

# RECONNECT CHINA

## POLICY BRIEF 28

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### Tactical synergy with China's BRI can safely improve EU-Central Asia connectivity

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China's Belt and Road Initiative has improved infrastructure connections with the country's neighbours and so strengthened the gravitational pull of its economy. Chinese projects in Central Asia – in particular its railway and pipeline projects – have led to rapid increase in cargo across the China-Europe Railway Express (CRE) and energy movement between China and Central Asia.

CRE traffic from China to Europe and energy flows from Central Asia to Europe were hit by the fall-out of Russia's war of aggression against Ukraine. This has increased Chinese and Central Asian interests in routes that avoid Russia, the so-called Middle Corridor. Yet risks remain that increased Eurasian connectivity would still help supplies reach Russia or increase Chinese invulnerability to maritime sanctions.

The BRI's success stems from structural forces that cannot be stopped. The best EU response would not be to attempt preventing countries to work with China, but to direct its energy to improve Europe's gravitational trade pull with complementary infrastructure projects. Worries about the strategic impact of the BRI programme

should not stand in the way of tactical cooperation when in Europe's interests. Synergy between the EU's Global Gateway (GG) and China's BRI can help make up for shortfalls in funding and political momentum on Europe's side. Chinese and Central Asian interests behind improving Middle Corridor railway and pipeline connections can be made to work for EU interests.

**Tactical synergy with China's BRI can safely improve EU-China connectivity:**

- **Prioritise Middle Corridor investments, reduce Russian railway and pipeline influence on the region**
- **Synergy between the GG and the BRI, expand influence of European standards**
- **Strengthen the gravity pull of international trade towards Europe over time**

#### PROBLEM

Chinese state media and diplomats proudly advertise the success of growing container traffic on the China-Europe Railway Express (CRE). This bustling transcontinental route is core to Eurasian connectivity. The European Union (EU) regularly expresses its support for better connections, most recently at the first EU–Central Asia summit in Samarkand April 2025.

However, Russia is core to the CRE. Moscow's war of aggression against Ukraine has only increased Russia's dominance of CRE traffic. While Twenty-foot Equivalent Unit (TEU) volumes on the CRE grow, the proportion going to the EU has gone from half to a little over ten per cent. At the same time, energy exports through Central Asia are also important to maintaining Moscow's income. How can Europe help Eurasian connectivity without oiling the wheels that fuel Putin's war effort or help China become impervious to maritime sanctions?

Central Asian countries have an obvious interest in improving their connectivity with the world. China offered solutions in the shape of its BRI. The EU cannot stop these countries from embracing such efforts. European countries also have their own interests in connecting with Central Asia, if only not to lose ground to other powers. If Brussels cannot stop connectivity efforts anyway, it needs to ensure at least that they are not against EU interests.

This paper investigates how synergy between the BRI and the Global Gateway can be made to work for European interests. It first looks at the BRI. It then considers the railways and pipelines in practice, before moving on to geopolitical risks. It concludes with concrete measures for using the BRI and the GG to jointly increase the trade pull towards Europe.

#### ALL BELTS AND ROADS LEAD TO BEIJING

In September 2013, Xi Jinping launched the first component of what would become the famous Belt and Road Initiative (BRI), the Silk Road Economic Belt, at Nazarbayev University in Kazakhstan's Astana. The second half followed October 2013 before Indonesia's parliament in Jakarta: the 21st Century Maritime Silk Road.

The priority given to the land-focussed Belt has important reasons. Across millennia, Eurasia was a core concern of the 'earthbound' Chinese empires'.<sup>1</sup> In modern times, the inventor of geopolitics John Halford Mackinder stressed the importance of the Eurasian 'world island' for global power.<sup>2</sup>

Central Asia's strategic importance to China means Beijing will not ignore it. In the contemporary People's Republic of China (PRC), the Chinese border with the Soviet Union and concerns about stability and

development of Xinjiang led to numerous 'Go West' policies domestically and the creation of the Shanghai Cooperation Organisation (SCO) internationally. The BRI was a logical next step in Beijing's engagement with the newly independent post-Soviet states.

The BRI was a success in terms of soft power and reshaping international trade. Even in Europe, media reporting was initially more positive than usually is the case with Chinese topics.<sup>3</sup> In China's neighbourhood, it was welcomed enthusiastically. Practically, too, BRI projects have seen success, increasing trade with China.<sup>4</sup>

The BRI worked so well, because it combined the strengths the Chinese state had to offer with recipient countries' wants. The Initiative mobilised China's relatively independent local governments. With central government support, they exported their development-led growth model abroad. At the same time, it suited the needs of many leaders to show they could deliver on economic growth.

The Initiative's sometimes overhyped promises were not always kept and there are concerns about excessive debt. Since the Covid-19 pandemic and domestic economic developments have changed China's circumstances, Beijing has switched to a more modest 'small but beautiful' approach. However, as part of the Global Development Initiative (GDI), the BRI continues on a firmer ideological footing as part of Xi Jinping's view of world order, the 'community of common destiny for mankind'.

#### BRI IN CENTRAL ASIAN PRACTICE

Central Asian countries left the Soviet Union in the early 1990s with backwards infrastructure centred on Russia. Added to their problems was their landlocked status. The UN's Vienna Programme of Action for Landlocked Developing Countries for the Decade 2014– 2024 was one form of recognition investment in these countries was needed. In many cases, China's BRI provided in this need.

#### Railways

The most important BRI component is the China-Europe Railway Express (CRE). The overall corridor has been a success to some extent. It went from fewer than 20 trains in 2011 to 12,400 in 2020.<sup>5</sup> However, there are concerns

about the dominance of Europe-bound freight over China-bound freight.

Russia's full-scale invasion of Ukraine severely impacted the CRE. While total cargo volume grew from 1.5 million TEU in 2021 to 1.9 million TEU in 2023, China-EU traffic along the CRE decreased from roughly half of total TEU to 29.1% in 2022 and 11.6% in 2023.<sup>6</sup> This implies a large increase of the volume destined for Russia from China. Since the start of this year, there has been a year-on-year slump, due to changing policies and lower demand in Russia<sup>7</sup> and seizures of goods.<sup>8</sup>

The CRE's main route is the so-called 'Northern Corridor'. It splits into a *Central Route* via Mongolia to Moscow, an *Eastern Route* via Manchuria to Moscow, and a *Western Route* via Central Asia to Moscow. From Moscow, goods would previously continue to Europe. The war against Ukraine means most cargo now goes no further than Russia.<sup>9</sup>

The alternative 'Middle Corridor' for the CRE expands the *Western Route* with the Trans-Caspian International Transport Route (TITR). In this way it avoids Russian territory. Instead, traffic crosses the Caspian Sea from Central Asia to the Caucasus, from where it continues to Europa via Turkey or the Black Sea.

Pre-2022, Duisburg in Germany was the best-known endpoint of the CRE. The main EU-side receiving land port has been the Polish border town of Małaszewicze with 85%, across from Belarussian Brest.<sup>10</sup> Belarussian troubles with Poland and Lithuania have led to border closures here too.<sup>11</sup> The Middle Corridor now attracts growing attention from China, Europe, and Turkey. A new service from China's Xi'an to Azerbaijan's Baku via Kazakhstan was launched in July 2024.<sup>12</sup> However, although TITR traffic has grown rapidly, in 2024 it only reached a still modest 8.4% of container traffic, up from 1.3% in 2023 and 2.3% in 2022.<sup>13</sup>

### Pipelines

The traditional Russian dominance over the Soviet energy space is perhaps best symbolised by Moscow's control over the Caspian Pipeline Consortium (CPC). Central Asian countries such as Kazakhstan risk suspension via CPC and onwards over the Druzhba pipeline to third countries as political retaliation. Chinese pipelines have now begun to offer alternative access.

Russia also angles for the Chinese energy market. Its access would be expanded by the much-discussed Power of Siberia 2 pipeline, which would pass from China through Mongolia to gas fields previously largely exporting to Europe. However, the Chinese government has no desire to become wholly reliant on Russia. Beijing's proposed China–Central Asia (Line D) gas pipeline would expand the connection between Xinjiang and Turkmenistan, aiding in diversification.

The new energy infrastructure China has built in Central Asia helped reduce its reliance on Russia by strengthening state capacity and offering alternative reliance on China, though within limits.<sup>14</sup> On the European side, the limited Baku–Tbilisi–Ceyhan oil pipeline has already become crucial for Kazakh oil exports to Europe since 2022.

Kazakh trade with the EU contrasts with difficulties behind proposed projects with Turkmenistan. European human rights concerns, Russian opposition, and Turkmen preference for neutrality and export to China create challenges.<sup>15</sup> However, even Turkmenistan has now signed a contract to deliver to Turkey via Iran, after shrinking Russian demand and growing Russian competition in China spurred diversification.<sup>16</sup>

### GEOPOLITICAL CONCERNS

Central Asian countries are not just passive targets of a new 'Great Game'. They try to use the desires and needs of various global players now interested in their region to pursue their own interests.<sup>17</sup> However, their pursuit of improved Eurasian connectivity still brings several geopolitical concerns for Europe.

#### Russia

China and Russia have well-established, close diplomatic ties going back to the late 1990s.<sup>18</sup> Yet the two countries remain aligned rather than allied.<sup>19</sup> Russia and China have sometimes-competing interests in Central Asia but align on keeping out Western powers and maintaining stability. Russia's resistance to growing Chinese presence in Central Asia has furthermore weakened since 2022.<sup>20</sup>

The importance of Central Asia as proving ground for Sino-Russian designs for global order means Europe has an interest in its political outcome as well as its economic implications. The Russia-led Eurasian Economic Union (EAEU) and its customs union help integrate the Central

Asian space but also open up that same space to a much more dominant Russia.

European exports to Central Asia have risen sharply since February 2022 in ways that suggest trade diversion in response to the anti-Russian sanctions.<sup>21</sup> At the same time, many Russian companies were founded in Central Asian countries, likely for the similar purpose of working around export control measures.<sup>22</sup>

Expanding direct connectivity between China and Russia continues as well. The first highway bridge between the countries opened in 2022, between Heihe and Blagoveshchensk.<sup>23</sup> However, BRI infrastructure can also be used to support Russia's economy indirectly through Central Asia.

### **Malacca Dilemma**

One important benefit for Beijing of the land-based component of the BRI is trade resilience. China remains highly vulnerable to a blockade of its maritime trade routes. The so-called Malacca Dilemma refers to the scenario where the United States, in the case of armed conflict in East Asia, would block vital flows of energy and other goods at the narrow strait of water between Malaysia and Indonesia. Improved Eurasian connectivity would reduce the deterrence of blockade and maritime sanctions.

### **GRAVITYPULL**

As China's economy grew tremendously, the country built new connections with its neighbours. Improved infrastructure centred on China strengthened its gravitational pull on global trade. The BRI worked because of generous financing, and an underlying economic and political logic that made a good degree of sense. Although some BRI projects were less sensible and there was a lot of waste, many projects were strongly desired by their recipient countries.

Europe cannot stop these investments from happening. It can, however, seek to shape developments to the benefit of its own interests. Rather than indefensible attempts at blocking certain unwanted connections, the EU should ensure the flows and barriers to Europe are smoother, so as to gain relative advantage vis-à-vis countries like Russia.

Physical barriers for trade between Europe and Central Asia need to be reduced beyond what is necessary to make up for lost ground relative to China. The best defence against trade flows that benefit a Sino-Russia condominium dominating the Eurasian world island is to improve the gravitational pull of trade to Europe.

For this, the EU can leverage synergy between its own Global Gateway and China's BRI. Through tactical cooperation with the Initiative, it can build trust among Central Asian countries. It can use Beijing's support to overcome its own financial and political shortages.<sup>24</sup> At the same time, care needs to be taken to not unduly help the BRI at the strategic level.

The best approach is to build on shared Chinese and Central Asian interests in strengthening the Middle Corridor. Chinese government subsidies for getting trade flows to Europe going can make up for a lack of European funds to improve the EU-Central Asia connections. Pipelines, in contrast, suffer from the trouble of a lack of Chinese interest in connecting through to Europe, so may need more EU investment.

Local actors in Central Asia often perceive EU attention as inconsistent and there is a lack of awareness of EU offerings.<sup>25</sup> In that context, the recent EU-Central Asia Samarkand summit was a good start. It did, however, continue to rely on non-binding MoUs and hopes for private funding.<sup>26</sup> The EU can learn from the straightforwardness of the sometimes transactional nature of certain projects, as well as greater leeway for recipient countries' politicians to sell successes domestically.<sup>27</sup>

A good start has been made already. The announcement of a European Investment Bank (EIB) office in Uzbekistan and €3 billion for the Middle Corridor with an eye on the critical raw materials in the region in the context of the Global Gateway initiative are useful.<sup>28</sup> Billions of public-private funding were committed at the January 2024 Global Gateway Investors Forum for EU-Central Asia Transport Connectivity in Brussels. MoUs of the EIB and European Bank for Reconstruction and Development (EBRD) with Central Asian states and the creation of a Coordination Platform for the Transmission Control Protocol (TCTP)<sup>29</sup> are practical steps. The EU-Central Asia summit's Joint Declaration mentions the 'Trans-Caspian

Transport Corridor and critical infrastructure projects along the Middle Corridor'.<sup>30</sup>

However, more practical steps need to be taken. To that end, this policy brief makes the following recommendations.

**Prioritise Middle Corridor investments, reduce Russian railway and pipeline influence on the region.**

- Mobilise support for Caspian Sea ports such as Kazakhstan's Aktau Port
- Support upgrades of Turkey's railway infrastructure, including a Bosphorus bridge.
- Support on-going construction of a critical piece of railway in Kyrgyzstan and Uzbekistan with China that would help avoid Russia.<sup>31</sup>
- Think creatively to make the Trans-Caspian Gas Pipeline work, such as using EU climate funds for methane leakages
- Mobilise funding to improve energy export via the Trans-Caspian International Transit Corridor or for expensive adjustments to export via the Baku-Tbilisi-Ceyhan (BTC) pipeline.<sup>32</sup>

**Synergy between the GG and the BRI, expand influence of European standards:**

- Include planning for the Middle Corridor in Trans-European Network-Transport (TEN-T), including the ports of Romania's Constanța and Ukraine's Odesa.
- Partner with China in the United Nations Economic Commission for Europe (UNECE) and the United Nations Commission on International Trade Law (UNCITRAL) to align rail and customs protocols, building on the On-Time In-Full – Organisation for Co-operation between Railways (OTIF-OSJD) consignment note precedent, while watching out for SCO

initiatives and the Transport Corridor Europe Caucasus Asia (TRACECA) transport programme

- Finalise single customs windows in countries along the CRE.

**Strengthen the gravity pull of international trade towards Europe over time**

- Increase European credibility through clear political commitment, openness about transactional interests, and regular EU-Central Asia summits.
- Research which nodes orient Central Asian trade to Russia and which nodes help reduce reliance, so as to inform selective cooperation with or near/around BRI projects.
- Do not neglect the security and capacity of the EU's maritime trade connections that do not go via Central Asia, so as to avoid that the Middle Corridor becomes exclusive.
- Expand EU presence in Central Asia in the form of EIB/EBRD and Delegation offices.

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