

## BRI in Central Asia: Overview of Chinese Projects

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### ABSTRACT

This data article summarises the analysis of 261 Chinese projects in Central Asia. The findings indicate that trade promotion and industrial development are the sectors where there is most BRI-related activity in Central Asia. The total number of projects in these areas approximates the number of projects in all other areas combined. These sectors also receive most investment. In terms of the number of implemented projects, roads is the second key sector, followed by energy. However, due to larger project sizes, energy receives more funds than roads. The majority of Chinese projects in Central Asia are bilateral.

*Keywords:* BRI, China, Central Asia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan

### Background

China's main strategic document devoted to BRI is "Vision and Actions on Jointly Building the Silk Road Economic Belt and the 21st-Century Maritime Silk Road," published in March 2015. As highlighted in that document, BRI "is aimed at promoting the orderly and free flow of economic factors, highly efficient allocation of resources and deep integration of markets; encouraging the countries along the Belt and Road to achieve economic policy coordination and carry out broader and more in-depth regional cooperation of higher standards; and jointly creating an open, inclusive and balanced regional economic cooperation architecture that benefits all."<sup>1</sup> The definition of BRI outlined in the document is all-encompassing in nature and it can be applied with equal success to different contexts. Therefore, the

term BRI itself is broad and general and it opens the room for a diversify of meanings and interpretations.

### What is a BRI project?

China has actively promoted Belt and Road Initiative (BRI) projects in Central Asia since 2013.<sup>2</sup> However, there are no commonly accepted definitions or key determinants of what makes project part of BRI. We regard Chinese projects in Central Asia as part of BRI if they satisfy the following criteria:

- publicly reported as a BRI project;
- fully or partially financed by the BRI financial institutions: Asian Infrastructure Investment Bank (AIIB), China Development Bank, Export-Import Bank of China or New Silk Road Fund;

<sup>1</sup>For more detail, see:

<http://www.beltandroadforum.org/english/n100/2017/0410/c22-45.html>

<sup>2</sup> Vakulchuk, Roman and Indra Overland (2019) "China's Belt and Road Initiative through the Lens of Central Asia", in Fanny M. Cheung

and Ying-yi Hong (eds) *Regional Connection under the Belt and Road Initiative. The Prospects for Economic and Financial Cooperation*. London: Routledge, pp. 115–133. Available at:

<https://www.researchgate.net/publication/329310641>

- launched after the first announcement of BRI in 2013;
- implemented and financed in either a bilateral format (between China and one of the Central Asian states) or a multilateral format (among three or more parties).

In this and other data articles on BRI (see CADGAT data articles no. 21-27), Chinese projects that meet all or some of these criteria are considered part of BRI. Other projects are simply Chinese bilateral projects implemented in Central Asian countries; they are also presented in this article. This article provides a detailed description of projects that have been implemented, have been cancelled, or are still in the planning stage.

Data on the 261 projects were gathered by one researcher from each Central Asian country and were drawn from official statistics, local and international media news, government press releases, interviews and reports. Data collection was carried out between August 2018 and January 2019.

We divide projects into four major categories that correspond to the four BRI priorities: (a) rail and road connectivity, (b) energy connectivity, (c) trade promotion and industrial development and (d) people-to-people projects. In addition, we have divided the trade promotion and industrial development category into four sub-categories: (a) mineral and petroleum exploration, development and processing (b) industry, (c) finance and IT, and (d) agriculture and food. Because trade promotion and industrial development are one of the four official categories of BRI projects, we present numbers for both the main category and its sub-categories.

This publication is part of a series of data articles on Chinese projects in Central Asia (see CADGAT data articles no. 21-27). It summarises some key numbers across sectors, whereas the other articles in the series contain more detailed overviews of BRI projects in specific sectors. All the data are also available in a unified database in Excel format at:

<http://osce-academy.net/en/research/cadgat/>

## **Definitions**

*Financing* – Sources of funding for each project are identified and presented.

*Commercial interests* – A project is classified as “commercial”, if the parties promoting it primarily pursue commercial goals.

*Strategic interests* – A project is classified as “strategic”, if it fits one of the broader categories, particularly strengthening connectivity.

*Connection to BRI* – If a project is announced publicly as part of BRI, then it is classified as a “BRI project”.

*Local project* – A project is classified as “local”, if the infrastructure or facility constructed and services provided, are limited to a specific country.

*Regional project* – A project is classified as “regional”, if it is part of the bigger regional initiative, which includes more than one country.

*Bilateral* – A project is classified as “bilateral”, if an agreement for project implementation is signed by the Chinese government or a Chinese company, as one party, and one of the Central Asian governments or companies as the other.

*Multilateral* – A project is classified as “multilateral”, if an agreement for project implementation is signed by three or more parties, including the Chinese or Central Asian governments, multilateral financial institutions (AIIB, China Development Bank, Export–Import Bank of China or New Silk Road Fund) and private enterprises.

Table 1. Number of China's BRI and bilateral projects in Central Asia

Sectors	Total number by sector	Kazakhstan	Kyrgyzstan	Tajikistan	Uzbekistan	Turkmenistan
<b>Total by country</b>	<b>261</b>	<b>102</b>	<b>46</b>	<b>44</b>	<b>43</b>	<b>26</b>
Trade and industrial development	<b>131</b>	61	17	17	24	12
Rail and road connectivity	<b>51</b>	14	11	16	5	5
Energy connectivity	<b>48</b>	20	5	7	12	4
People-to-people projects	<b>31</b>	7	13	4	2	5

Table 2. Breakdown of China's BRI and bilateral trade and industrial development projects

Sectors	Total number by sector	Kazakhstan	Uzbekistan	Tajikistan	Kyrgyzstan	Turkmenistan
Trade and industrial development	<b>131</b>	61	24	17	17	12
<i>Mineral and petroleum exploration, extraction and processing projects</i>	<b>47</b>	23	5	3	9	7
<i>Industry</i>	<b>44</b>	17	18	6	3	NA
<i>Agriculture and food</i>	<b>26</b>	17	1	6	2	1
<i>Finance and IT</i>	<b>14</b>	4	NA <sup>3</sup>	2	3	4

Table 3. Total investment of Chinese projects in Central Asia (USD mln)

	Total by country	Rail and road connectivity	Energy connectivity	Industry	Agriculture and food	Mineral and petroleum exploration and processing	Finance and IT	People-to-people projects
<b>Total by sector</b>	<b>136 251.06</b>	<b>23 499.74</b>	<b>35 693.8</b>	<b>12 299.55</b>	<b>1 451.88</b>	<b>55 159.65</b>	<b>8 100</b>	<b>46.44</b>
Kazakhstan	90 862.43	14 539.3	18 849.5	10 545.5	1 049.63	37 778.5	8 100	NA
Turkmenistan	24 842.5	1 402.5	9 410	NA	NA	14 03	NA	NA
Tajikistan	10 518.7	4 515.9	4 516	679,8	342	465	NA	NA
Kyrgyzstan	5 391.68	1 773.04	2 713	150.8	31.55	676.85	NA	46.44
Uzbekistan	4 635.75	1 269	205.3	923.45	28.7	2 209.3	NA	NA

<sup>3</sup> Here and throughout: "NA" means "no information has been found/is available".

Table 4. Number of bilateral vs. multilateral Chinese projects in Central Asia

	Total by country		Road infrastructure		Energy connectivity		Trade and industrial development		People-to-people projects	
	Bilateral	Multil.	Bilateral	Multil.	Bilateral	Multil.	Bilateral	Multil.	Bilateral	Multil.
<b>Total by sector</b>	<b>237</b>	<b>24</b>	<b>33</b>	<b>18</b>	<b>46</b>	<b>2</b>	<b>127</b>	<b>3</b>	<b>30</b>	<b>1</b>
Kazakhstan	100	2	13	1	20	0	60	1	7	0
Kyrgyzstan	41	5	8	3	5	0	16	1	12	1
Tajikistan	35	9	8	8	6	1	17	0	4	0
Uzbekistan	38	5	2	3	11	1	23	1	2	0
Turkmenistan	23	3	2	3	4	0	12	0	5	0

Table 5. Number of commercial vs. strategic Chinese projects in Central Asia

	Total by country		Road infrastructure		Energy connectivity		Trade and industrial development		People-to-people projects	
	Commerc.	Strateg.	Commerc.	Strateg.	Commerc.	Strateg.	Commerc.	Strateg.	Commerc.	Strateg.
<b>Total by sector</b>	<b>135</b>	<b>126</b>	<b>6</b>	<b>45</b>	<b>25</b>	<b>23</b>	<b>102</b>	<b>28</b>	<b>2</b>	<b>29</b>
Kazakhstan	70	32	3	11	10	10	57	4	0	7
Kyrgyzstan	12	34	0	11	1	4	9	8	2	11
Tajikistan	22	22	2	14	4	3	16	1	0	4
Uzbekistan	28	15	0	5	10	2	18	6	0	2
Turkmenistan	3	23	1	4	0	4	2	10	0	5

Table 6. Number of local vs. regional Chinese projects in Central Asia

	Total by country		Road infrastructure		Energy connectivity		Trade and industrial development		People-to-people projects	
	Local	Regional	Local	Regional	Local	Regional	Local	Regional	Local	Regional
<b>Total by sector</b>	<b>209</b>	<b>52</b>	<b>27</b>	<b>24</b>	<b>37</b>	<b>11</b>	<b>123</b>	<b>7</b>	<b>21</b>	<b>10</b>
Kazakhstan	96	6	13	1	16	4	60	1	7	0
Kyrgyzstan	29	17	5	6	4	1	13	4	7	6
Tajikistan	28	16	4	12	6	1	16	1	2	2
Uzbekistan	39	4	3	2	11	1	23	1	2	0
Turkmenistan	17	9	2	3	0	4	12	0	3	2

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## About CADGAT and Central Asia Regional Data Review

The Norwegian Institute of International Affairs (NUPI) and the OSCE Academy established the Central Asia Data-Gathering and Analysis Team (CADGAT) in 2009. The purpose of CADGAT is to produce new cross-regional data on Central Asia that can be used free of charge by researchers, journalists, NGOs, government employees, and students, both inside and outside the region. The data articles can be found at <http://osce-academy.net/en/research/cadgat/>

The following CADGAT data articles have been published:

1. Hydroelectric dams and conflict in Central Asia
2. The narcotics trade and related issues in Central Asia
3. Language use and language policy in Central Asia
4. The transportation sector in Central Asia
5. Road transportation in Central Asia
6. Gender and politics in Central Asia
7. Political relations in Central Asia
8. Trade policies and major export items in Central Asia
9. Intra-regional trade in Central Asia
10. Trade barriers and tariffs in Central Asia
11. Holidays in Central Asia. Part I: Laws and official holidays
12. Holidays in Central Asia. Part II: Professional and working holidays
13. Media in Central Asia: Print Media
14. Media in Central Asia: TV
15. Media in Central Asia: Radio
16. Renewable energy policies of the Central Asian countries
17. Wind power potential of the Central Asian countries
18. Solar power potential of the Central Asian countries
19. Hydropower potential of the Central Asian countries
20. BRI in Central Asia: Overview of Chinese projects

CADGAT has also produced a database on Elites in Central Asia, which can be found at <http://osce-academy.net/dbelite/>



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