

# SOME ASPECTS OF REGIONAL STRATEGIES OF RUSSIA, CHINA AND TURKEY TOWARDS CENTRAL ASIA: COMPARATIVE ANALYSIS\*

*Rusya, Çin ve Türkiye'nin Orta Asya'ya Yönelik Bölgesel Stratejileri:  
Karşılaştırmalı Analiz*

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## **Abstract**

*This study analyzes some of the aspects of geopolitical strategies applied by Russia, China and Turkey towards Central Asian states (Kazakhstan, Uzbekistan, Kyrgyzstan, Turkmenistan and Tajikistan) to establish their presence over the last 2-3 decades. The analysis shows that the dominance of Russia and China in Central Asia was due to geographic, economic and geopolitical factors. However, Turkey managed to become the third most influential Eurasian state in relation to Central Asia thanks to its successful approach based on socio-economic and cultural ties with the region, which allowed it to gain political, economic and socio-cultural significance in Central Asia.*

**Keywords:** EAEU, BRI, Central Asia, Investment, Trade.

## **Öz**

*Bu çalışmada Rusya, Çin ve Türkiye'nin son 20-30 yılda Orta Asya ülkelerine yönelik (Kazakistan, Özbekistan, Kırgızistan, Türkmenistan ve Tacikistan) izledikleri bölgesel stratejiler analiz edilmiştir. Rusya ve Çin'in Orta Asya'da nüfuzunun devam etmesi coğrafi, ekonomik ve jeopolitik faktörlerden kaynaklanmaktadır. Bununla birlikte Türkiye, Orta Asya devletleriyle olan ortak tarihsel ve sosyo-ekonomik bağlarını güçlendirerek bölge devletleriyle kapsamlı ilişkiler tesis etmeyi ve Rusya ile Çin'den sonra Orta Asya'da en etkili üçüncü Avrasya devleti olmayı başarmıştır.*

**Anahtar Kelimeler:** Avrasya Ekonomik Birliği, Kuşak ve Yol İnisiyatifi, Orta Asya, Yatırım, Ticaret.

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## **INTRODUCTION**

Turkey, Russia and China are three large emerging economies that started to cooperate actively with each other economically after the collapse of the USSR. As being one of the largest economies on the Eurasian continent, the two (Russia, China) countries also had similar economic experiences of being communist centralized economies. The collapse of the USSR and emergence of the new Russian state reset the bilateral relations and helped the countries to build economic relations with mutual respect and pragmatism, disregarding the political and ideological concerns of the twentieth century.<sup>1</sup> Despite stark differences in their economic policies and approaches in international affairs, over the past decade the two major regional powers have been showing rather symmetric efforts in establishing their economic as well as political presence in the Central Asian region. Russia, Kazakhstan and Belarus created the Customs Union in 2011 that was eventually transformed into EAEU, which Kyrgyzstan and Armenia became members of in 2015. The EAEU largely replicated the principles of the EU in what it comes to trade and was meant to foment economic integration of the member-states with free trade, common tariffs for trading with third countries and free movement of capital and labor. Due to the fact that Russia accounts for over 80% of the total population of the EAEU and nearly 84% of its total GDP, it plays the dominant role in the union.<sup>2</sup>

China, on the other hand, fits its strategy on Central Asia into the framework of the BRI project announced by Chinese President Xi Jinping

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1 Richard Lotspeich, "Perspectives on the Economic Relations Between China and Russia", *Journal of Contemporary Asia*, 36(1), 2006, p. 48-74.

2 Brindusa Nicoleta Pincu-Adrian Daniel Stan, "Eurasian Customs Union-Analyses and Perspectives", *EURINT International Conference*, January 2014, p. 180-192.

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in September 2013 in Kazakhstan.<sup>3</sup> The project is meant to connect China and Europe opening Kazakhstan to major transportation routes stretching from the Pacific and the Baltic Sea. Due to its valuable geographic location, the entire Central Asian region serves as a gateway for China in its way to West Asia and Europe, which immediately increases the attractiveness of the region to Chinese investment.<sup>4</sup> The project envisages implementation of projects of over \$130 billion mainly related to specific economic sectors like infrastructure and connectivity, energy, mining financial assistance etc.<sup>5</sup> For Central Asia having friendly relations and strong economic ties with both Russia and China is vitally important for two main reasons. Firstly, both countries are regional economic powers and the main trade partners of Central Asian states besides the EU.<sup>6</sup> Secondly, being a landlocked region and isolated from major global trade routes, puts the Central Asia in a weak position, in which it has to negotiate with their coastal neighbors (Russia and China) in order to get access to maritime roots.<sup>7</sup>

The economic role and importance of Turkey in Central Asia is less significant compared to those of Russia and China due to several basic reason. Firstly, it does not share common borders with any of the Central Asian states, which does not allow to have cross border trade and to handle other direct bilateral contacts with the same intensity as Russia and China are able to. Secondly, the economic size of Turkey is

3 Marek Jochec, "China's BRI Investments, Risks, and Opportunities in Kazakhstan and Kyrgyzstan", M. Laruelle, ed., *China's Belt and Road Initiative and its Impact on Central Asia*, George Washington University, 2018, c, p. 45.; Kadir Ertaç Çelik-Doğacan Başaran "Empire Tendencies of USA within the Context of Asia-Pacific Policy and China: An Analysis of Trump Doctrine", *Bölgesel Araştırmalar Dergisi*, 3(2), Aralık 2019, s. 43.

4 Frederick Starr, "US Perspectives on China's Belt and Road Initiative in Central Asia and the South Caucasus", *International Studies*, 2019, p. 1-13.

5 Farkhod Aminjonov et al., "BRI in Central Asia: Overview of Chinese Projects", *Central Asia Regional Data Review*, 20, 2019, p. 1-5.

6 Mehmet Seyfettin Erol, "20. Yıldönümünde Türkiye-Türk Dünyası: Sorunlar, Arayışlar ve Gelecek", M. S. Erol-Y. Gürler, eds., *Türk Dünyası 20 Yıllığı: Tahliller, Değerlendirmeler, Öngörüler ve Özeleştiriler*, Türksav Publishing, Ankara 2011, p. 44.

7 Brindusa Nicoleta Pincu-Adrian Daniel Stan, "Eurasian Customs Union-Analyses and Perspectives", *EURINT International Conference*, January 2014, p. 180-192.

much smaller than that of Russia and China. The GDP of Russia is twice as larger than that of Turkey and the Chinese GDP exceeds the GDP of Turkey by more than 17 times. However, efforts in economic diplomacy and comprehensive actions of cooperation with Central Asia allowed Turkey to greatly increase its influence in the region and become one of the key actors exerting significant political, economic and socio-cultural influence on the Central Asian states. Although Turkey's trade with Central Asia (\$2.7 billion) is not comparable to those of Russia (\$33.5 billion) and China (\$26.1 billion), it is significantly larger than those of other large Eurasian economies like India (\$2.2 billion) and Iran (\$0.97 billion).<sup>8</sup> Thus, within 2-3 decades, Turkey managed to become one of the three most economically important Eurasian states for Central Asia.

This study focuses on the geopolitical strategies of three Eurasian states (Russia, China and Turkey) applied towards Central Asia, which includes Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan and Turkmenistan. It intends to analyze and compare the approaches used by the three Eurasian states in channeling their political, economic and other resources in establishing their presence in Central Asia as well as developing closer ties with the region.

## **EVOLUTION OF PRINCIPLE POLITICAL AND ECONOMIC RELATIONS BETWEEN RUSSIA, CHINA AND TURKEY DURING THE POST-SOVIET PERIOD**

Russia and China are the two largest economic powers that share extensive common borders with Central Asia. The great progress made by both Russia and China in liberalizing the economy and trade allowed them to integrate to the global economy and attract FDI that rapidly converted

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<sup>8</sup> "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

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into trade and GDP growth of these states. Soaring industrial production in China and growing energy needs required additional oil imports from diversified sources, which allowed great opportunities for Russia to take advantage of the China's oil demand during the period of high oil prices in 2000s. In 2019, Russia exported oil worth \$36.5 billion to China, which is 15.3% of all China's oil imports.<sup>9</sup> The bilateral trade between Russia and China has grown from \$6.2 billion in 2000 to \$108.2 billion in 2018. Nearly three quarters of all Russia's exports to China consist of mineral fuels.<sup>10</sup>

Hydrocarbon exports was also the dominant part of Russia's economic cooperation with Turkey. Although the economic relations between Russia and Turkey were characterized by strategic competition in 1990s based on interests of the two countries in the Caucasus and Central Asia, the mutual interest in energy market helped to build mutually beneficial and lucrative cooperation largely based on energy sector.<sup>11</sup> For Russia, Turkish gas market is the second after Germany and the demand is growing.<sup>12</sup> Russia accounts for more than half of Turkey's natural gas imports, while half of Turkey's electricity is generated by natural gas.<sup>13</sup> Apart from being a reliable market for gas exports, Turkey also plays an important role in securing Russia's gas exports to Europe through the Turkish Stream gas pipeline bypassing Ukraine.<sup>14</sup> The EU is the largest and most important trade partner for both Russia and Turkey. Nearly of 40% of Russia's trade

9 "Top 15 Crude Oil Suppliers to China", *World's Top Exports*, <http://www.worldstopexports.com/top-15-crude-oil-suppliers-to-china/>, (Date of Accession: 12.04.2020).

10 Vladimir Paramonov, "China and Central Asia: Present and Future of Economic Relations", *Central Asian Series*, Conflict Studies Research Centre, 5(25), 2015, p. 1-14.

11 Mehmet Seyfettin Erol, "Küresel Güç Mücadelesinde Avrasya Jeopolitiği ve Türk Avrasyası", M. S. Erol, ed., *Yeni Büyük Oyun: Küresel Güç Mücadelesinde Avrasya'nın Değişen Jeopolitiği*, Barış Platin Publishing, Ankara 2009, p. 24-25.

12 Soli Özel-Gökçe Uçar, "The Economics of Turkey-Russia Relations", *Foreign Policy&Security*, October 2019, p. 1-27.

13 Emre Erşen, "Evaluating the Fighter Jet Crisis in Turkish-Russian Relations", *Insight Turkey*, 19(4), 2017, p. 85-103.

14 Seçkin Köstem, "The Political Economy of Turkish-Russian Relations: Dynamics of Asymmetric Interdependence", *Perceptions*, 23(2), 2018, p. 10-32.

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and 46% of that of Turkey is done with the EU.<sup>15</sup> However, the trade relations between Russia and Turkey are not competitive in their trade with the EU due to different sectorial composition of their exports. Nearly three-quarters of Russia's exports to the EU are mineral fuels, whereas the exports of Turkey to the EU predominantly consist of different manufactured goods. Mutually beneficial partnership between Russia and Turkey in energy sector and almost no competition in trade with their principal economic partner create the baseline for stable bilateral partnership for both Eurasian states.

Turkey is one of the countries that fully benefited from liberalization of capital accounts in 1989 and trade liberalization in the 1990s, which provided access to international financial markets. Close proximity to the EU and fairly low costs of production combined with free access to financial markets created highly favorable conditions for manufacturing sectors in Turkey.<sup>16</sup> However, the rise of China after its accession to the WTO in 2001 and its low labor costs created an enormous competitive advantage, which made China one of the major competitors of Turkey in manufacturing.<sup>17</sup> In 2019, the trade between Turkey and China was only about \$21.9 billion, which is nearly 5.5% of Turkey's total foreign trade. Due to a limited commodity structure of its exports, Turkey runs a huge deficit in its trade with China.<sup>18</sup> For instance, in 2018, Turkey's imports from China were \$20.7 billion while Turkish exports to China were only at \$2.9 billion. Due to a large size difference of trade, the share of Turkey in China's foreign trade is only about 0.5%.<sup>19</sup>

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15 "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

16 Mehmet Seyfettin Erol, "AB ve Türkiye'nin Avrasya Politikası", Z. Dağı., ed., *AK Partili Yıllar*, 1, Orion Publishing, Ankara 2006, p. 327-332.

17 Rosita Dellios-Nadir Kemal Yılmaz, "Turkey and China: A Study in Symmetry", *Journal of Middle Eastern and Islamic Studies in Asia*, 2(1), p. 13-30.

18 Altay Atli, "Questioning Turkey's China Trade", *Turkish Policy Quarterly*, 10(2), 2011, p. 1-10.

19 "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

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Appendix Table: 1 GDP Growth and share of Russia, China, Turkey and Central Asian States

	Percentage share in the global GDP	Accumulated GDP growth since 2000
Russia	1.9	654,5
China	16.3	1,184.0
Turkey	0.9	276.4
Kazakhstan	0.2	984.9
Uzbekistan	0.066	617.3
Kyrgyzstan	0.01	943.2
Tajikistan	0.009	1,490.3
Turkmenistan	0.049	420.9

Source: World Bank Data

### ECONOMIC PRESENCE OF RUSSIA, CHINA AND TURKEY IN CENTRAL ASIA MEASURED IN TRADE

The economic size of the Central Asian states is very small compared to the economies of major surrounding states. The combined GDP of the five Central Asian states is only about \$295.4 billion. This is 2.6 times smaller than that of Turkey (\$754.4 billion), 5.8 times smaller than that of Russia (\$1,699.9 billion) and nearly 49 times smaller than the GDP of China (\$14,342.9 billion).<sup>20</sup> Central Asia is a resource-rich region with vast reserves of energy resources, uranium, metal, minerals etc. For instance, Kazakhstan is estimated to have the 12<sup>th</sup> largest oil deposits of around 30 billion barrels.<sup>21</sup> Turkmenistan has the world's 6<sup>th</sup> largest proven natural

20 "GDP (current US\$)", *World Bank Data*, <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD>, (Date of Accession: 09.07.2020).

21 "Energy Information Administration", *International Energy Statistics*, [eia.gov/international/data/world#/?tl\\_type=p&tl\\_id=5-A&pa=0](http://eia.gov/international/data/world#/?tl_type=p&tl_id=5-A&pa=0), (Date of Accession: 20.06.2020).

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gas reserves of about 7.5 trillion cubic meters.<sup>22</sup> Apart from abundant deposits of zinc, chromium, gold, silver and commonly known metals, the region is also an emerging center of rare-earth metals.<sup>23</sup>

Appendix Table: 2 Proven Hydrocarbon Reserves and % Share of Fuel Exports of Central Asian States

	Oil reserves (billion bbl)		Natural gas reserves		% of fuel exports	
	Amount	Rank	Amount	Rank	Amount	Rank
Kazakhstan	30.0	12	2,407	15	70.0	10
Uzbekistan	0.6	44	1,841	19	34.3	24
Kyrgyzstan	0.04	78	5.66	89	-	-
Tajikistan	0.01	88	5.66	88	11.9	207
Turkmenistan	0.6	43	7,504	6	-	-

Source: Energy Information Administration, *World Bank Data*

Russia and China have very much in common in their economic relations with Central Asian states. Both countries began to increase their trade starting from early 2000s. In Russia, the increase of the amount of trade with Central Asia was associated with its own economic recovery after the economic decline of 1990s and the default of 1998. In China, the trade growth was due to its economic rise caused by abundant foreign investments that stimulated the export oriented industries in the country and especially its manufacturing sector. The trade between China and Central Asian countries started to grow rapidly after 1999.<sup>24</sup> For Central Asian states, the rapid economic growth in these two regional superpowers meant an opportunity to reap economic benefits by having

<sup>22</sup> "Energy Information Administration", *International Energy Statistics*, <https://www.eia.gov/international/data/world/natural-gas/more-natural-gas-data?pd=3002&p=0>, (Date of Accession: 30.06.2020).

<sup>23</sup> , Mark J. Mihalasky et al., "Rare Earth Element and Rare Metal Inventory of Central Asia", *U.S. Geological Survey Fact Sheet*, USGS, March 2018.

<sup>24</sup> Vladimir Paramonov, "China and Central Asia: Present and Future of Economic Relations", *Central Asian Series*, Conflict Studies Research Centre, 5(25), 2015, p. 1-14.



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more intense economic cooperation and engaging in trade with these large economies. From 2000 to 2008, the combined amount of trade of Central Asian states with Russia has grown more than fourfold from \$6.1 billion to \$27.1 billion.<sup>25</sup> During the same period, the trade of China with Central Asia has grown by an astonishing 23 times from \$1.1 billion to \$25.5 billion. The intensification of trade relations with Russia and China after the economic downturn of 1990s greatly contributed to the economic growth in Central Asia. The average annual GDP growth in Kazakhstan during 2000-2008 were at 9.4%, in Tajikistan 8.8%, in Turkmenistan - 7.6%, in Uzbekistan - 6.3% and Kyrgyzstan - 5.0%.

Being the first state to recognize the independence of the Central Asian states, Turkey has also been very active in establishing good relations and economic partnership with the region.<sup>26</sup> From 1995 to 2018, its trade with the five regional countries has shown more than fivefold increase reaching \$2.7 billion by 2018. Although the scale of the economic ties between Central Asia and Turkey is significantly smaller compared to those of Russia and China, the overall economic importance of Turkey for Central Asia is greater than those of Iran, other Middle-Eastern countries and India. Within a short period of time Turkey managed to build strong economic cooperation with Central Asia becoming the leading trade partner of the region among all Western and South Asia. The success and aspirations of Turkey as well as of most of the countries of Central Asia in establishing strong bilateral cooperation was mostly driven by political will based on recognition of the common cultural, historical, and linguistic roots.<sup>27</sup> Turkey has also developed closer economic ties with the region and casted its image of a friendly state through providing large

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25 "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

26 Mehmet Seyfettin Erol, "Türkiye'nin Orta Asya Politikasına Rusya Federasyonu ve Bölge Ülkelerinden Genel Bir Bakış", *Türk Dünyası İncelemeleri Dergisi*, 12(1), Yaz 2012, p. 4-9.

27 "Top 15 Crude Oil Suppliers to China", *World's Top Exports*, <http://www.worldstopexports.com/top-15-crude-oil-suppliers-to-china/>, (Date of Accession: 12.04.2020).

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amounts of economic aid to the region. In the early 1990s, Central Asia was the top priority region in providing economic aid.<sup>28</sup> For instance, in 1992, Central Asia received almost all of Turkey's foreign economic aid, the size of which reached \$1 billion in 1992, 1999, 2002, and 2003.<sup>29</sup> The Central Asian states' motivation to establish economic links with Turkey is also based on pragmatic goals of re-building their economies in a new capitalistic system and the Turkish model was seen quite suitable for them.

It is important to note that after the crisis of 2008-2009 and subsequent slowdown of the economic growth in Russia, China as well as Central Asian states, the share of Russia in the combined external trade of the five Central Asian states became inferior to that of China. This can be explained by the differences of the economic structures of the two countries. Russia being more economically reliant on revenues from oil and gas export revenues happened to be more sensitive towards the volatility on primary commodity markets while China with its highly diversified economy was less susceptible to external shocks. High share of mineral commodities in the exports of Russia kept producing a detrimental effect on its subsequent economic performance. Thus, the average annual GDP growth in Russia during 2000-2007 amounted to 7.2% while during 2008-2018, it went as low as 1.3%. Moreover, the creation of the EAEU, which was initially aimed at strengthening economic links with the region, produced a certain amount of opposite effect reducing the access to the common market for countries that decided not to be members of the economic union.

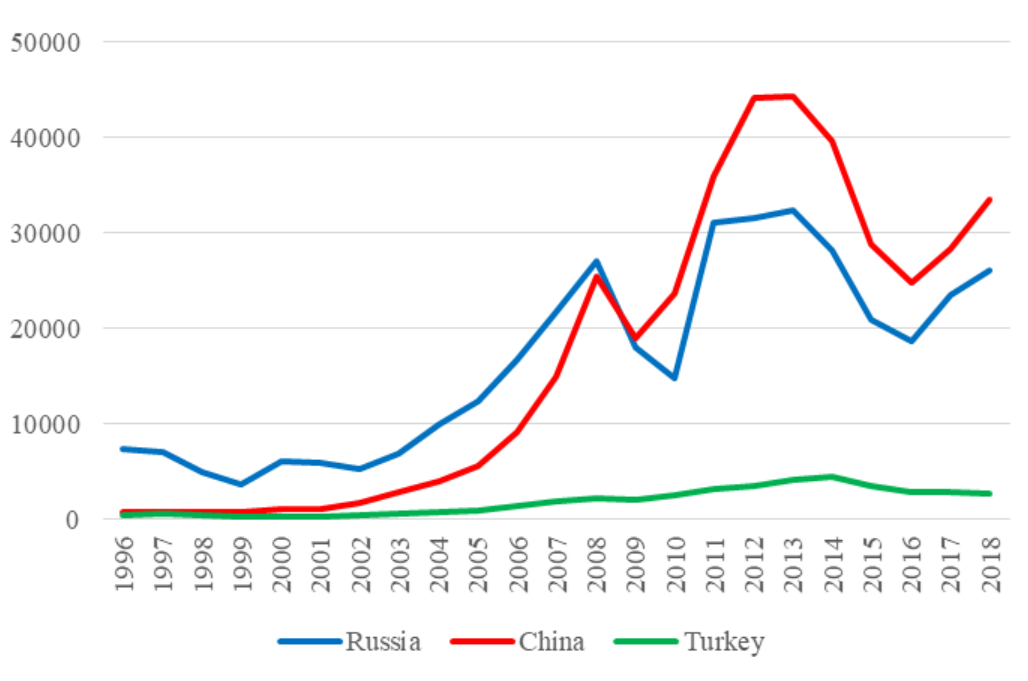
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28 Mehmet Seyfettin Erol, *Hayalden Gerçeğe Türk Birleşik Devletleri*, İrfan Publishing, İstanbul 1999, p. 59.

29 Thomas Wheeler, "Turkey's Role and Interests in Central Asia", *Saferworld Briefing*, October 2013, p. 1-16.

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Appendix Figure: 1 Total Amount of Trade of Central Asia with Russia, China and Turkey (million USD) (2)



Source: UN Comtrade

The Chinese economy, on the other hand has, grown by 10.6% annually on average throughout 2000-2007 and during 2008-2018 it slowed down to 8.1%. These circumstances and the difference in economic growth rates greatly affected the subsequent degrees of presence and economic influence of the two regional powers in Central Asia.

Trade is one of the facts that help to grasp the differences of economic instruments and approaches of Russia and China towards Central Asian states. Russia and China are the two main trade partners of all five Central Asian states together accounting for more than a half of the foreign trade of Kyrgyzstan, 37.7% of Uzbekistan and nearly one third of Kazakhstan's external trade.

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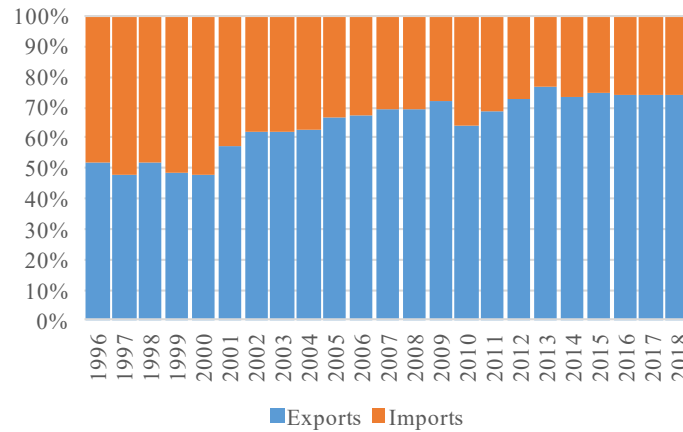
Appendix Table: 3 Shares of trade of Russia, China, Turkey and other countries in the external trade of Central Asian states

	Russia	China	Turkey	Other countries
Kazakhstan	19.5	12.3	2.3	68.1
Uzbekistan	15.5	22.2	6.2	62.3
Kyrgyzstan	26.2	28.1	6.0	45.7

Source: UN Comtrade

The region is highly dependent on Russia and China in terms of foreign trade while the combined share of all five countries of the region in the external trade of Russia and China is 3.7% and less than 1% respectively. At the same time the amount of regional trade is less than one-tenth in Central Asia's total foreign trade, which is primarily explained by the lack of complementarity between Central Asian economies, which have mostly commodity oriented exports.<sup>30</sup>

Appendix Figure: 2 Share of Exports and Imports in the External Trade of Russia with Central Asian States



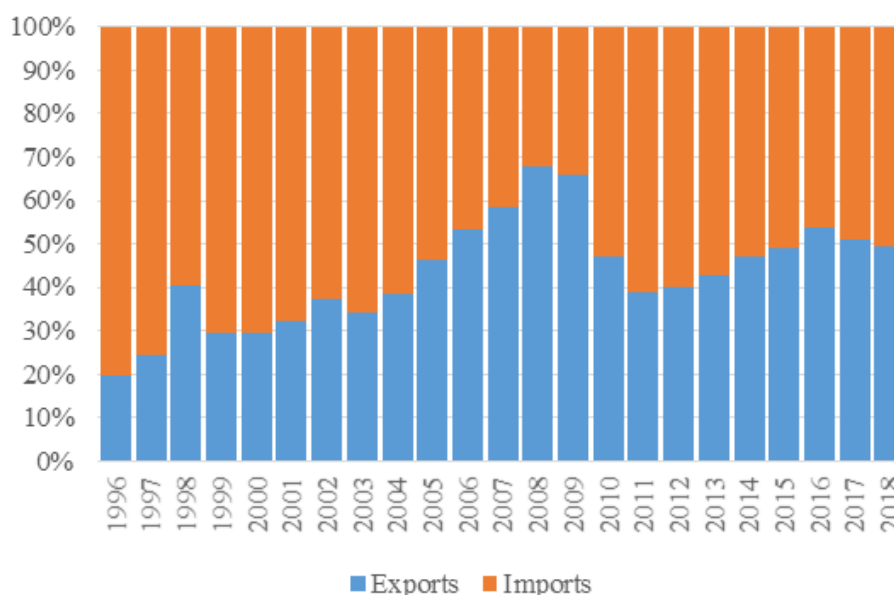
Source: UN Comtrade

30 Martin Russell, "Connectivity in Central Asia Reconnecting the Silk Road", *European Parliamentary Research Service*, April 2019, p. 1-12.

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One of the main features that reveal the difference of economic approaches of Russia, China and Turkey towards Central Asia is the structure of trade. Firstly, there is very large trade imbalance in Russia's trade with Central Asia and nearly 74% of it consist of Russia's exports to the region, while the balance of import and exports in the trade of Central Asia with China and Turkey was very close 50%. The sectorial structure of trade of Russia, China and Turkey with the five Central Asian states is also very different. Unlike Russia, China started to position itself as an immense and reliable market for mineral and energy resources from early 2000s.<sup>31</sup> Thus, in 2018 crude oil, natural gas and other mineral fuels accounted for more than 10% of China's imports from five Central Asian states and countries like Kazakhstan and Turkmenistan are particularly reliant on exports of their crude oil and natural gas to China.

Appendix Figure: 3 Share of exports and imports in the external trade of China with Central Asian states (2)



Source: UN Comtrade

31 Vladimir Paramonov, "China and Central Asia: Present and Future of Economic Relations", *Central Asian Series*, Conflict Studies Research Centre, 5(25), 2015, p. 1-14.

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The sectorial structure of trade of Central Asian states with Turkey is very similar to the trade between Russia and China. All five regional states import from Turkey a great variety of manufactured goods including machinery, textile, clothing, vehicles etc. Over two thirds of the exports of the regions to Turkey consist of raw materials and poorly processes goods like ores, metals, chemical and other goods with low value added.<sup>32</sup> Kazakhstan is the most important country for Turkey in terms of trade and economic relations.<sup>33</sup> accounting for 40% of Turkey's trade with Central Asia. It is important to note though that the economic importance of countries for some of the Central Asian states is determined not only by the amount of trade but also by the sectorial content of trade. Thus, the exports of energy resource are vitally important for Kazakhstan and Turkmenistan. European countries account for nearly four fifths of the oil exports of Kazakhstan<sup>34</sup>, which allowed to the EU to gain influence over Kazakhstan<sup>35</sup> and this is also one of the factors making Kazakhstan more liberal economy compared to its regional neighbors. Turkmenistan is hugely dependent on exports of natural gas and during 2009 and 2015, the share of China in Turkmenistan's exports increased from one to 80%<sup>36</sup> mostly at the expense of Russia's share, which produced a shift in the roles of the two major regional powers in Central Asia. The fact that Turkey is not the principal market for key export commodities of Central Asian states, highly dependent on exports of certain commodities, is one of factors that limit the importance of Turkey in the region.

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32 "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

33 Thomas Wheeler, "Turkey's Role and Interests in Central Asia", *Saferworld Briefing*, October 2013, p. 1-16.

34 "UN Comtrade Database", *Trade Data*, <http://comtrade.un.org>, (Date of Accession: 10.03.2020).

35 Pier Paolo Raimondi, "Central Asia Oil and Gas Industry-The External Powers' Energy Interests in Kazakhstan, Turkmenistan and Uzbekistan", *Fondazione Eni Enrico Mattei Working Paper No:006*, 2019, p. 1-75.

36 Thomas Wheeler, "Turkey's Role and Interests in Central Asia", *Saferworld Briefing*, October 2013, p. 1-16.

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### ECONOMIC INFLUENCE OF RUSSIA, CHINA AND TURKEY IN CENTRAL ASIA MEASURED IN INVESTMENTS

One of the main problems in conducting studies on China's BRI project is the difficulty of making quantitative assessments. However, any insight into the quantitative dimensions of the BRI projects carried out by China in Central Asia is very helpful in understanding the China's approach to Central Asia. The areas of implementation of investments can be divided into four main categories: 1-trade and industry, 2-transport and connectivity, 3-energy sector and 4-other areas.<sup>37</sup> As for the beginning for of 2020 there were 261 projects envisaged to be implemented on the territory of the five Central Asian states. Half of these 261 projects are implemented in trade and industry sector; 51 projects out of 261 are implemented in transport and connectivity sector, 48 projects are planned for the energy field and the rest of the projects are to be carried out in other areas.

Appendix Table: 4 Number of BRI projects in Central Asia

	Trade and industrial development	Rail and road connectivity	Energy connectivity	People-to-people projects	Total
Kazakhstan	61	14	20	7	102
Uzbekistan	24	5	12	2	43
Kyrgyzstan	17	11	5	13	46
Tajikistan	17	16	7	4	44
Turkmenistan	12	5	4	5	26
Total Central Asia	131	51	48	31	261

**Source:** Farkhod Aminjonov, et al., "BRI in Central Asia: Overview of Chinese Projects", *Central Asia Regional Data Review*, 20, 2019, p. 1–5.

<sup>37</sup> Farkhod Aminjonov et al., "BRI in Central Asia: Overview of Chinese Projects", *Central Asia Regional Data Review*, 20, 2019, p. 1–5.

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However, if we look at the financing of the investments in Central Asia by China, which almost entirely consist of BRI projects, we can note that mining and extractive sector is the top priority area that attracts nearly 40% of all investments.<sup>38</sup> More than 26% of the investments go to the energy sector and 17.2% of the investments go to transport and connectivity sphere. Taking into account that in Central Asia energy and mining sectors are very related we can state that extraction of energy and other mineral resources and their transportation is the very essence of the Chinese investments, which complies with its economic interests of a large growing economy necessitating large amounts of energy.<sup>39</sup> Hence, China prioritizes promotion and allocation of mineral resources in accordance with China's energy needs that constitute the essence of China's strategy in Central Asia.<sup>40</sup> Consequently, for China the transportation and connectivity sector is not only a necessity for getting access to natural resources but also a means of its trade, 2% of which is being done with the EU by land transport and this amount has quadrupled since 2007.<sup>41</sup> Only 9% of the Chinese investments in Central Asia go to industries other than mining.

Appendix Table: 5 Investment of Chinese projects in Central Asia

Sector	Investments (mln. USD)	Percentage share
Mining and mineral extractive	55,159.7	40.5
Energy connectivity	35,693.8	26.2
Rail and road connectivity	23,499.7	17.2
Industry	12,299.6	9.0
Agriculture and food	1,451.9	1.1
Other sectors	8,146.4	6.0
Total	136,251.1	100.0

**Source:** Farkhod Aminjonov, Alina Abylkasymova, Anna Aimée, Bahtiyor Eshchanov, Daniyar Moldokanov, Indra Overland-Roman Vakulchuk, "BRI in Central Asia: Overview of Chinese Projects", *Central Asia Regional Data Review*, 20, 2019, p. 1–5.

<sup>38</sup> *Ibid.*

<sup>39</sup> Fakhmiddin-Xiangming Chen Fazilov, "China and Central Asia: A Significant New Energy Nexus", *The European Financial Review*, April-May 2013, p. 38-43.

<sup>40</sup> Michael Fredholm, "Understanding China's Policy and Intentions Towards the SCO", *Himalayan and Central Asian Studies*, 17(3–4), 2013, p. 49.

<sup>41</sup> Martin Russell, "Connectivity in Central Asia Reconnecting the Silk Road", *European Parliamentary Research Service*, April 2019, p. 1-12.



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China also has become a significantly larger investing country to Central Asian states compared to Russia within the last decade. Thus, the amount of total Chinese FDIs to Kazakhstan from the launch of the BRI project in 2013 until 2018 has been 20% larger than FDI by Russia.<sup>42</sup> These FDI include all officially registered gross inflow of FDI from Russia and China. In smaller economies of the region, the share of Chinese gross investments has grown even larger relative to investments from Russia. Thus, over the period from 2013 to 2018 the amount of Chinese gross FDIs to Kyrgyzstan has been 81.6% larger than gross FDI inflow from Russia.<sup>43</sup> In Tajikistan, the amount of gross investments from China has been six times larger than Russian investments over the same period.<sup>44</sup> It is important to note that during 2013-2018 the investments to the region from Russia has been growing on average at 5-10% per year.

Turkey is one of the largest investors in the Central Asian economies. In 2017, the Turkish companies invested \$13 billion in the region<sup>45</sup> and the Turkish investments are more significant in smaller economies in the region like Tajikistan and Kyrgyzstan. However, the amount of Turkish investments in the region are significantly smaller than those of Russia and China. There are several reasons for this and the Turkish economic presence in Central Asia is dependent on political factors to certain extend. Firstly, by creating the EAEU, Russia considerably strengthened its economic interests in the region pushing out to certain point its competitors from the region. The tariffs applied to trade with countries outside of the EAEU provide significant advantage to Russia in trade and investment operations with Central Asian member-states and this

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42 "Statistics of Direct Investments in the Direction of Investment", *National Bank of Kazakhstan*, <https://nationalbank.kz>, (Date of Accession: 10.03.2020).

43 "Committee on Statistics of Kazakhstan", *Foreign Direct Investment by Country, National Statistical Committee of the Kyrgyz Republic*, <http://www.stat.kg>, (Date of Accession: 10.03.2020).

44 "Direct Foreign Investments in the Republic of Tajikistan by Countries", *National Bank of Tajikistan*, <http://nbt.tj>, (Date of Accession: 10.03.2020).

45 Pier Paolo Raimondi, "Central Asia Oil and Gas Industry-The External Powers' Energy Interests in Kazakhstan, Turkmenistan and Uzbekistan", *Fondazione Eni Enrico Mattei Working Paper 006*, 2019, p. 1-75.

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is also an obstacle that is difficult to overcome for Turkey. Secondly, economic engagement of Central Asia with Turkey from the early 1990s was associated with Turkey's role model of a "bridge" connecting newly independent post-communist states with developed capitalist world.<sup>46</sup> However, with the accession to power of the Justice and Development Party (JDP) and subsequent crisis in the relations between the EU and Turkey, this image of Turkey dwindled a little bit. These factors combined with the sharp decline of the oil prices in 2014 led to a certain decline of trade between Turkey and Central Asia after 2014-15.

Appendix Table: 6 Percentage shares of Russia and China in Gross inflow of FDI to Kazakhstan,<sup>47</sup> Kyrgyzstan<sup>48</sup> and Tajikistan.<sup>49</sup>

		2013	2014	2015	2016	2017	2018
Kazakhstan	Russia	5,4	6,7	3,5	4,1	5,9	6,2
	China	9,3	7,6	5,4	4,6	5,2	6,1
	Turkey	1,1	1,0	0,9	1,6	1,4	1,2
Kyrgyzstan	Russia	7,2	8,3	32,8	35,8	16,0	14,6
	China	48,6	30,5	30,2	37,0	49,1	39,7
	Turkey	2,5	4,0	7,1	4,1	2,8	11,0
Tajikistan	Russia	4,5	10,4	6,0	10,1	20,7	0,01
	China	67,8	30,0	58,4	64,6	49,1	71,4
	Turkey	5,2	6,0	8,7	1,9	1,1	4,7

**Source:** National Bank of Kazakhstan, National Statistical Committee of the Kyrgyz Republic, Agency on Statistics under President of the Republic of Tajikistan.

It is difficult to compare other dimensions of investments by Russia, China and Turkey in Central Asia though. Despite the fact that a significant

<sup>46</sup> *Ibid.*

<sup>47</sup> "Committee on Statistics of Kazakhstan", *Foreign Direct Investment by Country, National Statistical Committee of the Kyrgyz Republic*, <http://www.stat.kg>, (Date of Accession: 10.03.2020).

<sup>48</sup> "Direct Foreign Investments in the Republic of Tajikistan by Countries", *National Bank of Tajikistan*, <http://nbt.tj>, (Date of Accession: 10.03.2020).

<sup>49</sup> Daisuke Kitade, "Central Asia Undergoing a Remarkable Transformation: Belt and Road Initiative and Intra Regional Cooperation", *Monthly Report, Mitsui&Co. Global Strategic Studies Institute*, August 2019, p. 1-7.

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share of the Russian economy is state-owned, it is still a market economy with a rather large share of private businesses. China on the other hand, has a completely different economic structure with an overwhelming dominance of the central government, which has practically total control over external economic activities of Chinese companies. Generally, there is a lack of transparency stemming from the fact that China does not disclose its investment policies and its economic policies abroad. Turkey is certainly is one of the key foreign partner of Central Asia with significant economic influence in the region. However, there are a number of factors (natural and manmade) impeding Turkey to compete with Russia and China in strengthen further its economic ties with Central Asia increasing mutual investments and trade.

The sectorial content of trade of Central Asian states with Russia and China as well as the dynamics of investments of the two regional powers to the region show that Chinese initiatives largely target two areas, which are connectivity infrastructure and energy. Russia on the other hand, views Central Asia as its “sphere of influence,” using the EAEU as a projection of its economic presence in the region. The membership in the EAEU allows free movement of labor and capital on the territory of the member states and imposes tariffs on trade with non-member states. Hence, the EAEU allows Russia to use such powerful instruments of economic influence as trade and investments in strengthening its economic influence in Central Asia. Large differences of the GDP size of the EAEU member-states create a significant asymmetry of power even under conditions of equilibrated spread of power through institutional mechanism of the union.

### **CONCLUSION**

Russia, China and Turkey are large and highly influential actors that have seen tremendous economic growth during the last 2-3 decades due to active trade liberalization and inflow of investments. A number

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of similarities of development strategies and mutual economic interests helped Russia, China and Turkey to develop mutual trade relations depending on their necessities. In spite of intense mutual trade, however, comprehensive economic cooperation with the EU and the U.S. was the main source of economic growth for all three abovementioned emerging economies. Due to its geographic location as well as strong ties with Russia, China and Turkey, the Central Asian region plays a significant role in the economic relations between the three emerging states as well as their links the western world. In his light, the economic cooperation and diplomacy of Russia, China and Turkey can be seen as part of their strategies applied in order to reach certain goals in mutual economic relations as well as with the western world.

Comparing the total effect of the approaches of Russia, China and Turkey, we can note significant increase of the economic presence of China in the region during recent years. Although Russia has certain amount of influence on the region and plays a key role in the EAEU, the economic activities fomented by this integration project look dim compared to the scale of the China's Belt and Road initiative.<sup>50</sup> Therefore, the conjugation of the EAEU and the Belt and Road initiative in 2019 was largely economically effective.<sup>51</sup> Firstly, out of five countries in the region only Kazakhstan and Kyrgyzstan have decided to join the integration project with Russia. Uzbekistan, Tajikistan and Turkmenistan, on the other hand, do not show their willingness to become members of the EAEU and are actively developing their economic relations with China. This fact also leaves opportunities for Turkey to strengthen its positions in the region. On the other hand, it is also true that Russia's instruments of influence in the region are not limited to the EAEU and all three non-member states still have strong economic ties with Russia.

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50 Paul Stronski-Nicole Ng, "Cooperation and Competition Russia and China in Central Asia, the Russian Far East, and the Arctic", *Carnegie Endowment for International Peace*, 2018, p. 1-58.

51 Elnur Mekhdiev et al., "Conjugation of the Belt and Road Initiative and Eurasian Economic Union: Problems and Development Prospects", *Economies*, 7(4), 2019, p. 1-15.

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Secondly, up until recently China has been very successful in establishing its economic presence in Central Asia. Over the last decade China has surpassed Russia in terms of investments into the region targeting specific issues of it like infrastructure, transportation and energy.<sup>52</sup> The relative decline of the Russian economic presence in the region is primarily explained by the economic deceleration of its own compared to China. Moreover, the efforts of Russia aimed at maintaining its economic influence in Central Asia did not address specific sensitive issues of the region such as the necessity of transport routes and infrastructure that is needed for proper functioning of the production chains which would ensure connectedness of the region with overseas markets. The ties of the region with Russia are, however, still strong and can be used as a counterbalance against overwhelming influence of China. It is also worth mentioning that in spite of their rivalry in the region, Russia and China pursue different goals. Russia's efforts in maintaining its influence in the region is not motivated economically in the first place but rather emanate from its succession of the USSR. China, on the other hand, specifies clear-cut goals of converting the region into a secure gateway for trading with the EU. China engagement in numerous mining and energy related projects in the region also shows its interest to take advantage of the region's energy resources and raw materials to ensure the needs of its economy.

Turkey was highly successful in building economic cooperation with the Central Asian states at the early stages of their existence as independent countries. Its relations with Central Asian states to a great extent were based on common cultural and historical roots. Despite the significant geographic distance and absence of common borders with the region, Turkey managed to build a solid economic cooperation with

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52 Marek Jochec, "China's BRI Investments, Risks, and Opportunities in Kazakhstan and Kyrgyzstan", M. Laruelle, ed., *China's Belt and Road Initiative and its Impact on Central Asia*, George Washington University, 2018, p. 67-76.

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all five Central Asian states. In fact, during a short period of time Turkey became the key economic partner of the region not only in the Middle-East but also among all countries lying south of Central Asia. Unlike China, Turkey's investments and trade with Central Asia was not based primarily on mineral sector but involved multiple industries, which contributed to the economic diversification of the region.

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