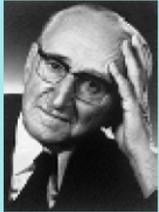




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**Challenges and opportunities to develop
Kazakhstani logistics projects within the
BRI**

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Abstract

The BRI initiative presents a colossal opportunity for landlocked Kazakhstan to become a central logistics hub. However, this prospect is overshadowed by geopolitical risks that have escalated since the beginning of 2022. The Ukrainian crisis increased geopolitical tensions on the Eurasian continent and worldwide. Furthermore, it disrupted respectively delayed logistics, as the borders both between Russian Federation and Belarussia on one side and many nations in Europe were practically closed, air traffic has to take huge diversions, increasing time and costs for the freight. A full-scale crisis has global consequences for states and people. Western companies have stopped their activities in Russia. Western countries have imposed unprecedentedly harsh sanctions on Russia. Supply chains can be broken. Chinese companies are concerned that their goods may be stopped at the border between Russia and the countries of Central and Eastern Europe. Because of close economic and political ties with the Russian Federation and membership in the Eurasian Economic Union (EAEU), Kazakhstan is concerned with secondary sanctions. Actually, there is already some impact, as Russian Banks in Kazakhstan have to cope with difficulties in international payments, which rebounds to their (innocent, kazakh and international expatriate) customers. Companies face a particular business risk that can be referred to as “geopolitical risk.” Geopolitical risks are becoming the main problem for the further development of the Eurasian region.

Keywords:

logistics, hub, geopolitical risks, projects, EAEU, BRI, SREB, cooperation, transport logistics complex.

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Challenges and opportunities to develop Kazakhstani logistics projects within the BRI

Introduction

China has ambitions to build extensive new infrastructure and significantly improve intra-Asian and Eurasian connections. The One Belt and One Road Initiative (OBOR) involve China financing new infrastructure beyond its borders. The activities outlined in the OBOR are taking place in most countries worldwide. The OBOR covers roads, railroads, pipelines, ports, and digital communication networks. In this way, China is paving the way for more efficient trade, communication channels, and the transformation of supply chains. For China's neighbors, the OBOR implies new opportunities and the need to define their role in new logistics networks and value chains.

According to Blanchard (2021), there is a considerable amount of "academic" material on BRI that can be found in "various university library catalogs and Google Scholar indicate there are thousands of BRI-related academic articles, books, briefs, conference papers, and reports." In addition, if in the media of Kazakhstan and Indonesia, "scientists dance to the tune of China" (Shichor, 2018), that is not a reason for BRI analysts not to focus on the Maritime Silk Road Initiative (MSRI) or Silk Road Economic Belt (SREB) in specific regions or countries (Blanchard, 2021). If we consider these materials from the point of view of the positive and normative approaches of economic science, then materials of a normative nature mainly prevail in Kazakhstani media. As if in unison, everyone argues that the BRI is a new model of interaction and the basis for creating new mechanisms for the economic development of Kazakhstan. At the same time, it is difficult and sometimes impossible to see the intermediate results with scientists' own eyes, to analyze them using a positive approach. If we search in the Kazakhstani domain of Google using the keywords "logistics" and "BRI," there is only normative content information.

The First President-Elbasy Nursultan Nazarbayev repeatedly noted, "Kazakhstan is the first and key country of the Silk Road Economic Belt, a kind of geo-economic gateway of China to the West" (Nurgaliyev, 2022). The two countries identified the main directions of joint work on integrating Kazakhstan's "Nurly Zhol" program with the (BRI). Both megaprojects "prioritize transport, logistics, industry, energy, agricultural exports, housing, communal infrastructure, education, human capital development, and support for small and medium-sized businesses"

(Nurgaliyev, 2022). "Of particular importance for Kazakhstan is the creation of transport corridors "China-Kazakhstan-Russia-Western Europe," "China-Kazakhstan-Western Asia," "China-Kazakhstan-South Caucasus/Turkey-Europe" within the BRI" (Nurgaliyev, 2022). The Nurlı Zhol program aims to turn Kazakhstan into a primary transport and logistics hub by modernizing roads and railroads, water supply and sewage systems, and boiler equipment.

However, after the January 2022 events in Kazakhstan, it turned out that many projects are non-transparent. Financial and oligarchic groups have become the key beneficiaries of economic growth (Tokayev, 2022). The Kazakhstani people are told that the existing oligopolies seriously limited the development of the free market and reduced the country's competitiveness (Tokayev, 2022). President Tokayev prospects "a significant potential for increasing budget revenues" after the transition of the cross-border customs with China to the legal field (Tokayev, 2022).

Any initiative or integration in Eurasia should be considered from two points of view: political and economic. According to political scientists, at present in Eurasia, "the struggle of the great powers for the redistribution of spheres of influence" is unfolding, which "becomes the arena of competitive cooperation between China and Russia," the purpose of which is "to push back BritAmerica." As for Central Asia, it is "the focus of two overlapping spheres of influence of China and Russia," and Russia dominates here "due to the long imperial experience of presence in Central Asia (tsarist and Soviet) (Shatskikh, 2022). In the light of events in Ukraine, this statement raises no doubts about its correctness. The multi-vector policy of Kazakhstan over the past 30 years has helped to avoid sharp corners, but the current geopolitical situation leaves no room for maneuvering. Membership in the EAEU and Collective Security Treaty Organization (CSTO) is the issue on the political agenda on which the country's future depends and without which sustainable development is impossible.

In his congratulatory letter to Chinese President Xi Jinping on the occasion of the 30th anniversary of the establishment of diplomatic relations between Kazakhstan and China, President of Kazakhstan Kassym-Jomart Tokayev noted the following:

I want to emphasize that Kazakhstan and China are connected by thousands of kilometers of railways, motor roads, and oil and gas pipelines. With this in mind, this "iron caravan," which is the main reference point of the "Nurlı Zhol" strategy and the "One Belt, One Road" initiative, allows the parties to transport a large number of our compatriots annually, as well as deliver millions of tons of cargo and billions of cubic meters of natural gas." (Iglıkova, 2022).

A transit potential is a powerful tool for realizing the country's capabilities to provide and maintain international transport flows. In many countries of the world, such as Austria, the Netherlands, and Singapore, transit is a significant source of income and plays an essential

role in developing the country's economy. However, Kazakhstan is not Singapore. The feasibility and viability of projects, especially megaprojects, depended entirely on the clan of the first president and the oligarchs associated with him. Furthermore, now Kazakhstan is at a crossroads. There are two ways. The first and only correct path is the path of de-elbasization and further democratization of all processes. The second way is to allow the former clan to remain in power and continue to export resources from Kazakhstan to maintain countless properties abroad.

Methods and materials

The research design involved the application of theoretical and empirical methods. Generally accepted theoretical research methods were applied to extract secondary information to prepare the literature review. Of these methods, induction, deduction, analysis and synthesis are essential. The basis for empirical research methods was qualitative research to extract primary information, which provided an overview of the state of the problem under study. Qualitative primary information was extracted through in-depth interviews and focus groups organized among specialists in BRI and cross-border cooperation. The use of quantitative methods was not foreseen.

The study's central question should include: What should be done to increase the competitiveness of the Kazakhstani transport logistics complex in the context of global geopolitical challenges? The consequences of the COVID-19 pandemic, membership in the EAEU, and the sanctions regime against partners in the EAEU are all medium-term challenges that Kazakhstan faces with the accompanying economic consequences. Beyond this, there is the long-term impact of sustainability, the diminishing of natural resources, the trend to electric mobility and renewable energies. To tend to these additional topics would go far beyond the scope of this article.

A comprehensive study and understanding of the geopolitical processes on the continent are necessary. In the new realities, logistics projects must first consider geopolitical risks. To conduct a consistent economic policy, governments need a science-based program of action to reduce and mitigate the risks of global geopolitical challenges. How economically beneficial is it to be part of the EAEU, whose members in their foreign policy are based on the tradition of realism characteristic of the old world order? An analysis of the peer review conducted among Kazakh and German specialists in international logistics and the BRI initiative made it possible to identify the prospects for logistics projects of the Republic of Kazakhstan within the framework of BRI. Based on secondary and primary studies, PESTEL and SWOT analyzes were carried out.

Literature review

Modern realities are such that countries far from the main world markets without direct access to a sea or countries that are not ready to cooperate in developing international transport links are doomed to stagnation. In globalization, transit is becoming an essential condition for the country's active participation in international trade, the development of its transport industry, and a source to fill the budget through payments for transit traffic. In this context, the advantageous geographical position of Kazakhstan at the intersection of two parts of the world - Europe and Asia - is a valuable strategic resource that can help the country to realize its transit potential, ensure effective integration of the country into the world economic system and thereby raise the country's economy to a new level. «One Belt, One Road» is a transcontinental long-term policy and investment program aimed at developing infrastructure and accelerating the economic integration of countries located along the path of the historical Silk Road that passed through Kazakhstan. China is one of the largest foreign trade and investment partners of Kazakhstan. For 11 months of 2021, the bilateral trade volume amounted to more than \$17 billion and grew by 13.6%.

Particular attention is paid to the prospects for increasing the supply of environmentally friendly agricultural products to China from Kazakhstan and building up cross-border cooperation (Kursiv, 2022).

BRI will be an infrastructure project that will likely have implications for supply chain and logistics management (Blanchard, 2021). Realization of the transit potential has been one of the priority areas of the economic policy of Kazakhstan from the day it gained independence. Several state programs aim to solve the problem of creating effective ways to use the country's transit potential.

Border regions play a special role; they should act as centers of economic activity (Brauweiler, H. 2002) and contribute to the integration of countries into the world economic system (Myrzakhmetova et al., 2020). According to Brauweiler et al. (2022), the cross-border projects are "becoming increasingly important, as Kazakhstan is located at the intersection of transcontinental corridors between Europe and China". Since cross-border projects are implemented by different countries jointly, the risks of cross-border projects increase (Brauweiler et al., 2022).

The practical realization of the transit potential of the Republic of Kazakhstan is facilitated by international transport corridors passing through the country in different directions. Through international transport corridors, the transit cargo flows are carried out. The most promising

areas for realizing the transit potential for Kazakhstan are through Russia to the EU countries, Japan, countries of Southeast Asia, and through Central Asia and the Caucasus to Iran and Turkey.

Transit through the territory of Kazakhstan has several advantages. The main one is the speed and reduction of the distance from the producer to the consumer from Asian countries to European countries and vice versa. It is common knowledge, unlike the sea route in this direction, where the cargo is in transit for 35-40 days, the delivery time by land is reduced by 2-3 times.

The development of Kazakhstan's transport infrastructure and logistics system and neighboring countries under the One Belt and One Road initiative (OBOR) contributes to the growth of international traffic and the expansion of all countries' transit potential.

Today, the Republic of Kazakhstan is facing a challenge to maximize the effectiveness of transit potential capacities and innovations, allowing the building of a competitive environment in the transport and communications complex and expanding transport facilities. In the last decade, mainly since the COVID-19 pandemic, e-commerce sales have grown significantly, and its expansion into consumer markets is occurring at an unprecedented pace (Yerimpasheva & Tarakbaeva, 2021). It has been reflected in the growth in the number of logistics companies and has led to significant investment in logistics as a tool used to achieve business expansion. The current climate in e-commerce requires logistics companies to modernize their operational capabilities in the face of Industry 4.0 (Yerimpasheva & Balgabayeva, 2020). Nevertheless, existing systems do not provide traceability, transparency, information security, and immutability of data stored and exchanged during various operational processes.

With a strategically advantageous territorial position, Kazakhstan is interested in creating an efficient transportation and logistics infrastructure through roads, the railway sector, water transporting, and the civil aviation industry. Therefore, the volume of cargo transportation shows a positive trend year after year. In 2018, the volume of cargo transportation in the republic amounted to 4.1 billion tons, 4.8% more than in 2017.

At present, the transit potential of Kazakhstan is not fully realized. Most cargo transportation is carried out within the republic, and the volume of transit traffic is insignificant. The importance of realizing the country's transit potential in the international transport system determines the relevance of the chosen topic. Kazakhstan is facing the task of maximally effectively realizing the country's transit potential and attracting private entities to implement logistics projects, which will help create a competitive environment in the transport and communications complex and increase the fleet of vehicles.

Wen, Ma, Choi & Sheu (2019) investigate the potential of the OBOR economic corridors. Taking into account “cost, environmental impact, mode reliability & security, transit time, and infrastructure reliability,” they state that there are “remarkable advantages of the corridors over the traditional ocean route” and “their heterogeneous impacts on different regions of China” (Wen et al., 2019, p.581). The evidence suggests that trading agreements and economic cooperation worldwide could generate “insightful implications for proper logistics planning” under the BRI initiative.

Li, Shou, Ding, Sun & Zhou (2019), after investigating the ex-post factors of local sourcing practices in overseas projects for the Belt and Road Initiative, have concluded that relational governance mechanisms play a “prominent role in implementing local sourcing practices” (Li et al., 2019, p. 212).

It is probably true that the BRI using challenging projects is tempted to intensify regional and global trade relations and realize China’s economic development strategy. The statements that BRI is a means for China to increase its influence with implications for geopolitical competition with the United States are frequently referred to in the press. Using a political economy approach, Flint & Zhu (2019, p. 95) consider that the “economic and political processes and goals of the BRI are inseparable.” Further, they argue that the BRI is neither an economic nor political project but “one that transforms politics at multiple scales and has the potential to be transformative and will simultaneously create possibilities for global cooperation and conflict” (Flint & Zhu, 2019, p. 95). As a result, China’s BRI has provided Chinese firms with “significant incentives to speed up the pace of internationalization” (Li, Liu & Qian, 2019, p. 350). Their study of Chinese firms in the Xinjiang Uygur Autonomous Region (XUAR) has become the reason to conclude that the BRI has “a positive formal institutional effect on the export performance of XUAR firms that target the “Belt” countries.”

Foo, Lean & Salim (2019) have concluded that the OBOR policy initiative is a promising mechanism for trade facilitation in many countries in the years to come. Their research project used the gravity model of international trade and data on the ASEAN countries and China from 2000 to 2016. Moreover, their results show that the coefficient of the OBOR model is positive and statistically significant. Therefore, concerning increased trade flows among ASEAN countries and China, the OBOR policy benefits both sides.

The BRI, within the context of global infrastructure needs and long-term economic strategy for China and other participating economies, both in the Asian region and beyond, is becoming a new driver of universal development. Chinese President Xi stated in 2017 on the BRI: “China will actively promote international cooperation through the Belt and Road Initiative. We hope to achieve policy, infrastructure, trade, financial, and people-to-people connectivity and thus

build a new platform for international cooperation to create new drivers of shared development” (Xi, J., 2017, p. 61).

Yu, Qian & Liu (2019) claim that China’s BRI positively impacts Chinese FDI activities, the direction and the size of which depend on the states’ willingness to participate in the BRI’s projects. According to Yu et al. (2019), the BRI promotes more FDI in developing countries.

Liu et al. (2018) explored “the supply chain coordination issues arising from the OBOR, and investigated the impacts of the cost-sharing contract on the key decisions for logistics service supply chain with mass customization.” From their perspective, “it will be beneficial to improving logistics service in the OBOR region” (Liu, Zhang, Chen, Zhou & Miao, 2018).

Discussion

For about 2500 years, through an ancient network of caravan routes that passed through the Mediterranean, Central, and East Asia, the Silk Road connected China and Japan with Europe. It was a path not only for the spread of religion, science, culture, and trade in silk and many other commodities but also for spreading wars and disease (Khan, 2019).

With the EU-Asia Cooperation Strategy adopted in 2018, the EU is trying to respond to China in this Initiative (European Commission, 2019). Both strategies aim to improve transport and energy networks, digital infrastructure, and trade. The overland route of the New Silk Road from China to Germany runs through Russia and the states of Central Asia, and today’s Russian aggression against Ukraine has called the One Belt - One Road project into question. Related to this is the degree of involvement of these states as transit countries and their participation in the project’s development.

According to Khan (2019), the New Silk Road project is not a threat to Europe but an opportunity for closer peaceful cooperation between the states, economies, and peoples of Asia and Europe. However, this will only be possible if the New Silk Road is not only an economic and transport project but also a project that benefits the people of Central Asia (Khan, 2019).

According to the Head of DHL China Rail/Multimodal in Europe, Thomas Kowicki, logistics is a backbone of the global economy, and BRI will play a central role in the future (Silk Road, 2022). Compared to other modes of transport, the BRI train line increases flexibility (door-to-door service, geographic coverage), reliability (well-defined departure and arrival times, daily trains), transparency (all customers can monitor the location of their container via GPS), and environmental friendliness (95% less CO₂ than air transport) of transport services.

Under BRI, Kazakhstan plays an important strategic and operational role in rail and road logistics. Furthermore, the Khorgos on the Kazakh-Chinese border is the largest dry dock

globally, unloading thousands of containers every month (Silk Road, 2022). The Chinese scientist Adil Kaukenov believes that "Kazakhstan has managed to become a reliable link of railway container transit between China and Europe, China and Iran, China and Central Asian countries. Thus, at the end of a problematic "pandemic 2019, the company KTZh (Kazakhstan Railways) reported an increase in transit volume in annual terms of 24%, with China - Europe - China - 12%, China-Central Asia - China - 56%, China - Iran - 43% (Yuritsyn, 2022).

On the other hand, President Tokayev openly stated that Khorgos lock is a place where the country is losing tens of billions of tenge in taxes. Differences in "mirror" statistics with the customs authorities of the PRC reach billions of dollars. All this requires an immediate comprehensive audit (Tokayev, 2022).

The retention of power for 30 years, the rewriting of the country's primary law, and the suppression of democratic initiatives led to the creation of oligarchic schemes and the division of the economy of Kazakhstan into spheres of influence. The feasibility of projects depends on the personal interests of the oligarchs.

At the same time, "part of the population of Kazakhstan has sinophobia," which flourishes "based on lack of knowledge, prevailing stereotypes and lack of information about the benefits of joint projects for the republic" (Yuritsyn, 2022).

Kazakhstani political analyst Maksim Kaznacheev openly stated in his interview that in the autumn of 2021, China put forward political conditions to Kazakhstan to continue economic cooperation and demanded punishment for participants of anti-Chinese rallies and pickets. To stimulate "the process of making the necessary decision in the capital of Kazakhstan, China unilaterally announced a tightened quarantine for cargo from and to Kazakhstan at the Khorgos and Dostyk customs checkpoints. Transit cargoes that come under the "One Belt, One Road" project - and these are rail trains from Europe to China - are screened by Chinese customs as a priority. They are practically not held up at the border. However, cargoes going by rail and road in Kazakhstan's bilateral trade with China are delayed. According to the latest Kazakhstani estimates, several thousand trucks and several thousand wagons stand at the border. We are talking about bulk cargoes, fuel tanks, and containers. A significant portion of the rolling stock is frozen. (IA-Centr.ru, 2022).

Bulat Sultanov, Chairman of the Board of the One Belt and One Road Expert Club, called on Chinese companies operating in Kazakhstan to be "more open about how many jobs they create, what taxes are paid to the budgets of all levels, what sponsorship is provided, how environmental issues are respected" (Yuritsyn, 2022).

The Republic of Kazakhstan has joined World Logistics Passport (WLP), a significant initiative to expand trade opportunities between emerging markets. The WLP aims to overcome trade

barriers such as logistics inefficiencies, improve existing trade routes, and develop loyalty programs for logistics and trade companies. In addition to Kazakhstan, Colombia, Senegal, Brazil, Uruguay, Thailand, and South Africa are also registered with World Logistics Passport as regional hubs and WLP partners. It is believed that Kazakhstan can become a link between the "One Belt, One Road" initiative and World Logistics Passport, which will open up new opportunities in transport and logistics, unlocking the country's full transit potential (Zona.kz, 2022). For Kazakhstan, with its location in Central Asia, there is an exceptionally high potential for developing the logistics sector. The economic opportunities associated with the international logistics hub in Kazakhstan are enormous and continue to grow as Asian economies become increasingly integrated into production chains. At the same time, transport is still one of the critical drivers of greenhousegas emissions. Kazakhstan's international competitiveness and integration into global value chains require a modern, climate-friendly transport sector.

The EU, China, and the Russian Federation are Kazakhstan's main trading partners, and their policies and corporate efforts combine to pose significant threats to Kazakhstan. How quickly and intensely Kazakhstan will respond to challenges and seize emerging opportunities to modernize its economy depends on its resilience to international pressures for sustainable development.

Results

Transport and logistics services are essential at every stage of production and consumption of products, both in domestic and foreign markets.

The transport and logistics complex makes a considerable contribution to the formation of value chains; it impacts production costs and revenues and thus has a significant impact on the competitiveness of products and the economy as a whole.

The Strategic Development Plan of Kazakhstan until 2025 aims to " promote economic growth and improve the living standards of the population through the development of an efficient and competitive transport infrastructure, transit, and transport services" (Adilet, 2022).

Over the past decade, about \$30 billion has been invested in transport and logistics infrastructure projects to increase the capacity of the infrastructure and develop the Eurasian transport corridors, taking into account container technologies (stat.gov.kz", 2022).

The constructed railway lines "Zhetygen - Khorgos" and "Zhezkazgan - Saksaulskaya - Beyneu" reduced transit routes by 1000 km. Thus, transport links within the country from East to West were ensured. The railway line Kazakhstan-Turkmenistan-Iran provided the outlet for cargo transportation to the seaports of the Persian Gulf. In the future, access to trade flows in India is possible.

The transport industry is one of the most critical sectors of the economy of Kazakhstan, whose share in the structure of GDP is about 7%.

The steadily growing demand for transport services indicates the most crucial socio-economic role of the transport and logistics complex in the development of the Republic of Kazakhstan.

The PESTEL analysis has been carried out to identify political, economic, social, technological, environmental, and legal aspects of the external environment that affect the transport and logistics complex (Table 1).

Table 1: The PESTEL-analysis of the Kazakhstani transport and logistics complex

	Groups of factors	Challenges and opportunities	Influence
1	Political (P)	Regional integration (EAEU, CSTO, SCO, CIS)	As a result of sanctions against Russia, the risks of secondary sanctions increase. In the new geopolitical conditions, integration is too complex.
2		International conflicts	Sharp fluctuations in energy prices, devaluation of the national currency, destruction of the transport system of Kazakhstan.
3		Linking with the BRI under the BRI China-Europe route	Kazakhstan is becoming an essential link in the regional transport corridor between China and Europe, which will lead to an increase in transit cargo flows. Growing demand for logistics infrastructure. Accelerating the construction of new regional transport and logistics hubs.
4		Reorientation of transit cargo flows	The outflow of transit cargo flows from the territory of Kazakhstan.
5		Regional terrorist activity	The need for continuous improvement of the system for ensuring the safety of transport and logistics activities.
6	Economic –(E)	Digitization and the rise of e-commerce	As a result of COVID-19, the bulk of transactions in the transport and logistics complex began to be concluded and executed in electronic format.
7		Increase of players in the transport and logistics complex	Increased competition will increase the economic efficiency of the industry.
8		“Coopetition” strategy	Expansion of cooperation between transport and logistics companies in the joint use of warehouse space and terminals based on the lease and operating leasing mechanisms.
9		Energy price volatility	Exchange rate fluctuations.
10	Social - (S)	Rising consumer expectations for the reliability and speed of cargo delivery and travel	Failure to meet expectations will inevitably lead to an outflow of transit cargo flows and a decrease in the regional competitiveness of the transport and logistics complex.

11		The outflow of qualified personnel	Lack of personnel in high-tech areas of the transport industry.
12	Technological - (T)	Development of the technological base for the broad introduction of advanced achievements of science and technology	Implementation of innovations such as Artificial Intelligence, Big data, an ecosystem based on the Internet of Things technology, crewless vehicles, and drones for targeted delivery of items.
13		Transition to "green technologies".	The global trend of transition to green technologies with tightening and widespread implementation of restrictions on greenhouse gas emissions
14	Ecological - (E)	Global climate change	Change in the historically established weather background—change in usual operating conditions—disruptions in schedules and supply chains.
15		Depletion of natural resources	Rising market prices will lead to the need to recycle materials.
16	Legal - (L)	Access to personal data	Tracking cargo flows VS restrictions imposed by the legislation on personal data protection.

Much is said about the favorable geographical position of Kazakhstan for the transit of goods along international transport corridors. At the same time, there is a threat of outflow of transit cargo flows through Kazakhstan to alternative transport corridors. It is due to the natural desire of neighboring countries to create and develop international transport corridors through their territories. Thus, the construction of the railway section Rasht (Iran) - Astara (Azerbaijan) of the North-South corridor will create opportunities for reorientation of transit cargo flows, bypassing the territory of Kazakhstan. "Rasht-Astara" will provide Iran with significant economic benefits and contribute to developing relations with neighboring countries. Russia hastily develops the Trans-Siberian railway, allocating budgetary funds for this. The task is to increase the carrying capacity of the Baikal-Amur Railway (BAM) and the Trans-Siberian Railway by 1.5 times: up to 180 million tons of cargo in 2024. According to the long-term development program of Russian Railways, it is planned to build about 1310 km of additional main tracks and 32 sidings and reconstruct 29 stations.

Digitalization and advanced technologies are essential in developing the transport and logistics complex. The critical criteria for competitiveness in the supply chain are cost and timing. At the same time, the collection, analysis, and storage of data are carried out at a low level. A significant proportion of transport operators and logistics companies are small and medium-sized businesses that cannot fully adapt to the needs of shippers interested in receiving integrated transport and logistics services based on "one-stop-shop" technology. So, there is a request for large logistics providers or strategic alliances with wide logistics networks.

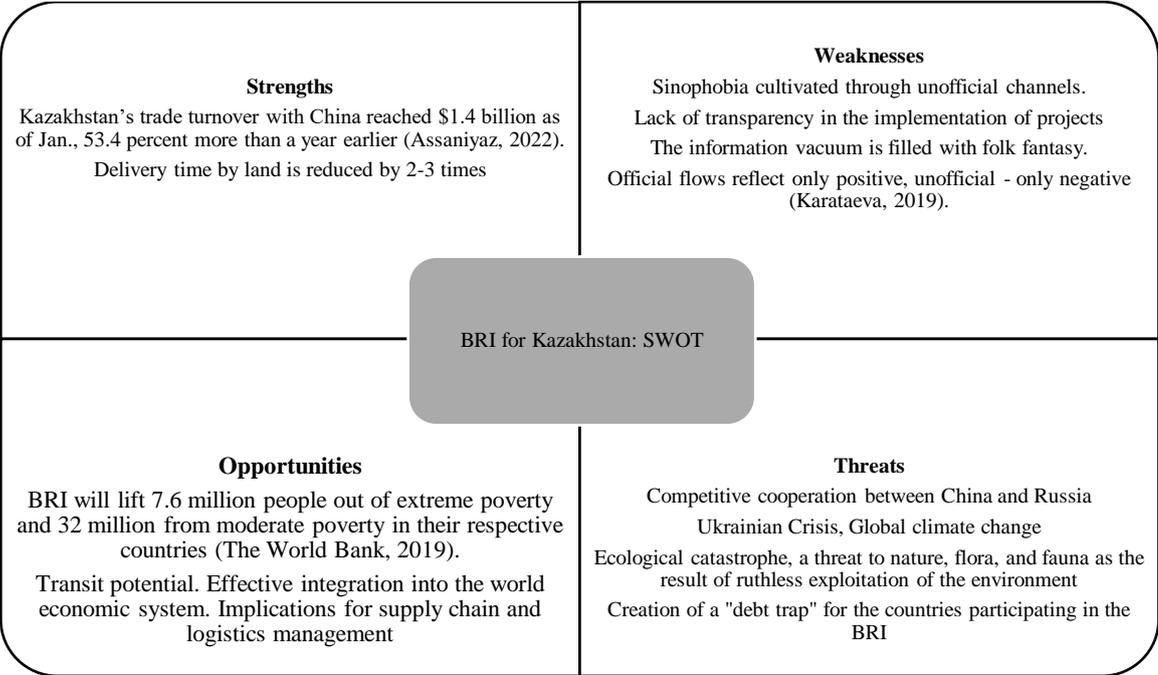
So, within the framework of BRI, the formation of transcontinental transport corridors is expected, in which Kazakhstan can take an active part. A multimodal Eurasian transcontinental corridor based on a network of crucial logistics hubs can significantly speed up the movement of goods in all directions and ensure the continuity of the transport process. The development of a network of logistics hubs involves systematic and coordinated interaction with all BRI participants and explicit coordination of the activities of regulatory and supervisory authorities both at the international level and within the framework of the SREB institutions. At the moment, the deterrent is the Russian aggression in Ukraine.

The One Belt - One Road initiative aligns with the Nuryly Zhol program. They were ratified within the framework of the Cooperation Plan to interface the construction of the Silk Road Economic Belt and the Nuryly Zhol economic policy in 2016. The formation of a joint transport and logistics complex will allow Kazakhstan to access the Pacific Ocean and realize its transit potential. In the cross-border and transcontinental trade structure, the free economic zone “Khorgos-Eastern Gate” was formed, where the dry port of Khorgos was built as an infrastructural transport and logistics unit. The dry port is inscribed in the Western Europe-Western China highway structure through the Zhetygen-Korgas railway. As part of the Nuryly Zhol program, transit revenues in 2020 were supposed to reach \$4 billion. The actual data are not available. One of the benchmarks for achieving the goals of the Nuryly Zhol program for 2015-2019. was the increase in the WEF (World Economic Forum) rating to 57th place in terms of the quality of basic infrastructure. An analysis of the 2020 WEF report “The Global Competitiveness Report” showed the dynamics of such an indicator of the World Bank as LPI (Logistics Performance Index). Thus, according to the World Bank report for 2018, the LPI was 2.81, while the position of Kazakhstan out of 160 countries participating in the assessment was 71 (“Global Rankings 2018. 2019 | Logistics Performance Index”, 2022). The assessment of the quality and development of infrastructure was 2.55. For 2014, the overall logistics efficiency index was 2.70, the position in the general list of countries participating in the assessment was 88, and the quality and infrastructure development assessment was 2.38. Based on the results of the evaluation of the logistics index, a positive trend is visible in terms of infrastructure development, as well as the development of the logistics system in the country (“Global Rankings 2018. 2019 | Logistics Performance Index”, 2022).

Any initiative or integration in Eurasia should be considered from two points of view: political and economic. According to political scientists, at present in Eurasia, “the struggle of the great powers for the redistribution of spheres of influence” is unfolding, which “becomes the arena of competitive cooperation between China and Russia,” the purpose of which is “to push back BritAmerica.” As for Central Asia, it is “the focus of two overlapping spheres of influence of China and Russia,” and Russia dominates here “due to the long imperial experience of

presence in Central Asia (tsarist and Soviet) (Shatskikh, 2022). The multi-vector policy of Kazakhstan over the past 30 years has helped to avoid sharp corners, but the current geopolitical situation leaves no room for maneuvering. Membership in the EAEU and CSTO is the issue on the political agenda on which the country's future depends and without which sustainable development is impossible.

Picture 1: The SWOT – analysis of cooperation between Kazakhstan and BRI



The strengths of cooperation with BRI are economic and technological achievements. Kazakhstan's trade turnover with China reached \$1.4 billion as of Jan., 53.4 percent more than a year earlier (Assaniyaz, 2022). Delivery time by land is reduced by 2 - 3 times. Weaknesses are associated with sinophobia cultivated through unofficial channels, lack of transparency in implementing projects and taking place information vacuum.

At the same time, BRI will lift 7.6 million people out of extreme poverty and 32 million people out of moderate poverty in the respective countries (The World Bank, 2019).

Threats are associated with the Ukrainian Crisis, Global climate change, Ecological catastrophe, a threat to nature, flora, and fauna as the result of ruthless exploitation of the environment, creation of a "debt trap" for the countries participating in the "Belt and road."

Conclusion

The development of Kazakhstan's transport and logistics complex is influenced by two influential external factors: the EAEU and the Chinese BRI initiative. These two factors will

determine the prospects for the development of international transportation with the participation of Kazakhstan soon. The dynamic development of the western and central regions of China, the growth of production and export of goods, the implementation of the Chinese initiative BRI create conditions and opportunities for increasing transit cargo flows through Kazakhstan to the countries of Central Asia, Europe, the Middle East, and Africa. Experts see prospects for Kazakhstan to use China's strategy to develop land routes as an alternative to maritime transportation. To use these opportunities to benefit the national economy, Kazakhstan has to develop transport logistics. The strategy for integrating the Kazakh transport system into the new architecture of the transcontinental transport corridors of Eurasia involves coordinated actions to modernize the institutional framework of the transport industry, introduce effective business models and management processes for the industry, and related sectors, and increase the investment attractiveness of transport logistics. The key driver for the growth of Kazakh transit is multimodal container transportation between two economic poles: China and the countries of Southeast Asia, on the one hand, and the EU countries, Turkey and the Caucasus, on the other hand. The first successful logistics project, which has become a vital component of the SREB, can be considered the terminal complex in the port of Lianyungang (PRC), which was put into operation in 2014. The terminal provides a full range of logistics services. Today it is proposed to transport goods by train from Lianyungang to Almaty within 5-6 days, to Duisburg (Germany) in 15-16 days.

To successfully interface the transport and logistics complex and BRI, Kazakhstan must integrate the transport and logistics systems of all countries located along the Silk Road, which involves the formation of a new architecture of transcontinental transport corridors based on the harmonization of national legislation, the implementation of joint strategies and programs. In general, this will lead to the creation of a unique institutional framework that ensures the smooth integration of national transport networks into an integral, unified, branched Eurasian transcontinental transport and logistics system with specific boundaries and the necessary infrastructure, which will contribute to the growth of regional and international trade.

The priority task of linking the Nurlı Zhol program with BRI is to modernize institutions and infrastructure and increase the competitiveness of international transport corridors passing through Kazakhstan.

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