as treaty-based ones.

This institutional fragmentation carries direct consequences for intra-Central Asian trade. Because Kazakhstan and the Kyrgyzstan apply the EAEU's common external tariff and technical regulations, while Uzbekistan, Tajikistan, and Turkmenistan set tariffs and standards independently, a good moving between, for example, Tashkent and Bishkek must satisfy two distinct and not mutually recognized regulatory systems, even though both cities lie within the same historically integrated economic space. The 2015 accession of the Kyrgyzstan to the EAEU customs union initially disrupted its long-standing informal re-export trade with China through the Dordoi and Kara-Suu markets, showing how deepening one axis of integration (EAEU membership) can weaken another (intra-regional and cross-border informal trade) rather than simply adding to it. The net effect observed across the literature is less a single, converging Central Asian market than a set of overlapping bilateral and multilateral trade relationships, layered on top of a persistent institutional split between EAEU and non-EAEU economies *(Central Asia Program, 2020)*.

3.4 Non-Tariff Barriers and Trade Facilitation Deficits

Multilateral assessments consistently identify non-tariff barriers, rather than tariffs as such, as the primary constraint on Central Asian regional trade. OECD Trade Facilitation Indicator scoring finds that, while Uzbekistan achieved the largest relative improvement in trade-facilitation performance of any regional economy after 2019 and Kazakhstan leads the region in absolute terms, all five countries continue to lag well behind OECD and many peer emerging-market averages *(OECD, 2023)*. ADB assessments of CAREC economies describe a common pattern of complex customs processes, non-transparent technical regulations, and border procedures that raise the effective cost of intra-regional trade well beyond what tariff schedules alone would suggest *(ADB, 2025)*. Older but still-cited World Bank and ADB analysis found that regional trade agreements already in force among Central Asian states had failed to unlock their full potential precisely because non-tariff measures administrative discretion, unpredictable regulatory change, and burdensome licensing remained extensive and poorly documented, even as anecdotal evidence of their effects on cost and delay was abundant *(World Bank, 2012; WTO, 2015)*.

Border-crossing procedures compound these regulatory frictions. Reporting on the region's trade corridors describes widespread informal payments, restrictions on the cross-border movement of trucks and drivers, warehousing and dry-port capacity constraints, and limited private investment in logistics infrastructure as persistent features of intra-regional and transit trade, despite recent digitalization of some customs procedures *(OECD, 2025)*. International donor programs including the European Union–funded Ready4Trade Central Asia initiative and its associated Info Trade Central Asia Gateway, launched in 2023 to provide standardized guidance on licensing and clearance procedures indicate that regional governments and external partners regard this transparency deficit as a first-order problem still requiring active intervention nearly a decade after the diplomatic reset began *(OECD, 2023)*.

3.5 Transport Connectivity: A Landlocked Region Reoriented Outward

Central Asia's geography compounds its regulatory frictions. All five states are landlocked, and by some estimates the region's combined share of global maritime-borne exports is under one-half of one percent, with Uzbekistan's individual share estimated at roughly 0.1 percent which is a structural handicap given that more than 80 percent of world trade by volume moves by sea *(The Diplomatic Insight, 2024)*. This geography has shaped where post-2017 infrastructure investment has actually gone: the large majority of new or upgraded transport corridors connect Central Asia outward toward China via the planned China–Kyrgyzstan–Uzbekistan railway, toward Europe via the Trans-Caspian International Transport Route (the "Middle Corridor") through the Caspian Sea, the Caucasus, and Türkiye, and toward the Gulf via emerging north–south links rather than knitting the five regional capitals more tightly together in their own right *(OECD, 2025; The Diplomatic Insight, 2024)*. The Middle Corridor illustrates both the opportunity and the limits of this reorientation: freight volumes along the route rose by 62 percent in 2024 to roughly 4.5 million tons, reflecting diversion of some China–Europe traffic away from the Russia-transiting Northern Corridor after 2022, yet its total capacity remains well below that of the Northern Corridor, and its further growth is constrained by Caspian shipping shortages, port bottlenecks, and uneven rail gauges *(OECD, 2025)*. Because these corridors are financed and designed chiefly around transit trade rather than intraregional trade, their completion strengthens Central Asia's connections to external markets a genuine developmental gain without necessarily reducing the cost or time of moving goods between, say, Dushanbe and Bishkek.

Where transport investment has been explicitly regional, the results illustrate the same shallow-integration pattern seen in trade-turnover data that is real, but narrow. The Tashkent–Andijan–Osh–Irkeshtam–Kashgar highway, in use since 2018, gave Uzbek and Kyrgyz road carriers their first direct access to China, and a shorter rail corridor connecting Kashgar to the Fergana Valley via Kyrgyzstan has since been advanced as a further, more direct link *(The Diplomatic Insight, 2024)*. These projects meaningfully improved specific bilateral routes but have not yet been embedded in a region-wide logistics or customs-transit framework that would allow goods to move as fluidly across all Central Asian borders as regional leaders' diplomatic statements imply.

3.6 The Water-Energy Nexus as a Persistent Source of Trade Friction

Central Asia's shared river system remains an unresolved structural constraint on regional cooperation, with direct spillovers into trade relations. The Amudarya and Syrdarya rivers originate in the upstream, water-abundant but energy-poor states of the Kyrgyzstan and Tajikistan, while roughly 85 percent of the region's water use occurs downstream, in the energy-abundant but comparatively water-poor states of Kazakhstan, Turkmenistan, and Uzbekistan *(Clingendael Institute, 2025)*. This asymmetry generates a structural conflict between upstream hydropower generation, which requires winter water releases to meet electricity demand, and downstream irrigation, which requires summer water availability for agriculture a conflict inherited from Soviet-era infrastructure planning that assumed a single integrated economic system and became a source of dispute once the successor states began pursuing independent, and at times competing, national resource strategies *(Bekchanov, Ringler, Bhaduri, & Jeuland, 2015)*.

Tajikistan's Rogun Dam project that is under construction, with roots in Soviet-era planning dating to 1976, and intended to become the world's tallest dam upon completion has been the single most consequential flashpoint. Hydro-economic modeling indicates that, managed cooperatively on a basin-wide basis, upstream hydropower expansion including Rogun could substantially increase regional energy benefits with only minor reductions in downstream irrigation benefits, and managed unilaterally to maximize upstream energy output, however, hydropower gains could more than double while irrigation benefits fall sharply, reducing net basin-wide welfare *(Bekchanov et al., 2015)*. Under President Karimov, Uzbekistan strongly opposed the Rogun project, but under Mirziyoyev, Tashkent's posture shifted toward pragmatic accommodation, including an agreement to purchase electricity from Tajikistan, alongside continued technical engagement intended to reduce the dam's downstream impact *(Clingendael Institute, 2025)*. This shift is itself a clear marker of the post-2017 diplomatic reset, but it has not resolved the underlying resource conflict, it has only moved its management from confrontation toward negotiated coexistence, leaving the nexus a continuing source of latent friction that could reassert itself as construction advances and as climate-driven glacial melt alters long-run water availability across the basin *(Brookings, 2016; Clingendael Institute, 2025)*. Because water and energy are frequently bartered or traded across borders in Central Asia the Soviet-era Central Asian Power System, and its various post-Soviet successors and analogues, historically linked hydropower exports to fossil-fuel and gas transfers in the opposite direction unresolved tension in this nexus does not sit alongside trade relations as a separate policy domain and it is itself a form of regional trade, and disputes over it have historically triggered retaliatory restrictions on other categories of cross-border commerce.

4. Discussion

The results support a "shallow integration" view of Central Asia's post-2017 path. Political friendliness under the banner of "good-neighborliness" has produced real, measurable gains: reopened borders, more people moving across them, new bilateral transport links, and several-fold growth in reported regional trade. But it has not yet produced the shared rules, resolved resource conflicts, or region-focused infrastructure that would let this trade growth sustain itself and survive a change in leadership.

This distinction matters because it separates two different things that are often mixed together in policy discussions: diplomatic friendliness between leaders, which can move fast once there is political will; and real structural economic integration, which needs the slower, less visible work of aligning rules, resolving disputes, and planning infrastructure that outlasts any one government.

Three implications follow. First, the durability of Central Asia's trade gains is more contingent than headline growth figures suggest. Because much of the observed expansion is based on the personal diplomatic investment of specific leaders most notably President Mirziyoyev rather than binding multilateral rules, it is still vulnerable to succession risk, shifts in any single country's foreign-policy orientation, and the type of unilateral resource action (for example, in water release schedules) that has previously disrupted regional relations. This is consistent with the broader literature's caution that regionalism in authoritarian or semi-authoritarian settings can be leader-dependent in ways that Western European or Southeast Asian regionalism, built on more codified supranational or treaty-based institutions, generally is not.

Second, the EAEU/non-EAEU split functions as a structural ceiling on how far intra-regional integration can go without a resolution of the region's relationship to external powers, chiefly Russia and China. Kazakhstan and the Kyrgyzstan's EAEU obligations bind their tariff and regulatory policy to a bloc whose other members lie outside Central Asia, while Uzbekistan's likely eventual choice between deeper EAEU association, WTO accession, or continued case-by-case bilateralism will materially reshape the terms on which the region's largest population center trades with its neighbors. Evidence that formal bloc membership has not reliably predicted the direction of actual trade flows Uzbekistan and the Kyrgyzstan diverging toward China, Iran, and Turkey despite differing EAEU status suggests that informal, bilateral, and infrastructure-driven trade patterns may in practice be outpacing the formal institutional architecture meant to govern them, a gap that raises questions about regulatory predictability and dispute resolution as trade volumes grow.

Third, the water-energy nexus illustrates a more general point about Central Asian regionalism where some of the region's deepest sources of interdependence are also its deepest sources of friction, and diplomatic normalization has so far managed rather than resolved this tension. The shift from confrontation to negotiated coexistence around Rogun is a genuine achievement of the post-2017 period, but it leaves the underlying asymmetry between upstream energy needs and downstream irrigation needs structurally unresolved, and it leaves the region's trade relations exposed to spillover from any future resource dispute. A comparable observation applies to transport routes of the Middle Corridor's growth demonstrates that Central Asia can attract substantial external investment when its role is as a transit bridge between other regions, but this externally oriented investment pattern does not, by itself, close the connectivity gaps between Central Asian capitals that limit intra-regional trade specifically.

These findings should be read with appropriate caution given the article's reliance on secondary and often institutionally produced data, the well-documented limitations of Central Asian trade statistics, and the relatively short time horizon under a decade over which the post-2017 reforms can be evaluated. Future research employing harmonized bilateral trade-flow data, gravity-model estimation extended through the most recent years, and firm-level survey evidence on the practical incidence of non-tariff barriers would substantially strengthen the empirical basis for claims about the depth, as opposed to the visibility, of Central Asian integration.

5. Conclusion

Central Asia's post-2017 experience demonstrates that diplomatic good-neighborliness is a necessary but not sufficient condition for regional economic integration. Uzbekistan's reform-driven reset, institutionalized through the Consultative Meeting process and a network of new bilateral treaties, has removed the most visible barriers to regional exchange and produced a substantial, well-documented rise in reported intra-regional trade turnover since 2016. Yet beneath this diplomatic success, the structural architecture of regional commerce remains fragmented, the region is institutionally split between EAEU and non-EAEU trade regimes, non-tariff barriers and trade-facilitation deficits continue to raise the effective cost of cross-border commerce, new transport investment is oriented predominantly toward external corridors rather than intra-regional links, and the shared water-energy system remains a managed rather than resolved source of tension. Sustaining and deepening Central Asia's trade integration beyond its current, still relatively shallow, foundation will require converting political goodwill into durable institutional convergence harmonized technical standards, predictable and transparent border procedures, deliberately intra-regional transport investment, and a negotiated, rules-based framework for water and energy sharing so that the region's trade relations no longer depend on the continuity of any single leader's foreign policy.

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