

〈Research Notes〉

## The China factor in Central Asia through its Belt and Road Initiative

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### Abstract

This year, 2023 is the 10th anniversary since the launch of the “Belt and Road Initiative” that was first introduced in the largest country of Central Asia, Kazakhstan in September 2013. This research note argues that China’s efforts to expand its influence in Central Asia, a vast and resource-rich region of mountains and steppes that was once considered Russia’s sphere of influence, has started from the launch of the “Belt and Road Initiative”.

Current Russia’s invasion of Ukraine has caused unease in the region and many Central Asian countries started to fear Russian expansionism. All this made Central Asian states turn closer to China as an investor, energy, and trade partner within the “Belt and Road Initiative”. The 2022 trade volume between China and Five countries of Central Asia registered a record of over 70 billion US dollars and has been increased for about 40% from the previous year. Among Five Central Asian countries, the biggest trade of China was with Kazakhstan, amounting 30 billion US dollars. The question that arises here is, why does Kazakhstan, in comparison to other Central Asian states have such a strong economic relationship with China? (For instance, Xi Jinping’s visit on Sept. 14, 2022 was the first foreign trip since the start of the COVID-19 pandemic in February 2020).

The purpose of this research note is to examine the economic impact of China on Kazakhstan and the perception of Kazakh people on the BRI and China in general. Finally, this research note analyzes if the influence will be expanding more in the future taking into consideration the present geopolitical situation.

**Keywords** : Belt and Road initiative, perception, China, Kazakhstan, influence, economic.

## Introduction

This year, 2023 is the 10th anniversary since the launch of the “Belt and Road Initiative” (BRI) that was first introduced in Kazakhstan in September 2013. The reason why Xi Jinping delivered his speech in Kazakhstan was because, in comparison to other Central Asian states, Kazakhstan offers key geographical advantages. According to the Deputy Chairman of the Board of the Institute for Foreign Policy Studies under the Ministry of Foreign Affairs of the Republic of Kazakhstan, ex-Secretary General of the Shanghai Cooperation Organization (2007-2009), Ambassador Extraordinary and Plenipotentiary of the Republic of Kazakhstan Bolat Nurgaliyev, China will have been well aware of Kazakhstan’s capacity to open up new cargo routes, acquiring the role of a trade and infrastructure hub for the entire Eurasian continent. He also added that President of Kazakhstan Kassym-Jomart Tokaev noted in his speech at the February 2020 Munich Security Conference that the Central Asian region is one of the key regions for the implementation of the SREB (Nurgaliyeva, 2022: 250).

Since its establishment, the economic cooperation between China and the five Central Asian countries have been developed at a rapid pace, especially with Kazakhstan. The 2022 trade volume between China and five countries of Central Asia registered a record of over 70 billion US dollars and has been increased for about 40% from the previous year. Among five Central Asian countries, the biggest trade of China was with Kazakhstan, amounting 30 billion US dollars. The importance of Kazakhstan to China is also visible from the Third Belt and Road Forum for International Cooperation that was held in Beijing on October 17 and 18, 2023, where President of Kazakhstan Kassym-Jomart Tokaev was one of the leaders (among leaders of Ethiopia, Chile, Hungary) whom Xi Jinping met the very first day of the Forum, on October 17, 2023 (The Third Belt and Road Forum for International Cooperation 2023).

Though the economic cooperation between China and Kazakhstan is a vital topic, there is not much research investigating what economic impact does BRI have on Kazakhstan. Numerous academic publications examine the reasons behind China’s interest in Central Asia. Some scholars claim that China values Central Asia because of its abundant mineral and energy resources (Garlick, 2020: 7; Sim & Aminjonov, 2020: 21). According to some scholars, while the BRI presents risks and opportunities for Kazakhstan to achieve economic diversification, it is also important for Kazakhstan to protect its interests from an overly influential partner (Kukeyeva & Dyussebayev

2019; Nurgaliyeva, 2021). Some researchers argue that Chinese projects advance only Chinese interests, not those of the Central Asian countries. According to Taliga (2021: 8), a significant share of the funds that China has poured into Central Asia never leaves the Chinese system: a loan given by a Chinese bank to a Central Asian government is repaid to the Chinese company that won the contract, bringing with it workers and equipment from China to carry out the project. For instance, the multi-regional study of the BRI conducted by Building and Wood Worker's International (BWI) refers to the data that over 60% of the BRI projects, funded by China, are allocated to Chinese companies. Despite Kazakhstan's strategic importance to China, very little research has been done to examine the economic cooperation between the two countries or to elucidate the economic implications of the BRI on Kazakhstan, with the exception of a few research papers (Nicharapova, 2023; Sim & Aminjonov, 2020; Taliga, 2021; Schagerl & Soldo 2023).

This research note aims to analyze the economic cooperation between China and Kazakhstan and economic impact on Kazakhstan as well as the perception of Kazakh people on the BRI and China in general. This research note discusses the implementation of economic cooperation while also questioning the role the Chinese projects play for Kazakhstan. The most recent data available was used in a qualitative analysis of secondary sources (articles, book chapters) and primary data (interviews, statistical data), with an emphasis on the economic implications of Kazakhstan's cooperation with China.

## **The Economic Cooperation between China and Kazakhstan: Towards the development of the economy of Kazakhstan?**

Following the announcement of the BRI, China has increased its investment as well as expanded its import and export trade with countries along the Belt and Road. This section examines the direct impact of China on Kazakhstan's economy and the indirect impact on Kazakhstan's people as a result of trade and investment in Kazakhstan, which is an important partner to China. First, we investigate the direct impact of the BRI on the import and export of goods between China and Kazakhstan. Here, we divide the trade between China and Kazakhstan into two stages: before and after the BRI was proposed.

*Before the BRI was proposed*

Kazakhstan was a newly independent country after the dissolution of the Soviet Union in 1991. Although diplomatic relations were established with China, due to the severe impact of the Soviet Union on domestic politics and economy, the true economic relationship began in 1993 when President Nursultan Nazarbayev signed the Joint Declaration on Basic Friendly Relations (Idrisov, 2002) during his visit to China. This document not only lays the foundation for bilateral relations, but also promotes the development of energy cooperation. Chinese companies such as China National Petroleum Corporation (oil), Huawei (telecommunications), and Nongken (trade) came to the Kazakh market in 1995. The chaotic nature of trade and economic relations was gradually moving towards the development of mechanisms aimed at regulating trade and economic relations. Therefore, as an independent country, the economic trade with China truly began in 1995.

The opening of joint ventures created the conditions for further development of bilateral relations and also, led to the rise in Chinese investments. The economic reforms in Kazakhstan and government support of direct investments attracted the attention of Chinese large companies. In the summer of 1997 China started to invest to the oil and gas sector of Kazakhstan in the amount of \$11 billion, mostly oriented to the construction of pipelines. The Chinese investments were provided in exchange for the transfer of a number of major oil and gas companies of Kazakhstan to Chinese investors. The period (from 1992 to 2000) in trade was beneficial for Kazakhstan because Kazakhstan exported more than it imported.

The year 2000 was a turning point in bilateral economic relations with the development of energy cooperation and large-scale economic projects designed to upgrade Kazakhstan's economy. Between 2003 and 2008, joint Kazakhstan-China projects included: the project Kenkiyak – Atyrau (2003), the transfer of “Aktobemunaigas” to the Chinese National Petroleum Company CNPC (2003) and the shares for the development of the North Buzachi field (2003), Kazakhstan enterprise “Aydanmunay” to CNODC (2005) and Canadian company “PetroKazInc” to the subsidiary company of CNPC (2005). There was also signed an agreement to build an Atasu-Alashankou oil pipeline. The Chinese oil and gas companies entered into Kazakhstan in exchange for direct investments, which amounted in 2001 to \$64.7 million and in 2005 to \$195 million (see Table-1).

**Table- 1** China’s Foreign Direct Investments (FDI) in the economy of Kazakhstan, \$ million.

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
64.7	64.73	248.6	387.8	195.0	276.24	609.9	1402.3	1516.21	1590.54	2858.45	4400.00

Source: (Ob’yem PII 2013).

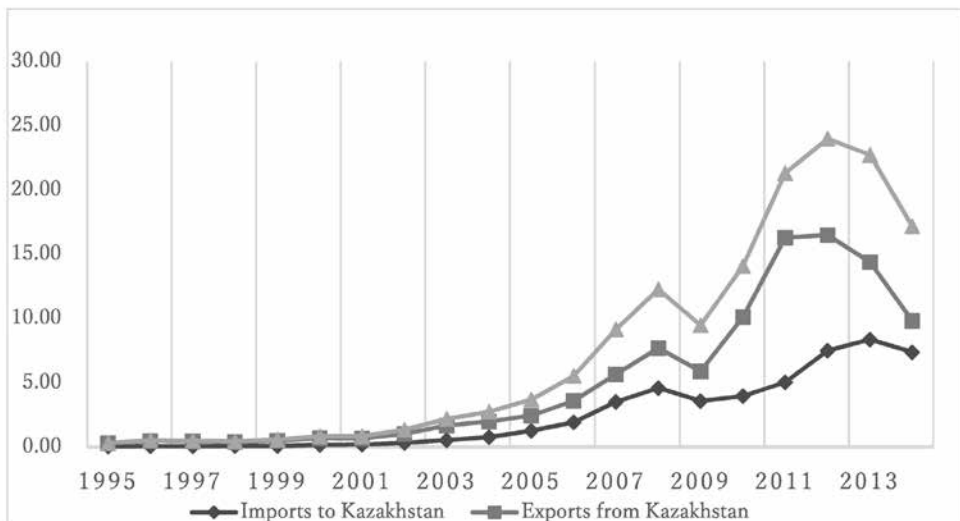
Data for 2006 – 2011 were taken from (Bedelov & Lyu 2013: 168-176)

Data for 2012 were taken from (Ministerstvo Industrii i novykh tekhnologiy 2013).

The first half of the 2000s was characterized not only by the growth of trade, but also by diversity of products traded. Kazakhstan exported to China copper, zinc, and ferrous metals. China’s growing consumption of raw materials and metals raised the world prices for these commodities, which had a positive effect on the growth of the economy of Kazakhstan (Zhukov & Reznikova 2009: 44). Kazakhstan’s GDP in 2001 increased to 13.5%, and in the next 6 years, it grew at an average of 9.6% (Gribanova 2010).

The structure of imports from China also contributed to the economic development of Kazakhstan, which is dominated by engineering products, equipment and ground means of transportation (Zhukov & Reznikova 2009: 44). A series of agreements between Kazakhstan and China signed between 2003 and 2008 strengthened the trade and economic relations and also, the development of positive trends in trade and economic cooperation between the two countries increased the share of high technology within the total trade (Syroezhkin 2006: 80).

**Graph- 1** Trade between Kazakhstan and China 1995 ~ 2014, billion \$ US

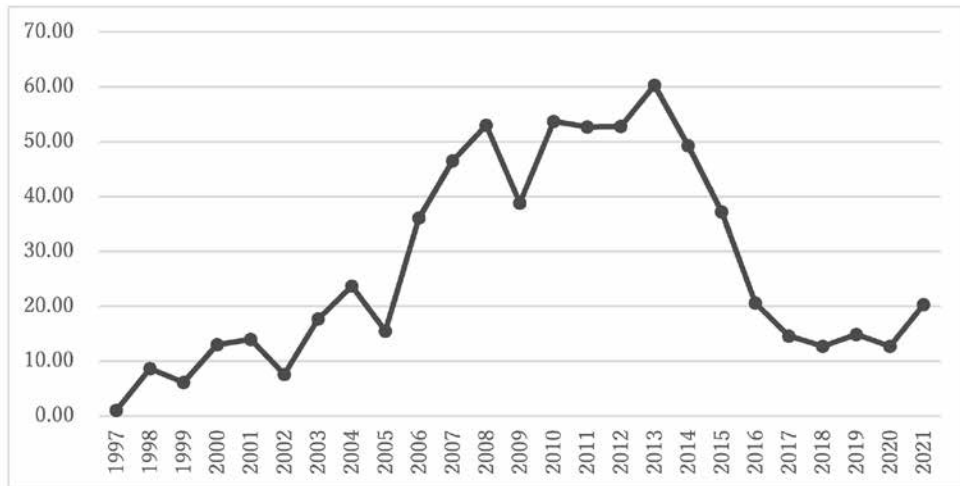


Source: Graph was created by author based on the data from (World Integrated Trade Solution. Trade between Kazakhstan and China).

From Graph-1, we can see that the trade between Kazakhstan and China did not show significant growth from around 1995 to 1997. The trade volume between the two countries continued to increase from 1998, reaching its peak from 2012 to 2013, and decreasing from 2014. The growth and decline can be explained by combining the main trade commodity of the two countries - oil.

The 1997 and 2005 years are characterized as two important milestones. The first important milestone was in 1997, marked by Chinese National Petroleum Company's (CNPC) acquisition of the rights to the Aktobe field in Kazakhstan, which was the beginning of Kazakhstan's cooperation with China in energy sector. Since then, China's "energy diplomacy" with Central Asia has prioritized the development of energy

Graph-2 The proportion of oil in all exports from Kazakhstan to China



Source: Graph was created by author based on the data from The Observatory of Economic Complexity (OEC) . Retrieved from <https://oec.world/>

Map-1. Kazakshstan-China oil pipeline Atasu-Alashankou



Source: Kazakhstan-China pipeline.

Retrieved from [https://www.kcp.kz/projects/atasu\\_alashankou?language=en](https://www.kcp.kz/projects/atasu_alashankou?language=en)

infrastructure. In 1997, Kazakhstan and China agreed to construct Atasu-Alashankou pipeline and the construction of which was completed in December 2005. The first section of pipeline from Kenkiyak-Kumkol was completed in 2003. The construction of pipeline from Atasu, Kazakhstan to Alashankou started in September 2004 and was completed in 2005. With the completion of the pipeline from Atasu to Alashankou, a second important milestone was in 2005. Since 2006, the proportion of oil in Kazakhstan's exports to China has exceeded 30% and has been increasing year by year, reaching a peak of 60% by 2013.

Therefore, since 1997, the trade volume between Kazakhstan and China has been increasing year by year, reaching its maximum in 2012. At the same time, Kazakhstan's exports to China have always been higher than its imports from China, which is beneficial for Kazakhstan's development. Due to the decline in oil prices and a decrease in the proportion of petroleum commodities, the volume of import and export trade between Kazakhstan and China began to decrease in 2013.

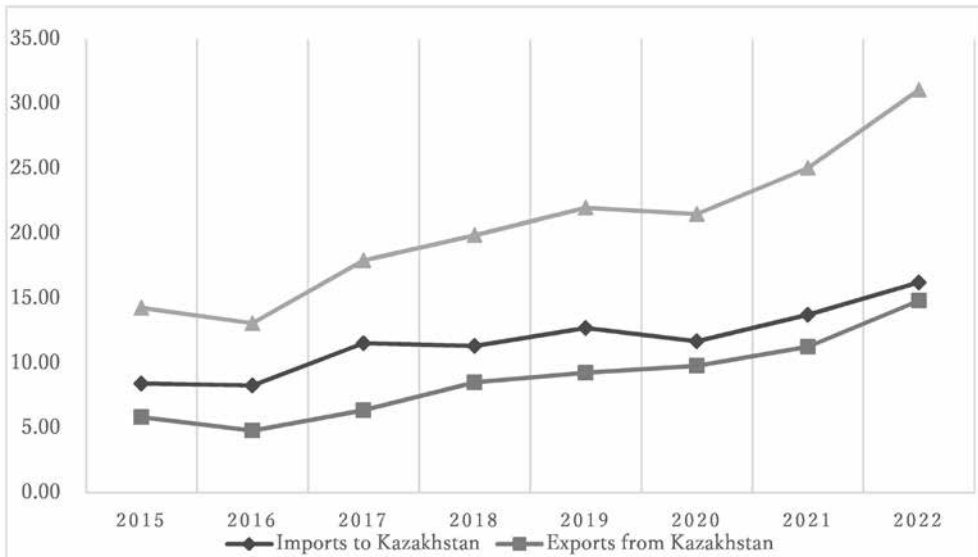
From the trade data, we can see that there are two issues in the import and export trade between Kazakhstan and China. Firstly, the high proportion of oil and the impact of oil prices have led to a decreasing trade volume between the two countries. Secondly, from Graph-1, it can be seen that the import and export trade between the two countries is a surplus for Kazakhstan and a deficit for China. So, we can suggest that China has proposed the BRI in order to solve these two issues.

#### *After the BRI was proposed*

After the BRI was proposed, China adjusted its investment and commodity trade structure with Kazakhstan. From Graph-3, we can see several things. Firstly, since 2015, the import and export trade volume between Kazakhstan and China has shown a renewed growth trend. The latest data shows that China has surpassed other countries and become Kazakhstan's largest import and export trading partner. Secondly, since 2015, Kazakhstan's exports to China have been lower than its imports from China, resulting in a trade deficit, which is not good for Kazakhstan's development. Also, from Graph-2, we can see that the proportion of petroleum products in Kazakhstan's exports to China is continuously decreasing, but the overall export volume is constantly increasing, indicating that China's imports of goods from Kazakhstan have changed, and petroleum is no longer the largest commodity imported by China from Kazakhstan.

Since 2015, China has continuously increased its imports of metal minerals from

Graph-3. Trade between Kazakhstan and China 2015 ~ 2022, billion \$ US



Source: Graph was created by author based on the data from The Observatory of Economic Complexity (OEC) , Retrieved from <https://oec.world/>

Kazakhstan, with the proportion of recycled copper increasing from 14% to an average of around 20% per year, and ferroalloys and copper mines maintaining around 10% annually. Since 2015, the proportion of natural gas exports from Kazakhstan to China has increased, from 1.58% in 2015 to 20.8% in 2019. Although it has decreased since then, it has remained above 10% (The Observatory of Economic Complexity (OEC), 2023).

### The Perceptions of Kazakhstan's people on China and the Belt and Road Initiative

While China's presence is increasing in the Central Asian region under the BRI, the massive influx of Chinese workers, environmental pollution, and social conflicts that accompany such economic activities have made the local people distrustful and wary of China. In Kazakhstan, for example, in 2016, many citizens held street protests in major cities in Kazakhstan (Almaty and Astana) against the government's land reforms, fearing that Chinese investors will come and buy out Kazakhstan's land (BBC News 2016).

As a result, a discussion arose in the expert community (academic circles, think tanks) : if the BRI is a threat and a challenge, or an opportunity for the socio-economic



development of the countries of the region and the strengthening of regional security.

This is why the assessment of the BRI from the expert and analytical circles of the Central Asian countries is ambiguous: on the one hand, enthusiastic and positive opinions regarding the results of its implementation are recorded, on the other hand, alarmism and pessimism exist in scholar's argumentations.

In the implementation of such a large-scale project as BRI, certain challenges, risks and problems arise, both at different levels and in different sectors, which must be identified and minimized.

This study analyzes views and perceptions of the population of Kazakhstan ("We") regarding the BRI, which serves as an external initiative for Kazakhstan, produced by China, understood as the "Other", as well as the scale of the spread of anti-Chinese or pro-Chinese sentiments, associations, risks and fears in society. The public perception of Kazakhstan was identified based on the analysis of data from applied sociological research (focus group (interviews with a group of people who work with Chinese or live in the areas where Chinese investment projects are present to collect a variety of information) and expert (academic circles and think tanks) interviews).

In general, as shown by the study, the citizens of Kazakhstan have a concern about the presence of Chinese and Chinese business in Kazakhstan, deterioration of the environment in connection with the activities of Chinese enterprises operating in the territory of Kazakhstan in the field of oil production and agriculture, and the growing socio-economic discrimination against Kazakh workers in Chinese-run enterprises, characterized by inequality in working conditions and wages. In addition, there are cultural and linguistic differences between Kazakhs and Chinese. Chinese actions do not coincide with the patterns of behavior adopted in Kazakhstan, and therefore are evaluated extremely negatively and cause irritation.

#### *Awareness of the Belt and Road Initiative (BRI) among the people of Kazakhstan*

Analysis of focus group discussions shows that the population has a low level of awareness of the Silk Road Economic Belt (SREB) - the overwhelming majority of respondents either "have not heard anything about the initiative" or "have heard something", "have heard the name, but do not know the content and details". Despite this, there are different points of view in public opinion regarding the influence of the SREB on the development of Kazakhstan: from alarmist ones - "The Silk Road Economic Belt is an expansionist project of China through which Kazakhstan will be conquered" - to neutral statements that "The implementation of the initiative can

bring benefits for Kazakhstan, but it is difficult to say which ones, since information is not available” or “the Silk Road Economic Belt is an impulse for the development of infrastructure in Kazakhstan”.

At the same time, a certain trend is recorded in the perception of China and the SREB – the degree of criticality is higher in those regions where Chinese enterprises are located and where the population directly interacts with the Chinese. The residents of Aktobe and the Aktobe region show the most negative attitudes in comparison with the population of other regions of Kazakhstan. The toughest assessments of the SREB and its impact on the country’s development were expressed here. 1) **The dominant opinion is that the presence of Chinese and Chinese business in Kazakhstan is not so much an economic problem as a political one.** In their opinion, the SREB may lead to a serious dependence of Kazakhstan on China, and its implementation is viewed by the population as Chinese expansion.

For example, look at Aktobe, the Chinese bought the best railroad, the Chinese bought the best geological deposits, they bought everything. And in Kenkiyak all the institutions, offices, everything is Chinese. It is important - where the Chinese go you have to be very careful there. ... “One belt - one road” – is to open the way for the Chinese! For this reason, I, on my own behalf, on behalf of my family, on behalf of society, I am against this project.

**Male, 59 years old, Kazakh, Worker at CNPC-Aktobe MunaiGas, Focus group interview, March 4, 2020, Aktobe city, Hotel “Aktobe”, conference hall.**

If we would allow the Chinese to stay in Kazakhstan, then it will be an economic expansion .... All production will be theirs, Chinese. Even though the investments are made, then most likely inflation will occur. Our debt will be even greater.

China is slowly entering Kazakhstan. I think that in the future they will occupy all our lands.

**Male, 30 years old, Kazakh, Senior Lecturer at the Academy of Public Administration under the President of the Republic of Kazakhstan, Focus group interview, March 14, 2020, Almaty city, Business center “Pioneer 2”, meeting room.**

2) **Deterioration of the environment in connection with the activities of Chinese enterprises operating in the territory of Kazakhstan in the field of oil production**

**and agriculture.** The consequence of the work of the Chinese business in the extractive sector, according to the respondents, is the bad impact on the health of the local population and the increase in diseases, as well as the pollution of agricultural lands with chemicals, which become unsuitable for further cultivation.

In the context of environmental problems, criticism of the population is aimed at low-quality environmental expertise. In the opinion of the respondents, research institutes conducting expert examinations assert that the harmful effect on the environment is insignificant or absent at all. It is also indicated that a negligent attitude towards the Kazakh nature on the part of Chinese companies is possible only with the lack of proper control on the part of the Kazakh authorities.

...Previously, 6 torches were burning, but now there are more than 40 of them. Hydrogen sulfide is absorbed into the water, which is drunk by both man and cattle, and everyone becomes sick ... Ecologists say that the river is clean, but the river from the city of Temir to Zhargamys is not suitable for swimming. In 2002, when we were swimming in the river, everyone was covered with sores, it was impossible to swim, fish could not be eaten, but according to the documents, all is good.

**Male, 49 years old, Kazakh, Worker at CNPC-Aktobe MunaiGas, Focus group interview, March 4, 2020, Aktobe city, Hotel "Aktobe", conference hall.**

I am from Semey, from the village of Aktogay, there is Kazakhmys, where a lot of Chinese work. In Aktogay, the air smells of medicine and it is not clean as before. People who now live in Aktogay have health problems. I am also afraid of this problem. My hair is falling out. There are a lot of health problems in newborns. This all happens after the Chinese have come.

**Female, 46 years old, Kazakh, Librarian, Focus group interview, March 14, 2020, Almaty city, Business center "Pioneer 2", meeting room.**

**3) The growing socio-economic discrimination against Kazakh workers in Chinese-run enterprises, characterized by inequality in working conditions and wages.** The same problem arises in Kazakhstani enterprises that provide certain services to Chinese enterprises, whose workers compare their working conditions with those where only Chinese workers work.

…the people are very worried by the state of the environment, the ecological situation is deteriorating every day, worried by the social situation, as well as the difference in wages. And this problem is constantly being raised! … The position of the Chinese, who extract oil near the sea… is much better than that of our Zhanazhol people. I work there myself. [This is about the Zhanazhol Munai Service company, whose services are used by the CNPC-Aktobe MunaiGas] …. I wear size 50 clothes, and they give me size 62 clothes. Until the Chinese eat, they do not give us food, the food is different, there is a big difference in wages. I'm just amazed at how Zhanazhol's workers put up with it. In [CNPC "AktobeMunaiGas"] the sleeping places are good, but we have 10 people in one room whereas they have two sleeping places. … We are so patient. Those who are outraged are fired from work for any reason.

**Male, 49 years old, Kazakh, Worker at CNPC-Aktobe MunaiGas, Focus group interview, March 4, 2020, Aktobe city, Hotel "Aktobe", conference hall.**

Two thousand Chinese were brought to the city of Shymkent, they work here. If we talk about their salaries, there is a big difference. Even though we have many local people, who are unemployed, they bring their Chinese workers. Sometimes they employ the local population on a contract basis, but our workers are paid one salary, and theirs are paid a completely different one.

**Female, 53 years old, Kazakh, Hair stylist, Focus group interview, March 16, 2020, Shymkent city, Hotel "Shymkent", conference hall.**

4) **The presence of serious cultural and linguistic differences between Kazakhs and Chinese**, which is a big obstacle in the interaction between these social groups. Sometimes even leading to an increase in tension in relations, up to open conflict. Moreover, such local conflicts periodically occur between Kazakhs and Chinese at Chinese enterprises or in settlements near which they are located (Karavan 2018).

On the other hand, there is concern about the possible loss of national Kazakh identity, since under the influence of the Chinese presence, "Kazakh youth may adopt the values and behavioral models of the Chinese", or "begin to imitate them," and "Kazakh culture will remain in the background".

We cannot speak with Chinese; we do not know their language. We cannot sit at the same table with the Chinese, we do not eat frogs and insects, we cannot go to the mosque with the Chinese, the Chinese do not know our customs and traditions, and we are very different.

**Male, 59 years old, Kazakh, Worker at CNPC-Aktobe MunaiGas, Focus group interview, March 4, 2020, Aktobe city, Hotel “Aktobe”, conference hall.**

...We have too different mentality. Cultures are different ... We are probably closer to Europe, to Russia than to China. The cultures are completely different. Therefore, we do not understand their medicine or education. ... Nothing else unites us, except for Chinese goods.

**Female, 26 years old, Kazakh, Software Engineer, Focus group interview, March 10, 2020, Oskemen city, Hotel “Ust-Kamenogorsk”, meeting room.**

## Conclusion

Though the economic cooperation between China and Kazakhstan before the BRI's proposal has brought positive results to Kazakhstan's development, the situation has been changed to the benefits of China. Since 2015, Kazakhstan's exports to China have been lower than its imports from China, resulting in a trade deficit, which is not good for Kazakhstan's development. However, there is more diversity (recycled copper, ferroalloys and copper mines, and natural gas) in Kazakhstan's exports to China, indicating that China's imports of goods from Kazakhstan have changed, and petroleum is no longer the largest commodity imported by China from Kazakhstan.

While China's presence is increasing in the Central Asian region under the BRI, the massive influx of Chinese workers, environmental pollution, and social conflicts that accompany such economic activities have made the local people distrustful and wary of China. It is very interesting that Kazakhstan's population characterize China positively taken by itself, without reference to Kazakhstan, and a negative assessment of China's presence in Kazakhstan. The general attitude of the population towards China is expressed by the following phrase: “You can cooperate, adopt knowledge and technologies, but the most important thing for us is to remain Kazakhs!”

The results of the survey allow us to assert that against the positive-neutral official

discourse regarding the prospects for Kazakhstan's cooperation within the BRI, at the level of public discourse, a predominantly negative attitude towards China is recorded, which is related to the BRI and its influence on the country's development. The main themes of negative narratives about China and the BRI are:

- growing economic dependence of Kazakhstan on China;
- risks of assimilation of Kazakhs by the Chinese, erosion of Kazakh identity;
- negative impact of Chinese enterprises on the environment, destruction of the original "habitat" of Kazakhs"
- discrimination of Kazakhstani workers, the formation of a complex of people of "second class"
- cultural and linguistic differences.

The authors' assumptions about the low awareness of the population about the Initiative were fully confirmed during the focus group interviews. Most of the citizens who took part in the discussions either never heard about the Initiative or heard something in general terms. Among the channels of information transmission, which citizens rely on when forming their own views on the situation, personal observation and social networks dominate. The perception of the Initiative itself, the benefits and risks of participation in it, takes place in the context of the historical aspect (the medieval Silk Road, Kazakh proverbs reflecting anxiety about China) and the theme of the Chinese presence in Kazakhstan (more often in the context of sinophobia) . Voicing the benefits of Kazakhstan's participation in the Initiative, citizens relay ideas promoted at the official level: "infrastructure development", "investment inflow", "job creation", "transit income". Risks are perceived through the prism of China's presence on the territory of Kazakhstan: "imperial aspirations", "loss of sovereignty", "cultural differences", "land grabbing", "environmental damage".

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