

**Beyond Transit:  
Harnessing the China–  
Kyrgyzstan–Uzbekistan  
Railway for Strategic  
Value Capture under  
NDP-2030**

by Przemysław Ozierski

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# POLICY BRIEF

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## Beyond Transit: Harnessing the China–Kyrgyzstan–Uzbekistan Railway for Strategic Value Capture under NDP-2030

by Przemysław Ozierski

### Executive summary

The China–Kyrgyzstan–Uzbekistan (CKU) Railway is among the most consequential new Eurasian transport projects of the 2020s. For Kyrgyzstan, it is more than a railway: it has the potential to reshape the country's economic geography, regional position, and long-term strategic relevance. The National Development Programme of the Kyrgyz Republic until 2030 (NDP-2030) identifies CKU as a “strategic decision” to maximise integration into global trade networks.<sup>1</sup>

The project will create the first direct east–west rail link across the Tian Shan, making China–Europe transit distances shorter by approximately 900–1,100 km and reducing cargo transit times by 7–10 days. The construction of 304.84 km of the new railway in Kyrgyzstan will significantly expand the national rail network. Kyrgyz officials project that the line's ultimate freight capacity will reach 15 million tonnes annually. This would exceed the approximately 10.5 million tonnes handled by Kyrgyzstan's entire existing railway network in 2025 and could transform the country from a peripheral transit dead-end into a central logistics connector.<sup>2</sup>

GTAP-based global general-equilibrium modelling projects that CKU could raise Kyrgyzstan's real GDP by 0.45 percent in the long term. It could also increase participation in simple global value chains by 1.66 percent forward and 2.98 percent backward, and in complex global value chains by 0.88 percent forward and 0.57 percent backward.<sup>3</sup> At the same time, the modelling projects

<sup>1</sup> Government of the Kyrgyz Republic, National Development Programme of the Kyrgyz Republic until 2030, (Bishkek: Presidential Decree No. 178, 5 June 2025), retrieved September 14, 2026, from <https://cbd.minjust.gov.kg/53-383/edition/32963/ru>

<sup>2</sup> «Railway Opens a New Gateway,» China Daily, (September 2, 2026), retrieved September 14, 2026, from <https://www.chinadaily.com.cn/a/202609/02/WS6a978de3e4b06d4aa055be52.html>; «CKU Railway Project: Kosh-Dobo North No. 2 Tunnel Completed,» Kabar News Agency, (August 26, 2026), retrieved September 14, 2026, from <https://en.kabar.kg/news/cku-railway-project-kosh-dobo-north-no-2-tunnel-completed/>

<sup>3</sup> Wanlu Dong, «The Economic Effects of Infrastructure Investment under the 'Belt and Road' Framework: Mechanism and Policy Simulation of the China–Kyrgyzstan–Uzbekistan

a decline in purely domestic value added of 2.77–3.70 percent. This suggests that, without complementary industrial, logistics, and governance policies, Kyrgyzstan risks becoming locked into a transit-oriented economy rather than developing diversified productive capacity.<sup>4</sup> The 2026 Bishkek SCO Summit's emphasis on local processing hubs and industrial zones further underscores the need to link corridor development with domestic value addition.<sup>5</sup> Without active domestic governance, Kyrgyzstan risks operating merely as a passive transit corridor.

The central policy challenge is to manage geological, security, governance and corruption, information, financial and debt-sustainability, and labour and local-content absorption risks. Drawing on national planning documents, economic modelling, and regional risk assessments, this brief proposes nine policy priorities to ensure that CKU serves as an engine of structural transformation rather than a narrow transit channel. CKU could become a central anchor of Kyrgyzstan's transition from a landlocked periphery to a regionally connected corridor state.

**Keywords:** CKU Railway, Eurasian transport corridors, Kyrgyzstan, regional connectivity, Middle Corridor, infrastructure governance, landlocked developing countries, Belt and Road Initiative

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Railway.» Price: Theory and Practice, No. 11 (2024), pp. 162–168, Tables 5 and 8, retrieved September 14, 2026, from <https://doi.org/10.19851/j.cnki.CN11-1010/F.2024.11.319>

<sup>4</sup> Dong, «The Economic Effects of Infrastructure Investment,» Table 8.

<sup>5</sup> Bishkek Declaration of the Council of Heads of State, Shanghai Cooperation Organisation, (September 1, 2026), retrieved September 14, 2026, from <https://rus.sectsc.org/20260901/2495418.html>

## Introduction and Policy Challenge

Kyrgyzstan's transport position is characterised by structural vulnerability. As a landlocked developing country, it depends heavily on northern routes through Kazakhstan and Russia – an exposure made more visible by disruptions following Russia's full-scale invasion of Ukraine in 2022. The country has only 424.6 km of railway, no direct rail connection between its northern and southern networks, and a freight system in which road transport accounts for approximately 80 percent of total volumes.<sup>6</sup>

This dependence is structural rather than temporary. Since independence, Kyrgyzstan has faced limited route diversification and has remained reliant on transit arrangements with neighbouring states. Disputes and restrictions affecting cross-border movement within the Eurasian Economic Union have illustrated the limits of relying on a narrow external route system.<sup>7</sup> In 2023, Prime Minister Akylbek Japarov stated that Kyrgyzstan could not rely exclusively on transit through Kazakhstan and needed alternative routes to reduce vulnerability.<sup>8</sup> The disruptions associated with the war in Ukraine therefore exposed a pre-existing weakness rooted in the post-Soviet transport architecture.

The existing rail network reached a structural capacity ceiling in 2024, when Kyrgyzstan transported 9.2 million tonnes of rail freight – effectively plateauing relative to 2023 despite increasing demand for transport and logistics services.<sup>9</sup> NDP-2030 targets 15 million tonnes of

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<sup>6</sup> National Statistical Committee of the Kyrgyz Republic, «Автомобильный транспорт и дорожное хозяйство: цифры и факты,» (October 25, 2025), retrieved September 14, 2026, from <https://stat.gov.kg/ru/news/avtomobilnyj-transport2025-i-dorozhnoe-hozyajstvo-cifry-i-fakty/>; «Железная дорога Кыргызстана вышла на рекордные объемы перевозок,» Kyrgyz Temir Zholu, (2025), retrieved September 14, 2026, from <https://eltr.kg/ru/zheleznyaya-doroga-kyrgyzstana-vyshla-na-rekordnye-obemy-perevozok/>

<sup>7</sup> Przemyslaw Ozierski and Elnura Omurkulova-Ozierska, «For China and Kyrgyzstan, the Time for Synchronous Development Has Come. Kazakhstan's Actions Strike a Blow to the EAEU,» AKIpress, (2017), retrieved September 14, 2026, from <https://analitika.akipress.org/news:5521>

<sup>8</sup> «Форум АКИпресс: Глава кабинета Асылбек Жапаров и посол Казахстана Рапиль Жошыбаев вступили в дискуссию,» Tazabek, (February 28, 2023), retrieved September 14, 2026, from <https://www.tazabek.kg/news:1874646>

<sup>9</sup> Open Data Kyrgyzstan, Freight Transportation by Rail Transport for 2024, retrieved September 14, 2026, from <https://data.infocom.kg/en/dataset/rpy3onepebo3ka-xejie3hodopoxhbm-transportom-3a-2024-rod/resource/371b885f-49e6-4f18-8200-77f5cf3d4f58>; «КТЖ увеличила объем перевозок до рекордных 10,5 млн тонн и определила приоритеты развития до 2030 года,» Kabar News Agency, (2026), retrieved September 14, 2026, from <https://ru.kabar.kg/news/ktzh-uvlechila-obem-perevozok-do-rekordnyh-105-mln-tonn-i-opredelila-prioritye-ravzitiya-do-2030-goda/>

annual rail freight by 2030 - a 63 percent increase from the 2024 level. Achieving this objective requires additional infrastructure, new cross-border connections, and modernised logistics systems. The present network's limited length, ageing assets, disconnected northern and southern segments, and dependence on a narrow set of external routes cannot alone support the required expansion. CKU is therefore a central enabling project. The NDP-2030 reports 21 percent freight turnover growth from 2021 to 2024 and a 163.11 percent increase in transport and storage services over the same period, demonstrating that demand for freight services is rising rapidly. Yet, without new physical capacity, this demand cannot be met. The NDP-2030 explicitly identifies rail expansion as a national priority, framing the CKU project as the essential instrument for reaching the next level of logistics and freight capacity.<sup>10</sup>

CKU should therefore be understood as a Kyrgyz strategic choice within a crowded Eurasian corridor landscape. Chinese-language studies by Shi and Zheng, Dong, Zhang and Li, and Su provide useful empirical data, risk mapping, and scenario modelling. This brief treats these studies as important analytical inputs while assessing their implications against Kyrgyz national-development priorities, official planning documents, and regional experience with other transport corridors. The resulting approach focuses on governance: maximising domestic benefits while managing environmental, social, security, and financial risks.<sup>11</sup>

## Construction Status and Early Domestic Effects

The project has moved decisively from planning into large-scale physical execution. Since full-scale civil construction began in June 2025, work has commenced on 27 tunnels, 43 bridges, 88 roadbed sections, and 20 railway stations. The 209.6-metre Kosh-Dobo North

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<sup>10</sup> Government of the Kyrgyz Republic, National Development Programme of the Kyrgyz Republic until 2030.

<sup>11</sup> Yue Shi and Hao Zheng (eds.), *The China–Kyrgyzstan–Uzbekistan Railway and China–Central Asia Cooperation: New Observations on Economy, Trade, and Humanities*, (Beijing: Xinhua Publishing House, 2024); Wanlu Dong, «The Economic Effects of Infrastructure Investment under the 'Belt and Road' Framework»; Huaqing Zhang and Qi Li, «The China–Kyrgyzstan–Uzbekistan Railway and the Reshaping of Central Asia's Geopolitical Landscape from a Multidimensional Perspective,» *Journal of Shaanxi Normal University (Philosophy and Social Sciences Edition)*, Vol. 54, No. 1 (2025), pp. 47–60, retrieved September 14, 2026, from <https://doi.org/10.15983/j.cnki.sxss.2025.0104>; Yong Su, «The Role of the China–Kyrgyzstan–Uzbekistan Railway in the Economic Development of Central Asia and Policy Optimization Recommendations,» *Investment and Cooperation*, No. 4 (2025), pp. 53–55.

No. 2 tunnel was the first tunnel drilled through on the Kyrgyz section.<sup>12</sup> Construction on the Kyrgyz section is underway, with overall progress estimated at approximately 17 percent as of September 2026.<sup>13</sup> The project is also beginning to generate domestic economic effects. More than 60 percent of major construction materials have reportedly been procured locally, while more than 2,000 Kyrgyz citizens have been employed and more than 1,800 have received specialised training.<sup>14</sup>

*Table 1. CKU Railway: Construction Status and Early Domestic Effects in Kyrgyzstan, September 2026*

| Project component     | Status as of September 2026                                                                     | Policy significance                                                                                                         |
|-----------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <b>Kyrgyz section</b> | 304.84 km planned; construction underway; approximately 17 percent complete                     | Demonstrated capacity to expand the national railway network and establish a direct rail connection to China and Uzbekistan |
| <b>Tunnel works</b>   | 29 tunnels planned; 27 under construction; first breakthrough achieved at Kosh-Dobo North No. 2 | Tunnelling is the main engineering challenge and a critical determinant of the overall timetable and route resilience       |
| <b>Bridge works</b>   | 43 bridges under construction                                                                   | Demonstrates that physical construction is advancing across difficult mountain and valley terrain                           |

<sup>12</sup> «First Tunnel Completed on Kyrgyzstan Section of China–Kyrgyzstan–Uzbekistan Railway,» China Daily, (September 5, 2026), retrieved September 14, 2026, from <https://www.chinadaily.com.cn/a/202609/05/WS6a9ba37ae4b06d4aa055c85d.html>; «CKU Railway Project: Kosh-Dobo North No. 2 Tunnel Completed,» Kabar News Agency, (August 26, 2026), retrieved September 14, 2026, from <https://en.kabar.kg/news/cku-railway-project-kosh-dobo-north-no-2-tunnel-completed/>; «1st Tunnel for China–Kyrgyzstan–Uzbekistan Railway Achieves Breakthrough,» Xinhua, (September 5, 2026), retrieved September 14, 2026, from <https://english.news.cn/20260905/286d01aab5b148cc8462ad7579fd15e8/c.html>

<sup>13</sup> «How China–Kyrgyzstan–Uzbekistan Railway Is Reshaping Eurasian Trade,» South China Morning Post, (September 9, 2026), retrieved September 14, 2026, from <https://www.scmp.com/special-reports/article/3366768/how-china-kyrgyzstan-uzbekistan-railway-reshaping-eurasian-trade>

<sup>14</sup> «First Tunnel Completed on Kyrgyzstan Section,» China Daily.

| Project component                 | Status as of September 2026                                           | Policy significance                                                                                               |
|-----------------------------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Roadbed and subgrade works</b> | 88 sections active                                                    | Indicates that main-line earthworks and ground stabilisation are progressing in parallel with tunnel construction |
| <b>Station infrastructure</b>     | 20 stations planned and under construction                            | Establishes future nodes for logistics services, cargo consolidation, and local economic activity                 |
| <b>Domestic sourcing</b>          | More than 60 percent of major construction materials procured locally | Creates an initial basis for local supplier participation, industrial spillovers, and domestic value capture      |
| <b>Kyrgyz workforce</b>           | More than 2,000 Kyrgyz citizens employed; more than 1,800 trained     | Provides early employment, technical skills transfer, and a foundation for future operational capacity            |

*Source:* Compiled by the author from China–Kyrgyzstan–Uzbekistan Railway Company reporting, as reported by Xinhua, Kabar, and China Daily, August–September 2026.

These early results do not yet guarantee sustained domestic value capture during operations, but they establish a practical baseline for local procurement, workforce development, and industrial participation. The evidence indicates that CKU implementation is no longer primarily a question of political commitment. The policy challenge is now to ensure that domestic procurement, skills transfer, safety, customs efficiency, and industrial linkages keep pace with physical construction.

## Risk Profile

The CKU risk profile is multidimensional. As the project moves from planning into full-scale construction, the principal challenge shifts from securing political commitment to managing implementation risks while preparing for the operational risks that will arise once the railway enters service. The central policy question is whether rapid physical construction will be matched by effective environmental, social, governance, safety, and economic safeguards throughout the project life

cycle. From a Kyrgyz policy perspective, six interconnected risk clusters require attention.

1. **Geological and environmental risks.** The route crosses the Tian Shan orogenic belt, where seismicity, fault zones, steep terrain, slope instability, water constraints, vegetation-protection requirements, and extensive tunnelling create substantial long-term engineering and environmental-management challenges. Shi and Zheng identify the Nikolaev, Atbashi-Inyckheskiy, and Talas-Ferganskiy fault zones, as well as nine active faults and 235 general faults along the proposed alignment.<sup>15</sup> The exposure of settlements and transport infrastructure in the wider Fergana and Jalal-Abad areas reinforces the need for stringent seismic design, continuous geotechnical monitoring, independent safety oversight, and rail-based emergency-response planning. These risks are manageable, but they require sustained investment in resilience throughout construction and operation.
2. **Security risks.** The CKU Railway traverses territories with differing security environments, with particular attention required in the Fergana Valley. The Fergana Valley has historically experienced inter-ethnic tensions, cross-border disputes, and uneven local confidence in state institutions. However, the regional environment has improved significantly. The Khujand Declaration on Eternal Friendship and the Treaty on the Junction Point of State Borders, both signed on 31 March 2025, together with the first Fergana Peace Forum, held in October 2025, have contributed to reframing the valley as “a symbol of a new era in Central Asia—a centre of trust and dialogue.”<sup>16</sup> The introduction of major rail infrastructure into this densely populated and multi-jurisdictional area nonetheless requires coordinated border management, rapid incident-response arrangements, protection of critical infrastructure, and secure exchange of railway-related threat information. The objective should be proportionate, risk-based security cooperation rather than indiscriminate securitisation of cross-border mobility.

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<sup>15</sup> Shi and Zheng, *The China–Kyrgyzstan–Uzbekistan Railway*, Chapter 5.

<sup>16</sup> «The Fergana Peace Forum Became a Platform for Strengthening Regional Dialogue,» Development Strategy Center, (October 17, 2025), retrieved September 14, 2026, from <https://strategy.uz/index.php?news=2176&lang=en>; «Khujand 2025: A New Architecture of Friendship and Strategic Partnership in Central Asia,» Uza, (April 3, 2025), retrieved September 14, 2026, from [https://uza.uz/en/posts/khujand-2025-a-new-architecture-of-friendship-and-strategic-partnership-in-central-asia\\_705188](https://uza.uz/en/posts/khujand-2025-a-new-architecture-of-friendship-and-strategic-partnership-in-central-asia_705188)

- 3. Information risks.** CKU operates within a contested information environment in which competing external narratives may influence public perceptions of sovereignty, debt, environmental impacts, security, and geopolitical alignment. Russian-language commentary often highlights security, sovereignty, and financial concerns; Western coverage frequently interprets CKU through the lens of strategic competition; and Chinese official messaging emphasises connectivity, development, and cooperative benefits. These perspectives may raise legitimate questions, but they can also polarise domestic debate and displace evidence-based evaluation of Kyrgyzstan’s national interest. Zhang and Li note that external actors may seek to exploit local grievances surrounding the project.<sup>17</sup> Kyrgyz policy should therefore rely on transparent public information, credible environmental and financial disclosure, and space for independent scrutiny, rather than on any specific external narrative.
- 4. Financial and debt-sustainability risks.** Financing a multi-billion-dollar corridor requires careful management of direct fiscal exposure, contingent liabilities, construction cost overruns, exchange-rate risks, and lower-than-anticipated freight revenues. The current structure distributes formal responsibilities through a trilateral joint venture, but it also relies substantially on Chinese financing: approximately \$2.3 billion is provided as a 35-year loan to the project company, while Kyrgyzstan is financing part of its equity contribution through a preferential loan from the Export-Import Bank of China.<sup>18</sup> As Dong argues, managing single-creditor exposure remains critical. Without flexible and diversified financing structures, risk-sharing instruments, or appropriate private-capital participation, future debt-service obligations could undermine the macro-financial stability objectives of NDP-2030. The joint-venture structure reduces but does not eliminate risks associated with public contributions, contingent liabilities, refinancing needs, and weak traffic-revenue performance.

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<sup>17</sup> Zhang and Li, «The China–Kyrgyzstan–Uzbekistan Railway.»

<sup>18</sup> Government of the Kyrgyz Republic, «Подписано соглашение о финансировании строительства железной дороги 'Китай – Кыргызстан – Узбекистан',» (December 16, 2025), retrieved September 14, 2026, from <https://www.gov.kg/ru/post/s/25876-kytai-kyrgyzstan-ozbekstan-temir-zolun-kuruu-dolboorun-karzyloo-ucun-makuldasuuga-kol-koyuldu>

5. **Governance and corruption risks.** CKU's scale and trilateral joint-venture structure make transparency in financing and procurement especially important. If financing terms and procurement arrangements are not sufficiently disclosed, public accountability may weaken and the project's benefits may be harder to assess. This could also limit confidence that Kyrgyz firms have fair opportunities to participate. Transparent disclosure is therefore essential to ensuring that the railway supports domestic value capture.
6. **Labour and local-content absorption risks.** The construction phase is already generating early domestic benefits: more than 60 percent of major construction materials are reportedly sourced in Kyrgyzstan, more than 2,000 Kyrgyz citizens have been employed, and more than 1,800 have received specialised training.<sup>19</sup> These outcomes provide an important baseline, but they do not guarantee sustained participation by Kyrgyz workers and firms during later construction stages or railway operations. Advanced tunnelling, signalling, rolling-stock maintenance, logistics management, digital systems, and specialised components may continue to require foreign expertise and imports unless domestic capabilities expand. The principal risk is therefore not foreign participation itself, but the failure to convert it into sustained local skills, supplier capacity, and technology transfer. Without active workforce-development, certification, procurement, and supplier-development policies, Kyrgyzstan may capture temporary construction employment while missing longer-term industrial and operational benefits.

The core policy challenge is therefore twofold. First, Kyrgyzstan must ensure that CKU delivers the additional connectivity and freight capacity needed to move beyond the existing structural ceiling in rail transport. Second, it must ensure that the railway generates domestic value beyond transit fees, re-export activity, and short-term construction employment. The central risk is clear: without active domestic governance, local procurement, skills development, trade facilitation, and industrial policy, CKU could leave Kyrgyzstan as a passive transit corridor rather than support a diversified and resilient economy.

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<sup>19</sup> «First Tunnel Completed on Kyrgyzstan Section,» China Daily.

## Policy Change

Analytically, the China–Kyrgyzstan–Uzbekistan (CKU) Railway helps Kyrgyzstan move from “point-level isolation” to a more resilient “point–line–surface” corridor system integrated into several Eurasian routes. It functions as a southern backbone that complements existing northern routes and strengthens the country’s negotiating position vis-à-vis neighbours and external partners.<sup>20</sup>

The economic mechanism operates through three connected channels: increased transport capacity, reduced trade costs, and enhanced logistics value. Of these, trade-cost reduction is the most important: shorter distances, fewer trans-shipment requirements, more predictable transit, and faster border procedures can make Kyrgyz trade and transit services more competitive.<sup>21</sup>

*Table 2. Kyrgyzstan: Change in Global Value-Chain Participation under the CKU Railway Simulation*

| Indicator                           | Projected change (percent) | Opportunity                                                                                       | Risk                                                             |
|-------------------------------------|----------------------------|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| Simple GVC participation, forward   | <b>+1.66</b>               | Greater provision of regional logistics, transit, and trade-related services                      | Continued concentration in lower-value transit activity          |
| Simple GVC participation, backward  | <b>+2.98</b>               | Improved access to foreign machinery, technologies, intermediate goods, and production components | Greater dependence on imported inputs and external supply chains |
| Complex GVC participation, forward  | <b>+0.88</b>               | Initial scope for entry into more sophisticated production networks and export upgrading          | Limited gain suggests a modest role in multi-stage value chains  |
| Complex GVC participation, backward | <b>+0.57</b>               | Stronger links with external production processes and regional manufacturing networks             | Industrial upgrading remains at an early stage                   |

<sup>20</sup> Shi and Zheng, The China–Kyrgyzstan–Uzbekistan Railway, Introduction.

<sup>21</sup> Dong, «The Economic Effects of Infrastructure Investment.»

| Indicator                 | Projected change (percent) | Opportunity                                                                         | Risk                                                                                       |
|---------------------------|----------------------------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| Traditional trade         | <b>+0.15 to +0.21</b>      | Improved market access for gold, agricultural products, textiles, and other exports | Export basket remains narrow and commodity-dependent                                       |
| Pure domestic value added | <b>-2.77 to -3.70</b>      | Deeper integration with regional and global markets                                 | Risk of a transit- and import-dependent development pattern without complementary policies |

*Source: Dong (2024), Table 8. Author's translation and interpretation.*

The table indicates a structural shift rather than an automatic industrial transformation. CKU is projected to raise Kyrgyzstan's participation in global value chains across all dimensions, but the largest increase is in simple backward participation, at 2.98 percent, suggesting stronger import-linked integration. Gains in complex GVC participation are comparatively modest, while purely domestic value added is projected to decline by 2.77–3.70 percent.

The policy implication is direct: improved connectivity can deepen Kyrgyzstan's integration into regional trade and logistics networks, but connectivity alone will not ensure diversified domestic production or higher-value industrial participation. The required policy change is therefore not merely to construct the railway, but to build the governance architecture that enables domestic value capture.

Hard infrastructure must be matched by soft infrastructure: customs harmonisation, interoperable digital documentation, coordinated border management, dry ports and logistics centres, transparent railway governance, and active industrial policy. Without these complementary measures, CKU may increase transit volumes and import-linked activity without delivering sustained domestic transformation. CKU connects Kyrgyzstan into three main corridor families. First, the Middle Corridor, where CKU can act as a southern feeder once domestic north–south rail upgrades are completed. Second, westbound Caspian routes via Uzbekistan and Turkmenistan to Turkmenbashi and onward to Baku. Third, southern connectivity corridors may provide access to Iran and its ports, including Bandar Abbas and Chabahar; potential rail extensions could strengthen links towards Türkiye and Europe, while alternative routes through Afghanistan may offer additional access

to Iranian ports or, in the longer term, to Pakistan’s Gwadar port and Indian Ocean markets.<sup>22</sup> For a landlocked developing country, this multi-directional access can reduce exposure to any single transit state, border disruption, or geopolitical crisis.

Geopolitically, CKU can elevate Kyrgyzstan from a peripheral transit add-on to a corridor state with greater active agency. Zhang and Li’s argument about the reshaping of Central Asia’s geopolitical landscape is relevant here, but it can be read less as a shift into any one power’s orbit and more as an expansion of economic and diplomatic options. Kyrgyzstan can engage China, Uzbekistan, the European Union, Türkiye, India, and Gulf states from a stronger position, while retaining room to balance competing offers. This supports the NDP-2030 goal of positioning Kyrgyzstan as a regional hub for transport, logistics, finance, and trade, provided that domestic governance and risk management keep pace with physical infrastructure development.<sup>23</sup>

Regional freight data supports this broader trend. Freight volumes on the Trans-Caspian International Transport Route grew by 63 percent in the first 11 months of 2024, reaching 4.1 million tons. Container traffic increased 2.6 times to 50,500 TEU.<sup>24</sup> This indicates that regional demand for diversified corridors is commercially significant and growing.

China frames CKU within its Belt and Road Initiative, emphasising cooperative benefits and greater resilience in regional trade routes.<sup>25</sup> For Kyrgyzstan, these are secondary benefits. The primary rationale remains national connectivity, sovereign trade diversification, and sustainable economic development.

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<sup>22</sup> Przemysław Ozierski, «International North–South Transport Corridor: Are the Indian Ocean Ports Becoming More Accessible for Kyrgyzstan?» AKIpress, (2023), retrieved September 14, 2026, from [https://analitika.akipress.org/unews/un\\_post:29907](https://analitika.akipress.org/unews/un_post:29907)

<sup>23</sup> Zhang and Li, «The China–Kyrgyzstan–Uzbekistan Railway»; Government of the Kyrgyz Republic, National Development Programme of the Kyrgyz Republic until 2030.

<sup>24</sup> «Perspectives of the Middle Corridor: A View from Central Asia and Azerbaijan,» PeaceNexus Foundation, (2025), retrieved September 14, 2026, from [https://peacenexus.org/wp-content/uploads/2025/10/srednij\\_koridor\\_vzglyad\\_iz\\_czentralnoj\\_azii\\_analiticheskij\\_doklad\\_compressed.pdf](https://peacenexus.org/wp-content/uploads/2025/10/srednij_koridor_vzglyad_iz_czentralnoj_azii_analiticheskij_doklad_compressed.pdf)

<sup>25</sup> Zhang and Li, «The China–Kyrgyzstan–Uzbekistan Railway.»

## Policy Priorities and Recommendations

The recommendations below follow directly from the two-part diagnosis in this brief. The first tier responds to the economic finding: CKU may deepen Kyrgyzstan's integration into regional value chains, but the modelling projects a decline in purely domestic value added unless complementary policies are put in place.<sup>26</sup> These recommendations therefore focus on converting connectivity into domestic value capture – through customs reform, logistics capacity, industrial linkages, financing, and skills development.

The second tier responds to the risk profile: geological, security, and information risks require enabling measures that protect the corridor and preserve the conditions under which economic benefits can be realised. Together, the two tiers address both the opportunity and the vulnerabilities identified in the preceding sections.

### Tier A — Domestic Value Capture

#### *1. Establish a Single-Window Customs and Border Reform Programme.*

**Responsible:** State Customs Service, Ministry of Transport and Communications, State Border Service.

**Feasibility:** Medium — requires inter-agency coordination and interoperable systems, though regional templates already exist.

Trade-cost reduction is the most important economic channel through which CKU affects Kyrgyzstan.<sup>27</sup> A broader reform programme is required to align border management with the corridor's commercial potential. Priority measures should include pre-arrival processing of cargo documentation, coordinated controls at border crossings, transparent transit procedures with published tariffs and timelines, and interoperability with regional digital-freight frameworks. Clearance-time data should be published by crossing and consignment type, allowing performance to be independently assessed and bottlenecks identified. Without procedural reform, physical capacity alone will not translate into lower trade costs or more competitive transit services.

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<sup>26</sup> Dong, «The Economic Effects of Infrastructure Investment,» Table 8.

<sup>27</sup> Dong, «The Economic Effects of Infrastructure Investment,» section on economic mechanisms.

## 2. *Develop Dry Ports and Logistics Clusters in Southern Kyrgyzstan.*

**Responsible:** Ministry of Transport and Communications, local governments, and private investors.

**Feasibility:** Medium-high — requires capital investment but can be phased over several budget cycles.

The projected increase in simple forward participation (+1.66 percent) suggests an expanded role for Kyrgyzstan in logistics, transit, and trade-related services.<sup>28</sup> To prevent this role from remaining low value, the state should develop bonded warehousing, cold-chain capacity, consolidation and deconsolidation services, customs clearance, freight forwarding, and local logistics enterprises around rail-linked terminals and logistics nodes in southern Kyrgyzstan. These clusters should serve both transit cargo and domestic producers. Priority should be given to facilities that reduce handling time and cost for agricultural exports, construction materials, and consumer goods, alongside regulatory arrangements enabling small and medium-sized Kyrgyz firms to participate in corridor-related logistics services.

## 3. *Adopt a Domestic Value-Capture and Industrial Policy Framework.*

**Responsible:** Ministry of Economy and Commerce, Ministry of Transport and Communications.

**Feasibility:** Medium — requires sustained cross-sectoral policy commitment.

The modelling projects a 2.77–3.70 percent decline in purely domestic value added.<sup>29</sup> Countering this requires more than logistics services and transit fees. The state should link CKU terminals and logistics nodes to processing, packaging, assembly, repair, supplier development, standards compliance, and export-support programmes. Priority should be given to agriculture and agro-processing, textiles, leather, construction materials, and supplier development for railway operations and maintenance. Without deliberate industrial policy, the corridor may move goods without generating sufficient productive capacity.

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<sup>28</sup> Dong, «The Economic Effects of Infrastructure Investment,» Table 8.

<sup>29</sup> Dong, «The Economic Effects of Infrastructure Investment,» Table 8.

#### 4. *Institutionalise Financing Transparency and Single-Creditor Exposure Mitigation.*

**Responsible:** Ministry of Finance, with international financial institutions.

**Feasibility:** Medium — requires financial analysis, transparency measures, and diversified risk-sharing arrangements.

The Ministry of Finance should proactively manage fiscal and debt-sustainability risks. Future capital mobilisation should assess diversified financing and risk-sharing structures, including public-private partnerships, co-financing with regional development banks, guarantees, and operational partnerships where consistent with public-interest safeguards. The government should publish financing terms, procurement arrangements, debt-service projections, and contingent liabilities. This would strengthen accountability while reducing excessive exposure to any single creditor. The CKU's reported financing structure includes a Chinese loan of about \$2.3 billion to the joint project company, alongside equity contributions from the three participating states.<sup>30</sup>

#### 5. *Build Railway-Linked Human Capital and Bilateral Skills Cooperation.*

**Responsible:** Ministry of Education and Science, Ministry of Labour, Ministry of Digital Development, and the Kyrgyz–China Intergovernmental Cooperation Committee.

**Feasibility:** High — builds on existing bilateral and national development priorities.

The CKU Railway should be treated not as a stand-alone transport asset but as an enabling platform for a broader human-capital agenda. The corridor will require engineers, logistics specialists, customs and digital-systems operators, and maintenance technicians. A permanent bilateral working group on skills transfer, joint curricula, and professional certification should align training pipelines with railway needs during construction and operations. These capacities can subsequently support adjacent sectors, including digital services and critical-minerals value chains.<sup>31</sup>

<sup>30</sup> Government of the Kyrgyz Republic, «Подписано соглашение о финансировании строительства железной дороги 'Китай – Кыргызстан – Узбекистан'.»

<sup>31</sup> «Tracks, Trade and Talent: China and Kyrgyzstan Build a Closer Community,» CGTN, (August 30, 2026), retrieved September 14, 2026, from <https://news.cgtn.com/news/2026-08-30/>

## **Tier B — Enabling Resilience and Security**

### *6. Establish an Emergency Mobility and Humanitarian Response Protocol.*

**Responsible:** Ministry of Emergency Situations, in coordination with rail operators.

**Feasibility:** High — implementable through a bilateral administrative agreement without new legislation.

To mitigate severe seismic vulnerabilities along the Tian Shan alignment,<sup>32</sup> a Trans-Tian Shan Crisis Response Protocol should provide for pre-positioning heavy rescue equipment and mobile medical units at key stations and logistics nodes. It should also codify rapid customs-clearance procedures for bilateral disaster assistance. In the event of an environmental shock, this would accelerate the movement of emergency aid, technical equipment, and rescue teams across the corridor.

### *7. Establish a Cross-Border Corridor Security Coordination Framework.*

**Responsible:** State Committee for National Security, in coordination with Uzbekistan and Tajikistan.

**Feasibility:** Medium — requires sustained trilateral coordination but can build on existing regional mechanisms.

To address border vulnerabilities in the Fergana Valley, Kyrgyzstan should pursue a joint corridor-security arrangement with Uzbekistan and Tajikistan. It should prioritise real-time information exchange, common procedures for security vetting of relevant transit personnel, and coordinated responses to illicit activity affecting railway operations. The framework should build on existing regional dialogue and cooperation channels rather than create unnecessary parallel institutions.<sup>33</sup>

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[Tracks-trade-and-talent-China-and-Kyrgyzstan-build-closer-community-1Q1rTddeeNG/p.html](https://www.chinadaily.com.cn/a/202608/31/WS6a958981e4b06d4aa055b7d7.html); «Pragmatic Cooperation Essential for Vitality of Sino-Kyrgyz Ties and Regional Stability.» China Daily, (August 31, 2026), retrieved September 14, 2026, from <http://www.chinadaily.com.cn/a/202608/31/WS6a958981e4b06d4aa055b7d7.html>

<sup>32</sup> Shi and Zheng, The China–Kyrgyzstan–Uzbekistan Railway, Chapter 5.

<sup>33</sup> UZA, «Khujand 2025»; Development Strategy Center, «The Fergana Peace Forum.»

## 8. *Deploy Integrated Corridor-Security Surveillance and Monitoring.*

**Responsible:** State Border Service, rail operators, and State Customs Service, with international technical assistance.

**Feasibility:** Medium-high — requires investment but uses established monitoring technologies.

The State Border Service and rail operators should deploy risk-proportionate monitoring technologies for isolated mountain tracks, bridges, subgrades, and tunnel perimeters where regular ground patrols are difficult. Unmanned aerial vehicles can support infrastructure monitoring and incident response. At border terminals, targeted security screening should be coordinated with—rather than substituted for—the single-window and risk-based customs procedures under Recommendation 1, so that security measures do not create unnecessary logistics delays.

## 9. *Establish a National Foreign Information Manipulation and Interference (FIMI) Resilience Framework.*

**Responsible:** Cabinet of Ministers, National Security Committee, and Ministry of Digital Development.

**Feasibility:** Medium — requires inter-agency coordination and legal safeguards.

**Responsible:** Cabinet of Ministers, State Committee for National Security, and the Presidential Affairs Department (digital transformation unit).  
**Feasibility:** Medium — requires inter-agency coordination and legal safeguards.

Kyrgyzstan should establish a framework for identifying and responding to FIMI<sup>34</sup> around strategic investment projects and national development priorities, including CKU, energy, digital infrastructure, and mining. Framed as a protection of national sovereignty and information integrity

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<sup>34</sup> Foreign Information Manipulation and Interference (FIMI) refers to intentional, coordinated efforts by foreign state- or non-state actors to deceptively disrupt public discourse and political processes. FIMI frameworks focus on identifying covert behavioural tactics, techniques, and procedures — such as artificial amplification, deceptive foreign funding, and impersonation — rather than targeting legitimate speech or critical reporting. See European External Action Service, 2nd EEAS Report on Foreign Information Manipulation and Interference Threats, (Brussels: EEAS, January 2024), retrieved September 14, 2026, from [https://www.eeas.europa.eu/sites/default/files/documents/2024/EEAS-2nd-Report%20on%20FIMI%20Threats-January-2024\\_0.pdf](https://www.eeas.europa.eu/sites/default/files/documents/2024/EEAS-2nd-Report%20on%20FIMI%20Threats-January-2024_0.pdf)

rather than censorship, the framework should include transparent attribution standards for foreign-funded information campaigns above a defined threshold, a standing capability to identify and publicly rebut demonstrably false coordinated claims, and channels for cross-border cooperation.

This design aligns with the commitments of the OSCE Representative on Freedom of the Media, which hold that state responses to foreign interference must focus on institutional transparency, access to information, and media pluralism rather than the blocking of platforms or the criminalisation of vague content categories.<sup>35</sup>

Independent media watchdogs, research institutions, and civil-society organisations should be recognised as partners in verification and public reporting. This safeguard is essential: the framework must distinguish coordinated manipulation from legitimate journalism, public criticism, and civic scrutiny.

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<sup>35</sup> UN Special Rapporteur on Freedom of Opinion and Expression, OSCE Representative on Freedom of the Media, OAS Special Rapporteur on Freedom of Expression, and ACHPR Special Rapporteur on Freedom of Expression and Access to Information, «Joint Declaration on Freedom of Expression and 'Fake News,' Disinformation and Propaganda», (March 3, 2017), paras. 1(a), 2(a), retrieved September 14, 2026, from <https://rfom.osce.org/sites/default/files/documents/6/8/302796.pdf>; and OSCE Representative on Freedom of the Media, Speech by Ambassador Jan Braathu to the OSCE Permanent Council, (Vienna: OSCE, November 28, 2025), FOM.GAL/11/25, retrieved September 14, 2026, from [https://www.osce.org/sites/default/files/documents/official\\_documents/2026/05/FOM.GAL\\_0011\\_25%20-%20Statement%20by%20the%20Representative%20on%20Freedom%20of%20the%20Media.pdf](https://www.osce.org/sites/default/files/documents/official_documents/2026/05/FOM.GAL_0011_25%20-%20Statement%20by%20the%20Representative%20on%20Freedom%20of%20the%20Media.pdf)

## Conclusion

CKU is a strategic national project, formally recognised in NDP-2030, but its economic value will not be realised automatically. The project reshapes regional connectivity, reduces dependence on a single northern route, and creates new options for economic and diplomatic engagement.

Economic modelling projects real gains: higher GDP, deeper value-chain participation, and expanded transit capacity. At the same time, it projects a decline in purely domestic value added unless deliberate policies are in place. Connectivity alone will not deliver structural transformation.

This brief has therefore proposed a two-tier response. The first tier focuses on domestic value capture — customs reform, logistics capacity, industrial linkages, financing, and skills. The second tier provides enabling measures — emergency resilience, corridor security, and information integrity — that protect the conditions under which economic benefits can be realised.

CKU remains a Kyrgyz sovereign choice. Its value will depend not on any single external partner, but on Kyrgyzstan's capacity to manage risks, capture value, and maintain balanced relations with all partners — China, Uzbekistan, Russia, the European Union, Türkiye, India, and the Gulf states.

Kyrgyzstan's strategic relevance increasingly lies in connectivity. CKU is the project that makes this transition possible — provided that connectivity is converted into durable domestic capability.

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