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KYRGYZSTAN–GULF ECONOMIC COOPERATION: TRENDS AND PRIORITIES

This article examines the current trends and priority areas of economic cooperation between Kyrgyzstan and the Gulf countries, with particular attention to Saudi Arabia, the United Arab Emirates, Qatar, and Kuwait. The study focuses on the role of trade, investment, logistics, energy, agriculture, tourism, and Islamic finance in expanding Kyrgyzstan's external economic relations. As a landlocked country, Kyrgyzstan faces structural limitations in accessing global markets; therefore, cooperation with the Gulf countries should be viewed not only as a means of increasing trade turnover, but also as a strategic opportunity for attracting investment, diversifying exports, improving transport connectivity, and financing infrastructure projects. The article applies a descriptive and analytical approach based on statistical data, official documents, policy materials, and relevant academic literature. The analysis shows that although the current scale of Kyrgyzstan–Gulf economic cooperation remains relatively limited, its long-term potential is significant. Promising areas include renewable energy, agricultural exports, halal and mountain tourism, logistics corridors, direct air connectivity, and Islamic financial instruments. The study argues that Kyrgyzstan should develop a more targeted Gulf-oriented economic strategy focused on investment attraction, export promotion, infrastructure development, and institutional coordination with Gulf partners.

Keywords: Kyrgyzstan, Gulf countries, economic cooperation, trade, investment, logistics, renewable energy.

Introduction

Against the backdrop of the changing regional economic relations, Kyrgyzstan increasingly needs to find new markets and long-term partners for investment.

Being a landlocked country, the development of Kyrgyz economy strongly depends on the quality of its transport corridors, border crossings, logistics systems and overall connectivity with its vast regions. Komendantova et al. write that first geographical position places the country in a number of regional connectivity processes – notably the Belt and Road Initiative and Eurasian Economic Union – and links the agenda of Kyrgyz foreign economic policy not only to traditional partners, but also to new interregional directions that can support the processes of export diversification and investment-led development [1]. At the same time recent studies show that infrastructure and external capital alone does not lead to automatic economic diversification and Calabrese argues that used in conjunction with active state policy, productive investment and sectoral upgrading, connectivity projects and foreign capital can support industrial development: «Our argument is that where connectivity becomes a ‘thing’, attains salience and actually ‘happens’, is not extricated from action-oriented, targeted state policy» [2]. This is the argument we need for our analysis because one region of cooperation we are interested in is cooperation with the Gulf countries that cannot be described simply as the increase of a trade turnover, but should be understood as the increase of more general economic opportunity in areas of investment attraction, infrastructure financing and development, promotion of exports, development of logistics, tourism, agriculture and energy. Gulf countries in general and Saudi Arabia, UAE, Qatar, and Kuwait in particular are an important potential partner group for Kyrgyzstan. These countries have the means to invest, have developed logistics and financial systems, and are looking to engage economically in sectors beyond oil and gas. Per Qian and Fulton, economic relations between Gulf and Asian partners have moved beyond energy trade and embracing foreign investments, infrastructure, construction, logistics, and broader commercial cooperation [3]. Pontes et al. state that «entering Gulf markets is facilitated by economic diplomacy, as doing business in such economies often depends as much on non-commercial factors (demand, cultural understanding, institutional support, strategic communication and risk management) as it does on price and quality» [4]. Cooperation with Gulf countries is particularly relevant for Kyrgyzstan, which seeks new destinations and sources of investment. According to the World Bank’s Country Partnership Framework for the Kyrgyz Republic for 2024–2028, «solutions which promote opportunities for expansion in the private sector, generate economic growth and jobs, improve resilience, and promote sustainable growth» are critical for Kyrgyzstan’s economy. Similarly, the WTO Trade Policy Review of the Kyrgyz Republic notes that «trade and investment policy remain important instruments towards strengthening the position of the Kyrgyz economy at the external level» [5]. These priorities are consistent with prospective areas of collaboration between Kyrgyzstan and

the Gulf, including in renewable energy, agriculture and food exports, tourism, logistics, and Islamic finance [6]. At the regional level, the first GCC-Central Asia Summit showed signs of the increasing engagement of the Gulf countries with Central Asia, with the signing of a Joint Statement which emphasized trade, investment, green energy, digital economy, and innovation, as well as areas such as infrastructure, and green technology [7]. Such meetings may show that relations between Central Asia and the GCC are beginning to become defined, setting them apart from other countries. In this regard, for Kyrgyzstan, an opportunity exists for it to position itself not merely as a small market, but as a partner of considerable potential in areas like hydropower, mountain tourism, meat and dairy products, agriculture and food exports, halal products, and regional logistics. However, the actual level of economic cooperation between Kyrgyzstan and the Gulf countries continues to lag behind its potential. Key constraints include lack of direct transport options, unfamiliarity with Kyrgyz products in the Gulf markets, certification and standardization issues, weak coordination between requisite institutions, and the relatively small volume of Kyrgyz exports. The current article is a sub-study on Kyrgyzstan-GCC economic cooperation, conducted through the combined prism of trade diversification, attraction of investments, logistics, and sectoral economic development. The main purpose of this study is to ascertain current directions and priority sectors of Kyrgyzstan-GCC cooperation at the present, and what such cooperation means for the expansion of export markets, the attraction of investment, and economic diversification in the long run.

Materials and methods

The study uses a descriptive and analytical research design to investigate the current areas of focus and trends of Kyrgyzstan's economic cooperation with the Gulf countries. We study the four selected Gulf partners – Saudi Arabia, the United Arab Emirates, Qatar, and Kuwait. The selection is based on the significance of countries from Gulf region and their potential relevance to Kyrgyzstan in areas such as trade, investments, logistics, alternative energy, agriculture, tourism, and Islamic finance. The study relies on secondary data and uses content analysis as a methodological tool. The primary statistical materials used are taken from the official external trade statistics of the National Statistical Committee of the Kyrgyz Republic [8]. With this work, we identified and examined exports, imports and total turnover of trade between Kyrgyzstan and the four Gulf countries. For cross-checking the trade indicators and partner-country data, we were using the WTO's World Integrated Trade Solution database, based on UN Comtrade [9]. The two types of sources also aids our comparison of national and international data on trade, as well as verification of conclusions against a single statistics source. The methodological procedure applied in this paper is comprised of five steps. First,

we assembled the official trade data for Kyrgyzstan's economic relations with Saudi Arabia, the United Arab Emirates, Qatar, and Kuwait. Second, we grouped the trade indicators by country and by type of flow: exports, imports and total turnover of trade. Third, we performed comparative analysis of countries' relative importance to Kyrgyzstan's external trade. Fourth was sectoral comparison of the main directions of cooperation such as investment, logistics, energy, tourism, agriculture and Islamic finance (figures relative to size of the trade and used for comparison between countries). Fifth, interpretation of the results through an element of SWOT analysis to highlight the main opportunities and constraints, and aid in identifying potential policy priority for Kyrgyzstan. The analytical structure used in the study is presented in Table 1. It shows the main directions of the study, content analyzed in each direction, and the relevance of the direction to the article. This summarization of the structure was also used to organize the empirical and analytical aspect of the study and mitigate against dealing with Kyrgyzstan–Gulf economic cooperation purely as a statistics issue.

Table 1 – Main research directions for analyzing Kyrgyzstan–Gulf economic cooperation

Research direction	Main content	Role in the article
Foreign trade	Exports, imports, trade turnover, key partners	To assess the current level of economic cooperation
Investment	Foreign direct investment, sovereign funds, development institutions, project finance	To evaluate financial and investment potential
Logistics	Transport corridors, air connectivity, transit routes, trade facilitation	To explain market-access opportunities and limitations
Energy	Renewable energy, hydropower, energy infrastructure	To identify promising investment projects
Tourism	Halal tourism, mountain tourism, medical and recreational tourism	To assess the potential of service exports
Agriculture	Meat, honey, dried fruits, organic and halal products	To examine export diversification opportunities
Islamic finance	Sukuk, Islamic banking, investment funds	To explore alternative mechanisms for infrastructure financing

For the investment and sectoral part of the study we referred to the website of the National Investment Agency under the President of the Kyrgyz Republic, which has an accessible summary of presented investment opportunities and priority sectors, helping to identify areas in which Gulf capital may be relevant for Kyrgyzstan—infrastructure, energy, tourism, agriculture, logistics, etc. [10]. The analysis' export-oriented part was informed by the official Export Portal of the Kyrgyz Republic, which identifies the Persian Gulf among priority export directions for Kyrgyz products, again helping to identify agricultural products, halal-oriented goods, food exports in particular, for inclusion in the analytical framework [11]. We also referred to tourism indicators in the sectoral analysis, for tourism is a direction of service-export potential of Kyrgyzstan—Gulf cooperation, and the National Statistical Committee's tourism statistics assisted the assessment of tourism potential and the possible relevance of halal, mountain, recreational, and medical tourism to visitors from Gulf countries. Here again, for the same reasons we only used some of the data, and have not added in any table about tourism [12].

Overall, our methodology utilized techniques of statistical analysis, comparative country analysis, document analysis, sectoral analysis and SWOT analysis elements, which we believe serve well in identifying state and future potential of Kyrgyzstan—Gulf economic cooperation. The main limitation of the study is that we used only secondary data and documents available to the authors publicly, and thus unpublished notes from investment negotiations, informal business links, and company-level commercial data are not fully captured in our study.

Results and discussion

The upshot is that Kyrgyzstan—Gulf economic cooperation needs to be seen as a multi-dimensional economic strategy rather than a bilateral trade issue. As the analytical framework suggested in Table 1 shows, cooperation with the Gulf countries may evolve in seven closely linked directions: foreign trade, investment, logistics, energy, tourism, agriculture and Islamic finance. These directions are not isolated from each other; for example, exports of agricultural goods will need to evolve along with questions regarding halal certification and access to logistics; tourism will require attention to air links and marketing; renewable energy projects will need long-stay capital and Islamic finance may contribute to infrastructure project financing if proper legal and institutional backing is in place.

The first result that stands out is the asymmetric quality of Kyrgyzstan's trade relations with the chosen Gulf countries. In Figure 1, it is evidence that trade relations should ideally be seen through the prism of exports, imports and total trade turnover as each key indicator signifies a different and distinct form of economic interaction. Exports indicate Kyrgyzstan's ability to «pierce» Gulf markets with domestic products. Imports partly convey the role played by Gulf countries

in the supply of goods and technologies, fuel-related products and equipment or consumer goods. Turnover is a reflection of the intensity of economic relations more broadly. Logically, from an analytical point of view, the UAE appears to be the most important Gulf oriented commercial hub for Kyrgyzstan, while Saudi Arabia, Qatar and Kuwait may play more specific roles depending on sector. Hence, the underlying policy question is not just one of raising total volume but also one of enhancing the quality and structure of this trade.

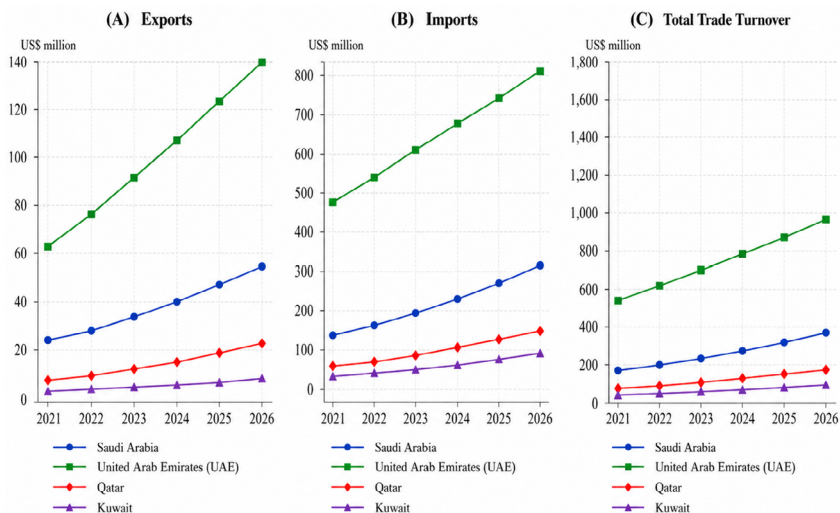


Figure 1 – Dynamics of Kyrgyzstan's trade turnover with selected Gulf countries

The second result relates to investment cooperation. Gulf countries have financial firepower, but this does not guarantee an effective investment in Kyrgyzstan. Productive access to foreign direct investment depends on macroeconomic stability, openness to trade, attractive labour-market conditions, institutional quality, and reliability of the business environment. Ashurov et al. take a detailed look at the drivers of the inflow of FDI's in their countries in Central Asia. They find that the FDI inflow is significantly related to prior FDI inflows, GDP, the size of the population (reflected in the labour force), conditionality of trade, and tax conditions¹⁴. This matters for Kyrgyzstan because the Gulf investment will do more to induce long term applications in Kyrgyzstan if they are directed to productive sectors rather than to short term commercial operations. For this reason, Kyrgyzstan should present to Gulf partners a menu of projects in

renewable energy, logistics infrastructure, tourist facilities, agro-processing, and production lines targeting export [13].

The third result relates to logistics and access to markets. Figure 2 shows that access from Central Asia to Gulf markets appears to depend on a limited number of explicit channels (in this case shown as solid paths) through Central Asia, Iran, and Afghanistan to Pakistan and connections by air to access in and out of Gulf cities. This is of obvious importance as Kyrgyzstan is a landlocked country with no access to seaports. Economically viable cooperation oriented to the Gulf then necessarily requires not only diplomatic agreements with Gulf countries, but practical arrangements to improve transport corridors, customs and warehousing practices, certification systems (say, of produce) and multimodal logistics. And the most realistic strategy will involve the use of several channels at once – road over land to the ports of Uzbekistan and Turkmenistan enroute to Iran, a possibility of more active channels South via a land route across Afghanistan and perhaps through Pakistan, and by air directly into destinations in the Gulf for tourist purposes, business mobility and high value goods.

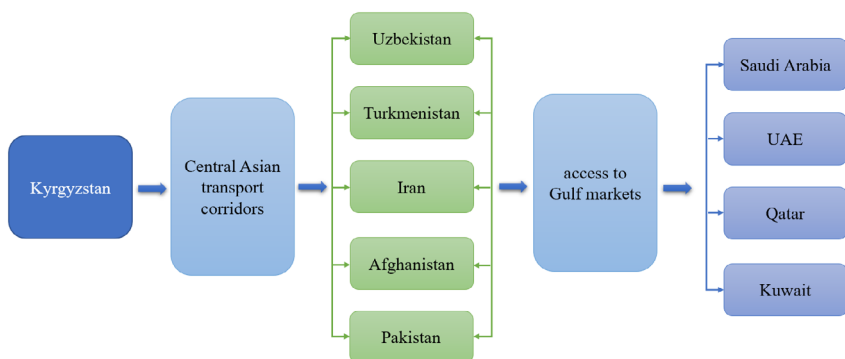


Figure 2 – Kyrgyzstan’s possible channels of access to Gulf markets

The fourth result is that agriculture and food exports are one of the more realistic areas of Kyrgyzstan-Gulf cooperation. Gulf countries are structurally food import dependent due to the scarcity of agricultural land as well as water, and climatic factors, while Kyrgyzstan has prospects in organic agriculture, meat, honey, dried fruits, dairy products, environmentally clean food etc. However, this potential for export can not be realised simply through raw production. It demands certification, quality control, packaging, cold-chain logistic base support and regular supply capability. Sun and Zhang find that trade openness improves food security in Central Asian countries once a certain «threshold value of trade»

is passed but stress that this is made of agricultural productivity and «reasonable self-sufficiency» [14]. In short, Kyrgyzstan should be using Gulf markets not only as destination but also as a stimulus to modernize its agricultural value chains.

The fifth result concerns tourism and service exports. Kyrgyzstan has deep natural advantages in mountain tourism, ecotourism, recreational tourism, halal-friendly tourism, particularly for visitors, say, from Saudi Arabia, the UAE, Qatar and Kuwait. For such clients, Kyrgyzstan could be known as a mountain, family, scenic, nature-based, culturally compatible destination. But that potential remains relatively farmers because of a lack of direct flights, a weak destination brand in Gulf countries and in Arabic promotion, erratic service standards etc. Tourism cooperation therefore needs to be linked with aviation policy, hotel investment, halal food service, medical and wellness infrastructure, and digital marketing. In this sense, tourism is not simply one area of cultural exchange, but also a sector of service that can bring in foreign currency and development to the region.

The sixth impact is on Islamic finance and halal-oriented economic development. Kyrgyzstan can leverage Islamic finance instruments such as sukuk, ijara, murabaha, and partnership-based financing to develop especially infrastructure, agricultural, tourist, and business projects. Islamic finance also cannot grow without legal support as well as professional expertise, public trust, and compatibility with national financial laws. The halal sector also suffers from institutional challenges. Aripov et al. identifies significant potential in the halal industry in Kyrgyzstan, but commitment to its growth is hampered by «weak sector infrastructure, lack of coordination between stakeholders, inefficiency of value-chains and regulatory policies» [15]. Here is yet another reminder that halal products, and Islamic finance too, cannot be treated only as an ‘aura’ of culture, but ‘joined-up’ into economically-valuable instruments through standards and certification, logistics and investment mechanisms which grow out of that cultural safety net.

We see the Kyrgyz Republic perhaps also cannot approach all Gulf countries in the same way. Saudi Arabia is perhaps more relevant to large-scale investment, renewable energy, cooperation for developing tourism and agriculture. United Arab Emirates in its more traditional role as the logistics and reexport hub, with aviation, tourism, and financial considerations of course. Busy Qatar as our neighbour, with investment funds and related food security considerations, development construction, and of course high-value tourism. In Kuwait, possibilities also exist as development finance, with construction/ infrastructure and long-term public-sector cooperation engagements. If we consider the engagement country-and-context specific, we can move from general diplomatic cooperation to a mode of economic partnership.

In line with the sectoral analysis, Gulf countries differ in their potential economic roles for Kyrgyzstan as above, and we summarise these Kyrgyz Republic – Gulf economic cooperation country-priorities in Table 2.

Table 2 – Country-specific priority areas for Kyrgyzstan–Gulf economic cooperation

Gulf country	Main role for Kyrgyzstan	Priority sectors	Strategic value
Saudi Arabia	Large-scale investment partner	Renewable energy, agriculture, tourism, infrastructure	Long-term capital and sectoral projects
United Arab Emirates	Logistics and commercial hub	Re-export, aviation, finance, tourism	Market access and trade facilitation
Qatar	Investment and food-security partner	Agriculture, construction, tourism, energy	Export diversification and project finance
Kuwait	Development finance partner	Infrastructure, public-sector projects, energy	Long-term concessional and development support

That said, there are certain limits to Kyrgyzstan–Gulf cooperation, such as low existing trade volumes, limited Gulf awareness of Kyrgyz products, certification requirements, limited transport linkages, expensive logistics, and legal challenges around investing in Kyrgyzstan. These issues point away from Uzbekistan–Egypt style of co-operation where policy makers sign bilateral agreements, and suggest that the harder task lies in establishing the physical economic networks that will allow for proper economic co-operation. Without product standardisation, market research, export promotion, and reliable logistics, Kyrgyz products cannot penetrate Gulf markets. For that reason the most useful recommendations for Kyrgyzstan include the establishment of an economic dialogue between themselves and the GCC, the creation of an export roadmap specifically for the Gulf, the establishment of a Kyrgyz back-end for Muslim tourism, the enhancement of halal certification and quality standards, a greater use of UAE and Saudi logistics channels, the use of Islamic finance for infrastructure projects, and direct air connections. Finally, the most significant part of the discussions is the lesson that Kyrgyzstan’s cooperation with the Gulf countries should be developed as part of an integrated economic strategy and not as a disjointed set of trade or investment initiatives.

Conclusion

This article examined the while examining the current trends and priority areas of economic cooperation between Kyrgyzstan and the Gulf countries with a particular focus on Saudi Arabia, the UAE, Qatar, and Kuwait. It finds that Kyrgyzstan–Gulf cooperation should not be seen solely as a matter of increasing trade turnover but for a landlocked country like Kyrgyzstan working with the Gulf represents a broader strategic opportunity associated with export diversification and investment attraction, financing of infrastructure, logistics development, tourism promotion, agricultural export and Islamic finance.

Kyrgyzstan-Gulf economic cooperation remains at a relatively low level in net terms but with some long-run potential. The UAE appears to be the most essential Gulf-oriented commercial and logistics transshipment hub for Kyrgyzstan while Saudi Arabia, Qatar and Kuwait may play more specialized roles in terms of investment, food security, renewable energy, tourism, infrastructure and development finance. This means that Kyrgyzstan should not adopt a generalized approach to the Gulf region but rather a notion of country-based cooperation.

The results suggest that the most promising areas of cooperation move ahead with the Gulf revolve around the priority areas of renewable energy, agricultural and halal oriented exports, mountain and halal tourism, logistics corridors, direct air connectivity and Islamic financial instruments; but Kyrgyzstan should not expect these opportunities to materialize without making dedicated effort to overcome a number of constraints, including limited transport links, weak product recognition in the Gulf markets, hard to negotiate certification barriers (especially around halal), limited productive, institutional coordination, very high logistics costs, investment-related risks.

This leads to the conclusion that Kyrgyzstan does need a Gulf-oriented economic strategy which among other things includes a Kyrgyzstan–GCC economic dialogue platform, clear export roadmap to Gulf markets, stronger halal certification and quality standards, improved logistics and air connectivity, and a portfolio of investment-ready projects in energy, agriculture, tourism and infrastructure. Only then will cooperation with the Gulf countries emerge as a key additional instrument for Kyrgyzstan's economic diversification, external market proximity and its long-run sustainable development.

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ҚЫРҒЫЗСТАН МЕН ПАРСЫ ШЫҒАНАҒЫ ЕЛДЕРІ АРАСЫНДАҒЫ ЭКОНОМИКАЛЫҚ ҰНТЫМАҚТАСТЫҚ: ҮРДІСТЕРІ МЕН БАСЫМДЫҚТАРЫ

Бұл мақалада Қырғызстан мен Парсы шығанағы елдері арасындағы экономикалық ынтымақтастықтың қазіргі үрдістері мен басым бағыттары қарастырылады. Ерекше назар Сауд Арабиясы, Біріккен Араб Әмірліктері, Катар және Кувейт елдеріне аударылады. Зерттеуде Қырғызстанның сыртқы экономикалық байланыстарын кеңейтудегі сауда, инвестиция, логистика, энергетика, ауыл шаруашылығы, туризм және исламдық қаржыландырудың рөлі талданады. Теңізге тікелей шығу мүмкіндігі жоқ мемлекет ретінде Қырғызстан жаһандық нарықтарға қол жеткізуде бірқатар құрылымдық шектеулерге тап болады. Сондықтан Парсы шығанағы елдерімен ынтымақтастықты тек тауар айналымын ұлғайту құралы ретінде ғана емес, сонымен қатар инвестиция тарту, экспортты әртараптандыру, көлік-логистикалық байланыстарды жақсарту және инфрақұрылымдық

жобаларды қаржыландырудың стратегиялық мүмкіндігі ретінде қарастыру қажет. Мақалада статистикалық деректерге, ресми құжаттарға, саяси-бағдарламалық материалдарға және тиісті ғылыми әдебиеттерге негізделген сипаттамалық-аналитикалық тәсіл қолданылады. Талдау нәтижелері қазіргі кезеңде Қырғызстан мен Парсы шығанағы елдері арасындағы экономикалық ынтымақтастық ауқымы салыстырмалы түрде шектеулі болғанымен, оның ұзақ мерзімді әлеуеті айтарлықтай жоғары екенін көрсетеді. Перспективалы бағыттарға жаңартылатын энергетика, ауыл шаруашылығы өнімдерінің экспорты, халал және тау туризмі, логистикалық дәліздер, тікелей әуе қатынасы және исламдық қаржы құралдары жатады. Зерттеу Қырғызстанға инвестиция тартуға, экспортты ілгерілетуге, инфрақұрылымды дамытуға және Парсы шығанағы елдерімен институционалдық үйлестіруді күшейтуге бағытталған неғұрлым нақты Gulf-oriented экономикалық стратегия әзірлеу қажет екенін негіздейді.

Кілтті сөздер: Қырғызстан, Парсы шығанағы елдері, экономикалық ынтымақтастық, сауда, инвестициялар, логистика, жаңартылатын энергия.

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ЭКОНОМИЧЕСКОЕ СОТРУДНИЧЕСТВО КЫРГЫЗСТАНА СО СТРАНАМИ ПЕРСИДСКОГО ЗАЛИВА: ТЕНДЕНЦИИ И ПРИОРИТЕТЫ

В данной статье рассматриваются современные тенденции и приоритетные направления экономического сотрудничества между Кыргызстаном и странами Персидского залива. Особое внимание уделяется Саудовской Аравии, Объединённым Арабским Эмиратам, Катару и Кувейту. В исследовании анализируется роль торговли, инвестиций, логистики, энергетики, сельского хозяйства, туризма и исламского финансирования в расширении

внешнеэкономических связей Кыргызстана. Будучи страной, не имеющей прямого выхода к морю, Кыргызстан сталкивается со структурными ограничениями в доступе к мировым рынкам. В связи с этим сотрудничество со странами Персидского залива следует рассматривать не только как средство увеличения товарооборота, но и как стратегическую возможность для привлечения инвестиций, диверсификации экспорта, улучшения транспортно-логистической связанности и финансирования инфраструктурных проектов. В статье применяется описательно-аналитический подход, основанный на статистических данных, официальных документах, программно-политических материалах и релевантной научной литературе. Результаты анализа показывают, что, несмотря на сравнительно ограниченный текущий масштаб экономического сотрудничества между Кыргызстаном и странами Персидского залива, его долгосрочный потенциал является значительным. К числу перспективных направлений относятся возобновляемая энергетика, экспорт сельскохозяйственной продукции, хаал- и горный туризм, логистические коридоры, прямое авиасообщение и инструменты исламского финансирования. В исследовании обосновывается необходимость разработки для Кыргызстана более целенаправленной экономической стратегии, ориентированной на страны Персидского залива, с акцентом на привлечение инвестиций, продвижение экспорта, развитие инфраструктуры и укрепление институциональной координации с партнёрами из региона Персидского залива.

Ключевые слова: Кыргызстан, страны Персидского залива, экономическое сотрудничество, торговля, инвестиции, логистика, возобновляемая энергетика.

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