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SECURITY ISSUES, INVESTMENT OPPORTUNITIES AND GEOPOLITICS

Geopolitical Report

Belt and Road Initiative:
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Geopolitical Report

A publication of the Association of Studies, Research and Internationalization in Eurasia and Africa (ASRIE)
The first volume of *Geopolitical Report* titled *Belt and Road Initiative: Security Issues, Investment Opportunities and Geopolitics* is dedicated to the analysis of the Chinese strategy to interconnect Europe and Asia with the purpose of highlighting current geopolitical problems and challenges, possible investment opportunities and political and economic trends.
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Scope

The aim of the Association of Studies, Research and Internationalization in Eurasia and Africa (ASRIE) is to promote international relations and business among Italy and foreign countries and further the study of and teaching on the geopolitical, economic, cultural and social characteristics of processes and developments in different areas of the world. The Association is the result of shared experience and knowledge by geopolitical analysts, journalists, businessmen willing to promote the intercultural exchange between Italy and countries in both the Eurasian Region and Africa, creating a link among the world of Business, Academy and Research.

The association's publication, *Geopolitical Report*, aims at investigating the current geopolitical and sociocultural events and trends which are shaping the world of international relations, business and security creating a debate by allowing scholars and professional experts to share their views, perspectives, work results, reports and research findings. One can submit manuscripts, analytical reports, critical responses, short articles, commentaries, book reviews to info@asrie.org. Information about the association's goals, activities, projects and publications which can be freely downloaded can be found on the website www.asrie.org.

Introduction

by Giuliano Bifolchi[1]

The Belt and Road Initiative (BRI), also well-known as the New Silk Road, interests the Eurasian continent with the purpose of improving commercial trade and human interconnection. Since China launched its strategy in 2013 Beijing has invested a huge amount of financial resources to improve the economy, security and stability of those countries interested by the BRI. Therefore, the People's Republic of China has become one of the main investors in the infrastructural development projects in Europe, Asia and Africa aiming at creating a secure economic and political environment.

The Association of Studies, Research and Internationalization in Eurasia and Africa (ASRIE) decided to analyse the BRI and its security issues, investment opportunities and geopolitical implications because we believe that Beijing's strategy can heavily impact the Eurasian dynamics changing current political alliance and balances and opening new markets to foreign investors.

Since 2013 the Italian government has shown its interests in the BRI because thanks to the 21st Century Maritime Silk Road Italy can use its geographical position in the middle of the Mediterranean Sea to play a decisive role in the Mediterranean maritime and trade market. The Italian goal is to attract Chinese and foreign investments in the maritime and port sectors to transform the Bel Paese in a logistic and commercial hub which will connect Europe, Asia and Africa and boost the European – Chinese trade.

The BRI might have a significant positive impact on the Italian economy but can change the geopolitical balances in Europe and the Mediterranean area. For this reason,

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the European Union and the United States look suspiciously the Chinese strategy labelling the New Silk Road as Beijing's strategy to control the entire Eurasian area and influence the international arena. In fact, since the Modern era, Eurasia has been the theatre of confrontation between great empires before and superpowers later to control this region and 'decide the destiny of the world'. Political thinkers, scholars, geographers and politicians such as Sir Halford John Mackinder in his *Heartland* theory, Nicholas Spykman in his *Rimland* theory and Zbigniew Brzezinski highlighted the centrality of Eurasia in the field of geopolitics and military strategy.

In the 19th century, the Tsarist and the British Empires clashed in a political and diplomatic confrontation over Afghanistan and the neighbouring territories in Central and Southern Asia described by Captain Arthur Conolly (1807 – 1842) as 'The Great Game'. Also, in the 20th century, Eurasia was the target of the Great Game between the United States and the Soviet Union which culminated in the Soviet-Afghan War (1979-1989) and ended with the collapse of the USSR.

In the 21st century, it is possible to state that we are experiencing a new confrontation to control the destiny of the world not only by military means but especially through economy and business. In this context, the New Silk Road and those countries interested by Beijing's strategy might represent the new battleground where trade agreement, oil and natural gas pipeline, and foreign direct investments (FDIs) are becoming more and more decisive and fundamental in the clash among the West, Russia and China.

In this international competition, it is not possible to forget the vast impact of terrorism, ethnic tensions and conflicts which are the biggest threats to countries' stability and security and the final success of the BRI. Indeed, the New Silk Road interests the Middle East, North Africa, the post-Soviet space, the Sub-Indian continent and South-East Asia which have experienced an increase of radicalisation process, terrorist attacks and geopolitical confrontations among states.

In 2014 the world witnessed the rise of the Islamic State that aroused as the biggest threat after a more than a decade characterised by al-Qaeda's terrorist attacks.

Although nowadays it seems that the international coalition forces and local governments defeated the Islamic State and the fall of Mosul in Iraq and Raqqa in Syria might support this theory, foreign fighters and *jihadist* propaganda still represent a threat to the international security and a solid obstacle to the success of the BRI. Recent studies have demonstrated that there is the risk of a convergence relationship between terrorism, organised crime and illicit trafficking in a unique entity which can become the predominant factor of instability among the countries of the New Silk Road.

The incomplete modernization process in the Eurasian and African regions, the external influences by foreign governments and international companies because of geopolitical and strategic reasons, the rise of terrorist groups due to domestic and socioeconomic problems and ethnic conflicts, organised crime and illicit trafficking and their link with the international terrorist networks are among the main threats and future challenges for the BRI which Beijing should consider, manage and contrast for the success of this strategy.

The first volume of Geopolitical Report of this year has the purpose to describe the BRI analysing geopolitical factors, security issues and investment opportunities thanks to analysis and consultancy of Italian and foreign experts and scholars.

Professor Ambrish Dhaka in his paper *The Belt and Road Semiotics and Its Geopolitical Pivot* describes the Chinese strategy as the representation of the bipolarity in the Mackinderian *Heartland* model. In this context, the role of BRI in linking Europe and Asia has both geopolitical and geoeconomics implications and might support Beijing and Moscow's attempt to reduce the US influence and predominant role in the international arena and the affirmation of a multipolar world.

Emanuel Pietrobon *The Belt and Road Initiative and the Xi Jinping's dream for a Chinese-centered Eurasia: a perspective from the United States and Russia* analyses US and Russia attitudes over the New Silk Road which threatens Washington and Moscow's foreign strategies and goal to become respectively the major player in the Eurasian region. In this regard, the Trump administration is trying to contrast the Chinese expansionism and the BRI by containment strategy while the Russian Federation is still deciding if fall in the Chinese orbit but have the economic benefits or try to preserve its role and influence in Eurasia and contrast the New Silk Road through the Eurasian Economic Union.

Professor Chen Xiaoding from the Belt and Road Research Centre of Lanzhou University in his analysis titled *Approaches Forward for Shanghai Cooperation Organisation's Participation in the Silk Road Economic Belt* underlines that although the BRI fits with the development concept of the Shanghai Cooperation Organisation (SCO) the current cooperation mechanism of the SCO should improve, consider the interests of Central Asian states and integrate the interests of India and Pakistan. In this approach, it is essential better coordination of the relationship between the New Silk Road and the Eurasian Economic Union which should cooperate and integrate their interests.

Daniele Garofalo in *La Nuova Via della Seta e l'espansione nel Corno d'Africa* focuses the attention on the important strategic role of the Horn of Africa for the BRI. This region is a key target for China whose major involvement might lead to a geopolitical confrontation with international players interested in the local natural resources and terrorist organisations involved in violent attacks, piracy and illicit trafficking.

Fabio Tiburzi in his paper *Italia, Cina e la Nuova Via della Seta* explores the Sino-Italian relations along the New Silk Road. Beijing's strategy represents an interesting opportunity for the Italian economy because the Bel Paese might exploit its geographical position in the middle of the Mediterranean Sea to attract Chinese and foreign direct investments (FDIs) in its maritime and port sectors to finance and develop infrastructural projects and become a logistics and trade hub among Europe, Asia and Africa.

Mattia Baldoni presents the case studies *Turkmenistan: le rotte del gas tra Cina, Russia ed Europa* describing the potential role which the Central Asian republic of Turkmenistan can play in the energy market thanks to its oil and natural gas resources. Turkmenistan is part of the 'Great Energy Game' which mainly interests Central Asian and the Caspian Sea basin and opposes Brussels, Moscow and Beijing and different energy projects such as the so-called TAPI pipeline (Turkmenistan-Afghanistan-Pakistan-India), the Southern Gas Corridor (SGC) and the Transcaspian Pipeline (TCP).

Yulia Prokopenko from the law firm Revera dedicates her paper *Investment opportunities in Belarus on the New Silk Road* to China-Belarus ‘Great Stone’ Industrial Park that is considered one of the most attractive regimes for FDIs on the New Silk Road in Eastern Europe. This economic zone emerges from the others because of tax and customs preferences, infrastructures, and the government supports foreign companies interested in investing or operating in Great Stone.

Sagira Tulesheva concludes our publication dedicated to the BRI with her study titled *The Internet as a tool in terrorists’ and extremists’ hands. How does Kazakhstan counter this phenomenon?* dedicated to counter-terrorism strategies and measures in the Central Asian republic of Kazakhstan where the Chinese government has paid special attention to investing financial resources and supporting national development projects. The Internet is ‘the land of *jihadist* propaganda’ and the experience of Kazakhstan might show how to eradicate terrorism and contrast the recruitment process.

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The Belt and Road Semiotics and Its Geopolitical Pivot

by Ambrish Dhaka*

Abstract in English

The Belt and Road Initiative represents bipolarity in the Mackinderian Heartland model. This is a response by Russia and China to resist unipolar world order as sought by the US. The signification of the Chinese presence in Heartland was called a ‘yellow peril’ by Mackinder. China has shown the other side of coin by leading an economic initiative in heartland geopolitics that is good enough to signify its presence as ‘blooming dandelions’. The role of BRI in linking Europe and Asia has both geopolitical and geoeconomics implications. Russia has been emerged as co-host to BRI geopolitics and is riding the initiative in creating its own long-term niche in European order. The pipeline geopolitics has preceded the BRI geopolitics and hence China has worked out its rules of engaging the West based on those experiences. The strategy adopted by Russia and China could be seen as defensive-offensive realism where China’s economic offensive and Russian defence against NATO advances are working in tandem. The US has tried to increase the cost ratio of this alliance by doing away several arms treaty that held the cold war détente. The geoeconomics of Heartland is being calibrated by Russia and China to reduce that cost ratio so that globally coplanar equilibrium with the West is maintained and peace becomes the dividend of heartland realism.

Keywords: China, Mackinder, Russia, Belt and Road Initiative, Heartland, geopolitics, US

Abstract in Italiano

La Belt and Road Initiative (BRI) rappresenta il bipolarismo nella teoria dell’*Heartland* di Mackinder. Questa è una risposta di Russia e Cina per resistere all'ordine mondiale unipolare voluto dagli Stati Uniti. Il significato della presenza cinese nell’*Heartland* fu chiamato da Mackinder ‘pericolo giallo’. La Cina ha mostrato l'altra faccia della medaglia conducendo un'iniziativa economica nella geopolitica dell’*Heartland* efficace abbastanza per giustificare la sua presenza nella regione. Il ruolo dei BRI nel collegare Europa e Asia ha implicazioni sia geopolitiche che geoeconomiche. La Russia è emersa come co-conduttrice della geopolitica della BRI e sta guidando l'iniziativa nella creazione di una propria nicchia a lungo termine nell'ordine europeo. La geopolitica del gasdotto ha preceduto la geopolitica della BRI e quindi la Cina ha elaborato le sue regole per coinvolgere l'Occidente sulla base delle esperienze geopolitiche precedenti. La strategia adottata da Russia e Cina potrebbe essere vista come un realismo difensivo-offensivo in cui l'offensiva economica cinese e la difesa russa contro i progressi della NATO stanno lavorando in tandem. Gli Stati Uniti hanno cercato di aumentare il rapporto di costo di questa alleanza eliminando diversi trattati sulle armi che hanno caratterizzato la distensione della guerra fredda. La geoeconomia dell'*Heartland* si sta calibrando quindi rispettando le volontà di Russia e Cina che cercano di ridurre questo rapporto di costo in modo che l'equilibrio globale con l'Occidente sia mantenuto e la pace diventi il dividendo del realismo.

Parole chiave: Cina, Mackinder, Russia, Belt and Road Initiative, Heartland, geopolitica, Stati Uniti

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The Signification of 'Yellow Peril'

Sir Halford Mackinder in the hubris of British Imperial system stretching from Cape through India to East Asia speculated the possibility of China's rise and its swaying westward influence over the Heartland as the 'yellow peril' in his famous 1904 paper, *The Geographical Pivot of History* (Mackinder, 2004). He mentions in his concluding remark about the chance of Chinese dominance over the meta-power structure, the Heartland. Mackinder wrote that the railways worked great wonders as they replaced the horse and camel mobility. The geographical dispensation of China in Heartland has provided an oceanic frontage to continental transport system that would connect numerous arteries running East-West in Eurasia from the Asia-Pacific economic hub to the European economic hub. And, it is no lesser corroborated by the statistics of the state-run China Railway Corporation that has run as many as 11,000 cargo trains to Europe since 2011. There are 34 European towns in 15 countries that are connected to the 35 Chinese towns on major routes of Chongqing to Duisburg, Zhengzhou, Shenyang and Changsha to Hamburg, Suzhou to Warsaw, Yiwu to Madrid, Daqing to Zeebrugge, Xiamen and Nanjing to Moscow, and Tianjin to Minsk. It takes only 16 days to ship container from Shanghai to Hamburg, which took 36 days before 2010. China has been able to subsidise the infrastructure costs for freight network with the large volumes of white goods sent to the European markets (Suokas, 2018).

The transport architecture being raised under BRI (Belt and Road Initiative) would have made Mackinder a happy man on seeing his prophecy coming true. The infrastructure symbolises China's economic power that is the bedrock for funding billions of dollars in the Eurasian transport infrastructure. Mackinder had been little obsessed with the vast Eurasian space and the spatial fetishism made him overlook the fact that it was not the extension of railroads that would make China a great power in Eurasia. The economic rise of China has been a priori for China’s ability to expand vast connecting network across Europe-Asia. One can surmise that it takes the economic and military might to gain a foothold in Eurasian Heartland. The Heartland is not the *in situ* economic and military power waiting for a suitable candidate to own it; as postulated by Mackinder. The centrality of land and the vast natural resources are functional only with the growth of the capable power rising to the occasion and the Sino-Russian cooperation in the post-Cold War period appears to be the measurable force of that quantum.

The East Turkestan posed enormous geographical and climatic challenge before China was able to conquer it with a relentless effort to raise infrastructure across Xinjiang, Tibet and Inner Mongolia. The Soviet Turkestan was comparatively better accessible, and the economic development of Central Asian republics attracted much attention from the West as a part of geopolitical strategy to cut it off from the Russian influence. The Russian steppes were the vast marshlands which dried over a period of time allowing communication across the Eurasian lands in an efficient manner (Kropotkin, 1904). The climatic conditions affected the settlements and it did not allow for growth of cities due to lack of water resources, but the same turned into advantage for modern day Belt and Road communication, which did not have to negotiate the vast swampy territories of 13th century Eurasia. Any attempt to cross-over such a terrain would have been economically prohibitive. The region's geo-cultural ontology is best described by S. Fredrick Starr whilst defining Greater Central Asia in terms of Eurasia. He points out to the three tier North-South arrangement of grasslands, deserts and the mountain ranges characterising Eurasian heartland giving rise to horizontally hierarchical nomads, vertically hierarchical oasis communities and the autochthonous mountainous tribes (Starr, 2008). This implies that Belt and Road runs along three different kinds of geographical terrains and three different kinds of peoples. An important geological process pointed by early 20th century geographers is the desiccation of Caspian region and Central Asia at large, which is often seen as the cause of nomads making forays into Europe (Holdich et al., 1904). If climate was the jeopardy that forced Asiatic nomads to reach out to Europe, then Belt and Road Initiative represents the contrast where it is the wealth, rich and human advancement paved foundation of a connection between two settled hemispheres. The southern mountainous tier of Eurasian Heartland bears particular relation with the phenomena of desiccation. The narrow valleys of Pamirs whilst moving from Kashgar to Tashkent could be crossed only because of reduced size of water bodies in these narrow and long stretches allowing rail and road infrastructure to be built. The semiology of vast lands has often been engaged in metaphoric binary of land and sea. Just as the ocean has no history, so do the vast Eurasian lands do not contain any epic volumes in it. But, just as the ocean beaches contain vast material telling myriad stories to the signification of vast material adrift to the shore; similarly the periphery of Eurasian lands have been the recipient of the Eurasian steppe influence and it is on that periphery the significance of peoples and cultures matter rather than dominant forms centred over the heartland.

Sir Halford Mackinder wrote, "A repellent personality performs a valuable social function in uniting his enemies, and it was under the pressure of external barbarism that Europe achieved her civilization" (Mackinder, 2004). This cardinal point in making or unmaking of a civilization sought to characterise the enemy saddled in the fortress of Heartland. The Russian and the Chinese are two distinct civilizations, but the trans-Atlantic consensus has tried to blend them into one character as some phantom phenomena of adversity unified by a common denominator. And, here came the vital value of democratization and human rights that could provide a common denomination against the authoritarian system of governance in Russia and China. Though, it is a different matter that when it comes to supporting the allies in the Middle East or Latin America, who need not qualify as a democratic humanitarian welfare state. One need not be surprise if the Mackinderian ghost is again raised to cultivate the fear of re-subordination of European history and future to the Asiatic history and future. However, at present the European Union is in discord with the very values of democracy and human rights whence faced with wave of migration and refugees from the Middle East that hitherto unified them in their secular struggle against the authoritarian regimes of Eurasia. Mackinder wrote in his famous 1904 paper, the geographical pivot of history, as concluding line stating that “were the Chinese…to overthrow the Russian Empire…they might constitute the yellow peril to the world’s freedom” (Mackinder, 2004). The political sociology of Chinese influence is significant on two accounts, first, the need to preserve the Russian isolation in its own Heartland so as not to allow it acquires the proportion of the nomads hammering the periphery. Secondly, the entire hubris of Western civilisation that was built over Greek and Roman past could only be comforted by preventing an Asian power from seeking dominance over the Mackinder’s Heartland; an area which he quantified as almost 21 million square kilometres. Mackinder to his disappointment should have known the strategic convergence of Russian and Chinese hemispheres as a secular response to the US-led Western undemocratic behaviour against these nations. Mackinderian Sinophobia is demolished by Repnikova and Gabuev in their article, who content that the myth of Chinese takeover is far from the reality. The fear is based on faulty premise that Chinese manpower and economic investments would complement Russian Far East and Siberia which is devoid of them. The Western media claims that by 2050 there would be 10 million Chinese in these lands. But the irony is that most of the economic opportunities are concentrated near the European periphery and most of the Chinese are living in the cities of Moscow, Saint Petersburg and not in Urals or Vladivostok (Repnikova & Gabuev, 2017).

Understanding the Mackinderian Great Game

The Belt and Road Initiative (BRI) can be deconstructed into two essential components. Firstly, the announcement of this initiative in 2013 under the acronym of One Belt and One Road (OBOR) revealed the consolidation of Chinese overseas investments that ranged from Southeast Asia, Africa to Central Asia. Secondly, the phenomena emerged as the integration of Chinese investments with its planning across Eurasia, which largely rested on increased connectivity towards its West. The twin policy of investments and connectivity created a unique scenario for development impetuous that generated plenty of awe and surprise with the rapidity and growth it happened. It would be difficult to view the Belt and Road as a hiatus from the past for the sake of establishing the novelty of idea and economic effort. The Belt and Road scheme act as a giant integrating time-space phenomenon across various Euro-Asiatic regions and most of the 17th to 20th century world politics centred over Europe and Asia. It is quite amusing to see when scholars try to see a giant scheme through the narrow lens of Great game and they fear the perception more than the reality. There are ample readings generated with a moniker, the ‘New Great game’ that has been used to identify rise of Great power politics and energy geopolitics in Eurasia particularly focussed on the New Central Asian States, the five ‘stans’. The Great Game was a peripheral phenomenon in southernmost part of the Mackinderian Heartland located around the Hindukush region that signified the importance of the Heartland. It revealed three major dimensions of Heartland geopolitics, 1) The Anglo-Russian rivalry, 2) Europe’s internal struggle for order, 3) Russian nationalism and its Asiatic roots (Edwards, 2003). These three formulations affected the peripheral regions of Heartland occupied by numerous mountainous tribes and nations such as, Iran, South Asian nations and Eastern Europe.

Russia has a long history of suffering from its western neighbours who blocked its access to the English and Dutch commercial and cultural contacts since the 16th century. The Dutch established a trading company after receiving a charter from Philip II to trade with Russia. The Danes were against the English and Dutch trading with

Russia. The Dutch traders did not prioritise political relations with Russia, unlike the English traders, who were interested not only in political relations but also the vast far Eastern lands of Russia. The English traders were able to secure political privileges with Ivan, the Terrible, but they had a limited capacity. One of the important differences in the Dutch and English trade was that the Dutch traded in multiple small companies or as individuals, whereas the English preferred to trade under a joint stock Company with a monopoly. One such single joint stock company was the Muscovy Company, which was given the monopoly of trade with Russia. One can conclude that the latter half of the 16th century was rife with intense competition between the Dutch and the English over the monopoly of trade with Russia. This could be seen as the sort of predecessor to the Great Game that was bound to descend over Eurasian land centuries later (Lubimenko & Lettres, 1924). The English discovered Russia from the North when a flotilla of three ships sailed towards the cost of Lapland. English were the first to explore new routes towards Russia in the second half of the 16th century. This was an imperative forced by the fact that South America was a Spanish monopoly and West Africa was under Portuguese influence, and India and China were far away then. Therefore, the Far North of Russia offered greater possibilities to the Englishmen. The Englishmen were complimenting the efforts of Moscow to reach out the West, hitherto prevented by the Baltic States and its Central European neighbours. In fact, the geographical embargo dated back to 1548 when 123 German craftsmen were stopped from reaching Russia, who went to join the service of the Tsar. Russia was truly living in isolation and cut off by the Central European powers and it was the White Sea which was a God-sent opportunity explored by the English to circumnavigate these barbed fences for the benefit of the English and the Dutch traders (Wretts-Smith, 1920).

The birth of Anglo-Russian rivalry in the latter half of 18th century could be attributed to the expansion of British East India Company’s control over India. The East India Company had already won two significant wars of Plassey (1757) and Buxar (1764) that allowed it to penetrate deep into South Asian heartland. This had given a great prestige and resources to the British who would no longer be keen look into trade priority with the Muscovy. The Russia had started annexing Caucasus under Tsar Peter I during Russo-Persian war (1722-1723) and under Catherine II when for the first time it was looking towards Asia after the annexation of Crimea from the Ottoman Empire in 1774. The collapse of Ottoman Empire in latter half of 18th century paved for the permanent rivalry between Russia and Great Britain. The focus of geopolitical order shifted from MittleEuropa to Russian Heartland. Russia became the twin inheritor of the geopolitical theatres. It commanded a significant influence over the continental order as shown by the crisis in 19th century Europe and at the same time also projected itself as the mentor of the large-scale geopolitical order across Europe-Asia after the conquest of Central Asian Khanates. Russia has played Great Game with a sense of defensive realism. They chose not to disturb the balance of power in Europe that would chance them to unite them against Russia. The Ottomans were weak but served as a buffer against the possible alliance by Britain, France and the Turks. The geopolitical fine balancing by Russia in 19th century paved for its successful advancement to Far East and Central Asia. Russia's ownership of Eurasian Heartland is the success of defensive realism it practiced in Europe (Rendall, 2006).

The pipeline geopolitics is a misnomer for defensive realism that Russia has mastered during the last two centuries. It knows that to operate like a hegemon in European order would isolate her. Therefore, a simple urge to provide oil and gas supplies to the energy scarce Europe through pipelines creates an indignant reaction in the Western capitals seeing it as a Russian trap. Russia offers from the position of strength which the EU states could not bargain individually. Hence, the collective approach to energy needs is proving to be a daunting task given the diversity of geopolitical conditions as one can see the contradictions of France and Germany over the Nord Stream 2 project. The Nord Stream 2 is a classic case of European chaos against the Russian geopolitical imperatives. Germany feels isolated amid opposition from Romania, Poland and France to the Russian energy supplies (Geropoulos, 2019). Russia has planned another pipeline to Italy via Greece and Black Sea that is Turk Stream to bypass the East European black mail at the behest of the US, who has its protagonists in Ukraine, Romania and Poland. The European house is in disorder on issues such as migration, refugees, Brexit and sanctions against Russia. Finally, the Russians citizens have changed position from moderate to become strong supporters of Putin as there is increasing effort to isolate Russia. The Crimean merger has also proved that Russia would put its foot heavy to deter the West's advances of NATO or the missile defence. The New Great Game of pipelines still inherits the classical concerns held two centuries ago. If one would apply Rendall's three parameters to the oil geopolitics, then it is not difficult to see that oil geopolitics reveals perpetual fetishism of the US-led West with the Eurasian Heartland. The US has now assumed the role of the erstwhile British Empire and it is bent upon preventing Russia to increase its oil and gas supplies to Europe as a means of securing influence.

Belt-Road's Defensive-Offensive Realism

The Belt and Road driving the heartland geopolitics represents a unique situation where given the newfound synergies of Russia and China reveal enormous potential that lies within the region to seek paramount status. This is limited by the bi-polarity of the Heartland statehood constituted by Russia and China who have come together for governing the region. Thus, the all-powerful Heartland shall remain short of monopoly of a single state if at all it is to retain its greatness. The collective approach to fend off the US's global dominance itself creates a structure of limitations where Russia and China must curtail their own ambition of offensive realism in Eurasia. Therefore, it is apt to say that Defensive-Offensive Realism of Russia and China is the Core-Periphery Realism in terms of Heartland modelling of realist paradigm. And, the Belt-Road Geopolitics is an example of Core-Periphery realism in Euro-Asian space running from Atlantic to Pacific. The realists have visualised various situations of power maximisation by the states amid universal perception of anarchy. Their most favoured bi-modal approach is about the international order as a unipolar world favouring the offensive realists or at the other end a rather hierarchical one suiting to the defensive realists. Mearsheimer contented that hegemony prevents the rise of potential hegemons (Snyder, 2002). The US tries to globalise its hegemonic system with allies, but at the same time faces the limitation due to peer competitors and the regional adversaries who would like to overthrow the US hegemony.

Russia has acted as a custodian and tweaked the Heartland model only in response to the global challenge posed by the United States and its influence over Europe that affects the Euro-Asian space. It is ironical that Mackinder did not see China collaborating with Russia in the region albeit feared the Chinese assuming the status at the cost of the weakened Russian state. This is quite in contrast to his surmising that Germany might join Russia in creating an all-powerful Heartland state. Destiny proved the opposite where in the Second World War Germany tried to overpower Russia, whereas the Chinese in the aftermath of Cold War only extended their hand to join Russia in creating Eurasian space. The defence of Heartland is the dialectical outcome of the rise of Heartland, which is seen as an offensive act by the West since British imperial times. This unique interaction of offence-defence (albeit defence-offence) geopolitics explains the unique status of Eurasian space. This underscores the binary of military versus economic, political and technological force defining the defence-offence structure of Heartland geopolitics (Quester, 2002). This also includes the peoples of the Eurasian space and near periphery that are potentially affected by the dual nature of contest. The western periphery of Heartland has witnessed military manoeuvres during the past century that has affected many peoples' lives. This is quite in contrast to the events unfolding now on the eastern periphery, where most of the action is governed by technological, economic and political interests and has affected the lives of many peoples' but in an entirely a different manner. One consequence of this has been the shifting of the geopolitical pivot towards Asia as the military deterrence on Heartland's western periphery has limitations over time, something the second type of momentum does not have. Mackinder collated the rise of mobility with the impetuous for a military offensive. But, the Belt and Road defies that logic with almost the entire mobility structure raised to cater the economic momentum.

The Belt and Road Offensive can also be qualified as China's charm offensive based on its experience of Asia-Pacific while dealing with the U.S. effort to curtail its rise in the region. Leaf tells that China has been using these tactics in South China Sea with a calibration of offering loans and economic infrastructure to the parties in disputed territories. China has offered to better military ties with Vietnam and offering financial aid and infrastructure through the Maritime Silk Road (Leaf, 2014). Wang furthers this hypothesis explaining the rationale behind the necessity of Belt-Road charm offensive. China needed the strategy of offensive realism to secure against its growing energy needs under rising economic growth and an increasingly hostile environment of maritime communication. The Belt-Road became an offense-defence of interest to work with Russia in securing its needs. China's excess economic capacity and accumulation of foreign reserves have been pivotal to functionalisation of this initiative. Russia got the suitable opportunity it needed to transform China's Belt-Road offense-defence into defensive-offensive realism in order to safeguard against the NATO aggression and at the same time incentivising the economic development of Eurasian heartland with the Chinese initiative. Therefore, one more conclusion can be drawn is that what caters to China as an offensive approach actually feeds into Russia's defensive approach.

Europe has become the pampered child of Eurasian Sino-Russian defensive-offensive realism. It now receives trains loaded with Chinese toys, fashion toiletries, dresses apparels, electronic items all from the Chinese industrial towns. And, at the same it is receiving generous shipment of natural gas from Russia both north and south ways. The Nord Stream 2 and Turk Stream once completed would fully satisfy its energy needs. This sounds like harbinger to the concert of Euro-Asia, a successor to the concert of Europe. It becomes clear that the security dilemma of great powers is bound to increase, if one goes by the tenets of Jervis, the proponent of Offense-Defence theory (Glaser & Kaufmann, 1998). The arms race would increase on both the frontiers of Heartland, namely, the Eastern Europe and now the Asia-Pacific as the oceanic frontage has been added by China's consociation ownership of heartland geopolitics under the Belt-Road initiative. This is more evident in the policies of the UK and the US who see the Belt-Road twin realism a creeping threat to their paramount position. The offence-defence is defined as a ratio of the cost of the attacker to take the territory to the cost of defender's forces. However, in a nuclear strategy these costs are meaningless with a mutually assured destruction by both sides effectively wiping out the influence of international alliance and first-move advantage. Glaser believes that the cost ratio can be shifted within that constraint by the size of forces, accumulation of resources and nationalism. The cost ratio increasing in favour of offense would lend an arms race and heightened security dilemma. The only way to bring down this cost ratio is the increase the defence capabilities by economic and technological growth. Russia and China have been calibrating the Mackinderian Heartland geopolitics by covering the gap between offense and defence through Belt and Road Initiative primarily. Glaser also includes military capabilities to succeed and skill level together with the growth of military technology. The Heartland has demonstrated unique degree of parallelism in developing military technology both by Russia and China to counter the West.

Conclusion

The signification of Chinese presence in Eurasia as the future threat points to the apprehension of creating a dominant Asian order that challenges the trans-Atlantic order. Russia fully acknowledges this threat perception and has chosen to play truant to the European interest in the event of such proximal situation. Peace is the bonus of Heartland geopolitics and advantage with the Defensive-Offensive Realism as practiced by Russia and China. Russia hard learnt the lesson that whenever it desired to peacefully coexist with the West in return actually contributed to the heightened offensive realism of the West. All through its history Russia has been an ally to the West in its Europe’s wars against Sweden (1655), Prussia (1756), Napoleonic France, and the two World wars. The disillusion with the West forced periods of isolation upon Russia that allowed to seek her internal strength (Tsygankov, 2012). The Belt and Road salvages Russia from this predicament for the first time in its geopolitical history. The abandonment of Intermediate-Range Nuclear Forces (INF) treaty by both the US and Russia signifies the desire to clear the obstacles to the renewed arms race. This is again a step by the US to increase the cost ratio in favour of offense to counter the heartland geoeconomics that increases the defence imperative with ever more integration of Europe-Asia. But, containment of Russia (USSR in cold war period) was different than breaking Russia and China partnership in post-cold war period.

The Belt and Road Initiative has also engaged the Silk route history in its lateral connect with what is known as Mackinder's Inner Crescent. The connectivity with Gulf and West Asia is one such significant linkage. The second important connection lies with the Mediterranean and the Eastern Europe. These are also the converging points of China's Maritime Silk Road; though hard to understand the rationale of Chinese calling maritime linkages as a 'road'. These lateral land bridges have now become Heartland's super highways to reach out the Inner and Outer periphery of Makinderian geopolitical order; though there are few flash points. South Asia and the Northeast Asia remain volatile that present a challenge to peace on the heartland periphery. The great powers once having reached the equilibrium of their cost ratio would perhaps prevail upon these regional conflicts in order to bring them in sync with the global harmony. The Belt and Road would prove to be a facilitator of geopolitical balancing at multiple scales if it remains engaged in weaving economic linkages as unhindered pursuit. And, the major transition would be visible if a southern oceanic frontage is created in Arabian Sea for the Mackinderian heartland through the Belt and Road Initiative.

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The Belt and Road Initiative and the Xi Jinping's dream for a Chinese-centered Eurasia: a perspective from the United States and Russia

by Emanuel Pietrobon*

Abstract in English

The Belt and Road Initiative, also known as the New Silk Road, is the most important geoeconomic strategic vision ever developed and it is expected to reshape the international relations and the America-centered liberal world order once completed. The national interests of Russia and the United States are both threatened by the scenario of a Sinocentric Eurasia, but to date they have been responding in a different way to Beijing's hegemonic plans. While the Trump administration is trying to undermine the Chinese expansionism and the BRI by means of a Soviet-modeled containment strategy, Russia's economic weakness is being exploiting by Beijing to extend its hegemony over Moscow's natural spheres of influence. Between the Xi Jinping's dream of a China-run Eurasia and its realization there are two unknown factors: the successful policy line launched by Donald Trump aiming at resizing the world power projections of Beijing, and the role that Russia wants to play in the future over the continent, namely if it still wants to be an autonomous and powerful major player or if it wants to fall definitely in the Chinese orbit and become a marginal player.

Keywords: Belt and Road Initiative, China, Russia, United States, Eurasia

Abstract in Italiano

La Belt and Road Initiative, anche conosciuta come la Nuova Via della Seta, è la più importante visione strategica di natura geoeconomica mai sviluppata e, una volta completata, rimodellerà le relazioni internazionali e l'ordine mondiale liberale americano-centrico. Gli interessi nazionali di Russia e Stati Uniti sono minacciati dallo scenario di un'Eurasia sinocentrica, ma ad oggi stanno rispondendo in maniera diversa ai piani egemonici di Pechino. Mentre l'amministrazione Trump sta tentando di minare l'espansionismo cinese e la BRI attraverso una strategia di contenimento simile a quella usata per l'Unione Sovietica, la debolezza economica della Russia viene sfruttata da Pechino per estendere la sua egemonica su sfere di influenza naturali di Mosca. Tra il sogno di Xi Jinping di un'Eurasia a guida cinese e la sua realizzazione pesano quindi due incognite: il nuovo corso politico inaugurato da Donald Trump, mirante al ridimensionamento della proiezione di potere globale di Pechino, che sta avendo successo, e il ruolo che la Russia vuole giocare nel futuro del continente, ossia se continuare ad essere un attore di rilievo, autonomo e influente, o cadere completamente nell'orbita cinese e trasformarsi in una voce marginale.

Parole chiave: Belt and Road Initiative, Cina, Russia, Stati Uniti, Eurasia

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Introduction

In 2012 Xi Jinping popularized the term “Chinese dream” in one of his first public speeches addressed to the nation after becoming General Secretary of the Chinese Communist Party. On the way to make this dream real, under the Xi era have been announced a series of incredibly ambitious projects aiming at converting the country into a global superpower present in every continent with spheres of influences conquered through the economic penetration tool.

Two projects are the most noteworthy: Made in China 2025, a strategic plan aimed at upgrading of Chinese industry in order to produce higher value goods and services able to compete with the ones produced in Western industries, and the Belt and Road Initiative (BRI), also known as the New Silk Road.

The BRI is a multidimensional development strategy announced in October 2013 by Xi Jinping with the purpose to build a Chinese-centered Eurasian trade network through an estimated US$ 4-8 trillion plan of investments in infrastructure corridors crossing more than 70 countries in Asia, Europe, part of Eastern Africa and part of Oceania.

The BRI has received mixed welcoming: on one hand it is seen as a great opportunity for those underdeveloped and developing countries which lack the necessary capital to develop autonomously well-working critical infrastructure networks, on the other hand the United States has perceived it as a way to build a giant and dangerous hegemonic area in Eurasia and accordingly it has responded through an increasingly overwhelming international pressure over Beijing on several spheres, most notably a long-scale trade war since 2018, a renewed interest for Central Asia and Indo-Pacific in form of both investments and interferences, and a call to boycott the Shenzhen-based tech giant Huawei Technologies.

The road towards the realization of the Chinese Dream is long and plenty of obstacles, and the anti-Chinese containment launched by the Trump administration aims at affecting Beijing's capabilities to uphold its first hegemonic effort.

On the background of the trade war and the raising concerns coming from the European Union and some Asian countries about the debt trap diplomacy and Chinese control over critical infrastructure networks, China is also facing the entering of Central Asia in a new season of the never-ending Great Game which poses a direct threat to its multi-billion investments owing to proxy wars, terrorism, Islamist insurgency and geopolitical instability.

In this conflictual context, the present and future standings of a very important third key player could make the difference and help win one of the two sides involved in this hegemonic race: this player is Russia.

Putin's Russia and Xi's China seem to have common plans and shared interests for the continent, and the whole world, and have been building a multi-sector strategic partnership active on a wide range of issues: diplomacy, economy, energy, international relations, regional security, know-how transfer, space exploration, trade.

But the effective realization of the BRI could act against the long-term interests of Russia because it would establish a China-centric Eurasian order with projections of power on a global level, and the economic and geopolitical consequences would be so deep that Moscow could hardly face them due to the demographic winter, its structurally weak economy, the abysmal distance in financial capacities, and the constant military pressures coming from NATO and other neighbours.

If Russia supports the BRI, it must take into account that its power projections over Eurasia will lower considerably in absence of a serious counter-initiative aimed at protecting its own natural hegemonic sphere over the former Communist world. At the same time, a common vision for Eurasia in which each side acts cooperatively according to a *divide and impera* policy may help both countries to marginalize the US presence to the outskirts and eventually finalize the long dreamed de-Americanized multipolar world order.

The Chinese dream against the American century

The BRI represents an existential threat for the American Grand Strategy for Eurasia because, if completed, it would create a China-centered trade network covering more than 70 countries which together host 70% of world population, 55% of world's GNP and hold 75% of world natural resources.

In the countries touched by the BRI, Beijing is being involved in multi-billion-dollar investments for the acquisition and the control over strategic assets and critical infrastructure networks. These investments are accompanied by massive loans that smaller and poorer countries are unable to refund and accordingly fall into the debt trap, and then become part of Beijing's influence sphere.

Loans and investments are being used as tools to penetrate in areas of geopolitical interest for the United States and the underestimation of such BRI-related risks during the Obama era has pushed the Trump administration to list the anti-Chinese containment among the top priorities for national security and to start a long-scale pressure campaign aimed at affecting quickly and hardly the Beijing's capabilities to finalize the BRI and at slowing down a further expansion in the European Union, in Central Asia, in the Middle East and in Africa.

On the background of the development of the New Silk Road, since some years Beijing has been strengthened its military presence in the Indo-Pacific region, as shown by the South China Sea militarization through manmade islands used to deploy weapons and naval forces. In this way, China is slowly marginalizing in the Rimland the presence of the United States and other rival powers like Japan and India.

Washington has the financial and military means to confront this hegemonic challenge, but it has to face with the severe loss of credibility recorded in the Muslim world in the post-9/11 due to the War on Terror, the Arab Springs, and the US-backed regime changes and coup attempts.

China took advantage of this anti-American revival and presented itself as a profitable partner interested only in doing business and trade and this kind of soft power diplomacy worked. Indeed, it was the US policy that pushed countries such as Iran, Pakistan, and Afghanistan in the Chinese influence sphere and it will be hard to invert a trend begun silently about a decade ago.

Trump's strategy for China seems being modelled on the successful anti-Soviet containment of the Cold War and it is based on the combination of military, economic and diplomatic pressures.

The US withdrawal from the INF Treaty and the recent birth of the Space Force work in the same direction: pushing China into an expensive and hardly sustainable arms and space race in order to bring the country to reduce the resources available for the BRI.

The most notably economic pressures which have entered into force are the long-scale trade war launched in January 2018, the upgrading of the Quadrilateral Security Dialogue, and the establishment of the US International Development Finance Corporation (USIDFC).

The trade war was started with the official aim to solve the Chinese alleged violations of international trade system and other practices related to the theft of intellectual property and unfair competition and to reduce the trade deficit with China.

Initially the United States imposed tariffs on a series of goods, such as solar panels, washing machines, steel, and aluminium, without targeting a specific country but covertly addressed to China considering it is one of the largest exporters of the above-mentioned. Later the same year were gradually implemented tariffs worthy about $250 billion on Chinese goods, China responded with tariffs on American goods worth about $110 billion.

Although the two countries have reached a temporary truce waiting for an official agreement aimed at renegotiating the bilateral trade terms, more recently the United States has opened a new battlefront against the Shenzhen-based tech giant Huawei Technologies.

According to the United States, the smartphones produced by Huawei are designed to enable unauthorized surveillance and taking in consideration the links between the company and the Chinese government and the People's Liberation Army it would exist a concrete risk of massive espionage against the users. For the above-mentioned reason the United States has invited its Western allies to boycott the company and ban it from participation in the building of 5G networks.

To date, Australia and New Zealand banned Huawei from providing 5G technology, while in the European Union there is an ongoing debate on the same issue and Germany, Poland and Czech Republic are expected to follow the same direction.

Furthermore, on 1 December Canadian police arrested Meng Wenzhou, chief financial officer and daughter of Huawei's founder, at the request of the United States because accused of doing business dealings with Iran despite the sanctions. She was released on $10 million bail a week later and now faces possible extradition in the United States.

The next month, Polish authorities arrested Wang Weijing, Huawei's communications director for Poland, and a former security official, both charged with spying. Later the same month, the government called for the EU and NATO to take a joint stance on the company in relation to security concerns emerged.

Another important part of the anti-Chinese containment is the removal of as many countries as possible from Beijing's orbit by means of the economic diplomacy. According to the new strategy for the Indo-Pacific announced last July by the Secretary of the State Mike Pompeo, the United States is set to increase its economic presence in the region in order to provide alternatives to the countries which do not want to take part to the BRI.

For this purpose, the following October has been set up the US International Development Finance Corporation (USIDFC), a new agency involved in investments on technology transfer, energy, infrastructures, primarily in developing countries of Asia and Africa.

In less than one year since the entering into force of the first official sanctions addressed to China, Trump administration succeeded into weakening both the Chinese economy, hitting the growth of the manufacturing sector, and the credibility of its power diplomacy, spreading globally the public concerns about the debt traps for developing countries and those about Huawei in the West.

The ensemble of these actions, to which others will follow, is expected to limit Beijing's capabilities to expand furtherly – but only if China won't elaborate an adequate counter-strategy.

Why the Moscow-Beijing axis could not last forever

The collapse of the Soviet Union has profoundly shifted the balance of power in international relations in favour of the West and reduced significantly Russia's sphere of influence both globally and continentally.

Despite the socio-economic progress made in the post-Eltsin era by Vladimir Putin, the Russian economy continues to be characterized by the same contradictions that have historically undermined the success of the hegemonic attempts made during the tsarist and the Soviet eras. The export of military technology and natural resources has proved useful to date but in the long run must be built a highly diversified economic system and able to withstand economic pressures coming from outside.

The transition to this type of system has already begun as evidenced by the expansion of the agricultural and industrial sectors and by the attempts to reach a semi-autarkic self-sufficiency condition in the strategic sectors. But the target of fortifying the Russian economy is obstructed by two issues: the military pressures coming from the US-EU bloc relatively to the expansionism to the East of NATO combined with the war in the Donbass, and the Chinese competitiveness.

Since some years China and Russia have built a solid multi-sector strategic partnership with the purpose to work together to accelerate the transition from a US-centered order to multipolarism. Both countries have recently started parallel but complementary projects of economic integration aimed at extending their spheres of influence in Eurasia: Beijing's BRI and Moscow's Eurasian Economic Union (EEU).

The EEU is a political and economic union established in 2015 by Russia, Belarus and Kazakhstan, which currently includes also Armenia and Kyrgyzstan. The potential transformation of the EEU in a super-state designed on the EU model could allow Russia to play a more important role in the continent affairs, and the participation of the member countries to the BRI at a first sight would help Russia to share with China the financial efforts to bring growth and development in the union.

In the next years a huge free trade area is expected to be established as a result of a bilateral agreement signed between China and EEU in May 2018. This agreement is a part of a wider plan aimed at tying the EEU with the BRI as outlined more times by Putin and Xi.

According to Chinese Premier Li Keqiang the bilateral trade between Russia and China is growing at a 30% annual rate and has been overtaking that of Beijing with the EU. The free trade area will accelerate this trend and make China and Russia closer than ever.

On the background of these actions, Beijing is investing billions of dollars in Russia, particularly in Siberia and in the Arctic region, as a part of the BRI. Last June, Vnesheconombank (VEB) received a $10 billion loan from the China Development Bank (CDB) to fund infrastructure projects in the country and in the EEU and they signed a framework agreement to cooperate in the funding of 70 projects, mostly in the Arctic.

It is exactly the Chinese interest for the Arctic, a region plenty of natural resources whose exploitation will be completely possible in the next years owing to climate change, which could represent one of the most important reasons of friction with Russia in the future. According to Beijing's Arctic policy released on January 2018, China sees itself as a “near-Artic state” willing to take part cooperatively with all the other Arctic countries in the development of the region.

As in the rest of the continent, Beijing has approached Russia with the tool of the investments and with a profitable trade proposal: the development of the so-called Polar Silk Road. In Beijing's vision this proposed route will allow reducing the shipping times from Shanghai to Rotterdam of about a week in comparison with the current mandatory Malacca-Suez route.

In order to pursue its Arctic policy, Beijing has invested $13 billion in the Yamal LNG, a liquefied natural gas plant, through the CDB, the Export-Import Bank of China and the Silk Road Fund; the last one purchased 9,9% stake.

The Western sanctions pushed Russia in Beijing's orbit due to the Moscow's extreme need of considerable capital injections into its stagnant economy and now the country must face the emerging issue of the excessive presence of Chinese players in strategic sectors and regions where exclusively Russian control is matter of national interest and national security.

Furthermore, despite the widely publicized participation of Russia to the BRI as a diplomatic success and an important step to the building of the Putin's Greater Eurasia Project, the country is set to be touched barely by relevant billion-dollar investments. In fact, the most noticeable achievements are only three: a $400 billion gas deal between Gazprom and CNPC, the Western Europe-Western China highway, and the Silk Road Fund investments in Sibur and the Yamal LNG.

Moreover, China-watchers in the Kremlin are catching on the perception of an excessive Chinese protagonism within the Russian borders and the scepticism on the effective economic effects related to the development of the BRI.

But Beijing has expansionistic ambitions also over the Russian Far East, another geopolitical region plenty of natural resources in which Russia has its only warm port in the Pacific: Vladivostok. The region is sparsely populated, and the government's tries failed to attract citizens and entrepreneurs in order to avoid a dangerous depopulation. This critical situation pushed Moscow, again, to open the doors to both Chinese investments and workers, sparking up anger among citizens and strategists. To date, Chinese money accounts for 45% of the total foreign investments in Khabarovsk, the regional capital.

The gas and oil deals signed with Russia are expected to help the nowadays resource-hungry China to secure its energy and industry requirements for the next future, but once the BRI and all the other development plans part of the Chinese dream will be completed Beijing will be able to hegemonize autonomously the continent owing to an intercontinental network of satellite states and strategic partners.

The hegemonization will be possible also because after decades of buy-and-copy policies now China is gradually becoming a world arms supplier and is set to become a nuclear energy supplier. While large part of the exports is directed to the BRI's countries in Central Asia and in the Middle East, the nuclear policy is expected to lead to the building of 30 nuclear plants in the BRI by 2030.

Indirectly, Moscow is helping Beijing to realize the Xi's dream of a China-centric Eurasia due to the military tech transfers and the collaboration in developing nuclear technology. The consequences of this weakness moment will be as deep as the economic penetration in strategic sectors. Indeed, not only arms and energy exports are the most important budget items for Russia, but they are also two geopolitical tools used historically to build and consolidate spheres of influence – particularly it is the energy that creates a relation of energy dependence between Russia and the energy consumer country.

For all these reasons Russia should fear the realization of the BRI as currently conceived because it will help spread the Chinese presence within its borders, in particular in the Arctic and in the Far East, in its natural sphere of influence, that is the post-Communist Central Asia, and because it challenges directly the Russian policy for the Middle East.

Conclusions

The BRI represents at the same time the most ambitious geoeconomics strategy ever developed and the major threat for America-centered liberal international economic order. Indeed, once completed the BRI will cover and connect more than two-thirds of the global population and it will shape deeply the relationships between Beijing and all the participant countries facilitating and accelerating the transition toward a Sino-centric world order.

Both the United States and Russia are aware of the geopolitical risks that could bring the effective realization of the BRI in relation to their respective grand strategies for Eurasia, but to date they are acting in different ways.

The US is not exposed to the same economic pressure experimented by Russia, whose military power is not counter-balanced by a strong economy, and accordingly it is in the position to challenge directly China with a muscular policy.

Trump's offensive against China can work in the short run but is doomed to fail in the long term because the simultaneous military pressures on Russia and Iran and the diplomatic failures in Afghanistan and Pakistan have pushed these geostrategic important powers in Beijing's orbit. The increasingly closer multi-dimensional partnership among these countries is unlikely to lead to the emerging of an anti-hegemonic coalition but it represents a considerable obstacle for the US expansionistic plans in the region.

Instead of this counter-productive muscular policy, Washington should cooperate with Beijing and work with its allies and partners to reshape some BRI's features in order to make the future trade network more profitable for each part involved and de-escalate ongoing diplomatic, trade and military tensions that are threatening the global financial stability.

With a realistic approach to the Chinese issue, the US is likely to secure its interests in Eurasia and deal with Beijing for a mutual understanding for what concerns the respect over the reciprocal spheres of influence.

Russia faces a different situation because of its geographical proximity with China and the gradually emerging of a dangerous dependence from Chinese investments in its stagnant economy hit by the Western sanctions.

The friendly partnership formed by Xi and Putin aims at the reshaping of the world order and since now has proved to be working on a wide range of issues, but things are likely to change due to Beijing's hegemonic ambitions over Central Asia, Middle East, and Arctic region.

Furthermore, in the next decade Beijing is set to emerge as a global player in the arms trade and energy supply and a future competition in these domains could damage profoundly the pillars of the Russian economy. In such a scenario, Russia would cease to be a major player to convert into a Chinese-dominated regional power.

The only way to avoid such a scenario is the development of a strategic vision both for the country and the continent equally farsighted as the Chinese dream. Putin's Great Eurasia Project announced two years ago is a sign of awareness and acknowledgment and it could allow the country to pursue its own dream of a Russian century on the condition of a wise combination of diplomatic and economic strategies.

This combination has to include the strengthening of the EEU and its possible conversion into a real sovereign super-state, the re-establishment of qualitatively high relationships with the West and a serious effort to make the national economy more diversified and less dependent on arms and energy exports and on foreign investments.

As in the US case, the BRI could represent for Russia a great opportunity exploitable for its hegemonic purposes or an existential threat, everything depends on the posture that the country will assume. In each case, the BRI is destined to shape deeply international relations.

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Approaches Forward for Shanghai Cooperation Organization's Participation in the Silk Road Economic Belt[1]

by Chen Xiaoding*

Abstract in English

The supply level of public goods is an important indicator to measure the function and development potential of the organization, and it is also the key to the sustainable development of the Shanghai Cooperation Organization (SCO). The Belt and Road is a public good advocated by China and fits well with the development concept of the Shanghai Cooperation Organization. How the Shanghai Cooperation Organization effectively synergizes the Silk Road Economic Belt concerns its long-term development. The problem with the existing cooperation mechanism of the Shanghai Cooperation Organization is that it is not deep instead of not comprehensive. The key to effective participation in the Silk Road Economic Belt includes: coordinating the relationship between the Silk Road Economic Belt and the Eurasian Economic Union; fully considering the interests of Central Asian member states; effectively inclusive and integrate the interests of India and Pakistan and improving the supply of public goods to create new development momentum for regional cooperation.

Keywords: Shanghai Cooperation Organization, Silk Road Economic Belt, Eurasian Economic Union, Expansion, Public goods

Abstract in Italiano

Il livello di offerta di beni pubblici è un indicatore importante per misurare la funzione e il potenziale di sviluppo dell'organizzazione, ed è anche la chiave per lo sviluppo sostenibile della Organizzazione Cooperazione di Shangai (SCO). The Belt and Road è un bene pubblico sostenuto dalla Cina e si adatta bene al concetto di sviluppo della SCO. Il modo in cui la SCO ottimizza la Cintura Economica della Via della Seta riguarda il suo sviluppo a lungo termine. Il problema con il meccanismo di cooperazione esistente della SCO è dato dalla sua mancata profondità invece della completezza. La chiave per un'efficace partecipazione alla cintura economica della Via della Seta comprende: il coordinamento del rapporto tra la cintura economica della BRI e l'Unione Economica Eurasiatica; la valutazione e considerazione degli interessi degli stati membri dell'Asia

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Centrale; integrare efficacemente gli interessi dell'India e del Pakistan e migliorare l'offerta di beni pubblici per creare un nuovo impulso allo sviluppo per la cooperazione regionale.

Parole chiave: Organizzazione Cooperazione Shangai, Nuova Via della Seta, Unione Economica Euroasiatica, espansione, bene pubblici

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Introduction

With the participation of India and Pakistan, Shanghai Cooperation Organization (hereinafter referred to as “SCO”) completed its first expansion, becoming a comprehensive, regional organization with the largest population, the largest geographical area and great potential in the world. How to absorb the pressure of expansion, and enhance competitiveness and attractiveness is an important task at the present stage of SCO, and the Belt and Road proposed by China provides a major strategic opportunity for the completion of this task (Kembayev, 2017). The Belt and Road is a public good initiated by China. At the same time, the supply level of public goods is an important indicator to measure the function and development potential of the organization (Olson and Zeckhauser, 1966), and it is also the key to sustainable development. After the expansion, how to improve the supply of public goods so as to effectively connect the Silk Road Economic Belt has become an important issue of SCO. Based on the conceptual fit of public goods supply and the need for transformation and upgrading, the SCO is an indispensable mechanism platform for promoting the construction of the Silk Road Economic Belt.

However, insufficient supply of public goods has always been the crux of the development of SCO. At present, the mechanisms of the SCO are not enough to effectively participate in the construction of the Silk Road Economic Belt. The strength gap and multi-interest orientation of member states are directly reflected in the asymmetry of the willingness and supply capacity of public goods and the imbalance between supply and demand. As far as regional economic cooperation is concerned, China and Russia, which have the most supply capacity, have distinct differences in their willingness to supply (Yun and Park, 2012; Naarajärv, 2012; Cabestan, 2013). China has always been committed to promoting the facilitation of trade and investment and is the largest supplier of public goods in the economic field (Jing-Dong Yuan, 2012). Russia, on the other hand, has reservations about regional economic cooperation in the Central Asia, within the framework of SCO. In addition to energy cooperation, there is little interest and limited investment (Katz, 2008; Movkebaeva, 2013). Although Central Asian member states tend to promote economic cooperation, other member states, except Kazakhstan, cannot effectively participate in the supply of public goods due to their limited economic strength, and there are obvious differences in the demand for public goods, which seriously restricts the level of regional economic cooperation. In addition, the accession of India and Pakistan also means that SCO has to face the impact of Kashmir issue and China-India border issue, which increases the difficulty of integration and may even affect the development direction of the organization.

Is it necessary to build a new cooperation mechanism to link the Silk Road Economic Belt? The answer is negative. Because regional economic cooperation lacking political foundation is not sustainable. The SCO has shaped a relatively stable expectations for cooperation, fostered political mutual trust among its member states and provided an irreplaceable political framework for the development of the Silk Road Economic Belt. As is known to all, Central Asia is a traditional backyard of Russia. Only through the SCO can China effectively get involved in Central Asian affairs and connect the Silk Road Economic Belt with the Eurasian Economic Union. More importantly, the differences among the member states of SCO are prominent, and the gap in economic strength are even more obvious, both Russia and Central Asian member countries are worried that China will dominate the regional economy with strong economic strength. The decision-making model of equal negotiation and the cooperation concept of mutual benefit and non-interference in internal affairs of the SCO can greatly alleviate the anxiety of other member states on China. India and Pakistan also hope to undertake the Silk Road Economic Belt through SCO to better safeguard their own interests. At the same time, China can also achieve self-restraint through the institutional constraints of the SCO and win wider support. The problem with the existing cooperation mechanism of the SCO is that it is not deep instead of not comprehensive, there is no need to reinvent the wheel and pay extra costs to build a new mechanism with uncertain prospects. Security, economy and humanities are the three pillars of the Silk Road Economic Belt, and the SCO has corresponding mechanisms. The key to effective participation in the Silk Road Economic Belt is to integrate and activate existing mechanisms and coordinate the supply and demand of public goods and create new development momentum for regional economic cooperation.

First of all, it is necessary to coordinate the relations between the Silk Road Economic Belt and the Eurasian Economic Union under the framework of SCO and improve the supply level of public goods (Diesen, 2016; Kembayev, 2017). The SCO's goal of regional economic cooperation has always been merely to facilitate trade and investment, there is still a long way to go from the free trade zone, let alone the Eurasia Economic Union. China and Russia with the most supply capacity have a distinct difference in the willingness of supply, which severely restricts the supply level of the public goods. One of the important reasons why Russia has always been wary of the regional economic cooperation advocated by China under the framework of SCO is that Russia has been trying to integrate the former Soviet Union region through regional integration to cope with the heavy pressure brought by the eastward expansion of North Atlantic Treaty Organization(NATO) ; and Russia tries to build two pillars of security and economic through Collective Security Treaty Organization(CIS) and Eurasian Economic Union to lead the process of European-Asian integration, especially alerting the impact of the SCO on its leading regional economic cooperation. At present, the development of the economy, especially the improvement of infrastructure, transportation networks, financing and energy cooperation, is an urgent need of the member states of SCO, especially the Central Asian member states, India and Pakistan. Therefore, docking the needs of economic development and rationalizing the relationship between China and Russia's regional economic cooperation initiatives under SCO framework has become the prerequisite for promoting regional economic cooperation.

The SCO must properly handle the relationship with the Eurasian Economic Union in participating in the promotion of the Silk Road Economic Belt. The Eurasian Economic Union aims to achieve an economic union similar to European Union. It has evolved from a customs union to a unified economic space, and it plans to fully implement the free movement of goods, capital, services and labour by 2025. While the promotion of the Silk Road Economic Belt is open-oriented and based on specific projects, which will not challenge the leading position of the Eurasian Economic Union in Central Asia's economic integration. The key to the success of the construction of the Silk Road Economic Belt is whether it can achieve fruitful cooperation with the Eurasian Economic Union under the framework of SCO. The SCO itself is a product of China and Russia facing each other's differences and conducting strategic cooperation and is also an important mechanism through which Central Asian member states can exert their influence. In fact, China has taken into account the interests and development strategies of Russia and Central Asian member states, and the Silk Road Economic Belt will not pose an impact on the highly integrated Eurasian Economic Union but will bring significant development opportunities to Russia. Due to the difference between the target and the development stage, China and Russia can work together within the framework of Sino-Russian cooperation and SCO to carry out pragmatic cooperation and enhance the supply of public goods in the economy. Of course, sufficient financial support is also a prerequisite for organizational operations and the supply of public goods. Although China and Russia have made outstanding contributions to the financing of SCO, SCO has been operating under a limited budget since its establishment. The Silk Road Economic Belt takes connectivity as the priority, and major infrastructure as a breakthrough, which puts higher demands on the financing mechanism. The lag of financial cooperation has become a major bottleneck restricting the construction of the Silk Road Economic Belt. Multi-channel financing is critical to improving the supply of public goods. Proactively try to improve the openness and implementation efficiency of the UnionPay and Business Council and promote the implementation of the development fund of SCO Development Bank and the SCO as soon as possible, Actively seek more financing from financial institutions such as Silk Road Fund, Asian Infrastructure Investment Bank, and New Development Bank. Only when the financial cooperation mechanism works effectively can public goods such as energy cooperation, infrastructure construction and major livelihood projects be supplied in sufficient quantity and the overall level of regional economic cooperation be effectively raised.

Second, fully consider the interests of Central Asian member states. Central Asian affairs is the core task of SCO, and any issue that has not been supported by the member states of Central Asia cannot be implemented. The member states of Central Asia not only attach importance to the role of SCO in maintaining regional security, but also look forward to participating in the actual regional economic cooperation in Central Asia and regard the SCO as an important platform for balancing the power of big powers, enhancing international influence and expanding diplomatic space Azarkan, 2010). For a long time, SCO has made significant progress in the direction of functional cooperation, but it has remained at the functional cooperation, and the negative effects have gradually emerged. The most important issue is that no effective organizational identity has been formed (Dadabaev, 2014). With the improvement of the level of regional economic cooperation, the Central Asian member states become more suspicious of being a vassal of China's economy, even some extreme views believe that the humanities exchanges such as the Confucius Institute are only to serve the economic interests of China in Central Asia (Dadabaev, 2014: 108-110). On the whole, the Central Asian member states hold a positive attitude towards the Silk Road Economic Belt and hope that will enhance the level of discourse power and economic development in regional economic cooperation under the platform of SCO. At the same time, Central Asian member states also have doubts about the Silk Road Economic Belt, namely whether they have the ability and means to benefit from the Silk Road Economic Belt. Central Asian member states hope to improve infrastructure, realize industrial upgrading and enhance economic competitiveness driven by China's strong economic strength, instead of merely becoming a place for the supply of raw materials and goods (Zhuangzhi, 2004; Azarkan, 2010; Dadabaev, 2014). One of the most important reasons for the twists and turns of the China-Uzbekistan Railway is that Kyrgyzstan believes that its own benefits are limited. How to effectively interface with the Central Asian member states concerns the role of existing SCO mechanisms in the Silk Road Economic Belt. After all, Central Asian member states are the main carriers of the Silk Road Economic Belt, only by fully considering their real needs and development strategies can regional economic cooperation achieve substantial progress. In order to increase trust and dispel doubts, China has done a lot of work, including large-scale investment in Central Asia and multi-level and multi-field policy communication. Among them, President Xi Jinping's promise of "not interfering in the internal affairs of Central Asian countries, not seeking the dominance of regional affairs, and not operating the sphere of influence" has alleviated the suspicions of Central Asian member states from a political height. At the same time, *Vision and Proposed Actions Outlined on Jointly Building Silk Road Economic Belt and 21st-century Maritime Silk Road* promises to take into account the interests and concerns of all countries, and seek the best points of interest and cooperation, which gives Central Asian member states more clear expectations of future benefits. To fully participate in the Silk Road Economic Belt, the SCO must fully consider the interests of Central Asian member states and comprehensively improve the supply of economic public goods. On the other hand, it is necessary to adjust the supply structure of public goods, and to clarify the categories, demand and effectiveness of regional public goods, adjust the supply structure, and improve supply efficiency, taking into account the differences in economic strength of the member states and the capacity of the regional economy. At present, only by improving the economic cooperation mechanism such as the UnionPay and the Industrialist Committee and giving full play their roles, the SCO can have the ability to participate deeply in the Silk Road Economic Belt and benefit from it. At the same time, enhancing the role of market operations in regional economic cooperation is also an important direction for improving the supply of public goods and promoting the Silk Road Economic Belt

Finally, effectively accommodate and integrate the interests of India and Pakistan. Central Asia is geographically adjacent to South Asia and has close ties with culture, religion and ethnicity. It is also facing the threat of “three evil forces”, especially affected by the spill over of the Afghan Issue. This is also the basis for SCO to accept India and Pakistan. The accession of India and Pakistan will help SCO achieve major breakthroughs in geographical space, economic capacity and political influence, and enhance the impact of SCO in global governance. However, the premise is that SCO must effectively integrate the interests of the new member states and enhance the recognition of India and Pakistan on the organization, otherwise, it is likely to cause internal friction due to expansion and reduce cooperation efficiency, which lose more than gains. It can be said that enhancing the cohesion of new and old member states and strengthening the identity of the SCO are related to the functioning of the SCO. Among them, the need to effectively contain and integrate the interests of India and Pakistan is particularly urgent.

India and Pakistan chose to join SCO mainly based on interest. For India, the main benefits of joining SCO are mainly to promote economic development, especially to improve infrastructure construction, promote energy cooperation and broaden financing channels (Norlin and Swanström, 2007); to promote counter-terrorism and maintain domestic security and stability; to balance China’s growing influence in Central and South Asia; to coordinate relations with China and Russia, and jointly promote global governance as an emerging power to enhance India’s international influence. The reason why Pakistan chose to join SCO is mainly: seeking new strategic support, promoting the anti-terrorism process, properly solving the Afghan Issue, maintaining political stability; revitalizing the economy, and providing strategic seaport as the core to realize the interconnection of Central Asian countries and solve the problem of backward infrastructure and energy shortage; stabilizing the relationship with India through a powerful mechanism platform to counter India’s strength. Based on this, while working hard to crack down on the “three evil forces” and drug crime, alleviating the common security concerns of member states, and maintaining regional security and stability, SCO should rely on participating the Silk

Road Economic Belt to dock the economic concerns of new and old member states, promote connectivity and economic cooperation between Central and South Asia, effectively enhance regional economic strength to lead the integration of new and old members with economic cooperation, thus enhancing the institutional recognition of SCO.

At present, the collective identity based on the highly integrated values of the European Union is difficult to meet the reality of SCO. Relatively speaking, institutional identity is more suitable for the heterogeneous characteristics and development stages of SCO. SCO and EU are at different stages: the former is committed to building a community of interests; the latter has moved towards a community of shared future. Institutional identity refers to the self-identification of member states to the organizational system, which embodies the central, enduring, distinguishing and cohesive features of the organization, and defines the organizational principles, basic missions, main functions, decision-making models and development directions of the organization (Oelsner, 2012). Institutional identity is the only way to achieve collective identity, and the EU is no exception. Institutional identity depends on the efficiency of the organization's execution, the ability to meet the needs of members' interests, and the attractiveness of value norms. From these three dimensions, SCO should clarify organizational positioning, establish value norms, improve the efficiency of implementation of existing mechanisms, foster comparative advantages, and gradually enhance the institutional recognition of the member states, especially the new member states, India and Pakistan. The in-depth advancement of the Silk Road Economic Belt has placed higher demands on the integration capabilities and cooperation efficiency of the SCO. It is imperative to strengthen organizational development and enhance institutional identity to solve the problem that new and old member states would stimulate the centrifugal force because they cannot achieve their own demands within the framework of the SCO. At the moment, with the "Shanghai Spirit" as the core, realizing the integration between new and old member states and enhancing organizational identity is the key to sustainable development. The SCO should take a two-pronged approach to build the Silk Road Economic Belt to a community of interests and shared future, strengthening the organizational identity, and creating a community of the shared future of SCO. First, continue to cooperate in non-traditional security areas to meet the common security concerns of new and old member states. Second, effectively participate in the Silk Road Economic Belt to meet the growing economic needs of member countries. Third, improve the long-term mechanism of humanities cooperation, fully tap the potential of cooperation at all levels, meticulously promote humanities cooperation, promote people-to-people bond, and win the recognition of the people of the member states.

In short, the SCO is an important platform for coordinating the interest of China, Russia, Central Asian member states and India and Pakistan, and is also an indispensable cooperation mechanism for promoting the construction of the Silk Road Economic Belt. Without the full use of cooperation, political mutual trust, security, economic cooperation and humanities exchanges cannot be improved, the Silk Road Economic Belt cannot meet the expected targets which will seriously restrict the supply level of public goods. At the same time, the SCO's current supply of public goods, especially economic public goods, is of low standards and limited types, which often overlook the actual needs of member states and seriously restrict the level of regional economic cooperation. Only by coordinating the relationship between the Silk Road Economic Belt and the Eurasian Economic Union, fully considering the interests of the Central Asian member states, effectively inclusive and integrating the interests of India and Pakistan, can integrate and activate the existing mechanism to effectively participate in the Silk Road Economic Belt, improve the efficiency of public goods supply and create new development momentum for regional cooperation.

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La Nuova Via della Seta e l'espansione nel Corno d'Africa

by Daniele Garofalo*

Abstract in English

The Horn of Africa enjoys a privileged geographical position, situated in front of the Gulf of Aden, the Strait of Bab al-Mandeb and the Indian Ocean, a fundamental area for the development of the "Silk Roads" in East Africa and Maritime Silk Road, the "Silk Road". The states of the Horn of Africa have the lowest levels of socio-economic development in the world, the highest levels of environmental fragility and ethnic, religious and tribal conflict that have fostered the spread of Islamist terrorist groups, local armed militias and pirates. These numerous crisis scenarios, and the geostrategic importance of the region have favoured the increase of the influence of international actors in the area through the creation of military structures and of port-logistics hubs. For the Beijing government, the interest in the Horn of Africa, which has led to a geopolitical confrontation with other players present and influential in the area, is linked to the needs of supplying mineral and energy resources, to investments in the agricultural sector, ports, manufacturing and banking. The African continent is a key trading partner for Beijing. Moreover, for China, the interest in the Horn of Africa also concerns the security of trade and investment but also of Chinese citizens employed on the spot. In addition to this, Beijing conducts operations linked to the fight against phenomena of international terrorism of an Islamist origin and to those linked to illicit and pirate trafficking.

Keywords: China, African Horn, New Silk Road, terrorism, geostrategy

Abstract in Italiano

Il Corno d'Africa gode di una posizione geografica privilegiata, situato di fronte il Golfo di Aden, lo stretto di Bab al-Mandeb e l'oceano Indiano, area fondamentale per lo sviluppo delle "Vie della Seta" in Africa orientale e della Maritime Silk Road, la "Via marittima della Seta". Gli Stati del Corno d'Africa hanno i più bassi livelli di sviluppo socioeconomici del mondo, i più elevati livelli di fragilità ambientale e conflittualità etnica, religiosa e tribale che hanno favorito il dilagare di gruppi del terrorismo islamista, milizie armate locali e pirati. Questi numerosi scenari di crisi, e l'importanza geostrategica della regione hanno favorito l'aumento dell'influenza di attori internazionali nell'area attraverso la realizzazione di strutture militari e di *hub* logistico-portuali. Per il governo di Pechino l'interesse per il Corno d'Africa, cha ha condotto al confronto geopolitico con altri attori presenti e influenti nell'area, è legato a esigenze di approvvigionamento di risorse minerarie ed energetiche, a investimenti nel settore agricolo, portuale, manifatturiero e bancario. Il continente africano rappresenta un fondamentale partner commerciale per Pechino. Per la Cina, inoltre, l'interesse nel Corno d'Africa riguarda anche la sicurezza del commercio e degli investimenti ma anche dei cittadini cinesi impiegati in loco. Pechino, oltre a ciò, conduce operazioni legate al contrasto di fenomeni del terrorismo internazionale di matrice islamista e a quelli legati ai traffici illeciti e pirateschi.

Parole chiave: Cina, Corno d'Africa, Nuove Vie della Seta, terrorismo, geostrategia.

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L'espansione cinese nell'area del Corno d'Africa

Nel Golfo di Aden vi è uno dei principali *chokepoint*[1] presenti lungo la *Maritime Silk Road*, la "Via marittima della Seta", che prevede di collegare le coste orientali della Cina al Mar Mediterraneo attraverso una rotta marittima che metterà in comunicazione il sud-est asiatico, il Golfo Persico, il Corno d'Africa e i porti di Atene e Venezia. Per Pechino, l'interesse per il Corno d'Africa non è legato soltanto a esigenze di approvvigionamento di risorse minerarie ed energetiche, ma anche a investimenti nel settore agricolo, portuale, manifatturiero, bancario, energetico, che hanno condotto la Cina a essere, in gran parte del continente africano, il primo partner commerciale di numerosi Stati. Il continente africano, infatti, rappresenta un fondamentale partner commerciale per la Cina, con il commercio bilaterale tra Pechino e l'Africa che supera i 200 miliardi di dollari (Cianciarelli, 2017). La Cina, inoltre, conduce operazioni legate all'interesse nazionale, mirando alla sicurezza e la protezione dei "mari lontani",

1 I *chokepoint* marittimi canalizzano un notevole interesse geostrategico ed economico poiché sono il cuore dell'economia globale, con lo stretto di Bab-el-Mandeb, in particolare, che è un transito obbligato per il trasporto del greggio e il gas del Golfo Persico, della materia prime africane e per le navi che trasportano beni di varia natura, da e per i mercati asiatici ed europei, per un valore stimato di 700 miliardi di dollari annui.

da intendere come difesa degli investimenti energetici, economici e dei lavoratori cinesi impiegati all'estero. Pechino, inoltre, sta promuovendo numerose iniziative economiche, commerciali, infrastrutturali e nel campo della sicurezza, tese a consolidare e rafforzare gli Stati africani partner. A tal proposito, il 3 - 4 settembre 2018, nel 7° *Forum on China Africa Cooperation* (FOCAC)[2], il presidente cinese Xi Jinping ha promesso 60 miliardi di dollari agli Stati africani, maggior cooperazione con le organizzazioni regionali africane, con le organizzazioni internazionali che operano nell'area, sostegno da parte delle aziende private cinesi con investimenti di circa10 miliardi di dollari in tre anni nei settori della sicurezza, dell'assistenza umanitaria e dello sviluppo. Il presidente cinese, infine, ha esposto iniziative significative per le relazioni sino-africane che riguarderanno lo sviluppo industriale, la connettività infrastrutturale, facilitazioni in ambito commerciale, ambientale, sanitario e di cooperazione per la sicurezza, soprattutto per ciò che concerne le "Vie della Seta", tramite missioni di *peacekeeping*, contrasto alla pirateria e al terrorismo. Gli accordi sino-africani prevedono, inoltre, la realizzazione di un Fondo per lo sviluppo[3], un Fondo di Cooperazione per il potenziamento della capacità produttiva[4] e il sostegno economico per le attività dell'*African Standby Force*, i caschi blu africani[5].

Fondamentale per la Cina è la penetrazione nel piccolo Stato di Gibuti, poiché la sua posizione geografica lo rende un punto operativo e strategico fondamentale, con una notevole importanza geopolitica e geostrategica. Il paese, infatti, si affaccia sugli stati petroliferi della penisola arabica, sullo stretto di Bab-el-Mandeb, ove transita circa il 40% dei traffici marittimi mondiali e la metà dell'import energetico cinese (Garofalo, 2018). Lo Stato gibutiano è divenuto per la Cina un sempre più rilevante scalo di traffici commerciali. Pechino, in questi anni, con sempre più forti investimenti ha sviluppato

2 Il Forum è stato creato per istituzionalizzare le relazioni sino-africane. Esso riunisce i rappresentanti di 53 paesi africani, numerose organizzazioni internazionali ed esponenti del governo cinese.
3 Con uno stanziamento di 5 miliardi di dollari.
4 Con uno stanziamento di 10 miliardi.
5 Con un finanziamento di 100 milioni di dollari.

importanti scali portuali nel paese per l'importazione e l'esportazione di merci e bestiame, come il porto di Doraleh[6], a ovest della città di Gibuti, sviluppato dalla *China State Construction Engineering* che ha edificato un vasto terminal petrolifero e uno scalo container. Sono stati inoltre sviluppati il porto di Tadjourah, dedicato all'esportazione di potassio per uso agricolo e quello di Ghoubet, dedicato all'esportazione del sale. Gli scali portuali gibutiani sono, inoltre, utilizzati da diversi Stati africani per la riesportazione delle loro merci. La Cina è presente nel paese per operazioni di contrasto della pirateria, per scortare le navi cargo cinesi di passaggio, per permettere alle stesse di rifornirsi di carburante, per controllare l'accesso al Mar Rosso e allo stretto di Bab-el-Mandeb e, inoltre, per accrescere le proprie partnership economiche con gli Stati del Medio Oriente e dell'Africa Orientale. Nelle acque dell'oceano Indiano transita annualmente la metà della flotta cinese che trasporta una larghissima percentuale delle esportazioni e gran parte delle importazioni di materie prime, petrolio e gas in primis, che Pechino acquista da Stati di Africa e Medio Oriente. Il governo di Pechino ha, inoltre, tramite maestranze e aziende cinesi, investito su suolo gibutiano nella realizzazione di strade, aeroporti, alberghi, banche, centri commerciali, impianti eolici e solari e una rete idrica per il trasporto dell'acqua potabile dall'altopiano etiopico. Gibuti è per la Cina anche un importantissimo *Hub* informatico, con la realizzazione di cavi sottomarini di fibra ottica, e investimenti nel *know-how* tecnologico e scientifico. A Gibuti, il governo di Pechino ha anche aperto la *Djibouti International Free Trade Zone*[7], una zona economica speciale di libero scambio e la prima base militare sul continente africano. I porti gibutiani compongono un nuovo segmento dell'*One Belt One Road* (OBOR), attraverso la connessione che offre con il porto pakistano di Gwadar, collegato alla regione cinese del Xinjiang attraverso il *China - Pakistan Economic Corridor* (CPEC), situato sul lato opposto del Mar Arabico. La linea marittima tra i due porti consente alle navi cinesi di navigare lungo le coste dell'Oman e dello Yemen fino

6 Il porto di Doraleh multifunzionale e commerciale è stato acquisito da Pechino per il 25%, con un investimento di 590 milioni di dollari. Il porto ha terminali per la movimentazione di petrolio, merci alla rinfusa e container. Tutti i terminal hanno accesso diretto alla ferrovia Addis Abeba-Gibuti, che fornisce l'Etiopia un accesso al mare.

7 Costruita dalla Cina e gestita congiuntamente dall'Autorità portuale e delle zone di libero scambio di Gibuti e dalla *China's Merchants Holdings Company*.

al Corno d'Africa. In altre parole, tramite i porti di Gibuti e la ferrovia che collega la capitale gibutiana ad Addis Abeba, nell'entroterra etiopico, la Cina inserisce il mercato etiope e africano nelle "Vie della Seta", collegando l'Africa orientale e il Corno d'Africa, tramite il CPEC, alle zone economiche della Cina meridionale e alla regione del Xinjiang. (Valantin, 2017).

Anche l'Etiopia è un partner di rilievo per la Cina, poiché offre importanti opportunità d'investimento sia nel settore agricolo e manifatturiero, con costi di manodopera considerevolmente ridotti, anche perché il paese gode di un elevato livello di stabilità politica. Le opere più importanti realizzate dalle maestranze cinesi sono l'autostrada Addis Abeba - Adama e la metropolitana leggera nella capitale etiope, finanziate in larga parte con prestiti concessi dall'*Exim Bank*, con la loro costruzione e gestione che è stata affidata ad aziende cinesi. Nel settore manifatturiero, importanti sono anche gli investimenti del gruppo multinazionale cinese *Huajian Group* nell'*Eastern Industrial Zone* e nel parco industriale etiope, l'*Hawassa Industrial Park*, le zone economiche speciali sino-etiopi. La Zona Industriale Orientale e il parco industriale etiope sono poli industriali costruiti da aziende cinesi e utilizzati da fabbriche di produttori cinesi, in particolare nei settori del tessile e dell'elettronica. L'Etiopia, essendo un paese senza sbocco sul mare, è per il suo import-export legato per circa il 90% ai porti di Gibuti. La Cina ha, quindi, finanziato circa il 70% della linea ferroviaria elettrificata Addis Abeba – Gibuti[8], con un costo di circa quattro miliardi di dollari, tramite la *China Civil Engeneering Construction Corp*. La ferrovia è composta di elettromotrici e vagoni totalmente *made in China,* si estende per oltre 750 chilometri, viaggia a 120 km/h e ha permesso di ridurre i tempi di percorrenza tra la capitale etiope e il porto di Doraleh a Gibuti, da tre giorni a circa dodici ore. Fino al 2023, tutte le operazioni di gestione e manutenzione della linea ferrovia saranno di due compagnie cinesi, la *China Railway Group Ltd* e la *China Civil Engineering Construction Corp*. Dal 2024, tutte le operazioni ferroviarie saranno gestite dall'*Ethiopian Railway Corporation* e dalla *Société*

8 Sui treni passeggeri gli altoparlanti annunciano le stazioni anche in cinese. I macchinisti, le hostess e i controllori sono di nazionalità cinese.

djiboutienne de chemin de fer China Railways, che integreranno il personale cinese con quello locale. In Etiopia, inoltre, nella regione dell'Ogaden, ricca di giacimenti di petrolio e gas, la Cina ha già avviato le prime operazioni di estrazione di prova[9] e ha raggiunto con il governo di Addis Abeba accordi sulla produzione petrolifera e sulla costruzione di un oleodotto verso Gibuti e una raffineria di GNL a Damerjog.

In Sudan, la Cina ha accordi per investire nelle infrastrutture nucleari con gli accordi tra il governo di Khartoum e la *China National nuclear corporation* per la costruzione di un reattore nucleare a partire dal 2021 e accordi per l'estrazione di petrolio, anche se in quantità minori rispetto al passato, in particolare dopo l'indipendenza del Sud Sudan. In Sudan inoltre la Cina ha costruito numerosi impianti di produzione di armi leggere.

Il Sud Sudan è entrato nell'orbita cinese subito dopo aver ottenuto l'indipendenza nel 2011 dal Sudan, poiché nel paese si trova la gran parte dei giacimenti petroliferi dell'ex Stato sudanese. In Sud Sudan gli investimenti nelle infrastrutture per l'estrazione e il trasporto delle risorse petrolifere sono ingenti e per questo la regione è stata inserita nell'*One Belt One Road Initiative*. La Cina in Sud Sudan però fornisce anche assistenza agricola, investe nell'industria del cotone e ha già sviluppato piani d'investimento futuri che prevedono l'incremento delle reti ferroviarie, di strade, porti, la costruzione di centrali a energia solare e maggiori dighe per l'irrigazione e la produzione di elettricità.

Il Kenya è un ulteriore punto d'ingresso delle *Maritime Silk Road* verso l'Africa centrale e meridionale. Nel 2013 sono stati garantiti prestiti da 3 miliardi di dollari dall'*Exim Bank of China* e finanziamenti sono stati assicurati dalla *China Development Bank* e dall'*Industrial and Commercial Bank of China*. Tra i diversi progetti vi è quello del ponte Sigiri, situato nella contea di Busia, affidata alla società *China Railway Corporation*, che andrà a integrare la linea ferroviaria che collega la capitale Nairobi al porto di Mombasa. La linea ferroviaria Porto di Mombasa – Nairobi, circa 610 km, è

9 Nel luglio 2018.

stata finanziata dall'*Exim Bank* per il 90% con un costo stimato di 25 miliardi di dollari (Gimba, 2018). La linea ferroviaria keniota sarà poi collegata alla linea Addis Abeba – Gibuti, e nel progetto definitivo si prevede un ampio collegamento nell'entroterra africano per circa 2700 km, collegando il Kenya oltre che con Gibuti ed Etiopia, anche con Sud Sudan, Uganda, Ruanda e Burundi (Breuer, 2017). L'obiettivo di Pechino è anche integrare il Kenya con il Sud Sudan e l'Etiopia attraverso altre operazioni infrastrutturali, come strade, aeroporti, raffinerie di petrolio e cavi in fibra ottica (Pautasso, 2016). La Cina, infine, prevede anche di ammodernare il porto di Mombasa e la costruzione di un nuovo porto ultramoderno e polifunzionale a Lamu.

La Cina estrae importanti quantità di petrolio dai giacimenti somali, presenti prevalentemente nel nord del Puntland, tramite la *China National Offshore Oil Corporation.* I porti dell'Eritrea, infine, sono d'importanza geostrategica per la Cina e per il progetto marittimo delle *Silk Road* poiché si affacciano sul Mar Rosso.

Un'area minacciata da terrorismo, criminalità e pirateria

Il Corno d'Africa si contraddistingue per una rinnovata valenza geopolitica in termini di sicurezza con un crescente numero di missioni di *peacekeeping* e un elevato numero di basi militari straniere edificate nella regione. La sicurezza nell'area è incentrata nel contrasto ai fenomeni del terrorismo internazionale di matrice islamista e a quelli legati ai traffici illeciti e pirateschi. Dall'inizio degli anni Novanta in poi, nel Corno si sono succeduti numerosi e anche gravi conflitti[10] che hanno causato vuoti politici, governi dittatoriali, carestie, siccità e difficoltà socioeconomiche che hanno favorito il dilagare di gruppi del terrorismo islamista, milizie armate locali e pirati. Per la Cina l'interesse nel Corno riguarda quindi la sicurezza del commercio e degli investimenti ma anche dei cittadini cinesi impiegati in loco, come delineato nel *China Military Strategy White paper*. Le minacce principali alla sicurezza delle navi porta-container e delle petroliere cinesi derivano dalla pirateria al largo delle coste somale, la

10 Tra i principali, la guerra civile in Somalia (1991), la guerra civile a Gibuti (1991-1994), la guerra tra Etiopia ed Eritrea (1998-2000), il conflitto nell'Ogaden (2007), il conflitto frontaliero tra Gibuti e l'Eritrea (2008).

frequente attività di movimenti jihadisti, in particolare ai militanti di *al-Shabaab*, di milizie dotate di capacità missilistiche, traffico illecito d'armi tra la Penisola arabica e il Corno d'Africa che giunge a gruppi armati presenti nel nord della Somalia, in Sudan, Sud Sudan ed Etiopia[11]. Dal 2008 la Cina ha una forza navale presente nel Golfo di Aden per la lotta alla pirateria, per la difesa alle navi commerciali, fornisce circa 2700 *peacekeepers* alle Nazioni Unite, è fornitore di armi a diversi Stati africani ed è impegnata nella formazione di eserciti del continente. Nel 2017 la Cina ha edificato la sua prima base militare all'estero, quella di Gibuti, strategica per compiere missioni per la sicurezza e il monitoraggio del *chokepoint* di Bab al-Mandeb. La scelta di costruire una base militare intreccia commercio e sicurezza, abbinando la creazione d'infrastrutture commerciali e militari.

La competizione geopolitica nella regione

La presenza nell'area di sempre maggiori attori esterni ha indubbiamente portato benefici sul piano economico a diverse aree, ma ha contemporaneamente contribuito ad aumentare le tensioni e i rischi in una zona già di per sé molto instabile. Dalla competizione di attori internazionali terzi i paesi del Corno d'Africa traggono sicuramente benefici nell'ambito dello sviluppo infrastrutturale, agricolo e militare ma l'aumento di contese tra gli attori internazionali esterni contribuisce, in alcuni casi, ad acuire contrasti politici e sociali in ambito locale. L'Africa è divenuta per la Cina sia un'opportunità economica sia un'area di confronto geopolitico con altri attori internazionali. La sempre più forte penetrazione cinese crea, e potrebbe creare, inevitabilmente tensioni con gli altri Stati che presentano interessi militari ed economici nell'area. Gibuti, ad esempio, ha una grande importanza geostrategica per gli Stati Uniti, i primi a installare una base militare nel paese[12]. Dalla base USA sono condotte numerose operazioni contro obiettivi sensibili in Medio Oriente e per missione antiterrorismo in Yemen e Somalia. La base di Camp Lemonnier è inoltre strategica per Washington per il controllo

11In particolare, i gruppi ribelli in Etiopia come il Fronte di Liberazione Nazionale dell'Ogaden (ONLF) e il Fronte di Liberazione degli Oromo (OLF).
12 La base militare statunitense di Camp Lemonnier è situata di fianco all'aeroporto internazionale di Gibuti, in cui sono operativi oltre 4500 militari americani.

dei traffici marittimi e di zone fondamentali quali Somalia ed Etiopia. La presenza della Cina in Gibuti potrebbe, quindi, alterare gli equilibri economici e strategici nell'area. Anche Tokyo e New Delhi hanno di recente rinforzato la propria presenza nel Corno d'Africa in chiave anticinese. Per il Giappone la presenza nel Corno è molto importante sia nel contrasto alla pirateria sia di scorta dei propri traffici commerciali[13]. Nelle acque del Golfo di Aden sono inoltre presenti numerosi pescherecci d'altura di Tokio (Garofalo, 2018). L'India mira ad avere un ruolo di primo piano nel commercio oceanico e nelle rotte dell'oceano Indiano e la presenza cinese nel Corno d'Africa è quindi vista da New Delhi come potenziale minaccia al primato e all'influenza indiana nei mari, oltre che per la sicurezza delle proprie rotte e interessi. L'aumento d'importanza del Corno d'Africa per l'India è conseguenza dell'avanzata cinese ma anche perché New Delhi ha nella regione comunque importanti interessi riguardante i propri bisogni di sicurezza energetica e alimentare, investimenti imprenditoriali e fornitura di crediti. L'India, inoltre, esporta verso gli Stati del Corno, Etiopia in primis, attrezzature elettriche, macchinari, prodotti farmaceutici, alimentari e manifatturieri. Anche l'Arabia Saudita si è impegnata nell'area in un'importante missione diplomatica di mediazione tra Etiopia ed Eritrea affinché i due Stati raggiungessero la pace. Per Riyadh la stabilità dell'Eritrea è fondamentale per il proseguimento della guerra contro gli Houthi in Yemen[14]. L'importanza del Corno d'Africa per l'Arabia Saudita è anche fondamentale per i finanziamenti e gli investimenti sauditi che riguardano per la maggior parte l'Etiopia e il Sudan, in particolare nel settore agricolo e in quello manifatturiero. I sauditi hanno ricevuto anche l'assenso da parte del governo di Gibuti all'apertura di una base militare con l'obiettivo della cooperazione antiterrorismo e per il controllo dei traffici petroliferi e commerciali. Gli Emirati Arabi Uniti, hanno concluso accordi commerciali

13 Il 10% del traffico marittimo giapponese passa, infatti, dallo stretto di Bab-el-Mandeb.

14 I sauditi hanno stanziato forze armate ad Assab e dalla rispettiva base militare partono di sovente le operazioni aeree saudita ed emiratini.

ed economici tramite la *DP World*, colosso delle spedizioni e delle infrastrutture marittime, con numerose città portuali del Corno d'Africa[15]. La Russia, infine, ha indirizzato la propria azione nel Corno principalmente nel settore energetico e in quello dell'export di armi.

Conclusioni

Le relazioni tra Cina e Africa sono fondamentali per il successo dell'estensione e sviluppo delle *Silk Road* nella regione del Corno e in generale in Africa orientale. Gli investimenti e le collaborazioni cinesi negli Stati del Corno d'Africa sono rilevanti e sono anche indubbie le prospettive di sviluppo economico e sociale dei paesi interessati. Non mancano però timori legati alla penetrazione cinese, poiché i progetti cinesi sono spesso poco trasparenti, indifferenti verso i rischi d'impatto sociale e ambientale, in particolare per ciò che concerne la situazione lavorativa del personale impiegato, gli effetti dei cambiamenti climatici, la riduzione dei terreni disponibili per agricoltura e pascoli e in particolare per il crescente debito estero che molti Stati stanno accumulando nell'accettare prestiti dalla Cina per la realizzazione di progetti infrastrutturali. Per ciò che concerne il numero di lavoratori locali impiegati nei progetti delle aziende cinesi, essi ammontano a circa il 70% del totale. Questo dato, però, va inquadrato in un discorso più ampio poiché anche se le aziende cinesi impiegano per la gran parte manodopera locale, creando fondamentali posti di lavoro, essi però raggiungono raramente posizioni di vertice e lavorano in condizioni vicine allo sfruttamento, con salari molto bassi e orari di lavoro elevati. Inoltre, bisogna tener conto che la penetrazione cinese nei diversi settori dell'economia degli Stati del Corno ha creato una forte concorrenza alle aziende locali[16] con notevoli ricadute economiche e sociali. A questa difficile situazione, va aggiunta quelle degli effetti negativi del cambiamento climatico che colpisce il Corno d'Africa, che ha condotto a un forte aumento delle difficoltà nel settore agricolo. Inoltre, l'incremento della densità abitativa e la riduzione dei terreni a

15 Tra le principali vanno sicuramente citate Assab in Eritrea, Doraleh a Gibuti, Berbera nel Somaliland, Bosaso nel Puntland, Barawe e Kismayo in Somalia.
16 Il 90% dei progetti di trasporto finanziati da Pechino sono andati a contractor cinesi, solo il 10% ai locali.

disposizione delle genti locali, a causa della costruzione di nuove infrastrutture, aggravano le condizioni di agricoltori e allevatori locali andando a intaccare la loro principale fonte di sostentamento e reddito. Infine, e di maggiore importanza e impatto sono le preoccupazioni legate ai prestiti che gli Stati del Corno richiedono alle banche cinesi. Sono centinaia le imprese cinesi che operano nella regione e solo nel settore delle infrastrutture circa il 50% delle imprese è cinese. "Il Fondo monetario internazionale e la Banca Mondiale si preoccupano […] che i prestiti cinesi aumentino il debito africano, raddoppiato in cinque anni e detenuto da Pechino per il 14%". Le banche cinesi, ad esempio, hanno prestato a Gibuti 1,4 miliardi di dollari negli ultimi due anni, oltre il 75% del PIL del paese (Clarkson, 2018).
Ciò, in caso in cui l'indebitamento possa divenire insostenibile, condurrebbe a una potenziale cancellazione totale o parziale del debito tramite la cessione di patrimoni a vantaggio della Cina.

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Italia, Cina e la Nuova Via della Seta

by Fabio Tiburzi*

Abstract in English

Today Chinese investments are fundamental in different world regions, in particular in those such as Europe where there is a high level of prosperity mixed with current economic crisis and low level of financial funds. The projects of the terrestrial, maritime and polar silk road can be seen as an aid to the international economy, in times of economic and financial crisis. Italy in this case can be useful to the Chinese cause, thanks to its geographical position, which connects Northern and Eastern Europe, the Mediterranean countries and the African continent. In addition, Italy can provide considerable infrastructure and high level of entrepreneurship that despite the current historical period always guarantees added value in the international context in terms of productivity and competitiveness. The high level of Italian know-how, combined with the great financial capabilities that China offers, can ensure mutual and above all peaceful development, also under the banner of cultural exchanges.

Keywords: foreign direct investments (FDIs), joint ventures, strategic assets, agricultural mechanization and food, supply chain

Abstract in Italiano

Oggi gli investimenti cinesi sono divenuti imprescindibili in molte aree del mondo, anche in quelle con un notevole benessere come l'Europa che attualmente presenta un'economia che stenta a decollare e un basso livello di investimenti. I progetti della Via della Seta terrestre, marittima e polare, possono essere visti come un aiuto all'economia internazionale in tempi di crisi economico finanziaria. L'Italia in questo caso può essere utile alla causa cinese, proprio grazie alla sua posizione geografica che collega l'Europa del Nord e dell'Est, i paesi del Mediterraneo e il continente africano. Inoltre, l'Italia può vantare notevoli infrastrutture da poter utilizzare, oltre l'alto livello di imprenditorialità che nonostante il periodo storico attuale garantisce sempre un valore aggiunto nel contesto internazionale in termini di produttività e competitività. L'alto livello di *know-how* italiano, unito alle grandi capacità finanziarie che la Cina offre, possono assicurare uno sviluppo reciproco e soprattutto pacifico all'insegna anche degli scambi culturali.

Parole chiave: investimenti diretti stranieri (FDIs), joint venture, asset strategici, meccanizzazione agricola e alimentare, supply chain

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Italia: punto di incontro per gli interessi cinesi

L'Italia, geograficamente situata nel mezzo del Mediterraneo, è da sempre considerata dalla dirigenza cinese il possibile terminale occidentale della Via della Seta Marittima e Terrestre del XXI secolo avendo a disposizione i suoi porti e le sue ferrovie che possono collegare il Nord Europa (ora più chiuso nei riguardi degli investimenti cinesi) e l'Europa Orientale. Europa dell'Est che appare attualmente molto più disponibile nei riguardi degli investimenti cinesi, dato confermato anche dalla Piattaforma del 16+1 che ospita il dialogo fra Cina e i sedici Paesi dell'Europa Orientale e Centrale (CEE), alcuni dei quali fanno parte dell'Unione Europea e della NATO (Bulgaria, Croazia, Repubblica Ceca, Estonia, Ungheria, Lettonia, Lituania, Polonia, Romania, Slovacchia e Slovenia, Albania, Bosnia e Erzegovina, Macedonia, Montenegro e Serbia) e dove ormai si profilano molti progetti legati alla Belt and Road Initiative (BRI), ed ai vantaggi che indubbiamente porta nelle rispettive nazioni. La Cina quindi ha grandi interessi nel concentrare i propri sforzi sui porti Italiani come *hub* per le merci e non solo.

La dirigenza cinese ha però rilevato anche una certa lentezza decisionale dell'Italia nell'assumersi l'onere di essere il centro dei progetti portuali nell'area Mediterranea ed è stata quindi costretta dalle suddette circostanze ad investire e comprare come prima base di appoggio il porto greco del Pireo.

In questo contesto però vanno aggiunte anche le altre partecipazioni che la Cina ha implementato nel Mediterraneo, come la joint venture che gestisce il terminal container del Canale di Suez dove si trova una Zona Economica Speciale, ormai snodo strategico delle rotte eurasiatiche, dove ha visto crescere i suoi traffici del 140% negli ultimi quindici anni raggiungendo nel 2017, grazie alla sua recente espansione, il massimo storico di 908,6 milioni di tonnellate; l'accordo per la costruzione di un centro di trasbordo merci, nel porto di Sarsal in Algeria, l'acquisto del 65% del Kumport

Terminal in Turchia che è utilizzabile come porta sul Mediterraneo per quanto riguarda la via terrestre asiatica; viene altresì utile ai cinesi anche lo sfruttamento del passaggio attraverso lo Stretto di Gibilterra che consentirà ai cinesi di arrivare a toccare anche le Americhe (Ghiselli A, e Fardella E,2017).

Tra i tanti movimenti che la dirigenza cinese ha eseguito, penso sia utile anche mettere in evidenza la concessione da parte di Israele del porto di Haifa dal 2021 al 2046 che verrà ampliato dalla Shanghai International Port Group (SIPG). Il porto di Haifa si trova vicino alla base della marina israeliana che, secondo quanto riferito dal *Times of Israel*, è sede dei sottomarini nucleari del Paese evidenziando come agli aspetti commerciali si possono unire implicazioni di natura militare. Questo dato può essere messo in relazione al discorso del Presidente Xi Jinping che espresse sostengo a ciò che ha definito 'politica d'integrazione civile e militare' il cui scopo è quello di combinare "idee, decisioni e piani d'integrazione militare e civile, in tutti i campi dello sviluppo economico nazionale e nella difesa".

L'interesse cinese sui porti italiani di Venezia, Genova, Trieste e del Mediterraneo in generale può essere inoltre spiegato dal recente aumento dei traffici globali verso la direttrice Suez-Mediterraneo. Rispetto agli altri paesi però, l'Italia può offrire anche ottimi e notevoli collegamenti su rotaia che sono molto più efficienti rispetto agli altri nell'Europa dell'Est; come detto e ricordato dall'ambasciatore italiano in Cina Ettore Sequi e l'ex presidente del Consiglio Gentiloni: "l'Italia ha un ulteriore punto di forza, ed è il primato nei tempi di sdoganamento delle merci, l'Italia è infatti riconosciuta dalle statistiche della Banca Mondiale, come primo Paese UE per efficienza doganale" (Morelli, 2018).

Già a partire dal 2013, con la creazione della Free Trade Zone di Shanghai, i cinesi hanno dimostrato la loro determinazione nell'introdurre misure per rendere più efficienti le loro procedure doganali, replicando le migliori prassi impiegate internazionalmente. In più l'istituzione di uno "sportello unico doganale" entro il 2017, preannunciata dal Consiglio di Stato, rappresenterà un ulteriore tassello di questa strategia per l'abbattimento dei costi delle operazioni di import-export.

La Cina ha mostrato già da tempo interesse a sviluppare una collaborazione con l'Italia in questo ambito, ne è stata concreta testimonianza la conclusione di gemellaggi tra le autorità doganali, di alcuni dei principali porti italiani e cinesi (Ningbo, Tianjin e i porti liguri ad esempio).

L'interazione fra i due Paesi negli ultimi anni sta avendo un incremento notevole, ma non ancora decisivo, per via delle varie difficoltà politiche interne in Italia, oltre al fatto di non aver concretizzato le famose condizioni per soddisfare il Sistema Paese, per ragioni di interessi personali, interessi egemonici esterni e di politica internazionale. Nonostante tutte le difficoltà legate alla condizione geopolitiche attuali, la presenza cinese nel Mar Mediterraneo è ormai diventata imprescindibile per il futuro della regione.

Tra gli altri terminali portuali strategici ci sono quelli di Valencia, Port Said, Ambarli e Vado Ligure, dove è in via di ultimazione il nuovo terminal container che vede COSCO detenere il 40% delle quote e il Qingdao Port International Development il 9,9%, da dove partiranno i treni che garantiranno il collegamento con gli interporti dell'Italia settentrionale, aprendo così nuovi mercati in Francia, Svizzera, Germania e Austria (Bertozzi, 2018).

L'economia marittima (con porti e shipping in prima fila) è quindi un settore di grande rilevanza strategica per la Cina e genera ogni anno il 9,4% del Pil del paese per un valore pari a 970 miliardi di dollari USA. Nel 2016, con la movimentazione di 200 milioni di TEU, la Cina ha dominato la classifica del traffico marittimo di container superando di ben quattro volte i secondi classificati, gli Stati Uniti, con un traffico marittimo annuo di soli 48 milioni di TEU. Per meglio comprendere l'entità di queste cifre occorre precisare che il porto di Shanghai da solo movimenta un traffico pari a quello di quasi tutti i porti degli Stati Uniti messi insieme.

Ad oggi, il Mare Nostrum assorbirebbe dunque il 20% del traffico marittimo mondiale, pari a due miliardi di tonnellate di merci l'anno. Le prospettive di crescita del Mediterraneo parametrate al traffico globale sono del 6,7% al 2018.

La rotta asiatica che arriva nel Mediterraneo, che talvolta prosegue fino alle Americhe passando lungo le coste dei paesi del Sud-Est asiatico e di Pakistan, India e Golfo, assicura una pluralità di scali inter-modali strategici e di carico medio superiore a tutte le altre rotte del traffico globale. Questo favorisce la creazione di grandi alleanze navali capaci di costruire navi sempre più capienti (18.000-20.000 TEU) idonee a ridurre i costi di trasporto attraverso forti economie di scala.

Le alleanze navali Ocean Alliance, THE Alliance e 2M dominano i commerci marittimi assorbendo il 77% della capacità di trasporto marittimo globale, e il 96% della tratta strategica Europa-Asia, che attraversa il Mediterraneo. COSCO Shipping, uno dei giganti del trasporto e della logistica marittima controllati dal governo cinese, contribuisce al 37% della capacità di Ocean Alliance sul totale delle rotte e al 36%, sulla rotta Far-East Europe/Med in particolare. Sulla base della flotta esistente e degli ordini fatti, l'entità congiunta delle compagnie COSCO-OOCL domina la Ocean Alliance (Tabelle 1 e 2), confermandosi terzo vettore porta-container al mondo.

Allo stesso tempo si assiste al rafforzamento del legame esistente tra la rete logistica controllata da Pechino e le Zone Economiche Speciali (ZES) che nel corso degli anni sono state istituite in paesi chiave con l'obiettivo di promuoverne lo sviluppo e offrire opportunità di investimento alle compagnie estere. Non è un caso che nel corso delle trattative fra le autorità dei paesi che ospitano le ZES e gli attori pubblici e privati cinesi si approvino spesso misure per l'attrazione di capitali cinesi.

La ZES egiziana nei pressi di Ain Sokhna, vicino all'imboccatura sud del Canale di Suez, è un classico esempio di questo fenomeno. Dopo anni di sviluppo della ZES, portato avanti da SCZone (la compagnia egiziana che gestisce la ZES), e dalla compagnia cinese Tianjin TEDA Investment Holding, ha di fatto incluso anche COSCO nel progetto (2017) con un accordo per l'ampliamento della ZES e la costruzione di un nuovo parco logistico. Si tratta di un piano che prevede progetti di investimento su un'area totale di 7,2 km². Nel lungo termine, è previsto lo sviluppo su un'area totale di 20 km², con un investimento di 230 milioni di dollari USA. In questa fase, il gruppo China Dayun avrebbe sottoscritto già i primi accordi con aziende egiziane di logistica. L'investimento di COSCO nel parco è di 30 milioni di dollari USA, ed è volto a creare un centro logistico e di servizi collegato alla zona di Suez.

Un altro dato interessante è che i paesi coinvolti nella BRI rappresentano quasi un terzo del nostro export e gli scali italiani come quelli di Gioia Tauro, Napoli, Genova, Trieste, Salerno, La Spezia e Livorno potrebbero svolgere un ruolo da protagonisti se supportati da adeguate politiche di sviluppo. In questa direzione potrà avere effetti positivi la riforma portuale varata con il Dlgs. 169/2016 che punta all'alleggerimento della burocrazia del sistema per la realizzazione di opere portuali e all'introduzione di misure di *governance* più snelle per guidare gli scali, pur restando il problema delle mega navi che hanno difficoltà ad approdare nei nostri porti e che quindi dovranno essere ripensati secondo le esigenze di approdo di questi giganti, che comunque comportano costi elevati e creano dei disaccordi sulla loro modernizzazione, lasciando presagire l'utilizzo del feederaggio, ossia il trasporto delle merci containerizzate verso paesi esteri scaricate in porti di *trans-shipment* (solo trasbordo) dal vettore principale su navi medie e piccole.

Secondo analisi effettuate da SRM, la trasformazione dello scalo navale in un punto di raccordo intermodale dove sia possibile effettuare scambi merci con il sistema ferroviario o stradale potrebbe incrementare il valore aggiunto in termini di logistica e consentire una maggiore efficienza degli investimenti. Allo stesso tempo, le cospicue risorse dell'Unione Europea potrebbero essere impiegate per colmare le carenze strutturali (in termini di finanza pubblica) del nostro Paese, soprattutto nel Mezzogiorno.

Un altro importante punto a favore dell'Italia per lo sviluppo e per l'attrazione di investimenti esteri saranno le SEZ istituite nel Sud Italia con la Legge 123/2017. Questa legge si pone l'obiettivo di agevolare la creazione di condizioni economiche, finanziarie e amministrative favorevoli allo sviluppo delle imprese già operanti in determinate aree del paese nonché all'insediamento di nuove realtà imprenditoriali. Campania (Napoli-Salerno), Calabria (Gioia Tauro) e Puglia (Bari-Brindisi e Taranto), stanno già muovendo i primi passi nella definizione di ZES, che prevedano incentivi fiscali e burocratici per gli investitori.

In ultima analisi, per quanto riguarda le infrastrutture, nel 2015 a Venezia si è tenuto un Forum sulla Cooperazione delle Città della Via della Seta dove fu sancita il l'accordo denominato "Alleanza dei cinque porti", uno dei tanti progetti logistici ed infrastrutturali che inseriscono l'Italia nella BRI che vede appunto un unione fra i porti di Venezia, Trieste, Ravenna, Capodistria (Slovenia) e Fiume (Croazia) che attireranno le navi mercantili cinesi dirette nel Mediterraneo passando Suez e fornendo un alternativa alla rotta Balcanica che parte dal Pireo. La punta di lancia del progetto è la nascita di una piattaforma plurimodale al largo di Venezia che ha la funzione di aumentare la capacità ricettiva *off-shore* costruita in mare ad 8 miglia nautiche da Venezia, smisterà queste merci verso altri porti marittimi e terrestri già in essere, il progetto è in capo al consorzio italo-cinese 4C3. (Bertozzi, 2018)

Per poter sfruttare al meglio le opportunità che la BRI offre c'è il bisogno di incrementare quelle leggi utili al Sistema Italia per competere nell'area mediterranea e garantire un ruolo chiave tra l'Europa, l'Africa e l'Asia cambiando così il volto dell'Italia da sud a nord.

La Cina negli Asset strategici italiani

Tra i vari interessi strategici cinesi in Italia è possibile mettere in evidenza ad esempio l'acquisizione del 40% di Ansaldo Energia con cui la Shanghai Electric è entrata nelle costruzioni delle centrali elettriche dove ad inizio novembre 201, hanno firmato un contratto da 60 milioni di euro per la fornitura della prima turbina a gas di classe H GT36 destinata alla centrale di Minhang in Cina. Il cliente finale del progetto della centrale da 800 MW di Minhang, è la Shanghai Electric Power, la maggiore utility operante nel campo dell'energia nell'area di Shanghai e controllata da SPIC (State Power Investment Company), una delle cinque più grandi utility elettriche in Cina.

L'acquisto di Pirelli per 7,8 miliardi di dollari da parte della Chinese Chemical Corporation (ChemChina), attraverso il Silk Road Fund, ha visto ad agosto 2018 la holding Marco Polo International Italy, a cui fa capo il 63,11% del capitale del gruppo della Bicocca, avviare le pratiche per la scissione non proporzionale, che porterà ChemChina, la Camfin di Marco Tronchetti Provera e i soci russi raccolti nella lussemburghese Long Term Investment in presa diretta sulla Pirelli. Così ChemChina arriverà a detenere direttamente il 45,52%, Camfin l'11,35% (e 422 milioni di liquidità) mentre a LTI arriverà a una quota del 6,24% (e 246 milioni per cassa).

Inoltre la Banca Centrale Cinese detiene il 2% di Eni, Fiat Chrysler, Enel, Telecom Italia Saipem, Unicredit, Mediobanca, Intesa San Paolo, Enel, Prysmian (settore dei cavi e dei sistemi per il trasporto di energia e telecomunicazioni) e Assicurazioni Generali. È inoltre possibile aggiungere il Gruppo Ferretti, Benelli, Fiorucci, Cerruti e Miss Sixty, la De Tomaso Automobili Spa. Long Yongtu, presidente del Center for China & Globalization di Pechino, ha evidenziato come la presenza di Pechino in un contesto estero servirà a costruire una piattaforma per i gruppi cinesi che possa crescere attraverso la partecipazione nell'economia globale.

La crescita sostenibile e la capacità di competere sul palcoscenico globale dipendono dalla velocità con cui la Cina potrà favorire le sue compagnie internazionali chiarendo in maniera inequivocabile la determinazione del paese a rinnovarsi puntando tutto su investimenti (all'estero e su gruppi ben consolidati) e sull'acquisizione di *know how* e tecnologie all'avanguardia (Panorama, 2015).

Quindi al 2017, abbiamo 235 aziende italiane condotte da investitori cinesi che danno lavoro a 15000 dipendenti, con una produzione in Euro di 5,5 Miliardi in riferimento al nostro PIL(Carreras S, Pira M,2017), dal 2000 al 2016 è emerso che l'Italia con una percentuale del 13% si è posizionata dietro a Gran Bretagna (23%) e Germania (19%), come destinazione degli Investimenti diretti esteri cinesi.

Nel 2017 Italferr (Gruppo FS Italiane) e la Beijing National Railway Research & Design Institute of Signal & Communication (Crscd), leader nella produzione di tecnologie, prodotti e servizi nel settore delle ferrovie, specializzato in sistemi di controllo e segnalazione ferroviaria, hanno siglato un memorandum di intesa per allargare le proprie alleanze internazionali per essere più competitivi nel mercato euro-asiatico, integrare il portafoglio clienti e stabilire partnership per acquisire nuove competenze, ed il *know how* per progettare e portare a termine le grandi opere infrastrutturali, anche al di fuori dell'area euro-asiatica.

Tra gli altri casi di successo in cui si sono uniti i capitali cinesi e l'imprenditorialità italiana è possibile citare il *business-case* più rilevante avvenuto in Italia secondo in Europa il 20 giugno 2008 dove Zoomlion Heavy Industry Science and Technology Development, colosso di macchinari per l'edilizia dal valore di 1 miliardo di euro di vendite, ha rilevato dal fondo Magenta, la maggioranza di Cifa (Compagnia Italiana Forme Acciaio) di Senago, leader dei macchinari per la produzione e la movimentazione del calcestruzzo, che ha fatto divenire Zoomlion il maggior gruppo al mondo nel settore, superando la tedesca Putzmeister e distanziando gli stessi cinesi della Sany. La Zoomlion quotata alla borsa di Shenzhen ingloba il fondo cinese di private equity Hony Capital, Goldman Sachs e soprattutto Mandarin Capital Partners, di cui il primo fondo è partecipato della Intesa San Paolo, Exim Bank e la China Development Bank, le quali aiutano ad investire in Italia i grandi gruppi cinesi e le aziende italiane in Cina. La Zoomlion nel 2016 ha registrato ricavi per 5 miliari di dollari, puntando a divenire numero uno al mondo nelle bonifiche ambientali e nel trattamento dei rifiuti.

Un altro colosso cinese è Foton Lovol International Heavy Industry di Weifang (Shandong) che fattura 3,3 miliardi di dollari con macchine agricole e costruzioni oltre a veicoli leggeri e motori diesel i quali utilizzano un sistema satellitare automatico per i propri apparecchi (i quali integrano, sia il sistema GPS che il sistema di posizionamento satellitare cinese Beidou) per favorire lo sviluppo nelle province dello Zhejiang, Anhui, Liaoning e Xinjiang. Foto Lovol ha rivitalizzato Arbos, storico marchio per le mieti-trebbie e la Goldoni, anche questo storico marchio per i trattori Universal.

Nel 2013 i cinesi hanno acquisito il 60% della Fosber leader nel settore del cartone ondulato e questo dimostra come il *packaging* per l'agri-food sia un settore di interesse cinese per la conservazione dei prodotti. Settore che vede gli italiani al primo posto a livello mondiale con significativi ritardi per i competitors come ad esempio i tedeschi e uno stato allarmante per i cinesi visto che il 25% dei loro prodotti come frutta e verdura marcisce prima della vendita.

L'Italia possiede un importante *know how* in diversi settori che vanno da quello spaziale a quello alimentare senza dimenticare l'industria biotecnologica e delle infrastrutture, veri settori target dei capitali cinesi che però si scontrano con la riluttanza nel cooperare da parte italiana che spesso favorisce paesi terzi. Cooperazione che potrebbe però trovare radici anche nel recente passato storico italiano se si pensa che già negli anni Sessanta l'Italia forniva aiuti alla Repubblica Popolare Cinese in diversi settori, anticipando diversi competitor internazionali viste le enormi potenzialità rappresentate dal mercato cinese poco incline al colonialismo.

L'Italia tra Cina e Africa

L'Italia grazie alla sua posizione geografica ha la doppia funzione di interconnessione della Cina con Europa e con l'Africa e quindi fornisce possibilità di triangolazioni sul versante degli investimenti infrastrutturali, sulla scia delle strategie globali di Pechino e degli organismi multilaterali della Banca Asiatica di Investimento (AIIB) insieme alla banca dei BRICS con task force in Africa.

La rete delle banche cinesi in Italia ed Europa sarò utile proprio nel supporto della presenza commerciale cinese nell'area europea e africana. Ad esempio la Industrial and Commercial Bank of China (ICBC), banca leader a livello mondiale con una base di 5 milioni di clienti corporate, 465 milioni di clienti al dettaglio, 17.122 filiali in Cina e 388 uffici in 41 Paesi nel mondo, si prefigge proprio di utilizzare l'Italia, come ponte finanziario globale e affidabile secondo quanto riportato da Jiang Jiangqing dopo l'apertura della sede romana il 19 ottobre 2015.

In sintesi, le aziende italiane sottocapitalizzate, ma con elevato potenziale di crescita, saranno aiutate finanziariamente dagli investimenti cinesi nel territorio africano utilizzando le garanzie europee come previsto dal Piano Juncker. La fascia sub-sahariana è la nuova frontiera degli investimenti internazionali e nazioni come

Mozambico, Angola, Sud-Africa, Nigeria e Gabon richiedono *know how* e tecnologia italiana. Ne consegue che il mondo imprenditoriale italiano potrebbe essere agevolato da diversi istituti di credito e finanziari cinesi come ad esempio la ICBC che, essendo il maggiore azionista singolo di Standard Bank con sede a Johannesburg, è il più grande gruppo bancario in Africa.

In questa ottica diverrebbe importante trasformare in un *hub* logistico e finanziario il Mezzogiorno italiano vista la sua prossimità al continente africano che è destinato a divenire in futuro l'area geografica di maggiore sviluppo e che vede gli investimenti stranieri, tra cui spiccano quelli cinesi, fungere da motore guida. L'Italia oltre alla posizione geografica e alla capacità aziendale detiene rapporti politici e socioculturali con alcune aree del continente africano che permetterebbero di concludere più facilmente accordi di natura commerciale senza incontrare quell'opposizione tipica nei confronti di altri paesi europei dovuta al loro passato coloniale.

Nel 2016 i capitali cinesi transitavano ancora per le Mauritius. Ne conviene che, qualora l'Italia volesse approfittare della strategia e degli interessi di Pechino in Africa e della sua posizione strategica, nonché del suo mercato economico-finanziario interno, la localizzazione delle holding cinesi nel Bel Paese potrebbe migliorare il regime per la tassazione nelle due direzioni Italia-Cina e Cina-Italia in cui registrare beni immateriali (ricerca e sviluppo, marchi) con il trasferimento di personale qualificato e parte del management in un paese sicuro con fiscalità ordinaria. Una possibile area di intervento triangolare è l'Etiopia dove operatori cinesi costruiscono l'autostrada di Addis Abeba-Adama e la metropolitana leggera di Addis Abeba finanziate dalla Exim Bank. Oppure il noto settore idroelettrico con la Società Salini Impregilo che sta realizzando la Grand Ethiopian Renaissence Dam (Gerd) e Gibe III-IV e V.

I cinesi si stanno muovendo oltre la strategia *Go Global* anche attraverso il partenariato strategico partecipando a progetti chiave nei settori di primaria importanza.

Conclusioni

Lo studio fin qui condotto ha come obiettivo quello di mettere in risalto tutte le forme e le potenzialità che l'Italia ha nei confronti della politica e della progettualità cinese inerente agli obiettivi della BRI.

La condizione dell'Italia appare favorevole per attirare capitali esteri, in particolare quelli cinesi perché Pechino ha dimostrato la sua capacità di investire e finanziare i propri progetti internazionali a lunga scadenza. L'interesse del mondo imprenditoriale e politico cinese verso il mercato italiano potrebbe rappresentare un vantaggio e favorire la promozione delle capacità industriali, ingegneristiche, culturali e intellettive italiane migliorando al contempo la situazione in termini di occupazione e PIL.

Si potrebbe quindi sfruttare il nord Italia come direttrice economica e commerciale verso i mercati dell'Europa centrale e orientale mentre il Meridione potrebbe essere visto come un ponte di lancio verso il continente africano in via di sviluppo. Il sud Italia potrebbe fungere inoltre da collagene per la cooperazione nel Mediterraneo con quei paesi che attualmente presentano una legislazione più snella e favorevole ai rapporti commerciali e una classe politica più intraprendente (un esempio potrebbe essere quello di Port Said che, sull'onda degli investimenti cinesi, ha creato subito condizioni favorevoli per un regime di tassazione molto basso, rimanendo quindi un porto tra i più competitivi nell' area mediterranea).

Non bisogna scordarsi però che nonostante le difficoltà politiche e la crisi economica ancora in corso nel mondo, l'Italia gode di ottimi rapporti con i Paesi della Lega Araba, i BRICS, i Paesi MENA, e con la Russia, e avendo anche una presenza (che dovrà essere aumentata rispetto agli altri anni precedenti) nell' Africa Sub-Sahariana, può far sentire la sua voce nel contesto internazionale.

L'Africa Sub-Sahariana, solo nel 2017, ha assorbito i prodotti italiani per 158 milioni di euro ed è consigliabile sfruttare ed effettuare, attraverso le politiche di cooperazione in modalità *win-win* con i partner cinesi, il maggior numero di accordi finanziabili e tangibili, apportando benessere in primis alle popolazioni locali ed ottenere maggior rilevanza sul versante politico da un lato ed economico-sociale dall'altro.

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Turkmenistan: le rotte del gas tra Cina, Russia ed Europa

by Mattia Baldoni*

Abstract in English

According to BP estimate, Turkmenistan holds the fourth largest natural gas reserves in the world. Despite its infrastructural lacks, it is a strategic crossroads of regional and global energy market. Since 2013, Ashgabat opted for diversifying its customers due to a strong decrease in Russian investments. China quickly took the chance to play a key-role in this area. Trade agreements and infrastructural projects are the main tools of Chinese strategy. Central Asia-China Pipeline already grants to Beijing the access to massive Turkmen gas reserves. Crossing Uzbekistan and Kazakhstan, this gas pipeline ends in Xinjiang, where it is connected to Chinese domestic grid. Another ambitious project, which involves Turkmenistan, is the so-called TAPI pipeline (Turkmenistan-Afghanistan-Pakistan-India). This project seems to be quite dangerous and unfeasible, due to Kabul's high political instability. Furthermore, in August 2018 the Convention on the Legal Status of Caspian Sea was ratified by all maritime Caspian Countries after 20 years-long negotiations. As a result, one of the most important opportunities brought by the Convention is the revival of Southern Gas Corridor (SGC) project. SCG is the sum of TAP, TANAP and SCP, plus the unrealised TransCaspian Gas Pipeline (TCGP). This infrastructure, backed also by EU Commission, could transport Turkmen gas from Turkmenbasy harbour to Azerbaijan. And finally, it could be led to Europe through SCG. This abstract global grid could potentially connect Italy to Shanghai, using Turkmen gas reserves. So far, the TCGP fulfilment has been resolutely opposed by Iran and Russia, because this pipeline could reroute gas transit from Moscow and Teheran, overcoming their intermediary roles. Furthermore, Turkmen inner problems and the lack of incisive strategy are deeply reducing the project's feasibility.

Keywords: Turkmenistan, China, Russia, Europe, gas pipeline, energy market.

Abstract in Italiano

Quarto paese al mondo per riserve di gas naturale secondo le stime BP, ma molto debole in termini infrastrutturali, il Turkmenistan è un crocevia strategico per il mercato energetico regionale e globale. Ashgabat, con il crescente allontanamento degli investimenti russi nel 2013-15, ha deciso di diversificare i suoi clienti. La Cina si è inserita nel discorso con decisione, seguendo una tendenza comune a tutta l'Asia centrale post-sovietica e sostituendo in parte il ruolo egemone rivestito da Mosca finora. Accordi e progetti infrastrutturali sono gli strumenti principali della tattica cinese: il gasdotto Central Asia-China collega già i due Paesi via Uzbekistan-Kazakhstan, arrivando nell'instabile Xinjiang cinese e allacciandosi alla rete nazionale. Un altro grande progetto che coinvolge il Turkmenistan, il TAPI (Turkmenistan-Afghanistan-Pakistan-India), sembra invece più infattibile e fragile, data la forte instabilità di Kabul.

Da sottolineare anche i disegni futuri. L'accordo sulla regolamentazione del Mar Caspio, raggiunto nell'agosto 2018 dai Paesi rivieraschi dopo 20 anni di trattative, ha aperto nuove prospettive e delineato alcuni equilibri. Una proposta tornata in auge è quella del Southern Gas Corridor, frutto della somma di TAP, TANAP e SCP, cui si aggiungerebbe il progetto TransCaspian, da Turkmenbasy all'Azerbaijan. Un collegamento di reti che, potenzialmente, legherebbe le forniture di gas turkmeno da Shangai all'Italia. Alla costante opposizione di Russia e Iran, che temono la deviazione del traffico energetico dai loro territori, si aggiungono numerose problematiche interne allo stesso Stato turkmeno, che riducono notevolmente le probabilità di successo di questo progetto.

Parole chiave: Turkmenistan, Cina, Russia, Europa, gasdotto, mercato energetico.

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Introduzione

Dopo il 1991, il Turkmenistan è rimasto sostanzialmente immutato. Tra le fastose rappresentazioni del potere nella capitale Ashgabat, il Paese ha vissuto nel culto della personalità dei suoi due Presidenti, Saparmyrat Nyyazow (1991-2006) e Gurbanguly Berdimuhamedow (2006-oggi), senza eguali in termini di stravaganza e pervasività. Il concetto scarsamente definito di "neutralità permanente", elaborato e promosso dallo stesso Nyyazow a metà degli anni Novanta, ha contribuito ad incrementare l'estremo isolamento del Paese verso il resto del mondo. Il Turkmenistan ha così rinunciato all'adesione ai vari progetti di integrazione sponsorizzati dalla Russia, come l'Organizzazione del Trattato sulla Sicurezza Collettiva (CSTO) o l'Unione Economica Eurasiatica (EEAU). Il Turkmenistan, inoltre, è l'unico stato dell'Asia Centrale che non è membro della Organizzazione per la Cooperazione di Shangai (SCO). Autoritarismo, patrimonialismo e repressione contribuiscono alla sostanziale debolezza economica e infrastrutturale del Paese, limitando le notevoli possibilità di sviluppo legate all'estrema ricchezza di risorse naturali.

Stando alle valutazioni del *BP Statistical Review of World Energy*, il Turkmenistan sarebbe il quarto Paese al mondo per riserve di gas naturale. Il volume di materia prima verificata ammonterebbe a circa 19.500 miliardi di metri cubi (mc), per una produzione annua di oltre 62 miliardi mc nel 2017 (British Petroleum, 2018). Classificabile come *rentier-state*, il Turkmenistan ricava oltre l'80% delle entrate fiscali dalla vendita del proprio gas, che rappresenta il 90% del proprio export (Cancarini, 2016). Tuttavia, l'immobilismo politico e l'enorme chiusura verso l'esterno hanno inibito enormemente le possibilità di crescita del settore e dell'intero Paese. Fino a pochi anni fa, lo sfruttamento delle risorse e il loro trasporto fino ai confini turkmeni era prerogativa dell'azienda statale nazionale. Esclusa la partecipazione della russa Gazprom, il governo turkmeno ha quasi sempre rifiutato l'intervento diretto di altri soggetti internazionali, costretti a limitarsi al solo finanziamento. Di conseguenza, la quasi totalità delle infrastrutture e dei gasdotti utilizzati erano quelli ereditati dall'epoca sovietica.

I primi segnali di cambiamento sono riscontrabili nel graduale impegno cinese. Nell'aprile 2006, Nyyazow sigla il primo accordo con Pechino per la realizzazione della linea Central Asia-China (CACGP). L'intesa si rivela provvidenziale per il governo turkmeno. Infatti, a partire dal 2013, il dialogo commerciale con la Russia si riduce notevolmente. Per il Turkmenistan, lasciarsi sfuggire il principale acquirente (Mosca) significa perdere introiti fondamentali per un'economia nazionale, come visto, fortemente dipendente dalla produzione e dall'esportazione del gas. Su questo si regge l'intero sistema clientelare sviluppatosi attorno alla leadership del presidente, che mantiene così un controllo ferreo su ogni aspetto della vita dello Stato. La diversificazione della clientela è l'unica strada percorribile per impedire il collasso di Ashgabat. L'Iran importa gas turkmeno attraverso i gasdotti Korpeje–Kurt Kui e Dauletabad–Khangiran, ma il volume degli affari non è paragonabile a quelli con la Russia e alcune imprecisate diatribe sul costo della materia prima hanno notevolmente raffreddato i rapporti con Teheran (Gurbanov, 2018). È quindi la Cina a vedere nelle riserve turkmene enormi potenzialità per il soddisfacimento del suo fabbisogno energetico. Per il governo turkmeno, la partnership cinese è salvifica ed estremamente redditizia. Ben presto, però, le prospettive di diversificazione e maggiore sicurezza si trasformano in una nuova, stringente dipendenza.

Il dominio commerciale cinese tra gasdotti, diplomazia e debito

Con il disimpegno russo, la Cina è diventata la principale destinazione del gas naturale turkmeno. La compagnia nazionale China National Petroleum Corporation (CNPC) è coinvolta attivamente in progetti di esplorazione e costruzione di gasdotti. Pechino sfrutta al massimo la situazione favorevole e le possibilità offerte laddove, per decenni, le società europee non hanno potuto o voluto siglare alcun accordo. Così, nell'ultimo decennio, il Turkmenistan è diventato il primo *supplier* di gas naturale per Pechino: attraverso i condotti terrestri, oltre il 45% delle importazioni cinesi di gas proviene dai giacimenti turkmeni (Indeo, 2018). Il merito principale va agli accordi e, in seguito, alla realizzazione del Central Asia-China Gas Pipeline, le cui prime linee sono state concluse nel 2009. Il CACGP rappresenta una svolta epocale per lo scenario energetico regionale, storicamente legato alle mosse di Mosca.

Il gasdotto, con i suoi 1.833 km, parte dal Turkmenistan nord-orientale e attraversa Uzbekistan e Kazakhstan, per poi arrivare al terminale di Horgos, nello Xinjiang cinese, dove si allaccia alla rete nazionale. La crescente domanda di materia prima da parte di Pechino ha reso necessari alcuni progetti di ampliamento. Alle prime Linee A e B, ciascuna della portata di 15 miliardi mc ed entrate in funzione tra il 2009 e il 2010, si è aggiunta la terza Linea C nel 2014, che può trasportare ben 25 miliardi mc di gas. In quest'ultimo caso, Uzbekistan e Kazakhstan non rivestono più solamente il ruolo di paesi di transito, ma anche di fornitore verso la Cina, esportando rispettivamente 10 e 5 miliardi mc. In totale, al 2016, la capacità totale del CACGP ammonta a 55 miliardi mc (Tian, 2018).

Un quarto progetto a lungo dibattuto e infine approvato nel 2014 (Linea D) sta subendo continui rinvii e suscita qualche campanello d'allarme per i rapporti commerciali nella regione centroasiatica e, soprattutto, per il futuro delle esportazioni turkmene. Ashgabat, infatti, è l'unico attore a non aver voce in capitolo riguardo alle numerose proroghe che sta subendo il progetto. Questa linea attraversa e coinvolge anche Tagikistan e Kirghizistan, includendoli così nella rete regionale come Paesi di transito. Nel 2016, tuttavia, l'Uzbekistan rimanda l'inizio dei lavori per due semestri, fino al marzo 2017, quando CNPC e Uzbekneftegaz (compagnia statale di Tashkent) hanno annunciato la sospensione della costruzione del quarto ramo in territorio uzbeko senza addurre particolari motivazioni. Questo arresto ha comportato un primo rinvio del completamento dei lavori al 2020, a sua volta posposto al 2022. La linea D, una volta attivata, trasporterebbe ulteriori 30 miliardi mc verso la Cina, portando la capacità del CACGP a 85 miliardi mc di gas naturale, di cui ben 65 miliardi provenienti dal Turkmenistan (Tian, 2018; Indeo, 2018).

Gli investimenti cinesi in questa infrastruttura strategica sono iniziati più di un decennio fa. La favorevole congiuntura tra un governo bisognoso di acquirenti, un'enorme disponibilità economica per la progettazione e notevoli prospettive derivanti dalla crescita della domanda cinese, ha garantito a Pechino una posizione commerciale estremamente vantaggiosa. La Cina, tramite la compagnia CNPC, è il solo Stato straniero a detenere i diritti di sfruttamento e coproduzione *onshore* (*Production Sharing Contract*) sulle riserve turkmene. Già nel 2007, CNPC firmò un accordo sullo sviluppo e sullo sfruttamento del giacimento di Bagtyyarlyk (riserva stimata di 1.300 miliardi mc) per 35 anni. Nel 2009, la China Development Bank stanziò un prestito di 4 miliardi di dollari a Turkmengaz per la prima fase del CACGP. Successivamente, 8 miliardi sono stati investiti nello sviluppo dell'immenso giacimento di Galkynysh, conosciuto come South Yolotan, le cui riserve sono stimate sui 14.000 miliardi mc. La penetrazione cinese nel mercato energetico regionale ha quindi subito un'accelerazione con il completamento delle prime linee della CACGP e con il disimpegno di Gazprom dopo il 2015 (Tian, 2018; Indeo, 2018).

Come in altri scenari (ad es. in Africa) la strategia di investimenti, prestiti e progetti infrastrutturali sostenuti dalla Cina garantisce un controllo crescente sui destini dei propri partner, spesso caratterizzati da economie deboli e strutture statali fragili. Lo stesso risultato è stato raggiunto con l'ambiziosa politica di sicurezza energetica cinese in Asia centrale, dove la cooperazione con le varie repubbliche è funzionale a un disegno molto più ampio, pianificato da Pechino. Come sostenuto dalla prof.ssa Alessia Amighini, «[...] in Medio Oriente e Asia centrale – primarie fonti di approvvigionamento rispettivamente di petrolio e di gas per la Cina – Pechino sta attuando, sotto il cappello del *One Belt One Road*, una politica di potenziamento delle forniture e di diversificazione dei paesi fornitori» (Amighini, 2018).

Così facendo, da un lato si alleggerisce progressivamente l'influenza dagli Stati Uniti, che presidiano militarmente i principali corridoi d'importazione verso la Cina, ovvero l'Asia meridionale e il Mar Cinese meridionale, da cui passano circa il 90% delle forniture di petrolio verso la Repubblica Popolare. Dall'altro lato, la strategia multivettoriale in Asia centrale riduce la dipendenza commerciale delle Repubbliche ex-sovietiche da Mosca, indebolendo così la presenza russa e spesso rivestendone il ruolo d'interlocutore principale.

La Cina è stata senz'altro abile nel pianificare la sua tattica e nel perseguire i suoi obiettivi. Lo strumento principale di Pechino, secondo Hao Tian, è stato il «*savoir faire* nella diplomazia inter-governativa, che si caratterizzata come bilaterale nei mezzi, ma multilaterale negli scopi» (Tian, 2018). Infatti, il governo cinese e la CNPC hanno concluso accordi direttamente con ciascuno dei Paesi produttori o di transito. Così facendo, la Cina gestisce più agevolmente non solo il progetto, ma esercita un'importante leva politica sui singoli soggetti statali, garantendosi una leadership molto influente nell'intera regione. Questa strategia non riguarda solamente il Turkmenistan, come visto finora, ma anche Uzbekistan e Kazakhstan, con i quali Pechino ha siglato contratti e intese per il mercato energetico, l'assistenza infrastrutturale e il sostegno diplomatico.

Il moderno *divide et impera* cinese fa sì che ciascun accordo copra la sezione di progetto riferita al singolo Stato, consentendo così a Pechino di controllare complessivamente l'intero disegno. Il Central Asia-China Gas Pipeline è l'esempio più brillante. Il gasdotto è gestito da tre distinte *joint ventures*, basate ciascuna sull'equa divisione tra Cina-Turkmenistan, Cina-Uzbekistan, Cina-Kazakhstan. Così facendo, Pechino si è assicurata la gestione del 50% dell'intera struttura, lasciando in minoranza gli altri partecipanti e conquistando una posizione privilegiata nelle dispute regionali, soprattutto in merito al mercato energetico, ai prezzi, al volume degli scambi (Tian, 2018).

Tornando al principale esportatore, il Turkmenistan è riuscito certamente a svincolarsi dalle decisioni energetiche russe. I tentativi di diversificazione prospettati da Ashgabat, tuttavia, hanno condotto l'economia del Paese in una nuova, forte dipendenza, legata a doppio filo con una nuova egemonia e ad un unico mercato, quello cinese. La sospensione della Linea D e l'inconsistenza delle rimostranze turkmene sono un altro sintomo della sua debolezza schiacciante. Il Turkmenistan, inoltre, riceve pagamenti in contanti solamente per un terzo del gas esportato in Cina; il resto viene rimborsato tramite il debito accumulato verso Pechino per gli ingenti prestiti ricevuti. Nonostante l'aumento delle esportazioni, il volume delle entrate si è ridotto del 30%, segno dell'enorme potenza contrattuale cinese sul prezzo. Secondo Stratfor, la Cina avrebbe ottenuto una riduzione da 165 a 100 dollari per 1000 mc: il gas turkmeno, 45% di quello importato da Pechino, è meno costoso di tutti gli altri (Gurbanov, 2018; Tian, 2018). L'Australia, secondo maggior *supplier* della Cina, vende la stessa quantità di prodotto a 220 dollari (Stronski, 2017). Una flebile speranza potrebbe essersi riaccesa ad Occidente, guardando al di là del Mar Caspio, ma potrebbe essere troppo tardi.

TransCaspian Gas Pipeline ed Europa: idee passate o nuove prospettive?

Il TransCaspian Gas Pipeline è un progetto di lungo corso, la cui realizzazione è discussa da oltre vent'anni. Il gasdotto, lungo circa 300 km, dovrebbe attraversare il Mar Caspio, collegando il porto di Turkmenbasy con il terminale azero di Sangachal. Da questo punto, il condotto si allaccerebbe alla linea Baku-Tbilisi-Ceyhan (South Caucasus Pipeline – SCP), poi alla linea TransAnatolian (TANAP) e infine alla dibattuta TAP. Raggiungendo il mercato europeo, il Southern Gas Corridor (SGC) aprirebbe nuovi spazi e potenzialità per il gas turkmeno, ma numerosi fattori ed ostacoli lungo questo percorso rendono la realtà estremamente più complessa rispetto alle carte della progettazione.

Già alla fine degli anni Novanta si accesero gli interessi congiunti delle compagnie turche, israeliane, statunitensi ed europee, tanto che la PSG, una *joint venture* composta da General Electric, Royal Dutch Shell e Bechtel Group, ottenne il primo contratto per valutare la fattibilità e la costruzione delle infrastrutture necessarie. Poco dopo, diverse variabili sconvolsero ogni piano. Nel 1998 Turchia e Russia siglano gli accordi per il gasdotto Blue Stream, mentre un anno dopo, in Azerbaijan, viene scoperto il maxi-giacimento di Shah Deniz, che sposta l'attenzione del SGC dal Turkmenistan all'altra sponda del Caspio. Nel quindicennio successivo, l'idea del TCGP venne quasi definitivamente accantonata. Sono molti i fattori che hanno contribuito a questo declassamento, a partire dal fallimento del progetto Nabucco nel 2013, che chiuse la rotta balcanica al gas russo e caucasico. Inoltre, lo spostamento dell'attenzione turkmena verso il mercato cinese ha praticamente monopolizzato ogni progetto energetico di Ashgabat. Infine, il mancante status legale del Mar Caspio e la costante opposizione di Russia e Iran completano il quadro di un percorso estremamente accidentato (Gurbanov, 2018). Su questo fronte, tuttavia, potrebbe essersi aperta qualche prospettiva.

Il 12 agosto 2018, ad Aktau (Kazakhstan), i cinque Paesi rivieraschi (Russia, Azerbaijan, Iran, Turkmenistan e Kazakhstan) firmano la Convenzione sullo Status legale del Mar Caspio, traguardo raggiunto dopo oltre venti anni di trattative. Con questo accordo, vengono riconosciuti i reciproci interessi degli Stati costieri e i principi per la cooperazione economica e militare nel bacino. Quest'ultimo aspetto è centrale, perché estromette qualsiasi Stato terzo (*in primis*, gli USA) dalla costruzione di basi militari lungo la costa. Per quanto l'intesa sia costruttiva, alcuni aspetti sono stati lasciati insoluti o di dubbia interpretazione. Tra questi, quelli riguardanti i possibili progetti infrastrutturali e la conservazione del patrimonio naturale.

L’art.14 della Convenzione riconosce agli Stati la possibilità di posare cavi sottomarini e condotte lungo il fondo del Mar Caspio, subordinatamente al rispetto dei requisiti e delle norme ambientali sanciti dai trattati internazionali. Le Parti coinvolte, inoltre, devono agire d’intesa con tutte le altre il cui settore di fondo marino sia coinvolto. Se guardiamo al caso specifico del TCGP, Turkmenistan e Azerbaijan sono gli unici soggetti interessati e responsabili per il rispetto dei termini accordati. Tuttavia, il testo prosegue con molta ambiguità. L’art.15, infatti, afferma l’impegno dei contraenti a proteggere e preservare il sistema ecologico del Mar Caspio e riconosce loro la facoltà di prendere autonomamente o congiuntamente tutte le misure necessarie per assicurare un uso sostenibile e razionale delle risorse biologiche del Mar Caspio (Kremlin.ru, 2018). Dunque, ogni Paese costiero ha voce in capitolo su qualsiasi progetto e sulla sua implementazione, indipendentemente dal suo coinvolgimento.

Su questo tema hanno sempre giocano la loro partita le opposizioni di Russia e Iran. Sollevando numerose questioni legate alla tutela ambientale, Mosca e Teheran hanno sempre manifestato la loro contrarietà al progetto, riuscendo a procrastinarne la realizzazione. La Convenzione non muta la situazione. Lo stesso Vladimir Putin, durante il V Summit del Caspio ad Aktau, ha sottolineato l’importanza dei vari documenti quadro su ecologia e biodiversità del bacino, evidenziando il «rigoroso controllo ambientale dei progetti infrastrutturali che presentano rischi potenziali per il benessere del Mar Caspio» (Kremlin.ru, 2018). Nel suo giudizio finale sulla Convenzione, Ilgar Gurbanov afferma che, eccetto l’esclusione militare di potenze non regionali, «l’accordo non raggiunge alcuna soluzione tangibile, ma garantisce semplicemente lo *status quo* sulle questioni irrisolte, soprattutto sui giacimenti *off-shore*» (Gurbanov, 2018). Ma gli ostacoli per il TCGP non si limitano alla legislazione.

Forte delle proprie riserve, l’Azerbaijan non è un partner particolarmente solerte per la realizzazione del progetto. Baku già dirige il suo export verso l’Europa ed il funzionamento del SCG ha dimostrato l’ottima intesa trilaterale con Turchia e Georgia. Sicuramente il memorandum d’intesa azero-turkmeno del 2017 è un passo avanti; la partecipazione di una delegazione turkmena alle riunioni ministeriali sul SGC e la convocazione periodica di gruppi di lavoro bilaterali Azerbaijan-Turkmenistan sembrano mirare all'espansione della cooperazione energetica tramite progetti condivisi (come auspicato dalla delegazione Ue presente ai summit). Ma una soluzione costruttiva sembra lontana. Il Turkmenistan, a differenza dell'Azerbaijan, non ha le capacità di esportazione sufficienti, non ha le tecnologie di perforazione necessarie in acque profonde (che l'azera SOCAR ha ottenuto da BP) né le risorse finanziarie per lo sviluppo di campi *offshore* (Rožkov, 2018). Da un lato, Baku continua ad offrire il suo territorio e le sue infrastrutture, ma ribadisce la sua ferma intenzione di non investire nel disegno TCGP, che dovrebbe riguardare le compagnie turkmene ed europee interessate. Dall'altro lato, Ashgabat persevera nella sua politica remissiva sui gasdotti, basata sul principio "zero oneri finanziari, cento percento di efficacia" (Amirova-Mammadova, 2018; Gurbanov, 2018). L'appetibilità degli investimenti, date le numerose problematiche, resta molto bassa, così come le probabilità di successo del TCGP.

La Russia, i nuovi equilibri e gli "interessi nazionali costanti"

Per il Turkmenistan, così come per le altre repubbliche dell'Asia centrale, l'eredità sovietica comprende gli stretti legami con la Russia. Fin dal 1991, Mosca rimane il principale interlocutore per Ashgabat, che a sua volta riconosce ampi spazi di manovra per gli interessi delle compagnie russe. Tra queste svetta il gigante statale Gazprom. Il Cremlino ha controllato per molto tempo l'export di gas turkmeno, acquistandone volumi consistenti a costi irrisori e poi rivendendolo a prezzi ben più vantaggiosi al mercato europeo, sfruttando la sua rete di gasdotti. Questa è l'importanza delle riserve energetiche dell'Asia Centrale per Mosca. Per l'élite politica russa, il controllo delle risorse e dei gasdotti è il fulcro della restaurazione del suo potere e la chiave per realizzare vantaggi competitivi sulle potenze estere (Amirova-Mammadova, 2018).

Fino alla costruzione del CACGP, l'unica grande rotta della materia prima turkmena era anch'essa definita da un lascito dell'URSS: la linea Central Asia-Center. Commissionato nel 1969 e ampliato cinque volte fino al 1988, questo gasdotto attraversa Turkmenistan, Uzbekistan e Kazakhstan, raggiungendo l'Oblast' di Saratov, dove si allaccia alla rete russa. Per decenni ha rappresentato il ferreo controllo di Mosca sulle politiche energetiche dell'Asia centrale. La produzione di Ashgabat era praticamente monopolizzata da Gazprom: acquistando gas turkmeno a basso prezzo per il mercato domestico russo, la compagnia sopperiva alla massiccia produzione per il lucroso export verso l'Europa. A sua volta, il Turkmenistan si era doppiamente legato alla Russia, data la sua forte dipendenza dagli idrocarburi e dall'esportazione di gas naturale (82% dell'export totale). Questa scarsa diversificazione lo ha reso estremamente vulnerabile agli shock energetici russi. Mentre Turkmenistan e Russia avrebbero dovuto essere concorrenti (in quanto Stati fornitori), il fatto che Ashgabat abbia affidato il suo gas (e la sua economia) totalmente a Mosca ha conferito al Cremlino un potere tale da irretire significativamente le strategie politico-economiche turkmene (Tian, 2018).

Tuttavia, nei primi anni Duemila i rapporti cominciano lentamente a cambiare. Gli accordi Gazprom-Turkmengaz iniziano a scricchiolare, così come la gestione dei prezzi imposta dai russi. La firma dei primi contratti con la Cina (2006) e il fallimento del progetto trilaterale Prikaspijskij Pipeline (gasdotto costiero Turkmenistan-Kazakhstan-Russia) nel 2010 segnano l'inarrestabile declino degli scambi tra Mosca e Ashgabat, quest'ultima desiderosa di diversificare i propri acquirenti (fallendo poi nel rivolgersi a Teheran e Pechino). L'export verso la Russia passa dai 40 miliardi mc annui del 2008 ai 10-11 miliardi mc nel quinquennio 2009-2014, nettamente al di sotto della quota di 70-80 miliardi mc previsti dal contratto firmato con Gazprom del 2009. Nel 2015 il volume si riduce a soli 4 miliardi mc, fino alla totale sospensione sopraggiunta nel 2016. Mosca decide quindi di compensare l'ormai piccola perdita rivolgendosi ad Uzbekneftegaz, mentre il Turkmenistan finisce definitivamente nelle braccia di Pechino (Cancarini, 2016; Gurbanov, 2018).

L'obiettivo di Gazprom resta quello di continuare a massimizzare le vendite in Europa, ma la perdita della materia prima turkmena è un segnale importante per Mosca. Il gasdotto CACGP ha prepotentemente inserito la concorrenza del mercato cinese nella regione, mentre la diminuzione dell'offerta di gas dal Turkmenistan e dal Kazakhstan ha ridotto gli utili russi derivanti dalle tasse di rivendita e di transito. È evidente come l'inserimento di Pechino abbia ridimensionato le entrate e l'influenza politica della Russia nell'intera macroregione. Tuttavia, per il Cremlino resta centrale il ruolo del redditizio mercato europeo, primo nella gerarchia degli interessi strategici russi. Il progetto Nabucco, accantonato nel 2013, ha rappresentato per Mosca una minaccia ben più grave del CACGP, che anzi fu tacitamente avallato. Con il gas dell'Asia centrale rivolto verso Est, quello russo non avrebbe conosciuto rivali in Europa. Nonostante abbia scampato questo pericolo, la strategia egemonica di Mosca potrebbe conoscere nuove insidie.

La regione del Caspio continua ad essere significativa per la Russia, in termini geopolitici, strategici e commerciali. Per questo il TCGP ha rappresentato e continua ad essere, seppur in misura molto ridotta, una possibile sfida alle rotte energetiche russe. Come detto, il TransCaspian, considerato come estensione orientale del Southern Gas Corridor, potrebbe ridurre la dipendenza dell'UE dal gas della Russia. Diramandosi nei sistemi di gasdotti esistenti, ad esempio, le risorse turkmene potrebbero giocare un ruolo significativo nei Balcani e nell'Europa orientale, regioni in cui Gazprom ha consolidato la sua posizione sul mercato. Tuttavia, come abbiamo visto, le varie problematiche e le opposizioni alla realizzazione di questo progetto hanno ridotto notevolmente la minaccia TCGP.

Dal lato russo, è stato sufficiente il pretesto delle questioni ambientali, sollevate insieme a Teheran, per sostenere i continui rinvii del progetto. Inoltre, l'accelerazione dei lavori del TurkStream (TS) e il suo completamento nel novembre 2018 hanno ridimensionato ulteriormente la rilevanza geoeconomica del TCGP (Gurbanov, 2018). Con il TS, 31,5 miliardi mc all'anno di gas russo entrano direttamente in Turchia senza intermediari, attraversando il Mar Nero. Da qui, l'estensione della vendita in Europa è già nei progetti di Mosca, che ha trovato subito una sponda nella disponibilità della Serbia.

Il Cremlino prosegue la sua partita più fronti, consapevole della vitale importanza del mercato energetico per la sua economia. Il controllo sulle dinamiche di questo settore nello spazio post-sovietico è imprescindibile per Mosca, che pur essendosi ritirata dal Turkmenistan, continua ad esercitare il suo *soft power* su tutti gli attori di questa macroarea. Non solo Ashgabat, ma anche l'altra sponda del Caspio, quella azera, deve fare i conti con la strategia russa. Le riserve di Baku hanno già tolto parte della domanda di gas prima rivolta alla Russia. Se la realizzazione del Southern Gas Corridor dovesse concretizzarsi, l'Azerbaijan diventerebbe uno dei principali *supplier* verso il mercato europeo; facilmente comprensibile, quindi, la sostanziale inerzia verso le istanze turkmene nel TCGP. Fino ad allora, però, Baku dovrà tener conto di due fattori: i tempi d'implementazione della seconda fase di sfruttamento di Shah Deniz, la cui produzione è essenzialmente rivolta all'estero; l'aumento della domanda globale, che nel 2017 ha costretto il Paese a richiedere a Gazprom un contratto triennale per l'import di gas, necessario per sopperire al deficit interno (Baldoni, 2019).

Per Mosca, l'influenza politico-commerciale sul Caucaso meridionale è determinante. In primis, qualsiasi prospettiva del TCGP rimane sotto scacco, per cui l'arrivo del gas turkmeno nella sponda occidentale del Caspio è ancora più osteggiato. In seconda battuta, facendo leva sull'instabile frontiera georgiana, sui bisogni azeri e, soprattutto, su quelli armeni, il Cremlino intende mantenere lo stretto controllo sul cosiddetto "corridoio caucasico", ovvero quella soluzione di continuità di interessi strategici e scambi che Mosca si è costruita rafforzando la sua presenza in Siria. Potenzialmente, l'asse Est-Ovest del Caucaso, rafforzatosi con il SCP, e l'idea del Southern Gas Corridor potrebbero interrompere l'ideale collegamento russo dall'Artico (Murmansk) al Mediterraneo (Tartus) (Florian, 2018). Qui si gioca la partita energetica fondamentale per il Cremlino, ma anche per le speranze occidentali del Turkmenistan.

La recente scoperta degli enormi giacimenti nello spazio marittimo compreso tra Cipro ed Egitto ed il lancio del progetto EastMed garantirebbero all'Europa un’autosufficienza crescente in materia energetica. Di conseguenza, la domanda di gas russo si ridurrebbe ulteriormente, così come la *soft power* ad esso legata, causando un grande contraccolpo per l’economia della Federazione. Inoltre, lo sviluppo del progetto EastMed relegherebbe in secondo piano sia l’idea del Southern Corridor, sia l’eventuale diversificazione proveniente dall’Asia centrale, sempre più ingestibile.

Conclusioni

Dall’idea di diversificazione ad una nuova dipendenza, il passo è stato brevissimo per il Turkmenistan. La crescente presenza della Cina, che si è imposta tramite il finanziamento e la costruzione di grandi progetti, sembra destinata ad un futuro duraturo e strategico nella *Silk Belt Road*. Nonostante il piano turkmeno di triplicare la produzione di gas naturale e di aumentare le esportazioni fino a 180 miliardi mc annui, il Turkmenistan non ha altri mercati in cui vendere ulteriori volumi del suo gas naturale (Tian, 2018). Inoltre, l'ormai prossima realizzazione del gasdotto sino-russo *Power of Siberia* consentirà a Pechino di inaugurare una rotta alternativa di approvvigionamento, riducendo così l'importanza del gas turkmeno (Indeo, 2019). Il ritiro di Russia e Iran, insieme ai bassi prezzi energetici, colpiscono duramente il bilancio del Paese. Il persistente immobilismo di Ashgabat, inoltre, le impedisce di volgere lo sguardo ad Ovest, annichilendo la già travagliata direzione europea delle esportazioni. Che il Turkmenistan possa garantire forniture per i paesi dell'Ue a lungo termine è certamente discutibile. Di sicuro, finché non sarà costruita un'infrastruttura concreta per portare il gas turkmeno nel SGC, quello azero rimarrà più affidabile per l'Ue nel prossimo futuro.

Con il TCGP ridotto ad uno sfortunato calcolo probabilistico, sembra così che «il Mar Caspio vada progressivamente perdendo il ruolo di potenziale connettore di una *Silk Belt Road* degli idrocarburi», come sostiene Carlo Frappi. Al contrario, il bacino sembra fungere da spartiacque tra due aree di sviluppo energetico, quella caucasico-anatolica e quella centro-asiatica. Queste due macroregioni «gravitano sempre di più attorno a due poli di aggregazione economica e diplomatica opposti: lo spazio europeo la prima, la Cina e l'Asia meridionale la seconda» (Frappi, 2018). In mezzo a queste, vanno inseriti anche la strategia russa e l'imprescindibile ruolo del mercato energetico per il Cremlino.

In questa rete di interessi e progetti si colloca il Turkmenistan, il cui isolamento e la cui fragilità rischiano di riflettersi sull'intero concetto di *One Belt One Road*, rappresentandone l'anello più debole e marginale. La riluttanza del paese ad aderire agli organismi regionali, inoltre, ne ostacola la capacità di affrontare le questioni transnazionali. Questo problema si riflette, infatti, nelle maggiori minacce alla stabilità del Paese. Il traffico di droga, la scarsità di risorse idriche, l'instabilità regionale e l'estremismo, come le politiche energetiche e di sviluppo, richiedono un approccio multilaterale e di ampie vedute, strategie di cui il Turkmenistan è tuttora totalmente carente.

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Investment opportunities in Belarus on the New Silk Road

by Yulia Prokopenko*

Abstract in English

This article is dedicated to China-Belarus "Great Stone" Industrial Park that is one of the most attractive regimes for investment on the New Silk Road in Eastern Europe. Created on intergovernmental level under agreement signed between China and Belarus, the "Great Stone" Industrial Park is open for investors from all over the globe and imposes no obligations to use Belarusian or Chinese goods, services, etc. The China-Belarus "Great Stone" Industrial Park is notable among all other economic zones for tax and customs preferences, having advantageous location and infrastructure, government support and investment security assurances. All these factors of attractiveness and importance on the New Silk Road will be considered in detail.

Keywords: investment, China-Belarus "Great Stone" Industrial Park, privileged regime, Belarus, the New Silk Road.

Abstract in Italiano

Questo *paper* è dedicato al Parco Industriale sino-bielorusso "Great Stone" che rappresenta uno dei regimi fiscali per gli investimenti maggiormente attrattivi della Nuova Via della Seta nell'Europa orientale. Creato a livello intergovernativo con il decreto firmato tra Cina e Bielorussia, il Parco Industriale "Great Stone" emerge tra le altre zone economiche tassazione e controlli doganali preferenziali avendo inoltre una posizione e infrastrutture vantaggiose, il supporto governativo e rassicurazioni sulla sicurezza degli investimenti. Tutti questi fattori di attrazione e importanza lungo la Nuova Via della Seta verranno considerati e analizzati nel dettaglio nel seguente studio.

Parole chiave: investimenti, Parco Industriale sino-bielorusso "Great Stone", regime privilegiato, Bielorussia, Nuova Via della Seta

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Introduction

Belarus due to the geographical position actually connects the Eurasian Economic Union (EEU) and the European Union (EU). Therefore, Belarus has been considered as an important hub platform of the Belt and Road Initiative. It is not well known, however Belarus is attractive not only because of location and developed infrastructure, but also because of investment opportunities on the Belt and Road Initiative. Through creating the “Great Stone” Industrial Park the Republic of Belarus becomes one of the most attractive jurisdictions for investment in Eastern Europe.

The “Great Stone” Industrial Park is a transnational project aimed at creating favorable conditions for investment and trade cooperation. The main goal of the Industrial Park is to maintain most favorable conditions for developing high-quality and innovative production facilities, in particular through developing its territory by attracting production companies of various profiles making use of preferential business regimes.

The “Great Stone” Industrial Park is covering an area of 112 square kilometers in Minsk region, Smolevichi district. The Park is adjacent to the international airport “Minsk”. It located on the international Moscow-Berlin route, the distance to Minsk, the capital of the Republic of Belarus, is 25 km. Proximity to the Belarusian capital provides access to highly qualified human resources.

Industrial Park boasts modern well-developed infrastructure that has been specially designed for manufacturing investment projects and may be tailored for any special needs of a specific investor. The up-to-date warehouse and customs infrastructure created by the world biggest logistic company China Merchants Group optimizes the flow of goods and the export-import procedures.

Park’s advantageous location and privileged business regime provides the investors with a gainful access to the Eurasian Economic Union market of over 200 million consumers.

The Industrial Park will become a platform for projects developing the following areas: electronics, telecommunications, pharmaceutics, fine chemistry, biotechnologies, machine building, new materials, integrated logistics, electronic commerce, social and cultural activities, research and advanced development.

The Industrial Park Master Plan was approved determining the strategy of functional territory development. A large portion of the Park territory was allocated for its industrial and logistic facilities. Alongside with industrial projects, investors are also encouraged to develop social projects.

Industrial Park's infrastructure, in addition, to production facilities, also comprises social, entertainment, recreation and shopping premises — thus providing opportunities for investment in many business areas.

Project dynamics

For better understanding current relationships between Belarus and China, we briefly look through dynamic of the project.

Cooperation on intergovernmental level between China and Belarus for creation Industrial park officially started in 2011, when an agreement on the China-Belarus Industrial Park was signed. It was ratified by the both countries on January 30, 2012. The project of the China-Singapore Suzhou Industrial Park (China) was taken as a model.

In 2012 a special legal regime of a 'special economic zone' was granted to the Industrial Park providing favorable terms of business activities for residents and investors, the China-Belarus equity joint venture "Industrial Park Development Company" and Administration of the China-Belarus Industrial Park were established.

On June 19, 2014, construction of the Industrial Park was started officially; by the end of 2014, 2 residents were registered — affiliates of HUAWEI and ZTE.

On May 12, 2017, Edict No. 166 of the President of the Republic of Belarus ratified the Regulation on the Special Legal Regime of the China-Belarus Great Stone Industrial Park. Its provisions largely expanded the list of remissions and preferences granted to Park residents and decreased the minimum investment limit making way for mid-sized business.

As of March 1, 2019, 42 residents were registered in the Industrial Park. By the end of 2020 it is expected 100 residents with the investments of $ 2-2.5 billion.

Thus, starting from 2017 the legislation stipulates a number of remissions and preferences for Industrial Park residents.

Remissions and preferences of the Park residents

Before detailed consideration of preferences in Park, it should be noticed that there are 3 types of entities related to Park's activity:

1. Park residents;
2. ‘Investors’ that are entities not being Park residents but involved in financing of construction/equipping of Industrial Park facilities (facilities being constructed under the approved planning documentation);
3. Other entities involved in Industrial Park activities.

All these types of entities may enjoy remissions and preferences, stipulated for particular type.

In this article we consider preferences and privileges for the first type – Park residents – as the most actual option for foreign investors.

Once an applicant has been registered as a Park resident, it may enjoy the Park’s special privileged regime. These preferences we consider in context of tax and customs preferences and privileges for Park employees.

Tax preferences

Industrial Park residents are, within a predefined period, exempt from:

a) Tax on profits from the realization of goods/operations/services produced in the Park territory — within 10 years from the date of first profit accrual.

Thereafter a reduced 50% profit tax rate will be applied (standard rate is 18%).

b) Real estate tax on facilities/premises within the Park territory.

c) Land tax on land plots within the Park territory.

d) Dividends. All dividends accrued by Park residents to their founders within 5 years from the year of first dividend distribution are charged with a preferential 0% rate of profit tax, personal income tax and profit tax pertaining to foreign entities having no representative office in Belarus.

e) Park residents are also exempted from the offshore duty.

That is, any and all allocated profits are fully exempt from all taxes within 5 years.

f) Royalty. Until January 1, 2027, the royalty tax rate for any Park residents' royalty payments to foreign entities made as remuneration for any information on manufacturing, commercial or scientific practices (including know-how), payments for a license, patent, design, utility model, scheme, formula, industrial prototype/process, will only be charged at 5% — which is three times less than the standard royalty tax rate.

g) Value-added tax. Park residents are entitled to make full deduction of VAT sums pertaining to any purchase of goods (works, services) and/or property rights on the territory of Belarus (or paid during importing in Belarus), where such goods/works/services/property rights are used for the construction or fitting of buildings/ structures located within the Park territory, however not later than on December 31 of the year following the year of commissioning.

Most transactions pertaining to sales of works and services by Park residents to foreign companies are exempt from VAT. These include auditing, consulting, marketing, legal, engineering, advertising and other works/services.

Privileges for Industrial Park employees

A number of tax allowances for personnel employed by Park residents have also been established. Until January 1, 2027, personal income tax on all incomes gained from Park residents under employment agreements will be charged at the rate of 9% (instead of standard 13%).

Preferences pertaining to mandatory insurance contributions have also been established:

• insurance contributions to the Social Security Fund (SSF) shall not be paid for foreign citizens who are temporarily resident in the territory of the Republic of Belarus and engaged in investment projects within the Park territory;

• in respect of employees of Park residents, mandatory insurance contributions are only charged on the sum of the average monthly wage in the Republic of Belarus (instead of normally applying rates which may be 5 times bigger). For instance, if an employee has a monthly take-home pay equivalent to 1,500 EUR, the Belarusian employer has to pay 820 EUR of tax and nontax payments to various funds, while a Great Stone resident will only have to pay 286 EUR (three times less).

Customs privileges

During construction phase all goods (manufacturing equipment, component/spare parts, raw materials) imported in Belarus to be used exclusively for the investment projects for the construction and equipping of Industrial Park facilities will be exempted from import customs duties and VAT charged by customs authorities.

During production phase Park residents are entitled to use the ‘customs free zone’ procedure that allows importing foreign goods in the Park territory without paying customs duties and taxes, provided that such goods will not be moved outside the Park territory and will only be used by the resident for an investment project.

(I) Goods manufactured (processed) from foreign goods placed under the ‘customs free zone’ procedure, and (II) goods manufactured (processed) from foreign goods placed under the ‘customs free zone’ procedure and EEU goods, will be treated as foreign goods. As a consequence, any trader selling such goods in the EEU market will have to pay import customs duties. However, where a Park resident places under the ‘release for domestic consumption’ procedure any goods produced by using of foreign goods previously placed under the ‘customs free zone’ procedure, such goods will be exempted from VAT charged by the Belarusian customs authorities.

Park residents are entitled to bypass the ‘customs free zone’ procedure. In such a case, during importing foreign goods, they will have to pay import customs duties and VAT. However, provided all required processing criteria have been duly observed, such resident's goods will be treated as EEU goods and no import customs duties will be charged on them.

Among other preferences should be noticed also visa-free regime for 180 day upon the application of the Industrial park administration.

Thus, the "Great Stone" Industrial Park offers number of preferences that attract foreign investors to become its resident. The reasonable investor's question in this regard is whether Belarusian government assures investment security.

Government support and investment security assurances

At present, the "Great Stone" Industrial Park is the main investment project of the Republic of Belarus and its fundamental legal principles and guarantees are stipulated by the Agreement between the Government of the Republic of Belarus and the Government of People's Republic of China on the China-Belarus Industrial Park. However, the Industrial Park is open for investors from all over the globe and imposes no obligations to use Belarusian or Chinese goods, services, etc.

Cooperation with the residents and investors is arranged on the basis of "one stop service" principle (all required procedures and services are provided directly at the location of the industrial park administration).

Park residents are granted the most favorable business regime in Belarus as compared to other modes of treatment (where any more advantageous business regimes should be established, they will immediately apply to Park residents as well).

All guarantees, and assurances stipulated by the Belarusian legislation apply to Park residents, in particular international treaties and the stabilization clause guaranteeing that any changes in legislation will not impact Park residents (in terms of taxation — at least until 2027).

Furthermore, any inspections of Park residents may be performed only as agreed by the Administration.

Gaining Industrial Park resident status

All investors, irrespective of whether they are residents of Belarus or another state, shall enjoy the same treatment and equal rights to found and to do business in the Industrial Park. However, only legal entities registered in the Republic of Belarus are entitled to do business in the Industrial Park as its residents. Consequently, foreign investors (and private individuals from among Belarusian residents) may carry out an investment project only through the participation in a Belarusian legal entity.

Gaining an Industrial Park resident status is a standalone administrative procedure requiring compliance with a number of following terms:

1. Location in the Industrial Park territory. Only legal entities founded in the Republic of Belarus and located in the territory of the Industrial Park can be registered as Industrial Park residents.

2. Implementing an investment project in a prescribed sphere. An investment project of a legal entity applying for Park residency shall simultaneously comply with the following criteria:

2.1. Financial criterion: stated amount of investments — at least 500,000 US dollars (where the term of investment is at most 3 years) / at least 5,000,000 US dollars (where the term of investment is up to 3 years).

2.2. Business line criterion: production spheres electronics, telecommunications, pharmaceuticals, fine chemistry, biotechnologies, machine building, new materials, complex logistics, e-commerce, data storage/processing, social/cultural activities or R&D projects.

If a legal entity desires to carry out another type of activities or define other investment volumes, it shall submit such proposal to the Industrial Park Administration.

For gaining a resident status an application shall apply an application with originals and copies of the state registration certificate and the constituent documents verified by company CEO, investment project rationale (the document containing the main aspects of the prospective investment project) and draft agreement on Park operational conditions.

The Industrial Park Administration will examine the submitted documents and approve (or refuse) the registration of an applicant within 5 working day.

Conclusion

Taking into account all above mentioned, from our short review obviously follows that creation of the China-Belarus Industrial Park “Great Stone” on intergovernmental level and further expansion the list of remissions and preferences granted to Park residents were an important step in the development of the Belt and Road Initiative. Currently, the China-Belarus Industrial Park “Great Stone” is the most favorable place for doing business in the EEU region with quite simple and transparent procedure for gaining Industrial Park resident status. Park’s advantageous location and privileged business regime attract investors from all over the globe. It provides opportunity to do business side by side with other major companies. Furthermore, the joint “Industrial Park Development Company” arranges the construction of Park’s engineering infrastructure and also assists in constructing investors’ facilities that is additional advantage to the tax and customer preferences.

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The Internet as a tool in terrorists' and extremists' hands. How does Kazakhstan counter this phenomenon?

by Sagira Tulesheva*

Abstract in English

The Internet today is a universal instrument of communication and exchange of information between billions of people in the world. However, despite the positive aspects of the use of the international network, it has attracted the attention of terrorist organizations. In other words, the Internet space is a good tool in terrorists' and extremists' hands. The article deals with the problems of spreading terrorism and extremism ideology through the Internet. The author considered what goals terrorists and extremists pursue, what methods they use to influence people's consciousness, particularly, how they use websites, social networks and messengers for recruitment. Using the example of Kazakhstan, a country particular interested by the Belt and Road Initiative which plays a strategic role in the regional security and geopolitical dynamics, the author described how the country counters this problem, what measures are taken to eradicate this phenomenon.

Keywords: security, terrorism, extremism, cyber-terrorism, Internet, counter terrorism.

Abstract in Italiano

Internet oggi è uno strumento universale di comunicazione e scambio di informazioni. Tuttavia, nonostante gli aspetti positivi dell'uso della rete internazionale, Internet ha attirato l'attenzione delle organizzazioni terroristiche. In altre parole, Internet è uno strumento nelle mani dei terroristi e degli estremisti che comporta problemi per la sicurezza nazionale. Terroristi ed estremisti utilizzano differenti metodi per influenzare la coscienza delle persone, come l'utilizzo di siti web, social network e messaggeri per il reclutamento. Usando l'esempio del Kazakistan, paese di estrema importanza nella Belt and Road Initiative per la stabilità regionale e il suo peso geopolitico, l'autore descrive quali sono le misure e le strategie adottate dal Governo per contrastare il terrorismo.

Parole chiave: sicurezza, terrorismo, estremismo, cyber-terrorismo, Internet, antiterrorismo

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Introduction

The Internet today is a universal instrument of communication and exchange of information between billions of people in the world. However, despite the positive aspects of the use of the international network, it has attracted the attention of terrorist organizations.

Today, in the world there are two main types of using the global Internet for terrorist purposes. First is information and psychological terrorism, which uses the Internet to promote terrorist ideology, demonstrate the power of terrorist organizations, intimidate the population and spread disinformation. Through the Internet, international terrorist organizations spread the ideas of extremism and terrorism on the basis of religion, propagate radical views that preach distorted ideas of "*Jihad*" and fight against "infidels". Xenophobia is promoted when pseudo-religious groups cultivate fanatical devotion and rejection of other religions in their adherents. By means of Internet resources, scenes of murders and tortures of people are shown, the policy of large-scale information terror is carried out.

Second is information technology terrorism, or cyber-terrorism, the main purpose of which is the destruction of infrastructure systems. At the same time, cyber-terrorism in the current period is particularly dangerous because in case of disconnection of life support systems it can lead to human casualties.

Unfortunately, the Internet attracts terrorist groups with its features such as ease of access; weak censorship or even the complete absence of any government control; the presence of a huge potential audience of users, especially young people (the majority of the daily audience of online resources are people under the age of 30, and the audience of social networks is mainly teenagers and young people from 14 to 20 years. They are students of schools and universities) (Lashin, Churilov, 2016); anonymity of communication, as well as the fastest and relatively cheap way to disseminate information.

The World Wide Web has become a tool for promoting harmful extremist ideas and the cult of violence. Terrorists are actively using the potential of payment instruments for commercial electronic transfers and other systems of the Internet.

There are websites that directly disseminate ideas of extremism, separatism and terrorism. In particular, international terrorist organizations via such resources carry out without any obstacle propaganda of radical movements of Islam. There are also Internet resources of reference nature that do not directly call for illegal activities. Using such sites, we can find information about how to get toxic substances in simple conditions or to collect some explosive device. Sites related to this group can be located almost anywhere in the network, as the information contained there is presented as a reference. Most of these sites are short-lived and often change domain names.

The Internet has become fertile ground for the spread of various rumours (including disturbing) and propaganda materials. Because of this robust functionality that touches so many social aspects; this has resulted in a fundamental shift in human perspective and psychological behaviour (Wisenberg Brin, 2012).

Features of information dissemination in social networks determine their importance, which is difficult to overestimate. From a psychological point of view, a user sees his account as a kind of personal space with peculiarities of social networks, such as the user's independent choice of the circle of friends and membership in communities (Gladyshev, 2013).

Ideologists of terrorist organizations in their propaganda work are increasingly using documentaries, audio and video messages, propaganda and agitation through personal communication, through visual means of communication of the Internet - Skype, Viber, WhatsApp (Zhavoronkova, 2015). In their outreach work they use not only a symbolic system, as a speech (written or verbal), but also the means of non-verbal communication: opto-kinetic (gestures, facial expressions, pantomime), para - and extralinguistic (range and tone of voice, pauses, crying, laughing, speed of speech), eye contact (Andreyeva, 2014).

Terrorists often use terrorist attacks as a means of transmitting messages (due to the resonance in the media), activity in social networks and Internet forums, their own Internet sites and much more. All these measures are included in the communication strategy, where the ultimate goal may be to change state legislation, to displace a political leader or to force the authorities to take other decisions beneficial to terrorists (Bazarkina, 2013).

Terrorists have come to rely on the Internet for some level of overall sustainment of their organisations and execution of activities and attacks. Some of the most important aspects of the Internet across all of these capabilities are its ability to globalise terrorist groups and allow them to operate, or be solely operational, in many geographic locations separate from its core (Cronin, 2003), influence new social movements and "the clash of civilizations". While it can be argued that only some of terrorists' activities on the Internet would be considered a direct threat, any of these activities are cumulative and contribute to the overall threat to national security.

Cases of using Internet space by terrorists in Kazakhstan

In Kazakhstan, as well as in many other countries of the world, the issue of counter terrorism in Internet space is quite relevant. Despite the fact that the overall religious situation in the country remains stable, however, there are a number of problems associated with the trend of religious radicalization among a certain part of the population (Azilkhanov, 2014).

The demographic of users of the Internet plays a key role - its availability and saturation of youth-oriented websites, social networking sites and media channels make it perfect for targeting recruits. Terrorist groups have become very well familiarized to the content and material that appeals to youth and how to reach them on the level of peers, as opposed to the once perceived generational divide (Findlay, 2014). The lack of goals, ideas and a decent sample in the youth environment can lead to a loss of orientation, psychological vacuum, which is quite successfully filled by specialists in the field of information war (Samokhina, Gutova, 2016). And also, a critical level of socio-economic development forms the subconscious of the population (especially young people), making it more susceptible to certain kinds of ideas: “universal justice”, “equality”, “egalitarianism”, “prosperity” (Manoilo, Shegayev, 2018).

The monitoring of printed and electronic media, Internet resources, as well as social networks (which are more preferable for young generation) is carried out in order to identify materials promoting the ideas of religious extremism and terrorism.

For example, the monitoring found that a video file called “Those who were truthful with Allah” was posted in the social network “Vkontakte” in the communities called “AlHayat” and “Islamic state” (prohibited organization in Russia and Kazakhstan), where the content showed signs of propaganda and justification of terrorism (Daulbayev, 2015)

Similarly, the monitoring established that in the social network “Twitter” and also on Youtu.be and Youtube.com the video “Information center Al-Hayat is: Detect internal enemies” with called to terrorist activities was posted (Daulbayev, 2015).

In this regard, the Prosecutor General in accordance with article 41-1 of the Law of the Republic of Kazakhstan “On communication” introduced regulations on measures to restrict access to these materials temporarily.

In 2013 on the Internet portal “Youtube.com” a video “Mujahideen from Kazakhstan in sham” about a group of Kazakh citizens who went to Syria to participate in the fighting was posted. The video also contained calls to join the ranks of Syrian terrorists. Signs of propaganda of extremism and terrorism in the video were established by the judicial psychological, philological and political expertise (Tursynbekova S., 2014).

In 2017 in the city of Shymkent there was a case when phone repairers downloaded extremist materials on their clients’ mobile phones that were difficult to remove.

All this is a planned psychologically directed information impact on the population, and it is organized by specially trained people with certain skills in the field of design, religion and psychology. One of the reasons for the success of recruiters is their active use of modern psychological and marketing technologies. The methods of their work are diverse and constantly improving, which complicates the work of agencies.

Most extremist and terrorist organizations portray themselves as being constantly pursued by state structures - a tactic designed to attract “sympathetic” followers. Members of a movement or organization seem to be fighters for freedom who use violence against their will because “a ruthless enemy” infringes on the rights and dignity of people.

However, the owners of popular social networks, Internet platforms of global importance have become more responsible to block pages that promote terrorism and calls for violence. For example, Facebook and Twitter according to the results of their own monitoring, identifying violations of the rules of use of the network, removed the official pages of terrorist groups and thus helped in the fight against terrorism. Google Corporation, which is the owner of the video portal YouTube, introduced a system that allows users to tag content potentially related to terrorism (Mailybayev, 2014).

Along with humans as a resource, one of the most transformative aspects of the Internet is the area of financing for terrorist groups – fundraising, money laundering and transferring.

As an example, there is a case with a citizen of Kazakhstan Abrisova E. In August 2013, she went to the United States to treat her daughter. It was done at the expense of the American charity. Being in the United States, the woman who practically did not speak English, actively began to make acquaintances in the Internet. In the social network Facebook, she established contacts with a group of Russian-speaking Muslims from the republics of the former USSR. As a result of intensive communication, this woman transferred 7.5 thousand dollars to the account of Syrian militants, it was found later by the US law enforcement agencies (Isabayeva, 2015).

Another type of using by terrorists the Internet is electronic *Jihad*. Unlike an ordinary terrorist who uses explosives or small arms to achieve his goals, a cyberterrorist uses modern information technologies, computer systems and networks, special software designed to infiltrate computer systems and organize a remote attack on the information resources of the victim.

We should not forget about the difficulties of detecting and eliminating network centres (servers, domains, websites). Extremists widely use features of the technical organization of the global network, allowing to register domain names of the site in one country, and to place information in another. At the same time, access to it can be provided from almost anywhere in the world with a network connection. In this regard, there are additional difficulties in combating the spread of extremist materials and psychological impact through the Internet.

What measures are taken to counter terrorism and extremism in Kazakhstan?

Kazakhstan is developing effective measures to counter terrorism and extremism. The first step was the adoption of the law "On combating terrorism" (July 1999), which established the legal and institutional framework for the fight against terrorism, the functioning of state agencies and organizations. On 18 February 2005, the President of Kazakhstan signed the law "On combating extremism", which protects the country in the information sphere. Thus, the article 12 of the Law prohibits the importation, publication, production and distribution of extremist materials. Information materials imported, published, manufactured and containing signs of extremism and propaganda of terrorism are prohibited for distribution in the territory of the Republic of Kazakhstan (Online Zakon, 2016).

Recently Kazakhstan has created the State Program on combating religious extremism and terrorism, designed for 2018-2022, which clearly outlines the mechanisms and methods for preventing manifestations of religious extremism and preventing threats of terrorism. Particular attention is paid to the broad involvement of the public, the media and experts in preventive activities, the modernization of information outreach, including in the Internet space (Mailybayev, 2014).

The renewed Criminal code reflects the results of criminalization of new forms of terrorist and extremist activities, computer crime, including in the Internet space. The Chapter “Criminal offenses against the security of information technologies” provides the responsibility for the provision of services, the distribution of Internet resources for illegal purposes.

Practice shows that mass mailing materials by e-mail, using Skype and other computer programs, by means of SMS and MMS messages on networks of cellular communication is widely used for distribution of information, for example, with destructive content. The criminal code of Kazakhstan introduced the term “information and communication networks”. A qualified structure of propaganda of terrorism or extremism or public calls to commit an act of terrorism, using the means of information and communication networks has a following punishment - deprivation of freedom with confiscation of property.

In 2012 the President of the Republic of Kazakhstan Nursultan Nazarbayev in his Message to the people of Kazakhstan “Strategy-2050” (a new political course) noted that in the age of Internet and high technologies, when the information flow is enormous, each person should have a “filter”, because extremism and terrorism in Kazakhstan have not ideological, but criminal basis. Behind the pseudo-religious rhetoric there is criminal activity that undermines the foundations of society (Nazarbayev, 2012).

Conclusion

It should not be forgotten that one of the effective ways to counter the propaganda of terrorism and extremism in the Internet space is to increase the religious literacy of modern youth through the Internet resources with spiritual and educational purposes, for instance, website: Islam.kz

The importance of parental control cannot be underestimated. In order to protect their children from the negative impact of recruiters and false preachers, parents must know for what purpose their children use social networks, in what communities they have membership and what knowledge they get there.

The problem of Internet terrorism takes a strong position in the minds of modern society. Information flows, which are presented to the population by the mass media and through the Internet resources, must remain under control. On the one hand, it is done to avoid the possibility of causing excessive fear and anxiety among people, and on the other - not to form indifferent attitude to terrorism. We can agree that the Internet is not only an immense source of information, a means to ensure communication, the implementation of integration ideas, but also a powerful tool of information influence to achieve the desired response, to manipulate behaviour of an individual, social groups and society.

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