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WHY ECONOMIC POWER DOES NOT BECOME SOFT POWER: THE CASE OF THE CENTRAL ASIAN STATES

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Abstract

China has become the dominant economic actor in Central Asia, yet its standing in regional public opinion has not risen in step with its economic weight, and in several states it has declined. This article asks why economic dominance has failed to translate into soft power. It argues that the conversion fails for a structural reason: China's instruments of influence are overwhelmingly state-directed and operate at the elite level, while attraction is generated in the society-level realm of perception, identity, and everyday experience that Beijing does not control. Drawing on trade and debt statistics, Central Asia Barometer survey data across the five states, and a comparison of China's cultural and educational instruments, the article shows that favourable opinion fell sharply across the region during the very years in which economic ties deepened, and that the one type of instrument that does improve attitudes — vocational training delivering tangible local benefit — is precisely the one that bypasses the elite channel and reaches ordinary citizens. The case of Central Asia therefore confirms a more general proposition: economic power and soft power are distinct resources, and the first does not automatically produce the second. The finding has implications both for China's regional strategy and for the theory of influence.

Keywords: soft power; economic influence; China; Central Asia; Belt and Road Initiative; public opinion

1. Introduction

In the space of two decades China has gone from a marginal economic presence in Central Asia to its single most important external partner. Total trade with the five regional states reached about 94.8 billion dollars in 2024 and crossed 100 billion in 2025, and Beijing has displaced Russia as the leading trade partner for most of the region (Astana Times, 2025; Times of Central Asia, 2026). By the conventional logic of influence, this should have made China the most admired power in Central Asia.

It has not. Across the region, favourable views of China have fallen from their late-2010s highs, and where they have recovered they remain below the level its economic role might predict (Central Asia Barometer, 2024). The gap between China's economic dominance and its public standing is the puzzle this article sets out to explain. It is a puzzle with theoretical stakes, because so much analysis of China's rise assumes that economic weight will, more or less mechanically, generate political influence and goodwill over time.

The explanation offered here is structural rather than incidental. It is not that China has communicated badly or that a handful of projects went wrong. It is that the instruments through which China exercises influence are built for one task — securing cooperation from governments — and are poorly suited to another — winning the attraction of societies. Where China's engagement does flow through to ordinary citizens as concrete benefit, attitudes improve; where it does not, economic weight accumulates without producing affection. The argument unfolds in several steps: a conceptual distinction between economic power and soft power, a description of China's economic dominance and its instruments, an analysis of the public-opinion record across the five states, an account of the

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debt and protest dynamics that depress attraction, and a comparison of China's cultural instruments that isolates the conditions under which conversion does occur.

2. Literature Review

Joseph Nye's concept of soft power rests on a simple but consequential distinction. Power can be exercised through coercion, through payment, or through attraction; the first two are hard power, and only the third is soft power (Nye, 2004). Attraction is the capacity to shape what others want, so that they align with you voluntarily because they find your culture, conduct, or model appealing. The distinction matters here because economic resources sit on the payment side of the ledger, not the attraction side. Trade, loans, and investment can purchase the cooperation of elites and can make a partner difficult to refuse, but they do not in themselves create admiration, and large economic involvement can produce the opposite of attraction when it generates dependence or the sense that benefits flow mainly to the investor.

Nye himself cautioned that soft power depends heavily on the credibility of the source and on whether influence is exercised through civil society rather than imposed from above. Subsequent scholarship has extended this insight, distinguishing soft power proper from sharp power — influence exercised through information control and manipulation — and arguing that recipient publics often reclassify a sending state's cultural projection as the latter. This literature implies that state-directed instruments may be structurally limited in their capacity to attract, a hypothesis this article tests against the Central Asian record.

A second relevant body of work concerns the conversion of economic power into political influence more broadly. Studies of economic statecraft show that material leverage translates unevenly into outcomes, mediated by domestic politics, identity, and perception in the target society. Constructivist international relations theory supplies the mechanism: the meaning assigned to material facts is socially constructed, so identical economic engagement can be read as opportunity in one society and as threat in another, depending on prevailing narratives and historical memory (Wendt, 1999). For Central Asia, those narratives include a documented strand of Sinophobia predating the current investment surge (Laruelle & Peyrouse, 2012).

A third strand examines the specific debate over Chinese lending — the debt-trap thesis — and the regional protest dynamics it has generated (Central Asia-Caucasus Analyst, 2024). Whether or not the strategic-intent version of the thesis holds, the literature establishes that public anxiety about debt is real and politically active. Finally, a growing literature on China's educational and vocational instruments, including Confucius Institutes and Luban Workshops, has begun to ask which forms of engagement actually build goodwill (Washington Post, 2023). The present article synthesizes these strands into a single structural account and tests it comparatively across all five Central Asian states.

The literature on economic statecraft adds a further reason to expect imperfect conversion. Dependence is a double-edged instrument: while it can give the dominant economy leverage over governments, it also generates resentment and a defensive search for alternatives in the dependent society. Studies of asymmetric economic relationships show that the weaker party frequently develops hedging behaviour and a heightened sensitivity to sovereignty, precisely because dependence is uncomfortable. Applied to Central Asia, this implies that the deeper China's economic penetration, the more likely it is to activate the very anxieties that depress its attraction — a dynamic in which economic success and soft-power failure are not merely unrelated but can be causally linked. This article's findings are consistent with that more pointed possibility.

3. Research Methodology

The study adopts a comparative case design covering the five Central Asian states — Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan — which together hold the

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relationship to China constant in broad terms while varying in the depth of economic dependence, the length of shared borders, and the openness of the public sphere. This variation allows the central proposition to be examined under different conditions. The evidence base combines public-opinion data from the Central Asia Barometer across successive waves between 2017 and 2023 (Central Asia Barometer, 2024); trade, investment, and external-debt statistics from Chinese customs data, national finance ministries, and regional financial institutions; and documentary analysis of China's cultural and educational instruments.

Soft power is operationalized as an outcome — the degree of voluntary favourability China secures among regional publics — rather than as the volume of activity it undertakes. This output-based definition is essential to the argument, since the phenomenon under study is precisely the divergence between high economic input and low attraction output. Two limitations apply. First, survey data in constrained public spheres carry reliability risks, and reliable data are thinner for Turkmenistan and Tajikistan than for the other states. Second, official economic statistics are themselves contested: figures reported by Beijing diverge, sometimes markedly, from those reported by the Central Asian states (Orda, 2025). The analysis therefore relies on the consistency of trends across multiple sources rather than on the precision of any single figure.

The choice to examine all five states together, rather than a single country, is deliberate and methodologically motivated. Because the five share the same dominant partner but differ in border length, economic structure, debt exposure, and public-sphere openness, the regional frame functions as a natural comparison that strengthens the central inference: if economic weight produced attraction, the most economically engaged states should display the most favourable opinion, and they do not. A single-country design could not distinguish a general mechanism from a local idiosyncrasy. The breadth of the case selection is thus a source of analytical leverage rather than a dilution of focus, allowing the article to show that the disjunction between economic power and soft power recurs across very different national settings.

4. Results and Findings

4.1 The scale of China's economic dominance

The scale of China's economic position is not in dispute. Beyond the headline regional trade figure, dependence varies but is uniformly significant: in 2024 China accounted for an estimated 55 per cent of Turkmenistan's trade, around 35 per cent of Kyrgyzstan's, and roughly a fifth of the trade of Kazakhstan, Uzbekistan, and Tajikistan (Caspian Post, 2025). Kazakhstan alone conducted some 43.8 billion dollars of trade with China in 2024, and regional trade surpassed 100 billion dollars in 2025 (Astana Times, 2025; Times of Central Asia, 2026).

This dominance is reinforced by investment and lending under the Belt and Road Initiative, first announced in the region in 2013, and by infrastructure across transport, energy, and digital sectors. Flagship undertakings include the China–Kyrgyzstan–Uzbekistan railway, whose financing was finalized in December 2025 at a project cost of about 4.7 billion dollars, and the Central Asia–China gas pipeline network (Railway Supply, 2025). The China–Central Asia summit format, with its most recent meeting in Astana in 2025, has given the relationship a permanent diplomatic architecture at the highest level. China supplies machinery, electronics, and consumer goods and draws out hydrocarbons, metals, and agricultural products, leaving the regional states structurally embedded in a relationship that would be costly to unwind.

One feature of this dominance deserves emphasis because it bears directly on perception: the data themselves are contested. Trade figures reported by Beijing frequently diverge from those reported by the Central Asian states, sometimes by wide margins, owing to differences in methodology and the treatment of transit cargo and re-exports (Orda, 2025). This opacity is not merely

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a technical issue; it feeds a public sense that the true terms of the relationship are not fully known, which in turn corrodes trust even where the underlying economic benefit is genuine.

Energy ties deepen the dependence and vary it by country. Turkmenistan, whose trade is the most China-oriented in the region, sends the bulk of its natural gas to China through the Central Asia–China pipeline, making Beijing the decisive market for its single most important export. Kazakhstan, by contrast, has used its larger and more diversified economy to expand the range of goods it exports to China and to keep its debt ratios low, which has translated into a somewhat steadier, if still wary, public posture. Kyrgyzstan and Tajikistan, the smallest and most exposed economies, run heavily imbalanced trade in which finished Chinese goods dominate and raw-material exports lag, deepening both their dependence and their vulnerability (Carnegie Endowment, 2025). These differences in economic structure shape the texture of public concern in each state, but in none of them has economic weight produced commensurate attraction.

4.2 State-directed instruments operating at the elite level

The core of the explanation is that China's main instruments of influence — large loans, intergovernmental agreements, summit diplomacy, and platforms such as the Shanghai Cooperation Organisation — are directed by the state and consumed by the state. They build durable cooperation among decision-makers, but they make little contact with the populations whose attitudes register in surveys. A relationship that is dense at the level of ministries can remain shallow at the level of citizens, and it is the second level that determines soft power. This is the structural heart of the conversion problem: the channels are optimized for elite cooperation, not for popular attraction, and the two do not automatically reinforce one another.

The point is not that elite-level engagement is ineffective; on the contrary, it has secured China a commanding economic and diplomatic position. The point is that this form of engagement produces a particular kind of result — governmental alignment — that is frequently mistaken for, but is not equivalent to, public affinity. When analysts infer rising Chinese soft power from the density of summits, agreements, and loans, they conflate the two. The survey record, examined next, shows that the inference does not hold.

4.3 The public-opinion record across the five states

In 2017, favourable views of China stood at roughly 75 per cent in Kazakhstan, 73 per cent in Uzbekistan, and 55 per cent in Kyrgyzstan; by 2021 these had fallen to around 39, 44, and 46 per cent respectively (Central Asia Barometer, 2024; China-Global South Project, 2025). The decline unfolded during the very years in which trade and investment were expanding most rapidly, the clearest possible evidence that the two move on separate tracks. After 2021, favourability partially recovered in Kazakhstan and Kyrgyzstan without returning to earlier highs, indicating that opinion responds to events and framing rather than to the steady accumulation of economic ties.

The five states differ in degree but not in direction. Uzbekistan and Turkmenistan began with comparatively favourable attitudes and a later onset of scepticism, partly because their large-scale engagement with China started later and, in Uzbekistan's case, because it shares no border with China (Eurasianet, 2020). Kazakhstan and Kyrgyzstan, with longer borders and longer histories of contact, developed apprehension earlier and more sharply, and both experienced waves of anti-China protest. Tajikistan, the most economically dependent and politically constrained, presents the most ambiguous picture, with limited reliable data but evidence of static, externally shaped sentiment. Across all of them, comparative surveys show China continuing to trail Russia in favourability in several states despite leading it in trade (Caspian Policy Center, 2024). Variation in the pace of decline does not disturb the underlying finding that economic weight and public attraction move independently.

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Beneath these national averages, the survey evidence shows that attitudes are structured by demographic factors — ethnicity, age, and gender — and by the local impact of specific projects and the information sources on which respondents rely (Central Asia Barometer, 2024). The mediating role of information is itself revealing: where attitudes have shifted, they have done so in response to narratives circulating through media and social networks rather than in response to changes in trade volumes. This is the constructivist mechanism made visible. It also explains why opinion can recover, as it did in Kazakhstan and Kyrgyzstan after 2021, without any corresponding change in the underlying economic relationship: what moves is the story, not the balance sheet. For the argument of this article, the implication is that economic engagement is simply the wrong variable to expect attraction to track.

4.4 Debt, opacity, and protest

Where the economic relationship does reach public awareness, it often does so through the language of debt and dependence. The figures give the anxiety substance. By the end of 2023, Uzbekistan's debt to China stood at about 3.775 billion dollars, just under 13 per cent of its external debt; Tajikistan owed China on the order of 900 million dollars, close to 28 per cent of its external debt, and the country is rated at high risk of debt distress; and Kyrgyzstan's obligations to China have at times approached 40 per cent of its external debt, prompting public warnings that strategic assets could be at risk in the event of default (BISI, 2024; The Diplomat, 2026; Central Asia-Caucasus Analyst, 2024). For the most exposed states, debt to China is not an abstraction but a recurrent feature of domestic politics.

These concerns have repeatedly translated into mobilization. Kyrgyzstan saw roughly forty anti-China demonstrations in 2019, and Kazakhstan experienced a comparable wave in 2021, with grievances centred on debt, labour practices, the presence of Chinese workers, and environmental effects (China-Global South Project, 2025). The structural asymmetry of trade — finished goods imported from China against raw materials exported to it — sharpens the sense among the most dependent states that the relationship entrenches rather than transforms their economic position (Carnegie Endowment, 2025). Economic engagement, in short, can mobilize opposition as readily as it secures cooperation, and the opposition is concentrated, visible, and politically salient in a way that diffuse benefit is not.

A recurring theme in the most exposed states is the suspicion that the benefits of the relationship accrue to a narrow elite while the costs — debt service, displaced labour, environmental burden — are borne by the wider population. This perception is corrosive precisely because it attaches the relationship to questions of domestic justice and governance, not merely to foreign policy. When citizens conclude that Chinese projects enrich connected insiders rather than the public, the resulting resentment is directed at both the partner and their own government, and no amount of additional investment resolves it. The political economy of the relationship, in other words, can convert each new project from a potential source of goodwill into a fresh occasion for grievance, which is the opposite of what the payment-equals-attraction assumption predicts.

4.5 Cultural instruments: the Confucius–Luban contrast

China's cultural and educational instruments reveal the conditions under which economic engagement does convert into goodwill. The Confucius Institute network — at its global peak numbering in the hundreds — has expanded the teaching of Chinese language and the promotion of Chinese culture across the region, and government scholarships draw thousands of regional students to China; nearly ten thousand Tajik students alone have passed through a single Confucius Institute over a decade (Cambridge / Nationalities Papers, 2023). Yet these instruments are widely read as state-

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directed projection, and the regional decline in favourability occurred despite their expansion, suggesting that culture broadcast from above does little to attract.

Two limits compound the problem. First, the reach of these instruments is narrow relative to the population: language learners and scholarship recipients are a small minority, so even a successful programme touches few citizens directly. Second, scholarships and language training are frequently understood as channels into employment by Chinese enterprises rather than as disinterested exchange, which frames them as extensions of the economic relationship rather than as cultural goodwill. The instruments therefore inherit the same suspicions that attach to the investment they accompany. This is why their expansion has coincided with, rather than reversed, the decline in favourability, and why the cultural apparatus cannot be relied upon to repair an image problem rooted in the economic and identity domains.

Luban Workshops present the instructive contrast. First opened in the region in Tajikistan in 2022 and since extended — Kazakhstan inaugurated its second and third workshops in 2025, with further sites planned for Uzbekistan, Turkmenistan, and Kyrgyzstan — these vocational centres train students in marketable technical skills such as land surveying, gas transportation, and green-energy technology (Chinascope, 2025; Eurasianet, 2022). Because their value is concrete and accrues to individuals rather than to the state's image, and because they attract less political scrutiny, observers have argued that they may build goodwill more effectively than the institutes through the gradual accretion of tangible benefit (Washington Post, 2023). The pattern is decisive for the argument: economic engagement improves attitudes mainly when it is restructured to reach citizens directly with usable benefit. That is the narrow channel through which economic power becomes soft power, and most of China's engagement does not flow through it.

5. Discussion

The findings converge on a single mechanism. Economic power converts into soft power only when economic engagement also delivers something that ordinary citizens experience directly as a benefit — and most of China's engagement, routed through loans, intergovernmental agreements, and state-directed cultural projection, does not. Debt anxiety, opacity, local friction, and identity all blunt the conversion, while the instruments that succeed are those, like vocational training, that bypass the elite channel and reach individuals with concrete value. The comparison across the five states holds the sending side constant while varying the receiving conditions, and the result is consistent: the country that gives the most economically is not the country that enjoys the most public trust.

Identity imposes a ceiling that economic means cannot raise. The situation in Xinjiang, directly relevant to the Turkic and Muslim-majority societies of the region, undercuts Beijing's cultural outreach in a way no economic figure can offset, illustrating the constructivist point that a single dimension of identity can override a large body of material benefit. This is why the most overtly cultural instruments, the Confucius Institutes, have struggled to move opinion: they operate on exactly the terrain — values and identity — where China is least persuasive, while the instruments that work, the vocational workshops, succeed precisely because they offer practical benefit rather than ideological appeal.

The wider implication is theoretical as well as regional. The Central Asian record confirms the analytical separation at the heart of Nye's framework: economic resources and soft power are distinct, and treating the first as a reliable source of the second is a strategic error. It also specifies the condition under which the two connect — direct, society-level, tangible benefit — and thereby converts a general observation into a testable claim. For analysts of China's rise, the lesson is that the density of economic and diplomatic ties is a poor proxy for influence over publics, and that the two must be measured separately.

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The failure of conversion also carries strategic consequences for China. Persistent public scepticism gives Central Asian governments both reason and room to diversify their partnerships, and the period of declining favourability has coincided with intensified regional engagement with the European Union, the Gulf states, and others, as well as with renewed emphasis on multi-vector foreign policy (Bloomsbury Intelligence and Security Institute, 2024). Because the regional states are deliberate balancers rather than passive clients, a partner that is economically indispensable yet publicly unpopular is one they have every incentive to offset. Soft-power weakness thus translates into a ceiling on strategic influence: economic dominance secures cooperation, but the absence of public goodwill limits how far that cooperation can be deepened or relied upon, and leaves China structurally exposed to the diversification its own dominance helps provoke.

6. Conclusion

The Central Asian case offers a clear answer to the question of whether economic power becomes soft power: it does not, at least not automatically. China's economic dominance in the region is unmatched, yet its public standing has stagnated or declined, because the instruments that carry its influence are designed to secure elite cooperation rather than to attract societies. The decline in favourability during the very years of deepest economic expansion is the strongest evidence that the two resources move independently, and the comparative pattern across five states shows the finding to be robust rather than idiosyncratic.

For Central Asia, this means that China's deep economic position guarantees neither lasting affection nor immunity from public backlash, and that the political returns on its engagement will depend on whether that engagement can be made to reach, and benefit, ordinary citizens. For the study of influence more generally, it is a reminder that attraction must be earned in the realm of perception, where money does not spend, and that economic statecraft and soft power belong to different categories that should not be collapsed into one.

7. Recommendations

Two implications follow. For analysis and policy, influence over publics should be measured directly through opinion data rather than inferred from the volume of trade, loans, and summits; conflating the two leads to systematic overestimation of a rising power's soft power. For the design of cooperation, the evidence suggests that engagement which delivers tangible, locally felt benefit — vocational training, local hiring, skills transfer, and transparent project terms — is far more likely to build goodwill than state-directed cultural projection. For future research, the article points to a testable hypothesis: that the introduction and expansion of direct-benefit instruments such as Luban Workshops should, over time, be associated with measurable improvements in local favourability, a proposition that panel survey data across the five states could confirm or refute.

Conflict of Interest Statement

The author declares no financial or non-financial conflict of interest in relation to this manuscript.

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