



Producing the Eurasian Land Bridge: a case study of the geoeconomic contestation in Kazakhstan

Jessica Neafie¹

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Abstract

What are the implications for emerging economies that become central to geoeconomic contestation between great powers? For Kazakhstan geoeconomic contestation is a tool for increasing importance and regional networking in the pursuit of becoming the Eurasian Land Bridge. Kazakhstan's current multilateral approach to foreign affairs utilizes geoeconomic contestation in a unique way that benefits national interest, pushing local infrastructure and economic goals. This case study looks at the great power contestation in Kazakhstan to show the effect of geoeconomic contestation on pivot countries, where pivot countries create a relationship that is mutually beneficial rather than clientelist, dependent or exploitative. This study shows evidence supporting research on great power politics that suggests that geostrategic pivots have the agency and power to push national interests and can utilize its position to exert some control in its relationship with powerful states.

Keywords Central Asia · Geostrategic competition · Great power politics · Kazakhstan · Geoeconomic competition · Geopolitics

Introduction

Since independence in 1991, Kazakhstan's role in Central Asia and the world has evolved and is becoming the physical and metaphorical *Eurasian Land Bridge*, linking east and west. Kazakhstan is situated on the corridor that connects Asia and Europe and is central to both security strategies and economics in the region. Most commonly connected to Russia, its former colonial ruler, Kazakhstan has, since independence, gained a stronger relationship with both the United States and China that allows it to balance these powers against each other and successfully navigate great power politics without becoming a client of any one of the other states. For all three states Kazakhstan presents geoeconomic and geostrategic opportunities, but

✉ Jessica Neafie
Jessica.neafie@nu.edu.kz

¹ Nazarbayev University, Nur-Sultan, Kazakhstan



for China and the United States their growing interest in the importance of the Eurasian Land Bridge is becoming more apparent. Kazakhstan has successfully maintained peaceful relations with all three nations and asserted its sovereignty in areas of foreign policy through its multi-vector framework for foreign policy. Building on my previous work on infrastructure competition in Kazakhstan, in which I propose the idea that Kazakhstan is trying to become the Eurasian Land Bridge, this article looks at how this is achieved through the negotiations between a middle power and great powers (Neafie 2022). In order to understand how middle power states can successfully negotiate relationships with great powers without becoming a client state, this article, building on previous literature¹ related to Kazakhstan's multi-vector approach to international relations, focuses on exploring Kazakhstan's growing relationships with the US and China.

The US and China may not have the historical relationship that Russia has with Kazakhstan but they both have growing security and economic interests. The US has worked with Kazakhstan since the 1990s on security issues, and throughout the 2000s, Kazakhstan helped the US "by financing Afghanistan's security forces and by participating in Afghan transportation infrastructure development projects" (Sanchez 2020; US White House 2018). But the US has had a large economic interest in Kazakhstan as well with over 54 billion USD invested in Kazakhstan since 1991 and over 600 US companies operating there, making it one of the largest investors in the country (Satubaldina 2021). While China also has security interests in Kazakhstan, China's primary interest in Kazakhstan has been economics. In fact, Chinese President Xi Jinping announced China's key international economic engagement strategy, the Belt and Road Initiative (BRI), during his 2013 visit to the country. For much of the twenty-first century American and Chinese foreign policy towards Kazakhstan were compatible or even complementary as the security and economic strategies of each country did not appear to come into conflict with one another. However, since China announced the Belt and Road Initiative (BRI), the US has appeared to shift its focus and engagement back to Kazakhstan, in order to engage with China in geoeconomic competition, highlighting the importance of Kazakhstan as an essential regional pivot.

The US shift to increasing competition with China offers Kazakhstan the opportunity to hedge between the US and China, but this is a delicate balancing act.² But not one that is new to Kazakhstan foreign policy, Kazakhstani officials have sought to leverage Kazakhstan's strategic location as a pivot at the crossroads of Eurasia and the country's rich resource endowments between Russia, the US, China, and Europe. The Kazakhstani Government has enhanced geoeconomic ties with both China and the US as it pursues spatial objectives.³ Its overarching spatial objectives

¹ Most notably Vanderhill et al. (2020) on the foreign policy strategies related to the relationship of Kazakhstan with China and Russia.

² For more on geostrategic hedging between the US and China see Cheng-Chwee (2020) and Neafie (2022).

³ The notion of a 'state spatial project' is taken from Brenner (2004, pg. 90–91), who notes that these projects "emerge as attempts to differentiate or integrate state institutions and policy regimes across geographical scales and among different locations within the state's territory."



are centered around the idea that Kazakhstan become the Eurasian Land Bridge, a central hub for goods transportation across the continent and economic growth for the region (Neafie 2022; Pepe 2021; Pomfret 2021). The manifestation of this territorial designation depends on the construction of a series of large-scale infrastructure project focused on the transportation sector and economic diversification projects driven by the government's Nurlı Zhol plan. In pursuit of this goal, the Kazakhstani Government has established a series of institutions and pursued a multi-vector foreign policy strategy. This paper examines state restructuring in Kazakhstan and its hedging strategies in the context of the Sino-US rivalry and anticipates the emergent territory of the Eurasian Land Bridge, which is at once a pivot, an economic hub and strategic node in an increasingly networked Eurasia.

As Kazakhstan becomes one of the central locations for this geoeconomic contestation, it is essential to understand how this new great power competition impacts the pivotal states involved and how they respond. Unlike assessments that focus on the power of great powers to control and manipulate developing countries, this assessment focus on how geostrategic pivots, which are essential to geostrategic competition, are able to maximize the utility and agency to successfully promote self-interest. Focus on geoeconomic competition is important because control of the new world order is increasingly driven by economics, and engagement is taking place not on a battlefield but in the markets. This shift toward economic strategy is reflected in state behavior as the geostrategic players shift away from interventionist policies, leaving the recipient state to handle its own domestic affairs and respects the political structures of the countries involved (Kembayev 2018). As a result, great power competition is no longer a quest for security power, but is instead a quest for wealth and influence in the pivotal states (Blackwill and Harris 2016). In the following case, there is less evidence that China and the US are being "rule-makers" or unilaterally exploiting Kazakhstan, rather Kazakhstan takes advantage of its position as pivot to produce a positive-sum game. Kazakhstan has more opportunities to increase growth and infrastructure development and has more agency over its economic and political relations. This makes the implications and impacts of geoeconomic competition in recipient countries empirically different than the more traditional theories of great power competition predict.

This article has two goals: (1) to further analyze Kazakhstan's multi-vectorism with a focus on its relationship with the United States and China, and (2) to engage in the theoretical discussion about the agency of states who are recipients of great power competition to promote their own interests. Vanderhill et al. (2020) examine the importance of multi-vectorism in Kazakhstan, and establishes the importance of secondary powers by looking at Kazakhstan's relationship with Russia and China. This article adds to the previous literature by focusing more on Kazakhstan's complex balancing strategies with China, but also adding more about its engagement with another great power, the United States. The discussion of the US's geostrategic engagements in the region, alongside China's and Russia's, is important to advancing not only the argument that Kazakhstan is an important pivot in great power politics but in also showing how Kazakhstan is able to maintain its sovereign strategies irrespective of the foreign power they face.



Geostrategic pivot and agency in geoeconomic strategies

In research on great power politics, geostrategic pivots are significant to competition and “attaining domination” of a region or the world (Brzezinski 1998, p. 21). Mackinder (1904) pioneered the idea of the “pivot area”, which was then defined in modern relations by Brzezinski (1998, p. 22) as a state whose importance is derived from its “sensitive location” and by its vulnerability to the great powers. In the context of current US-Sino competition, Kazakhstan is a clear pivot, however the country’s ability to hedge is threatened by the fact that the objectives of the US and China objectives are increasingly mutually exclusive.

Mackinder (1904) might have been the first to identify the potential of Central Asia as a pivot in great power politics, but Kazakhstan’s role as the Eurasian Land Bridge, and modern pivot, can be linked to the development of its overland transportation routes in the 2010s (Pepe 2021; Pomfret 2021). These transportation routes increased Kazakhstan’s importance in geoeconomic strategies by offering a more sustainable way to ship goods, and while this was particularly important to China, it offered an opportunity to increase connectivity across the continent for the European Union (EU), Southeast Asia, Japan, and beyond (Pomfret 2021). Kazakhstan as a result has become a sensitive location for connecting global value chains, and the growing interest by multiple parties is making it more vulnerable to the more powerful geostrategic players.

When geostrategic players focus on geoeconomics, the pivots have more agency or power to push their own national interests and the local actors have more control in the relationship (Brown 1992; Cooley 2012). A pivot is not just a client of the powerful states they interact with. The strategic players are looking to benefit from the relationship and have something to lose if they cannot gain access to what they need from the pivot state. Additionally, a pivot’s strategic importance usually means that they can have a more multi-vector approach to foreign policy strategy by creating “overlapping spheres of influence...that are competitive but positive sum” (Goh 2008, p. 129). The pivots are able to play key strategic players off each other to create opportunities for the pivot to push their own interests. The agency of a pivot state is even more pronounced when the great power strategies are focused on geoeconomic competition, where the strategic players are pragmatic players look for economic interests and influence that does not include interference with state political institutions. This is the case in Kazakhstan, where China does not interfere with Kazakh government structures but promotes increased trade and investment strategies (Kembayev 2018); these strategies focus on harmonious relations between the countries and mutually beneficial outcomes.

Instead of a narrative of dependency and exploitation, these relationships strengthen the pivot state allowing the local elites to see the geoeconomic strategies of the competing players as opportunities to acquire capital flows, and technology for local development. They have the ability to force the strategic players to integrate the pivots own plans and policies into the geoeconomic strategy. Increased agency can be both a benefit and a boon for the recipient state, as they have the ability to push national interests, but elites can also use this power for unilateral benefit.



A geostrategic pivot is identified by its recognition by the key geostrategic players, hence, the way that the US and China are engaging through security and economic competitive strategies indicate the importance of Kazakhstan and its role as a pivot. This started with the emphasis that China puts on relations with Kazakhstan as vital to the Chinese plans for economic growth and the influence China has not only in Central Asia but also in Europe. Without Kazakhstan, China loses a link to both Europe and Russia, its Eurasian Land Bridge. Kazakhstan makes it faster and easier for Chinese goods to reach Europe, and its relationships with Russia, Europe, and other Central Asian countries open up potential markets for Chinese companies that manufacture in Kazakhstan; markets that might otherwise be harder or more expensive to enter. As China has gotten more involved in Kazakhstan, the US strategy has shifted to a more active participant in working to increase its relationship with Kazakhstan. The US has almost 23% of stock foreign direct investment (FDI) in the country (United States Department of State 2021a), and as China has been attempting to increase its own investment in the country the US has begun to act to protect its energy investments and security ties. No longer does the US see the Chinese policies in Central Asia as compatible to its own (i.e., each pursuing their own path in Kazakhstan), now the US has begun an “enhanced strategic partnership dialogue” to deepen security cooperation over the next five years, and further increase its economic relationships, particularly seeking to normalize trade relations which are still reminiscent of the Cold War era (United States Department of State 2021b). The US is competing with China, its economic strategy seeks is indicative of attempts to strengthening its economic influence in Kazakhstan over China’s, and seeking to maintain a crucial geostrategic relationship—as Kazakhstan borders China to the west and continues to be an outlet for monitoring other security concerns in the region (Napper 2022). These moves by the US responding to China’s activity in the region demonstrate how Kazakhstan is a geostrategic pivot significant to the competition between the US and China.

Kazakhstan leverages its economic and strategic endowments through its multi-vector approach to foreign policy. This framework is designed to deal with foreign relations in a way that is ‘pragmatic, and non-ideological’ (Hanks 2009) with the goal of promoting the policy objectives of the state by relying on inter-state relations. Instead of balancing coercive powers or focusing on military alliances with one single great power, the state engages in complex balancing, usually in the form of economic entrenchment, that increases the stakes the great power has in the security of the country and region (Goh 2008). The state does not put too much emphasis on any one of its economic or security relations and will choose alternative policy plans if they begin to rely too much on any ally. Multi-vector approaches to foreign policy and pivot status enhance each other, as the importance of a pivot state gives it more prominence in international affairs and more resources to pursue complex balancing through a multi-vector framework. Allowing the state to pursue a strategy of ‘omni-enmeshment’—soft balancing in which the state draws others into ‘a web of sustained exchanges and relationships’—giving it a tactical advantage to decrease dominance by any one power (Pape 2005; Goh 2008; Vanderhill et al. 2020).

A geoeconomic approach to great power competition means that recipient state strategies and behaviors change along with the outcomes from policy choices.



Recipient countries have more agency in the geostrategic relations, and as a result each state may respond differently, and outcomes become variant not monolithic. This study focuses on Kazakhstan because of its growing importance to China and to the United States, which has made it into a geostrategic pivot. Exploring Kazakhstan's institutions and policies following this shift toward geoeconomic strategies provides a better understanding of recipient country responses to great power competition. If the geoeconomic strategies are not a zero-sum game, Kazakhstan is able to exercise more autonomy and will have the power to push its own agenda and protect its institutions to build wealth. Recipient countries, like Kazakhstan, can leverage their economic endowments, such as domestic market features and influence over commodity and energy flows to give themselves more agency in their relations.⁴

What makes Kazakhstan a geostrategic pivot?

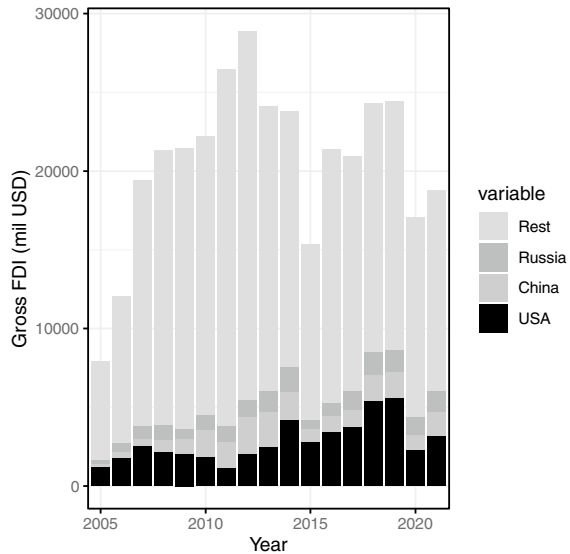
As a pivot, Kazakhstan is an important security and economic location, in which the great powers are interested, and in response has made a multifaceted effort to form bonds with these great powers—Russia, Europe, the US and China. Evidence of the success of Kazakhstan's complex balancing can be seen in its ability to pursue strategies that are in opposition to the interests of its great power partners, such as pursuing alternative energy transportation routes to bypass Russia, maintaining an active security relationship with the US on issues of military professionalization, counterterrorism, and denuclearization, and an increasing relationship with China that many feared would incite Russian hostilities (Hanks 2009; Omelicheva and Du 2018; US Department of State 2021a; Napper 2022). Kazakhstan does not want to choose between the various great powers, and its important status as a pivot provides the leverage needed to pursue a multi-vector approach and maintain state sovereignty and independence.

Since 1991, American policy towards Kazakhstan has overwhelmingly focused on security. Its initial focus on nuclear non-proliferation and securing the Soviet arsenal in the 1990s gave way to anti-terrorism initiatives and support for its invasion of Afghanistan (US Department of State 2021b). The US and Kazakhstan relationship is based on an 'informal defense partnership' (Sanchez 2020), but even without a formal agreement the US has conducted annual military exercises and troop training (U.S. Army 2019). The US has trained Kazakhstani troops as peacekeepers and under the Cooperative Threat Reduction Program, the US spent \$240 million to help Kazakhstan eliminate weapons of mass destruction (Sanchez 2020; US Department of State 2021b). This relationship remains informal so that Kazakhstan can balance the strategic gains it gets from its relationship without upsetting Russia, which has been the primary source of military aid for Kazakhstan. However, this has not stopped Kazakhstan from pursuing a deeper strategic relationship with the US through the C5 + 1 framework and the announcement of a new US strategy in Central Asia (through 2025) in which Kazakhstan facilitates the maintenance of

⁴ See Blackwill and Harris (2016) for more on state endowments in geoeconomics.



Fig. 1 Gross inflow of FDI to Kazakhstan by country, USD million. Data is from the National Bank of the Republic of Kazakhstan (2022)



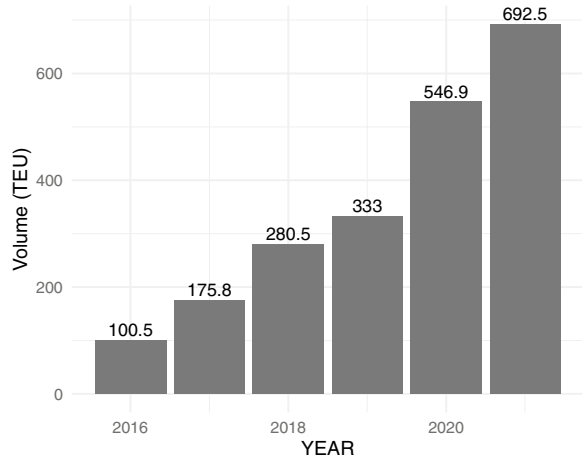
a US presence in the region (US Department of State 2020; Akylbayev and Wong 2021).

The US has also had a growing economic interest in Kazakhstan, looking to gain more economic influence which may be coming into conflict with China. Kazakhstan is the number one trading partner for the US in the Central Asian region, reaching 2.1 billion USD in 2018 (Sanchez 2020), however this is much lower than its top trade partners—Russia and the EU (Comtrade 2022). However, the US has a much stronger investment relationship with Kazakhstan, holding 38 billion USD, 22.9% of total in foreign direct investment stock (FDI) (Kantchev and Matthews 2022), greater than both China and Russia, and a US company runs two of the largest oil fields. Over the last 15 years the US investment in Kazakhstan have topped Russia and China all but 2 years, see Fig. 1, and is largely into the oil and gas sector that makes up 20% of Kazakhstani GDP and 70% of the export market (Kubayeva 2021; National Bank of Kazakhstan 2022). The US has a strategic interest in continuing to grow its relationship with Kazakhstan: maintaining its security interests and pushing for more investment and a stronger economic relationship, especially in trade relations (US Department of State 2020).

China has mostly had a stronger economic relationship to Kazakhstan, and a weaker security relationship. In the early 2000s China began to use its economic power to lend money to distressed governments, like Kazakhstan, seeking resources and markets for goods. By 2003 trade with China had already grown to \$3.3 billion from \$368 million in 1992 (Yau 2020). After the 2008 financial crisis the relationship with China grew even stronger as China stepped in to help by providing the investment needed when Western countries reduced their investments. These investments continued to strengthen the trade relationship between China and Kazakhstan before the BRI. During this period China has also been careful to signal that



Fig. 2 China–Europe Train Traffic Volume (in TEUs) through Kazakhstan. Data from the UTLC ERA (2022)



it recognizes Russia's historical influence in Central Asia, while simultaneously enhancing economic and security ties with Kazakhstan, but China has mostly limited its security ties with Kazakhstan to limit Sino-Russian tensions in the region. Sino-Kazakh security initiatives have only focused on joint anti-terrorism exercises (sixteen since 2002) and some military aid (Sukhankin 2020; Akylbayev and Wong 2021).

Since the announcement of the BRI the economic relationship with China has continued to grow, and Kazakhstan has used China for both infrastructure development aid and increased military aid. Including the financing and building of a series of infrastructure projects in Kazakhstan worth over \$27 billion (Simonov 2019). There has also been increased infrastructure debt to China, however, Kazakhstan did not appear to be falling into the 'Chinese debt trap' as the infrastructure investments led to increased investment and economic opportunities which are affording the Kazakhstani government to pay back its debts (van der Kley 2020). China has fast-tracked BRI projects in Kazakhstan, and in a ceremony to commemorate the fifth year of the BRI the only foreign performer was a Kazakhstani singer (Macaes 2018). Indeed, Kazakhstan occupies a key location in the BRI—Khorgos, the largest dry port in Central Asia, is situated on the Kazakh-China border, it is here that Chinese trains transfer goods to wider gauged trains that transport goods to Europe (Furlong and Kupka 2018). According to the United Transport and Logistics Company (UTLC)—Eurasian Railway Alliance (ERA) (2022), the train volume over the Eurasian land bridge has increased almost 700% over the last six years, see Fig. 2. Furthermore, Chinese manufacturers have established production facilities in Kazakhstan because it offers access to Russia and other countries in the Eurasian Economic Union (Macaes 2018, pp. 108–110). However, this has not shifted the trade market for Kazakhstan, which still mostly exports resources or raw materials to China, while importing about 80% of goods, from China, that are finished consumer goods (shoes, appliances, toys, etc.) (Chazan 2020).

China's growing economic influence in the region has led the US to encourage the strengthening of economic ties, which, until the BRI, had been driven by private



firms in the energy and extractive sectors, such as Chevron. This geoeconomic focus has been coupled with a strongly anti-China rhetoric during the Trump Administration (2017–2021) in the United States. In January 2020, during a five nation-tour, including Kazakhstan, US Secretary of State Mike Pompeo labelled China the “central threat of our times” and promoted China as a risk to Central Asia citing the repression of ethnic minorities in Xinjiang Province and development projects that put small, poor countries at risk (Associated Press 2020; Tleuberdi 2020). Pompeo was unable to get Kazakhstani officials to agree with his assessment of Chinese foreign and domestic policy, as this would affect their complex balancing strategy. Kazakhstan to maintain its independence and multi-vector foreign policy strategies does not engage in behaviors that would make it seem like it was balancing and band wagoning with any one of its strategic partners. Yet this did not affect the geostrategic relationship with the US, as the Trump administration not only continued to work with Kazakhstan, but improved upon the economic and security strategies of the previous administration (Starr and Cornell 2020). Two examples, came late in the Trump Presidency, after their failure to convince Kazakhstan during Pompeo’s visit: first, the US- Kazakhstan Business Council was launched in September 2020 to support economic and commercial cooperation between the US and Kazakhstan, (Embassy of the Republic of Kazkhstan 2020), and then the US State Department established the Central Asia Investment Partnership to encourage investment in Kazakhstan and Uzbekistan at the beginning of 2021 (US Department of State 2021a). This new investment partnership—promising 1 billion in infrastructure investment in Kazakhstan alone—“is an important step in advancing US efforts to support economic growth and prosperity for the region” and signals that the US intends to compete with China in a region where economics and investment have been weakened by COVID-19 (Ospanova 2021).

America’s policy shift signals Washington’s intention to compete with Beijing in the field of geoeconomics, and its infrastructure funding comes at a time when China appears to be scaling back the BRI (How China’s Flagship Belt and Road Project Stalled Out 2021). Kazakhstan represents a pivot to the US and China, and Kazakhstan has resisted efforts to choose sides. Instead, it has hedged between the US and China, and this has enabled Nur-Sultan to pursue new state spatial objectives.

Using multi-vectorism to hedge between great powers

In the process of China and the US transforming the way that they compete, Kazakhstan has acquired new meaning and geopolitical implications as a pivotal country to great power competition in the region and the world. It is imperative to recognize that this geoeconomic strategy is reflective of a positive sum game, and not the zero-sum game long imagined by realist theory of international relations. This is because of the presence of agency in the pivot’s relationships with other strategic powers because of the reliance on interdependent economic relations and institutions rather than ideological agreement and security presence. In the case of Kazakhstan, the geoeconomic relationship with great powers has elements of being mutually beneficial, and not clientelist, dependent or exploitative (Cinotto 2020).



Bitaborova (2018, p. 151) wrote “Central Asian states are not passive bystanders but *proactive agents* working to affect the course of the ‘game’” and Kazakhstan is proactive in its relationships with its strategic partners. While it is possible for geo-economic strategies to be zero-sum, this has not been evident in the case of Kazakhstan. As a pivot, Kazakhstan has expressed its agency in the implementation of infrastructure projects at home and in creating opportunities with foreign powers to prioritize what is in the best interest of Kazakhstan in the ‘game’. It pushes its own agenda in these relationships, often combining foreign state policies with national interests. Kazakhstan builds mutually beneficial relationships and develops positive diplomatic relationships to gain concessions from different players and maintain its independence.

“Pivot” agency and spatial objectives: Kazakhstan’s Nurly Zhol policy

Kazakhstan as a pivotal player in geopolitical competition has been able to direct its economic and political relations; the government has been able to prioritize the national narrative, and focus negotiations and agreements on the issues that are important to Kazakhstan, such as open investment policies and cooperation on development (Darden 2009, pp. 207–21). This emphasis on business-making, has made the Kazakhstani economy the most open economy and trade market in Central Asian. Kazakhstan seeks to gain from its economic relationships and the elites have a more positive attitude toward countries it has stronger economic relations and that benefit growth. It also uses these relations in a multi-vector strategic approach to leverage its bilateral relationships against each other, e.g., China and Russia (Pannier 2011; Pieper 2020; Vanderhill et al. 2020), or more recently China and the United States (Stallard-Blanchette 2020). As part of this approach, the Kazakhstani government does not completely rely on investment from any one country, and utilizes a mix of domestic and international lending sources to promote the development of economic sectors as to not become dependent on anyone country (Cinotto 2020).

An important part of this strategy is the use of multilateral institutions to balance relationships with China, the US, the EU, and Russia. These institutions target areas of trade and investment where none of these states hold any advantage over the other and allow Kazakhstan to develop its profile as an important middle power. For example, Kazakhstan is already a member of the Eurasian Economic Union (EEU), the Collective Security Treaty Organization (CSTO), the Shanghai Cooperation Organization (SCO), the C5 + 1, and the Enhanced Partnership and Cooperation Agreement (EPCA) all of which enhance its multi-vector approach to foreign relations. The EEU is a Russian led organization focused on economics, in which Kazakhstan has resisted further economic integration, does not acquiesce to demands by Russia to dictate Kazakhstani laws, and has threatened to leave the organization if the EEU threatens Kazakhstan’s independence (Tanchum 2015; Laruelle 2018; Vanderhill et al. 2020). However, Kazakhstan is active in the CSTO, in which Russia is the most dominant actor, but membership in the CSTO allows Kazakhstan to balance its relationship with Russia against its relationship with China in the SCO and



Kazakhstan's participation in US and NATO military activities, remaining, to a certain extent, neutral amongst the great powers.

Another important institution in Kazakhstan's complex balancing is the SCO; Kazakhstan is one of the founding members of the SCO and plays a leadership role. The SCO organization is a political, economic, and security alliance of eight countries throughout Asia, and Kazakhstan has benefited from this organization by building a stronger relationship with China and gaining support to combat terrorism. The SCO also includes Russia, hence, Kazakhstan can work with both countries through the institution without having to choose one over the other on security, economic or political needs.

However, Kazakhstan's participation in multilateral organizations goes beyond just Russia and China. The C5+1 is an organization started in 2015 to strengthen relations between the US and Central Asia. It shows the importance of Central Asia to the US's economic and security strategies (Kim 2021), while offering opportunities for Kazakhstan to soft balance against Russia and China. Kazakhstan has also had annual military exercises with the US and NATO through the Steppe Eagle program. While Kazakhstan is not a member of NATO, participation has added opportunities for Kazakhstan to acquire training, weapons and military equipment from the US and Europe, further reducing its reliance on Russia for security needs (U.S. Army 2019; Vanderhill et al. 2020). Kazakhstan also has the ECPA with the EU, which entered into force in 2020 and builds on its strong economic relationship with the region (PubAffairs Bruxelles 2020). The EU is the biggest trading partner and the largest investor in Kazakhstan, and this new institution allows Kazakhstan to diversify its economic, political and security opportunities to balance Russia, China, and the US. Through these institutions Kazakhstan can soft balance on a variety of issues without directly confronting any great power, and by exerting power in these organizations Kazakhstan can retain its autonomy and increase its choices of how it aligns with great powers, like US and China, rather than to accept having foreign processes imposed on it.

Even before large international infrastructures projects like the BRI, Kazakhstan demonstrated its ability to bargain successfully in its own favor, for example, Sino-Russian-US competition over the energy sector. Kazakhstan companies have, since independence, needed foreign expertise to assist in its extractive industries, the US has held the largest investments. Mostly held by Chevron, which is the largest oil producer in the country operating two of the largest oil fields with stakes in other companies and oil fields throughout the country. This has largely left Russia and China to fight with other countries to secure additional oil projects. The competition in the energy sector allows Kazakhstan to dictate its own terms and choose the option that will be the most beneficial for Kazakhstan's interests.

In the early 2000s, a falling out between PetroKazakhstan—a Canadian company—and the Kazakhstani government led to the sale of the company. The Chinese National Petroleum Company (CNPC) wanted the company as China needed to its access to additional oil resources. From the beginning of this deal, the Kazakhstani citizens had expressed concern over handing 100% of this company to the CNPC, and the government was also skeptical of Chinese interests in the country. Kazakhstan also had an aggressive deal from the Indian state oil company ONGC



Videsh, whom was supported by the Russians who opposed the sale of the company to China (Bradsher and Pala 2005; Economic Times 2006). The Kazakhstani government had also put a law into place that allowed it to control who buys and sells these extractive companies in Kazakhstan, which took control away from the Canadian owners. As a result, Kazakhstan was able to put pressure on the Chinese to acquiesce to its interests and allowed the CNPC to purchase the company but only if it initially sold back 33% of shares from the acquisition to KazMunaiGas (KMG)—the Kazakhstani national oil company (Cinotto 2020). This deal also included shared control of the Shymkent refinery managed by PetroKazakhstan, and by 2007, KMG had also acquired bought back 50% of the shares of the refinery management company, allowing the Kazakhstani government to regain an equal share of control of the oil refinery company (Cinotto 2020). This example demonstrates just one occasion when Kazakhstan leveraged with multi-vector foreign policy approach to successfully promote its own interests. It may also be mentioned that this was doubly beneficial for the Kazakhstani governments complex balancing, as ONGC would have relied on the Russian pipeline for delivering the oil and Kazakhstan also wanted to avoid putting too much control of oil and gas resource in the hands of the Russians.

Agency has also played an important role in the promotion of the Nurlı Zhol (Bright Path), ‘100 concrete steps’, and ‘strategy 2050’ industrial policies as part of its domestic agenda (Macaes 2018). The Nurlı Zhol plan (established 2010) is a national infrastructural development plan focused on transportation and economic diversification; it is a key part of the Kazakhstani governments foreign policy and it is used to direct international aid and investment (Papatolios 2020). The goals of this program are to construct an effective infrastructure that can guarantee long-term growth and sustainability. This program was in jeopardy following the deterioration of Kazakhstan’s oil economy with the decline of oil prices in 2014 (Bitabarova 2018). However, the BRI project has brought new life to the project and provided Kazakhstan with the opportunity to gain increased capital inflows and technology for the Nurlı Zhol development reforms and programs. After President Nazarbayev visited China in August 2015, the BRI and Nurlı Zhol were easily integrated as the strategic priorities of the BRI did not contend with the Nurlı Zhol plans and prioritized transportation infrastructure, trade, and manufacturing industries. The successful integration of this infrastructure program and the resulting infrastructure projects directly linked to Nurlı Zhol show the willingness and capacity of the Kazakhstani government to promote national interest into bargaining even with a great power.

Hedging and leveraging

This section will evaluate the success and failures of Kazakhstan to capitalize on this agency its allowed due to its geopolitical strategic importance. Looking at the two main goals of the Nurlı Zhol—transportation development and economic diversification—will show how Kazakhstan has been successful in pursuing its own national interests against by leveraging its pivot status against more powerful countries and



creating opportunities for national infrastructure growth and development but also opportunities for local political elites.

Transportation initiatives

Transportation infrastructure is a key infrastructure objective for physically making Kazakhstan the Eurasian Land Bride. As the bridge between East Asia and Europe, with a dry port on the border with China to the east, seaports on the Caspian Sea to the west and resource pipelines and railways running through Russia, building up the transportation infrastructure is important to future economic development and diversification. Taking Kazakhstan from a country dependent on oil and other extractive industries for economic development, to a freight service that will “turn weakness—isolation from the world’s oceans—into advantage” (Hillman 2020, p. 66).

Of particular importance is the Sino-Kazakh railway links from Xinjiang to Europe, which seeks to increase the profitability and efficiency of the China–Europe rail freight that run through Kazakhstan. China sees an opportunity to utilize this overland bridge, because it will allow them to transport goods to Europe over 35 days faster than by ship (Furlong and Kupka 2018). Not only has the freight traffic through Kazakhstan to Europe via Russia grow, see Fig. 1 (above), but also efforts helped freight traffic grow 44% from 2017 to 2018 across Kazakhstan to the port in Atyrau, and the chairman of China COSCO shipping has promised to “deliver the products of Central Asia, including Kazakhstan, across the [Caspian] sea to the world market” (Qazaq TV 2017). The Nurly Zhol initiative has been successful in promoting the transportation sector, increasing Kazakh transport options not only via Russia but also via the Caspian Sea, and as a result, the rail sector is outperforming early expectations due to Chinese investment (US Department of Commerce 2020).

Part of the transportation infrastructure development between China and Kazakhstan is the “Khorgos Cooperation Center.” This is a dry port on the border between China and Kazakhstan, and was formed as a strategic hub for cargo exports and includes a Chinese subsidized special economic zone (SEZ) where Kazakhs and Central Asians can shop visa-free for duty-free cut-price products (Chazan 2020). While this hub may be an economic loss for China, it is good for Kazakhstan who benefits from the unfilled railcars that China sends through the region and the potential benefit from the growing SEZ. Kazakhstan has smartly maintained control of this port; while they are working with the state-owned Chinese shipping company COSCO, they only allowed it to buy a 49% stake, while the Kazakh state railways corporation maintains the controlling stakes (Standish 2019; Hillman 2020). Additionally, Kazakhstan did not rely solely on Chinese loans for this project, the Kazakhstani government funded most of the work nor did it allow the Chinese to operate the port—instead relies on DPWorld, a Dubai-based company (Ruehl 2019). In many of Kazakhstan’s infrastructure projects they seek funding and partnerships with different countries and companies from around the world in its multi-vector approach. The Khorgos dry port is one such opportunity for Kazakhstan to capitalize



on its role as a geostrategic pivot to leverage economic opportunities among several international players in order to make sure that controlling power either stays within Kazakhstan and Kazakhstani companies, or they bring in partners from other countries to provide more balance and control over their development as the Eurasian Land Bridge.

The BRI presents an opportunity for large infrastructure projects, like Khor-gos, but the agency accessible to Kazakhstan increases the lack of transparency or accountability for how infrastructure investment money is allocated. Allegations of corruption have been associated with multiple Chinese BRI projects where there is skimming, bribery, and kickbacks. The US and the EU are much more vigilant in the policing of their companies abroad, while Chinese companies are among the least transparent (Transparency International 2016), however even US and European companies have to deal with these issues while operating in Kazakhstani markets because of an inability to force the issue in Kazakhstan or face losing investment opportunities. This allows the elites to take advantage of the autonomy of the projects and the lack of transparency to further their own self-interest.

One example of this appears in another transportation infrastructure project, the Astana light rail project. The light railway was a Chinese financed scheme for the capital city of Nur Sultan, launched originally in 2011 and was meant to be completed by the 2017 Expo Exhibition. It was designed as a 22-km elevated railway line to connect the airport to a new train station and pass through the city center. However, the project struggled even to get started, from 2011 to 2015 very little was done as there were issues with financing as well as determining the size and scale of the project. In 2015, an agreement between former President Nazarbayev and Chairman of China Xi Jinping was signed to provide a loan for the projects financing as part of the BRI. The Chinese Development Bank provided a loan of 1.6 billion dollars, 80% of the project cost, with the remaining 20% to be covered by Kazakhstan (Koskina 2019). The failure of this light rail reflects not only the gap between the elite and popular visions of Kazakhstani infrastructure development but also the lack of power China has to prevent its investments from being misused.

The corruption problems for this project may largely be linked to the Kazakhstani government's power as a pivot. In most lending situations the Chinese development bank will either keep money within the Chinese bank or only transfer funds to the Chinese construction companies responsible for the project. However, the Kazakhstani government was able to use its special relationship to negotiate terms that required the transfer of the funds to a quasi-public company, Astana LRT LLP. This departure put power in the hands of the local Kazakhstani government officials to control the funds and terms of the contracts with the construction companies. In 2017, 2 years after the agreement had been signed, not only had the Chinese contractors on the project been angered by mismanagement of the funds and constantly changing terms in their contract, but the only work that had been accomplished were piles and grilles; failing to finish the light rail time for the EXPO (Koskina 2019). By 2018 the local bank that had been holding the funds collapsed, and \$258 million of the \$313 loaned for the project had been allocated elsewhere (Gizitdinov 2019). As a result, the Chinese stopped financing the development project, and in 2019, Kazakhstani President Tokayev ordered a probe by the states anti-corruption body in



which more than a dozen people have been brought in to the investigation with some being charged fines or given prison sentences (Koskina 2019; Chazan 2020).

While this was a failed project for the Kazakhstani transportation infrastructure, that failure was because the Chinese gave more autonomy to this project than they give to typical infrastructure projects. Money was given with no oversight, which was unusual for China and its typical strict principle that money should be kept within the country or withing businesses of the country, and the lack of transparency meant that the Kazakhstani government could act uninhibited. In this case, the Kazakhstani government capitalized on its importance as the Eurasian Land Bridge, that is vital to China's geopolitical strategies for individual gain. Which in these situations shifts a large amount of agency and power to Kazakhstan in negotiations with these strategically more powerful countries. As a result, Kazakhstan is able to control not only the policies that are created in its bilateral interactions, but the ways in which these policies are implemented; power that is not typically given to emerging middle-income states that do not possess some level of strategic importance.

Economic diversification

Making Kazakhstan the Eurasian Land Bridge is not just making it the center of transportation but also a node for economic trade and manufacturing. This is why economic diversification is an important part of Kazakhstan's national goals. Historically Kazakhstan has relied on extractive industries and the exportation of raw materials (Kursiv 2017; Office of the U.S. Trade Representative (USTR) 2020), and this has caused problems for Kazakhstan; when energy and raw material prices fall and Kazakhstan has no other economic sectors to fall back on and it fears falling into the middle income trap Kazakhstan knows this can only be avoided by creating sources of long-term growth (Asian Development Bank 2012). Kazakhstan needs to diversify to promote future growth and stability, and as such, has attempted to use its increased trade and cooperation with other countries in complementary supply–demand markets, to push for diversification of its own manufacturing sector. One way that Kazakhstan has used its negotiating power, is to require that bilateral agreements focused on investment in the resource extraction sector also include investment in other sectors as well.

Kazakhstan has been successful in some economic diversification efforts, even ensuring that economic deals are in the best interest of Kazakhstani citizens. For example, in negotiations over the BRI projects, Kazakhstan insisted that, under the auspices of the Nurlı Zhol initiative, Chinese investment could not just focus on the energy sector but must also diversify into the manufacturing and agriculture sectors (Cinotto 2020). This joint partnership allowed new Kazakhstani products to enter the Chinese market, including an increase of Kazakhstani wheat, meat, vegetable seeds, oil, and honey to the Chinese market (Kassenova 2017). These agreements with China were still not as successful in allowing Kazakhstani manufactured goods in to Chinese markets, but they did prohibit the Chinese investors from being able to own lands and requires them to partner with Kazakhstani businesses to invest in the processing of agricultural products (Bizhanova 2018; Xiaojing 2018). This was



to protect the agricultural sector in Kazakhstan and prevent the land grabs feared by many citizens.

The US has had a much stronger presence in Kazakhstan economic diversification than transportation infrastructure development. The US has recently committed to strengthening its economic infrastructure and investment ties to Kazakhstan through newly created organizations. This is largely driven by the presence of both Russia and China that Washington is trying to counteract. As previously mentioned, the US has been unable to manipulate the bilateral relationship between Kazakhstan and China through rhetoric and is now seeking stronger economic ties that will allow it to use Kazakhstan as both an economic and security bridge to Central Asia and they hope, a dam to further Chinese exploits.

The new US-Kazakhstan Business Association will be used to promote growth not only in energy and mining but in the infrastructure and agriculture sectors. This multilevel organization allows the Kazakhstani government to work directly with US businesses through high-level meetings, policy advocacy and networking to push through new economic diversification projects (US Chamber of Commerce 2020). This new venture also gives trade from Kazakhstan access to US market at a lower tariff schedule, which may attract new manufacturing opportunities (Rapoza 2021). This US-Kazakhstan Business Association came into being just months before the announcement of the Central Asia Investment Partnership, a multilateral institution, set up to assist in bringing that new investment into Kazakhstan. These new initiatives promise US commitments to economic growth in Central Asia and to Kazakhstan, and there are already new investment trends taking shape thanks to these efforts. As a result, the Kazakhstani government has signed deals with American companies, like Tyson Foods and a manufacturing subsidiary of Valmont Industries, to set up new factories (Sanchez 2021). These new relationships with the US push past purely security and energy interests in the region and align with Kazakhstani interests, giving the US new ground to compete with the geoeconomic threat of China.

However, like with China, Kazakhstan has taken to preventing US interference and is negotiating on its own terms. The US has tried to push government reforms to align with its own democratic views, but other than the Kazakhstani government rhetorically supporting anti-corruption measures and other reforms it has avoided instituting any real governmental change (Vanderhill et al. 2019). Kazakhstan has even made it harder for US investors by increasing local content requirements and not complying with international arbitration rulings (Vanderhill et al. 2019). Despite refusing to reform and failing to meet commitments to democratize⁵ the US has maintained positive diplomatic and economic relations, providing no substantial pushback to Kazakhstan's behavior. These examples highlight how Kazakhstan acts in defiance of the US as well, but similarly to China, the US must fear losing access to the all-important Eurasian Land Bridge if Washington pushes its agenda too much. The increased economic and infrastructure investment is welcomed by the

⁵ For example, the failure to implement the "Madrid Commitments". These commitments were defined at the Organization for Security and Co-operation in Europe (OSCE) Ministerial Meeting in Madrid in 2007, where Kazakhstan committed to "steady progress on the fundamental principles of establishing a functioning democracy and civil society that will serve as a model for other countries in the region" (Kazakhstan and so-called 'Madrid Commitments', 2010).



Kazakhstani government, more so than the efforts to push democracy and anti-Chinese sentiment that come into conflict with the government's multi-vector approach to foreign relations.

Conclusion

Overall, the multi-vector strategy has been successful for Kazakhstan to promote its domestic interests in the form of the Nurlı Zhol initiative. Local Kazakhs fear exploitation by the stronger powers, like China, but most evidence suggests that the Kazakhstani companies and government still maintain control at the local level. Kazakhstan has capitalized on its pivot role to maintain open investment policies that favor domestic companies over foreign entities and negotiates agreements that benefit Kazakhstani companies and local workers, forcing countries like China to hire local or lose oil access. It has leveraged its relationships with China and the US as to promote Kazakhstan as the overland trade route from East Asia to Europe and is making increased efforts to use these relationships to diversify economic interests.

Kazakhstan is also using its role as a pivot state in great power competition to emphasize its role as the Eurasian Land Bridge—“[n]ot just a bridge connecting Europe and East Asia, but a central node connecting the US, China, Europe, Turkey, Russia, South Asia, the Middle East, and Central Asia” (Neafie 2022). The ability to pivot between these countries and leverage international economic relationships allows Kazakhstan to operate with a large amount of agency, and this finding has important theoretical implications for the study of emerging powers as they navigate their relationships with great powers.

Kazakhstan's multi-vector strategy prevents the relationships that it has with stronger powers from becoming clientelist, dependent or exploitative as it hedges and leverages the relationships against one another. This is what gives Kazakhstan power in its multi-vector strategy, leveraging its connection among the many stronger powers that want to use Kazakhstan's network for themselves and playing a complex game of soft balancing that incorporates traditional aspects of balancing and bandwagoning. This study has shown just some examples of how Kazakhstan's multi-vector approach to foreign policy allows it to change the operational landscape of infrastructure aid and economic development to meet its needs.

Nonetheless, while the Kazakhstani government can pick and choose the policies and practices it wants to implement, the lack of oversight or pushback from either of the great powers has not always meant that the projects lead to the expected outcome. China and the US know they are not the only players in this region, and as the key connection to East Asia, Europe, and Central Asia, Kazakhstan can hedge these relationships against each other for self-benefit; whether it be benefit of the economic development of Kazakhstan or the benefit of individual politicians who take advantage of the freedom to promote their own agenda. As a result, the promotion of the Nurlı Zhol has had limited success in implementation. First, because the increased agency allotted to a pivot country has allowed some corrupt politicians to mismanage funds, as seen in the Astana Light Rail Project. This resulted in the Chinese pulling funding out of this project, and there are other projects that may face a similar fate



moving forward. If Kazakhstan does not improve transport in some parts of the country this may prohibit economic diversification efforts.

Second, government reforms, like those called for by the US to fix issues of bureaucracy, transparency and corruption that may help in promoting *Nurly Zhol* have largely gone ignored. This is possible because foreign countries and companies do not want to lose such a crucial connection to Central Asia. However, it may pose a problem moving forward for Kazakhstan's diversification efforts as new foreign firms may be wary of doing business without a sound rule of law that does not challenge contractual rights and often favors domestic companies. Some changes have been made with the inclusion of organizations, like the Astana International Financial Centre (AIFC), to attract foreign investors with more fair economic standards.

Both China and the US are fully aware that they are not the only players in this region, and as the Eurasian Land Bridge, the key connection to East Asia, Europe, and Central Asia, Kazakhstan can hedge these relationships to achieve policy goals. It allows the Kazakhstani government to pick and choose the policies and practices it wants to implement, but the lack of oversight or pushback from either of the great powers has meant that there is limited pressure to embrace best practices. As a result, the achievements under the *Nurly Zhol* initiative have been limited, because as this study has shown, these internationally funded infrastructure projects are dependent on domestic politics where individual politicians may take advantage of the political environment to pursue their self-interest. The Kazakhstan example demonstrates how emerging middle powers have more agency in their international negotiations than expected, but also provides a warning for the problems that may come with agency misused and local control can hinder success.

Declarations

Conflict of interest On behalf of all authors, the corresponding author states that there is no conflict of interest.

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