ISSN 2454-5597

ISFIRE WORKING PAPER SERIES

THE ONLY PARTNER THEY'VE EVER KNOWN: HOW THE BELT AND ROAD GENERATION IS BECOMING CHINA'S DEEPEST MOAT IN CENTRAL ASIA

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Working Paper-48
Issue- September 2026

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THE ONLY PARTNER THEY'VE EVER KNOWN: HOW THE BELT AND ROAD GENERATION IS BECOMING CHINA'S DEEPEST MOAT IN CENTRAL ASIA

Punit Oza [1]

Abstract

China's Belt and Road Initiative has moved past infrastructure and finance into something harder for rivals to dislodge: generational familiarity. China–Central Asia trade hit a record $106.3 billion in 2025, Kyrgyzstan now sources 54% of its imports from China, and Chinese loans account for a quarter to nearly half of external debt in Kyrgyzstan and Tajikistan. But the more durable asset is human, not financial. A cohort now in its twenties has never known a Central Asia where China was not the default outside partner — visible in Chinese-built parliament and government buildings in Dushanbe, the Tajikistan Independence Tower, Tashkent's Olympic City, and a growing web of Chinese-built roads reshaping daily commutes in Bishkek — reinforced by Confucius Institutes, Luban Workshops, and Chinese-language study now second only to English regionally. Surveys show younger Central Asians view China more favorably than their elders do. The EU's €12 billion Global Gateway pledge and comparable US commitments have struggled to match this not for lack of capital, but because BRI's centralized, fast-moving state-capitalist model and its visible, everyday physical footprint compound in public memory in ways multilateral financing communiqués do not. For competitors, the strategic lesson is that infrastructure spending alone will not close the gap — winning the next generation requires the same patient, decades-long investment in language, education, and visible landmarks that China has already made.

Keywords: *Belt and Road Initiative (BRI); China–Central Asia Relations; Chinese Soft Power; Infrastructure Diplomacy; Geoeconomic Influence; Central Asian Development; Strategic Competition; Foreign Investment; Youth Perceptions; Regional Connectivity*

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Introduction

Walk through a market in Bishkek, a construction site in Dushanbe, or a logistics yard in Almaty today, and you are looking at a generation for whom "foreign partner" is close to synonymous with "Chinese partner." A Central Asian born around the time President Xi Jinping unveiled the Belt and Road Initiative (BRI) in Kazakhstan in 2013 is now entering university, the workforce, or their first years of independent economic life. They have never known a Central Asia where China was not the dominant external force in trade, infrastructure, energy, and increasingly, education and culture. That is not a talking point — it is now measurable in trade data, debt ledgers, language enrolment figures, and youth-opinion surveys. And it is precisely this generational imprinting, more than any single pipeline or port, that has become the hardest barrier for the EU, the United States, India, Japan, or even a resurgent Russia to overcome in the region.

The numbers behind the dependency

China's economic footprint in Central Asia has moved from significant to structural. China–Central Asia trade in goods reached a record $106.3 billion in 2025, up 12% year-on-year, according to China's Ministry of Commerce. Chinese investment into the region hit roughly $25 billion in the first half of 2025 alone, with Kazakhstan absorbing the lion's share at around $23 billion — a figure that made Central Asia, alongside Africa, one of the two fastest-growing BRI destinations that year, overtaking Southeast Asia. Since the initiative's 2013 launch, China's cumulative global BRI engagement has crossed $1.39 trillion, and 2025 construction contracts alone jumped 81% over the prior year to $128.4 billion.

The trade dependency at the country level is where the generational story becomes concrete. In Kyrgyzstan, China supplies close to 54% of all imports — more than Russia, Uzbekistan, Turkey, and every other partner combined. Road-based BRI corridors now carry 51.8% of China–Central Asia trade, up from just under 20% in 2020, meaning the physical infrastructure a young Kyrgyz or Tajik entrepreneur uses to move goods was largely built, financed, and is often still operated within Chinese commercial and logistics frameworks.

Debt tells the same story from the financing side. Kyrgyzstan's external debt to China sits at somewhere between 30% and 45% of its total external debt depending on the measure used, equating to roughly a fifth to two-fifths of GDP; debt service alone absorbs 18-22% of Kyrgyz government revenue. Tajikistan owes China roughly $900 million, about 27-28% of its external debt and around a quarter of GDP, with China its single largest creditor. Even resource-rich Kazakhstan, whose Chinese debt exposure is comparatively light at around 3.5-6.5% of GDP, has anchored its energy security to Chinese-built pipeline infrastructure linking it to

Turkmenistan through western China — infrastructure that has quietly and permanently reduced the country's vulnerability to externally induced supply disruption.

Concrete and steel: the physical signature in the skyline

Debt ledgers and trade statistics are abstractions most citizens never see. What they do see, every day, is concrete — and China has been unusually deliberate about ensuring its name is on the buildings a young Central Asian actually walks past, works in, or watches on television. This is soft power made literal: architecture as a permanent, unmissable touchpoint that a bridge financing agreement or an investment communiqué can never match.

The clearest example sits in the heart of Dushanbe. In 2024, on the tenth anniversary of Xi Jinping's first state visit to Tajikistan, China handed over two newly built compounds on Rudaki Avenue — the country's parliament building and its government building — as what Tajik President Emomali Rahmon publicly called the most precious gift Xi could have given the Tajik people, structures he said would be "recorded in the annals" of the two countries' relationship for generations. These are not peripheral utilities; they are the literal seats of Tajik state power, built by a Chinese contractor and inaugurated jointly by both heads of state. A short distance away stand two more Chinese-built Dushanbe landmarks: the 121-metre Tajikistan Independence and Freedom Tower, now the city's dominant skyline feature and a magnet for tourist photographs, and the Tajikistan National Library on Friendship Square, its open-book facade designed as a literal architectural metaphor for the relationship. A teenager in Dushanbe today has grown up taking their national symbols of independence, knowledge, and government for granted — without necessarily registering that all three were built by the same foreign contractor.

Uzbekistan offers a parallel example on a civic rather than governmental register. The Tashkent Olympic City, built by China's Sinomach group to Chinese design and construction standards, is set to become the largest sports complex in Central Asia — five main venues seating 15,000, plus twenty further indoor and outdoor facilities, built specifically to host the Asian Youth Games. President Shavkat Mirziyoyev described it at groundbreaking as a project of historic significance for young Uzbeks to "explore their potential" — meaning the next generation of

Uzbek athletes will train, compete, and form their formative sporting memories inside a stadium complex that is, by design and construction standard, Chinese.

Kyrgyzstan's touchpoints are less monumental but more pervasive, embedded in the everyday geography of getting around. China Road and Bridge Corporation (CRBC) has built more than ten roads across the country, including the $1 billion "alternative north-south road" connecting Kyrgyzstan's two population centers, a new 433-kilometer north-south highway that halves freight costs between the country's north and south, and — newly begun — a strategic highway toward China's Xinjiang region designed to shorten freight routes by 500 kilometers. CRBC is now also contracted to reconstruct large parts of central Bishkek itself: relocating the city-center railway line, rebuilding the northern bypass road, and constructing a series of new intersections — meaning the literal traffic pattern of the capital a young Bishkek resident navigates daily is being redrawn by a Chinese state contractor. The China–Kyrgyzstan–Uzbekistan International Highway, part of a corridor eventually meant to link Pakistan, China, and all five Central Asian republics, runs a regular freight line from Kashgar through Osh to Tashkent — a physical, driveable line on the map that did not exist in this form a generation ago.

These projects sit alongside a growing network of soft-infrastructure touchpoints that reinforce the same message through different channels: Luban Workshops — Chinese-branded vocational training centers — are now operating in Tajikistan, Kazakhstan, Kyrgyzstan, and Uzbekistan, training the next generation of regional engineers under a Chinese pedagogical brand; Confucius Institutes anchor Chinese-language study on university campuses across the region; and cultural-tourism initiatives, including a new train service between Xi'an and Almaty launched around the first China-Central Asia Summit, are packaged explicitly as "dialogue between civilizations." None of these individually is remarkable. Cumulatively, they mean a young Central Asian's parliament, national tower, library, stadium, commuter roads, and vocational classroom can all plausibly carry the same foreign signature — a density of everyday touchpoints that no rival power has come close to replicating in the region.

It is worth noting this comes with friction, not just gratitude. Chinese-financed and Chinese-contracted projects in Kyrgyzstan have also produced some of the sharpest local controversies — a Bishkek heating-plant modernization that failed during a record-cold winter and sent two former prime ministers to prison over corruption, contract terms that reportedly bar Kyrgyzstan from legal challenge against CRBC, and periodic construction-site theft and community friction during road-building. These episodes matter because they show the physical footprint is not uniformly popular — but even critics tend to frame their objections around contract terms and debt exposure rather than around whether China should be building at all, which is itself a measure of how normalized the underlying relationship has become.

A generation raised inside the relationship, not alongside it

What makes this moment different from earlier chapters of great-power competition in Central Asia is time horizon. A Soviet-era Central Asian adult remembers a world before independence, and a post-Soviet 1990s adult remembers a chaotic multipolar scramble among Russia, Turkey, Iran, and the West for influence. But someone who is now 20 to 25 years old has spent essentially their entire conscious economic life inside a region where China was already the default external actor — the source of the phone in their pocket, the bus they ride, the university scholarship advertised on campus noticeboards, and, for a growing number, the language elective that improves their job prospects.

Chinese has become the second most-studied foreign language in Central Asia after English, a shift driven less by ideology than by calculated career logic among young people who see fluency as a route into the logistics, mining, and manufacturing jobs Chinese firms are creating locally. Confucius Institutes, cultural exchange programs, and China's Luban Workshops (vocational training centers) are explicitly positioned by Beijing as tools to shape favorable perceptions among the "younger generation" specifically — language taken directly from Chinese and regional policy commentary around the 2025 China–Central Asia summit in Xi'an, where leaders from all five republics met Xi Jinping in person for the first standalone summit of its kind.

The polling data, while mixed and contested, increasingly supports the thesis that younger cohorts are more receptive to China than their elders. Global surveys — including Pew Research Center findings reported through 2025 — found more favorable views of China in 15 of 25 countries surveyed, with younger respondents consistently more positive than older ones across most of those countries. The Central Asian Barometer's multi-wave surveys between 2017 and 2023 found generally favorable Kazakhstani opinion of China, a positivity that reportedly increased after Russia's invasion of Ukraine reshuffled the region's threat perceptions of its traditional patron. This is not uniform — Kazakhstani protests over Chinese land-lease proposals in 2016 and periodic anti-Chinese demonstrations in Kyrgyzstan show real and persistent public wariness, particularly around debt and labor practices — but the generational drift in sentiment is a documented trend, not a hypothesis.

Why this is a soft-power problem, not just an infrastructure problem

Competitors to China in Central Asia have generally tried to answer BRI with more infrastructure money: the EU's Global Gateway pledged €12 billion at the inaugural EU–Central Asia summit in Samarkand in April 2025, plus a further €2.5 billion earmarked for critical raw materials supply chains, and up to €45 billion regionally as part of a broader €300 billion global pledge. The United States has reportedly committed up to $4 billion toward Trans-Caspian corridor development. These are not trivial sums. Yet the Middle Corridor these programs are meant to strengthen carried only about 6 million tons of freight in 2024, against more than 100 million tons moving along the Russian northern route — and analysts at the European Council on Foreign Relations and DGAP both flag financing, logistics, and coordination gaps that remain unresolved years into the effort.

The deeper issue analysts increasingly point to is structural, not financial: BRI projects move faster because they are centrally directed through Chinese state-owned enterprises and state banks, without the procurement transparency, environmental review, and multi-stakeholder coordination that Western-style financing requires. Bruegel's comparative analysis of Global Gateway versus BRI concluded plainly that this speed and coordination advantage is close to structural for China, rooted in its state-capitalist model, and will be very hard for the EU to replicate regardless of how much capital it commits. European parliamentarians have even complained that some EU-financed tenders in competitor markets have ended up awarded to Chinese firms anyway, given their cost and delivery advantages.

But money and speed are only half the equation. The harder problem for any competitor is that China has spent over a decade building the human infrastructure of familiarity — language programs, youth scholarships, vocational partnerships, e-commerce platforms, and cultural exports (from Chinese short-video apps to Chinese cinema) — that make China feel less like a foreign investor and more like the ambient economic weather. A European or American company entering a Central Asian market today is not just competing against a Chinese company's price or delivery timeline. It is competing against a young engineer's Chinese-language vocational certificate, a young trader's existing WeChat-based supplier network, and a young graduate's lived sense that "how things get built here" is a Chinese-shaped process. That is soft power operating exactly as Joseph Nye's original framework predicted: not coercion, but the shaping of preferences so that the dominant actor's way of doing things is simply assumed to be normal.

The strategic implication for maritime and trade actors

For shipping, logistics, and trade intermediaries watching this region, the takeaway is not that Central Asia is closed to competition — Kazakhstan's hedging behavior, the EU's Samarkand summit, and periodic Kyrgyz and Tajik public pushback on debt terms all show real, contestable space. The takeaway is that entering these markets now means entering against an incumbent with a fifteen-year head start on the generation that will run these economies for the next thirty years. Competing on financing terms or infrastructure speed alone will not be sufficient.

Competitors need their own long-horizon investment in the human and cultural layer — scholarships, language programs, vocational partnerships, local-hire commitments — treated with the same seriousness as the port, rail, or pipeline capital they are already committing. And they need to think about visibility the way China's contractors clearly do: a parliament building, a national tower, or a stadium is a touchpoint that lasts fifty years and is seen by every citizen, while a financing communiqué is read by almost no one. The EU's €12 billion and America's $4 billion will not compound in public memory the way a skyline does. The generation that grew up with China as the only visible partner did not arrive at that view by accident. It was built, deliberately, one Confucius Institute and one Luban Workshop at a time. Anyone hoping to compete for the next generation will need to build with the same patience.

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