Fault Lines Eastward

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Shifting Sino-Russian Dynamics in Kazakhstan and Uzbekistan Before and After the Iran War

The war in Iran, catalysed by coordinated US-Israeli strikes in late February 2026, has fundamentally disrupted the architecture of Eurasian connectivity that both Russia and China spent a decade constructing. For Kazakhstan and Uzbekistan, two Central Asian states long identified as the region's primary practitioners of multi-vector foreign policy, institutionalising their hedging between great powers to extract maximum diplomatic and economic leverage, the conflict marks a further evolving point. On one hand, Russia's influence, already waning since its 2022 invasion of Ukraine, faces new structural constraints as its International North-South Transport Corridor (INSTC) through Iran collapses. On the other hand, China absorbs the shock of a disabled Belt and Road node but possesses both the capital, 2025 marking the highest BRI engagement ever recorded at $213.5 billion globally, with Central Asia ranking as the second largest recipient at approximately $25 billion in the first half of the year alone, and the alternative infrastructure ready to scale, primarily the Trans-Caspian Middle Corridor, to adapt. The result is an accelerating structural divergence between the two partners, and a Central Asian region increasingly able to bargain on its own terms.

In order to fully understand the situation, we must dive deep into the context of the pre-Iranian war in the Central Asian region. Before the war, economic ties between Tehran, Astana, and Tashkent were deepening on accelerationing level as the Central Asian region has been working on expanding its partnerships with other countries to oppose Russian historic dominance in the region. In May 2025, the Eurasian Economic Union finalized a free trade agreement with Iran, eliminating tariffs on almost 90% of traded goods and giving Kazakhstan direct preferential access to Iranian markets, and Uzbekistan developed its own bilateral trade framework with Tehran independently of the EAEU.

Kazakhstan's plans on the agreements with Iran contained a turnover of over 3 billion dollars for the grain, meat, oil, and cotton export via the Amirabad terminal within a span of a year. In exchange, Iran agreed to supply the petrochemicals and building materials. Meanwhile, Uzbekistan's export to Iran has reached over 157 million dollars, with imports from Iran exceeding 420 million dollars. This shows the example of the determination of Central Asian countries to expand economic ties with the Persian allies. Additionally, Iranian ports play a crucial part for Central Asian interests as they serve as a southern corridor for cargo shipments via sea.

It can be analyzed that prior to the Iranian war, Iran had been emerging as an increasingly stable economic and logistical partner for both Kazakhstan and Uzbekistan. Along with the EAEU-Iran free trade agreement and geopolitically strategic seaports, it allowed Central Asia to have access to global economic markets, serving as a strong alternative for historically dominated Russian partnerships. Consequently, the major disruptions with Iran, which affect economic and transport infrastructure, have a huge impact on Central Asian trade, geopolitical stability, and regional development dynamics.

Iran plays a huge role in the whole Eurasian region, not only as an economic partner but as a geopolitical counterpart. For Central Asian countries, which are geographically landlocked states, access to global markets lies via overland or maritime corridors. Such a necessity requires allies with more suitable geographical positions. Thus, Iran is a strategically important ally to all Central Asian states, which share not only economic interests but also historic and cultural attributes.

The southern corridor serves as a key transportation point, making Uzbekistan reliant on trade with Iran. This dependency has been building over the years of partnership and diplomatic relationships. Kazakhstan also benefits from Iran's port infrastructure within the International

North-South Transport Corridor connecting Russian and Central Asian exporters to South Asia and the Gulf through Iran.

Important to point out that , both Kazakhstan and Uzbekistan, being members of the Shanghai Cooperation Organization alongside Iran , has contributed to the Central Asian countries having a non-Western and non-Russian ally in the diplomatic arena. Iran plays a key role in the symbolic religious representation of Islamic history and identity. The Central Asian region, in particular, both Kazakhstan (over 70% muslim national) and Uzbekistan (over 80% muslim national), are predominantly Muslim-majority states. Thus, having Iran as its ally helps to overcome the tensions against secular powers while keeping the internal religious sentiments under control. Tehran represents a form of Muslim identity and resistance to Western pressure, which resonates with the public opinion of residents of Kazakhstan and Uzbekistan. However, it also creates a challenge when it comes to openly condemning Iranian actions or siding with the US/Israel within the conflict, as it can pose risks of triggering public unrest along religious lines public unrest on a religious basis.

We can state that Iran was already acting as one of the significant geopolitical balancing players even before the war. After the Russian invasion of Ukraine in February 2022, Central Asian countries were forced to adjust their ties and dependency on Moscow. Iran was one of the ideal alternative partners with proper trade corridors helping Kazakhstan and Uzbekistan to loosen ties with Russian-controlled trade routes. The war in Iran has become one of the unfortunate scenarios disrupting one of the main pillars of both countries' strategic diversification against Russian dependency during the times when it is most needed.

The most relevant geopolitical consequence of the Iran war for Kazakhstan and Uzbekistan is not the immediate economic disruption, but the divergence it has forced in Russian and Chinese strategic responses, and what that divergence means for the region's negotiating leverage.

3.1 Russia: Security Relevance as Compensation

For Moscow, the Iran war was a strategic catastrophe that arrived dressed as an opportunity. The collapse of the INSTC as a viable economic corridor was a serious blow, but Russia moved quickly to reframe its position. With Iran temporarily sidelined as a regional actor, Moscow intensified its pitch to Central Asian governments as the CSTO's indispensable security guarantor. The logic was transparent: if Iran's fate demonstrated that no state outside a formal security umbrella is safe from Western military action, then the CSTO's value proposition, however battered by its Ukraine-era credibility crisis, suddenly looked less redundant.

Russia also retained leverage through energy. The Uzbekistan gas relationship held, and with Iranian supplies disrupted, Tashkent's dependence on Russian gas became marginally more acute. Moscow's hold in nuclear energy, with Rosatom leading Kazakhstan's first nuclear plant, gave it continued relevance in the region's long-term infrastructure planning. But the limits of Russia's position were equally visible. The Iran war confirmed, as the LSE's analysis put it, that Russia and China were losing their grip on the Middle East, and that Moscow's southward connectivity strategy had been built on a fragile foundation. The INSTC required a stable Iran to function, a stability that is now gone.

3.2 China: Rerouting Through the Middle Corridor

Beijing's response to the Iran disruption followed its familiar pattern: strategic patience, combined with accelerated investment. China's failure to protect its Iranian partner, despite the 2021 strategic partnership and years of economic entanglement, was a reputational hit. As the Middle East Council on Global Affairs noted, Beijing was unable to shield Tehran from either the 2025 or 2026 US-Israeli attacks, exposing the limits of its cautious approach to regional security.

But China had something Russia lacked, that is to say, an alternative ready to scale. The Trans-Caspian Middle Corridor, linking China to Europe via Kazakhstan, the Caspian, Azerbaijan, Georgia, and Turkey, had been developing for years as a complement to the Iran route, but the war converted it, almost overnight, from supplement to primary artery. Recorded Future's 2025 analysis had already flagged that Beijing had built alternative systems that were making Moscow less central, with trade, energy flows, finance, and digital infrastructure increasingly redirected toward China. The Middle Corridor matters not just as a trade route but as a power projection tool: it bypasses both Russia and Iran, and runs through territory where neither Moscow nor Tehran can exert transit leverage. For Beijing, investing in it is simultaneously a commercial and a strategic decision. For Kazakhstan, sitting at the corridor's eastern anchor, the value of its geographic position has grown considerably.

The Trans-Caspian International Transport Route had already doubled its fees and expanded capacity to an estimated 10 million tons per year by 2025; post-war demand will only push that further. Kazakhstan and Azerbaijan are meanwhile deepening the digital infrastructure that runs alongside this corridor. The Trans-Caspian Fibre-Optic Cable, the Asian component of the Azerbaijani-led Digital Silk Way initiative, will connect Kazakhstan to Azerbaijan and open a new high-capacity data route between Central Asia and Europe by late 2026, a corridor that China stands to benefit from without having built it. Together, these developments represent a layer of physical and digital integration that Russia cannot match through the CSTO or bilateral security ties alone, and one that quietly builds the kind of institutional dependencies that outlast any single infrastructure project.

Kazakhstan and Uzbekistan are not to be understood as passive objects of great-power competition: both governments have, over the past several years, developed a statecraft sophisticated enough to turn rivalry into revenue and pressure into autonomy. E-International Relations' April 2026 analysis described President Tokayev as an attuned geopolitical analyst practising fundamentally different statecraft compared with his predecessors. The description holds when confronted with an empirical analysis: Tokayev has simultaneously maintained Russia engagement within the CSTO framework, deepened Chinese trade ties under the BRI, secured EU connectivity agreements worth up to 12 billion euros under the Global Gateway framework agreed at the first presidential-level EU-Central Asia summit in April 2025, and courted Gulf capital alongside Turkish institutional partnerships. Uzbekistan has followed a parallel track, and by keeping multiple external actors simultaneously invested, both states ensure that none of them can exercise decisive leverage.

The US has reinforced this logic from the outside: the Trump administration's November 2025 C5+1 summit at the White House, the first time all five Central Asian presidents gathered in Washington at presidential level, and bilateral critical minerals agreements with Uzbekistan formalised in April 2025 and deepened by a Joint Investment Framework in February 2026, signal that Washington is willing to compete commercially in the region without demanding the alignment commitments it historically attached to its engagement. The Iran war, paradoxically, has strengthened this position rather than complicated it. With Russia's southward corridor disabled and China's Iranian node gone, Central Asia becomes more indispensable as a transit zone. Kazakhstan's infrastructure, its Khorgos dry port, Caspian terminals, and rail connections, positions it as a pivotal node in the emerging architecture of Eurasian trade, with the Trans-Caspian International Transport Route having already expanded capacity to an estimated 10 million tons per year by 2025. Tashkent's value as a gateway to the south and east of the former Soviet space has risen accordingly, with Uzbekistan's multi-vector positioning, balancing Chinese BRI investment, a landmark EU Enhanced Partnership Agreement signed in October 2025, $8.3 billion in Gulf investment by mid-2025, and deepening US commercial ties, ensuring that no single external actor can exercise decisive leverage. Both governments know this, and they are positioning accordingly.

Following this analysis, some structural implications emerge clearly: first, the Sino-Russian complementarity thesis in Central Asia, that is, the idea that Beijing takes economics while Moscow takes security and that this division keeps them out of each other's way, is breaking down. With the INSTC disrupted, Russia cannot deliver on its core economic promise to the region. With China unable to guarantee the security of its BRI nodes, Beijing can no longer fully separate its economic engagement from security questions. Both powers are now competing in spaces they previously ceded to the other.

Second, the Middle Corridor is the dominant frame for Central Asian connectivity in the post-Iran order. The Atlantic Council noted that Russia and China have been trying to prevent growing Western influence in the region through control of transit corridors; the Iran war has handed that corridor debate to parties that Russia cannot dominate.

Third, the nuclear energy sector will remain a bellwether, as Kazakhstan's decision to split nuclear plant contracts between Rosatom and CNNC, with China leading two of three facilities, and Uzbekistan's contingency turn to CNNC, reflects a deliberate diversification strategy that will deepen as both countries expand their energy infrastructure. Russia will not be displaced entirely, but it is safe to say that its monopoly position is gone.

Fourth, and most importantly: Central Asian agency is real and growing. The post-Iran environment produces a more genuinely multipolar regional order in which Astana and Tashkent have more negotiating partners and therefore more room to move. The question for Western policymakers is whether they can offer a sufficiently compelling package on investment, critical minerals, connectivity, and security to become a meaningful fourth pole in this emerging architecture.

The Iran war has not created a new geopolitical order in Central Asia so much as it has violently accelerated trends already in motion. Russia's structural retreat, China's infrastructure advance, and the growing sovereign confidence of Kazakhstan and Uzbekistan were all visible before the first strikes on Tehran. What the war has done is collapse the timeline, close off Russia's most promising compensatory strategy, expose the limits of Chinese security guarantees, and install the Trans-Caspian Middle Corridor as the new spine of Eurasian trade.

For policymakers in Washington and Brussels, this is both a warning and an opening. The window for building institutional and economic partnerships with Kazakhstan and Uzbekistan, on their terms and through their preferred frameworks, is open, but whether it stays open depends on how quickly Western institutions can match the pace of Chinese investment and the depth of Russian institutional memory. The great game in Central Asia is being redrawn, and the new map will be written in fibre-optic cables, nuclear plant contracts, and grain supply chains as much as in military alliances.