

SOUTH KOREA'S CENTRAL ASIA PUSH: FROM SUMMIT DIPLOMACY TO ECONOMIC PARTNERSHIP

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South Korea's first summit with all five Central Asian presidents, held in Seoul on September 16, gave new institutional weight to a relationship more than three decades old. Critical minerals and supply-chain security featured prominently, but the significance of the new framework will depend less on how many resources South Korea secures than on what its engagement leaves behind in Central Asia. Seoul wants more resilient and diversified supply chains. Central Asian governments increasingly want foreign interest in their resources to generate processing, technology, skills and industrial development. Seoul is seeking diversification; Central Asia is seeking transformation.

BACKGROUND: The summit did not mark South Korea's arrival in Central Asia. The Korea-Central Asia Cooperation Forum has existed since 2007, while successive governments in Seoul have incorporated the region into broader Eurasian strategies. Moon Jae-in's New Northern Policy and Yoon Suk-yeol's K-Silk Road initiative both preceded the current framework, and the summit itself had originally been envisaged under Yoon.

What changed in September was the level of institutionalization. For the first time, South Korea and all five Central Asian states met in a common presidential format, upgrading cooperation that had previously been conducted mainly through bilateral relations and ministerial-level mechanisms. An inaugural C5+1 Industry Ministers' Meeting also created a multilateral channel focused on industry, supply chains and critical minerals.

The new framework nevertheless reflects a changing international economic environment. Russia's full-scale invasion of Ukraine, disruptions to global trade and growing competition over strategic inputs have increased South Korea's incentive to diversify sources of key materials. Matteo Fumagalli, Professor of International Relations at the University of St Andrews, sees this emphasis on resilience as an addition to longstanding Korean priorities rather than a fundamental change of direction.

Central Asia is attractive in this context because of its reserves of uranium, tungsten and other strategic resources. South Korea, meanwhile, depends heavily on imported minerals for industries including semiconductors, batteries and steel.

But the priorities announced around the summit went beyond extraction. The first C5+1 Industry Ministers' Meeting identified industrial infrastructure, critical-mineral supply chains, technology cooperation and talent development among its main areas of work. Importantly for Central Asian governments, the stated ambition also included refining, smelting, higher-value processing and manufacturing.

The question is whether this political and institutional momentum can now be converted into commercially viable projects.

IMPLICATIONS: The first test of the new framework is not how many agreements are signed, but what kind of economic relationship develops around Central Asia's resources.

For the region, increasing mineral exports would represent only a limited form of success. The more consequential question is whether Korean investment creates capabilities that remain locally: processing facilities, engineering expertise,

laboratories, trained workers and suppliers able to meet demanding industrial standards.

This distinction is particularly important when governments speak of technology transfer. Purchasing Korean machinery does not in itself create technological capacity. Aidar Kurmashev of the Kazakhstan Institute for Strategic Studies argues that meaningful transfer requires local engineers able to control production processes, laboratories capable of testing quality, maintenance capacity and suppliers able to meet industrial specifications.

Kazakhstan's automotive sector provides an indication of what a deeper model of cooperation could look like. Korean-backed vehicle production has increasingly been accompanied by efforts to localize components and connect industrial investment with technical education. Its longer-term significance will depend on whether domestic suppliers eventually acquire capabilities that allow them to serve several customers rather than remain dependent on a single assembly operation.

This is where South Korea could offer something distinctive. Korean companies can combine technology and production management with knowledge of the standards required by advanced industrial customers. If those capabilities are embedded locally, they could help Central Asian firms enter production networks that would otherwise be difficult to access.

Yet the constraints are considerable. Central Asia is landlocked, divided into several relatively small markets and geographically distant from Korean production centers. Transport therefore remains expensive and complex. The Middle Corridor has attracted growing attention as Central Asian governments seek additional routes across the Caspian and South Caucasus, but from South Korea even an overland Eurasian connection requires goods first to reach the continent by sea because transit through North Korea is unavailable.

A second challenge concerns the regional character of the new framework. A C5+1 mechanism does not automatically create a regional economic relationship.

Kazakhstan and Uzbekistan have traditionally dominated South Korea's engagement with Central Asia because of their larger markets, industrial bases, resource endowments and extensive human ties. Kyrgyzstan, Tajikistan and Turkmenistan have different economic structures and offer different forms of cooperation.

Replicating the Kazakh or Uzbek relationship across all five countries is therefore neither realistic nor necessary.

A more viable model would combine bilateral investment with regional economic effects. Large industrial projects will continue to be negotiated primarily between individual governments and companies, but they can acquire a regional dimension if they generate supply chains, services and commercial links across borders.

Smaller Central Asian economies do not each need a Korean assembly plant to benefit from deeper cooperation. They could participate through specialized suppliers, logistics, technical services, training or other activities connected to regional production networks. Jieon Lee, Professor in the Department of Central Asian Studies at Hankuk University of Foreign Studies, also points to areas such as water management, human-resource development, environmental policy and digital governance, where cooperation could create regional benefits even if not every country participates in the same way.

This differentiated model also changes how South Korea's growing role should be understood geopolitically. Central Asian governments are not looking for Seoul to

replace China, Russia, the European Union, Japan, Türkiye or the Gulf states. They are seeking additional options.

The value of diversification lies not in accumulating foreign partners for its own sake, but in reducing structural dependence. A producer with several potential customers, access to alternative technologies, multiple financing sources and more than one workable transport route has greater room for maneuver. Adding another external actor without changing those underlying dependencies achieves much less.

South Korea enters this environment with important advantages. It retains a comparatively non-threatening profile in Central Asia and does not carry the same geopolitical baggage as some larger powers. Korean culture, education and business also enjoy considerable visibility, particularly in Kazakhstan and Uzbekistan.

But this goodwill should not be taken for granted. If Korean engagement becomes associated primarily with securing access to raw materials, it risks reproducing the same frustrations Central Asian governments increasingly express toward extractive forms of external partnership. The credibility of the new framework will therefore depend on whether industrial cooperation produces visible local value.

That makes implementation more important than diplomatic architecture. The summit and the new C5+1 mechanisms can create political direction and regular channels for cooperation, but they cannot by themselves make projects commercially viable.

Financing, transport costs, regulatory conditions, reliable customers and private-sector incentives will ultimately determine which initiatives move forward.

CONCLUSIONS: The September summit has institutionalized South Korea's relationship with Central Asia. It has not yet transformed it.

The decisive phase will take place below the level of presidential diplomacy.

Memoranda must become feasibility studies, financing agreements, actual investment and operating facilities. Progress should therefore be measured not only by the volume of minerals exported or the number of agreements announced, but by whether cooperation produces processing capacity, competitive suppliers, skilled engineers and commercially viable production networks.

The C5+1 format should likewise not be judged by whether it creates identical Korean relationships with all five Central Asian states. Kazakhstan and Uzbekistan will remain the principal economic anchors, while smaller economies can participate through supply chains, services and regional initiatives.

South Korea does not need to become Central Asia's dominant external actor for the new framework to matter. Its opportunity lies in the overlap between Seoul's search for resilient supply chains and the region's search for investment, technology and greater productive capacity. If that overlap creates durable local capabilities, the summit may mark a substantive change. If it produces mainly new memoranda and meetings, the institutional architecture will have advanced further than the economic partnership.

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