

Ukraine – China Asymmetric Economic Power Relations: What is to Come after BRI?

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ABSTRACT

This article analyzes the dynamics of the Ukraine – China asymmetric power relations in the areas of economic cooperation and infrastructure projects, with said relations having been affected by a gray rhino event, namely the Russo-Ukrainian armed conflict. I argue that both China and Ukraine have adapted to the disruption of transit routes – in particular, the functioning of the Belt and Road Initiative – affected by the hostilities in the territory of Ukraine and international sanctions imposed on Russia and Belarus. China, as a more powerful actor, through its active economic diplomacy and diversification strategy, has managed to obtain additional benefits from wartime trade with Ukraine and the reorientation of transit routes through Eurasia. Ukraine, as a less powerful actor, lost its status as a transit state, which constituted its natural geo-economic niche in the 1990s and 2000s; nevertheless, the country's connectivity with the world for the export of Ukrainian agricultural products are ensured through European Union (EU)-funded Solidarity Lanes and the Black Sea Grain Initiative. Although the Ukrainian economy has been functioning in crisis mode during the war, the postwar reconstruction of Ukraine's transit potential is likely to depend on the extensive EU – China cooperation based on mutually beneficial connectivity programs. The exact nature of Ukraine – China cooperation, however, depends on the timing and results of the Russo-Ukrainian war.

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Introduction

Before the Russo-Ukrainian conflict commenced in 2014, Ukraine's geographic location between the European Union (EU) and Eurasia constituted its natural geo-economic niche. The exploitation of geo-economic advantages, manifesting themselves as various transit routes (railway routes; auto-, sea-, river-, and air- routes; and gas and oil pipelines), ensured the survival of the Ukrainian economy during the period of its structural adaptation to and integration into the world economic system after the collapse of the Soviet Union. In 2005, the last year of the era of Ukraine's so-called "multivector foreign policy" (when Ukraine was considered a bridge between the West and Russia), which was implemented by then president of Ukraine Leonid Kuchma, Ukraine earned US\$4.48 billion from the export of transportation services. In addition, with regard to the country's export structure, transportation services comprised 69.5 % of Ukraine's exports of services in 2005 (Ukrstat, 2019). In subsequent years but before the onset of the full-fledged Russian invasion, although the revenue from the export of transportation services grew in monetary terms and amounted to US\$9.1 billion in 2019, the share of transportation services among Ukraine's exports of services gradually decreased and averaged 54 % in 2010–2022 (Ukrstat, 2019; DiyaBusiness, 2022). Between 2005 and 2022, Ukraine gradually lost its status as a "bridge," despite the emergence and development of ambitious global, macroregional, and microregional geo-economic and geopolitical alliances around and toward Ukraine – namely, the China-led

Belt and Road Initiative (BRI), the EU-led European Neighborhood Policy (ENP), and the Eastern Partnership (EaP). During the period of conventional war with Russia (2022–p/t), the export of transportation services from Ukraine decreased dramatically and reached a historical minimum of US\$3 billion (32.3 % of Ukraine's service exports in 2022). In 2023, the export of transportation services continued to fall, with such services representing no more than 18 %–20 % of Ukraine's service exports, according to preliminary statistical estimates (DiyaBusiness, 2022; Ministry of Economy of Ukraine, 2023a). Although the Ukrainian government is operating in crisis mode and thus giving priority to short-term survival over long-term development of the economy, a strategic vision is still necessary, insofar as it will determine whether Ukraine will be a transit state and how the country will cooperate with great powers, including China, in the development of its transit potential – this will largely determine the model of the Ukrainian economy during and after the war.

1. Ukraine – China Asymmetric Economic Power Relations Between the Euromaidan Revolution and the Russo-Ukrainian War

In 2014–2022, the unchanging policy of successive Ukrainian governments toward China was subordinated to two interlinked strategic priorities: (1) Ukraine's geopolitical reorientation toward the EU and NATO, which triggered the annexation of Crimea by Russia and "gray zone" conflict in eastern Ukraine in 2014 and (2) the Ukraine's patron – client relations with the United States.

These priorities have manifested themselves in Kyiv's "no" to China's proposals for strategic cooperation. Any proposal involving the participation of Chinese business and/or proposed by the Chinese government and going beyond "trade as usual" was assessed according to two criteria, namely, first, whether the proposal would strengthen or weaken Russia's position in Ukraine, and second, whether the proposal would be consistent with the priorities of American foreign policy to prevent the rise of China as a global actor (National Institute for Defense Studies, 2014; Kapitonenko, 2021). The most well-known examples of Washington exerting direct leverage to prevent the entrenchment of China in Ukraine are the cases of Motor Sych and Huawei – in these instances, contracts were terminated by Kyiv, despite incurring financial losses as a result. China's Skyrizon sued the Ukrainian government for US\$4.5 billion over the failed Motor Sych deal (Terajima, 2021).

The logic behind Ukraine's choice of economic partners stems from the country's Economic Strategy 2030 (Cabinet of Ministers of Ukraine, 2020). The Strategy emphasizes security over economic benefits and defines the United States as the primary strategic partner of Ukraine, despite the fact that Ukraine's trade with the United States has always been relatively insignificant. The Strategy also emphasizes the crucial role of the EU and its diplomatic umbrella as a factor to consider regarding any possible cooperation with China by Ukraine. In addition, one should consider the specific financial situation in Ukraine during the war, with a 4.5-fold increase in the budget deficit, mainly financed by external borrowings and grants from Western partners (Chugunov et al., 2023).

Although China officially proposed that Ukraine be a part of the BRI in 2013, 2016, and 2020, Kyiv persisted in declining to join the BRI because of the same logic of prioritizing security over economic benefits. Ukraine refused to participate in the New Eurasian Land Bridge to avoid strengthening its connectivity with Russia, although the operation of the Ukrainian branch of the BRI could contribute roughly US\$1 billion to the Ukrainian budget annually. At the same time, Ukraine, although not a member of the BRI, has benefitted from the west route of the New Eurasian Land Bridge, with container trains moving from China through Belarus to the Ukrainian station Chop at the border with Hungary (Malyarenko & Wolff, 2021).

As a reaction to the BRI, the EU established the EU – China Connectivity Platform, with the aim of enhancing the synergies between the EU's approach to connectivity and the BRI. The EU expanded its TEN-T program (with a budget of €12 billion) to Ukraine, Georgia, and Moldova; the TEN-T program has two goals, namely, first, to strengthen the connectivity of the EU with EaP countries, and second, to strengthen the connectivity of the EU with the BRI throughout the territory of the EaP countries, including Ukraine. The key question concerning the geo-economic competition between the EU on one side and Russia and China on the other side is who will control, exploit, and profit from the exploitation of transit infrastructure in the Eastern European countries located between the EU and China. In Ukraine's National Economic Strategy 2030, the country, in declaring its intention to be under the EU's umbrella in the event of possible participation in the BRI, referred to the TEN-T program. However, for the EU, the facts strongly indicate that investing in the transit infrastructure of Georgia, primarily its Black Sea ports, was a higher priority than investing in Ukraine's transit infrastructure even before the large-scale Russian invasion (Cabinet of Ministers of Ukraine, 2020; Joint Communication, 2018; European Parliament, 2013).

Despite resisting a strategic partnership with China, Ukraine found China to be its main trading partner in 2014–2022. The scale of export – import operations between Ukraine and China has grown annually. For example, the growth of Ukraine's exports to China was 63 % in 2019 and 100 % in 2020. For comparison, the growth of Ukraine's exports to Poland was 1.2 % in 2019 and a decrease of 0.7 % in 2020 (Worldbank, 2021). Ukraine's trade with China, however, has been profoundly imbalanced, with Ukrainian imports from China considerably outweighing exports; moreover, exports have predominantly been natural resources such as wood and agricultural products (Ministry of Economy of Ukraine, 2023a; 2023b). China was the main importer of Ukraine's agricultural production, with imports valued at US\$2.4 billion in 2021, and India followed in second place, with US\$947 million worth of imports. Down the list are the Netherlands and Spain, which imported agricultural goods worth US\$908 million and US\$538 million, respectively (Ministry of Economy of Ukraine, 2023a; 2023b).

In 2014–2022, the weakening Ukrainian economy, corruption, predatory behavior of the elites, and, most importantly, the fact that the Ukrainian government rather relied on external managerial, technological, and financial assistance than on its own crisis management and leadership capabilities, led to the gradual relegation of the Ukrainian state into the niche of a "small state," with this entailing asymmetric power relations with global and regional actors, and thus, an inability to change the nature or operations of the relations of its own accord (Tuliakov et al., 2023; Yakubovskiy et al., 2021; Malyarenko & Wolff, 2021).

2. Ukraine – China Asymmetric Economic Power Relations During the Conventional War: Adaptation Strategies

The response of the Ukrainian elites and the Ukrainian economy, society, and institutions to the full-fledged Russian invasion deserves a separate study. In this article, I simply acknowledge and develop an observation made by a number of Ukrainian and foreign authors (see, for example, Ukrainian political scientist Mykola Kapitonenko) that in reacting to the invasion as a *gray rhino event*, the Ukrainian institutional matrix, including formal and informal norms and relations in the "state-elites-society" trinity, as well as the Ukraine's economic model, has followed established paths rather than done something fundamentally new (Hrynevych et al., 2023; Kapitonenko, 2023). Similarly, no radical changes have occurred in the diplomatic and economic relations between Ukraine and China.

During the first two years of the conventional war, Ukraine preserved and entrenched its small, open export-oriented economic model (Voznyak et al., 2023), characterized by the domination of agriculture products. According to official statistics, in 2022, agricultural

and food products constituted 53 % of Ukraine's gross exports; the share of metal production among exports dropped to 13.6 %; and the share of mineral products was 9.8 %. In 2022, exports of metals decreased 62.5 %, chemical products by 54 %, and minerals by 48.6 %. Armed hostilities initially impacted exports from the war-affected territories. Although the processes of deindustrialization, which started in 1991, have been deepened and extended during all Ukraine's years of independence, the hostilities in the eastern industrial parts of Ukraine, combined with intentional missile attacks on Ukraine's industry and critical infrastructure, made the production and export of machines impossible. In 2023, Ukraine's export structure became even more imbalanced, with agricultural products representing two-thirds of the exports from the country. Accordingly, Ukrainian exports decreased in monetary terms. Their exports were worth US\$44.2 billion (decrease of 35 %) in 2022 and US\$35.8 billion (a further decrease of 18.7 %) in 2023 (Ministry of Economy of Ukraine, 2023a; DiyaBusiness, 2022).

This drop in exports in 2022 – 2023 was accompanied by a relative rise in imports, thus making foreign trade even more imbalanced than it had been before the war. For example, Ukrainian imports increased 20.7 % in the first six months of 2023. China remained in first position among trading partners, with Ukraine importing goods worth US\$5.6 billion from China and Poland (US\$3.8 billion) and Turkey (US\$2.8 billion occupying the second and third positions, respectively. Although China retained its first place among countries exporting to the Ukrainian market in 2022–2023, it lost its first position among countries importing Ukrainian products. In 2022, Ukraine's export to China dropped to fourth place (US\$2.5 billion, 5.6 %) behind Poland (US\$6.1 billion, 15.1 %), Romania (US\$3.9 billion, 8.7 %), and Turkey (US\$2.9 billion, 6.7 %). In the seven months of 2023, China ranked third (US\$1.7 billion) after Poland (US\$3 billion) and Romania (US\$2.2 billion). In assessing the rankings of the importing countries, a crucial fact is that Poland and Romania are Ukraine's neighboring countries, and they serve as "transshipment point[s]" for Ukrainian agricultural products before their onward delivery to third countries (Ministry of Economy of Ukraine, 2023a; 2023b).

The blockade of the Ukrainian Black Sea ports, the destruction of port infrastructure by missile and drone attacks, and the Russian occupation of the ports on the Sea of Azov contributed to entrenching Ukraine's status as a "transit dead-end." These processes also resulted in export losses for key Ukrainian industrial sectors – in particular, metallurgy and chemicals. The occupation of the city of Mariupol (two metallurgical plants in Mariupol accounted for 3 % of Ukraine's GDP in 2020 and 2021) further exacerbated the decline of Ukraine's exports (Kivalov, 2023; Hussein & Knol, 2023; Malyarenko, 2021).

As for the opening of the Black Sea Grain Initiative, China received the greatest benefit. According to statistics, China received roughly 30 % of the 26 million tons of cargo (grain and corn) exported from the port of Odesa. In 2022, during the opening of the Grain Corridor, grain exports to China were the highest in the history of Ukraine – China trade in agricultural products. One can assume that in the event of the opening of sea routes from Ukraine through the Azov and Black Seas, China may again be the first destination for Ukrainian exports (Ministry of Economy of Ukraine, 2023a).

In the system of the Ukraine – China asymmetric economic power relation, the Russian–Ukrainian war has weakened the power of an already weaker actor – Ukraine. China, through its active foreign policy and the diversification of its economy and transit routes, has been able to minimize the economic risks associated with the war (U.S. Department of Defense, 2023).

The greatest harm the war was supposed to cause was the disruption of transit through the New Eurasian Land Bridge – a route from China to the EU via Kazakhstan, Russia, and Belarus. Markus Keuper (2022) summarized various types of disruptions in connectivity between China

and the EU that have occurred due to the war: disruptions caused by the physical inability to transit goods through the Ukrainian territory as a result of the armed hostilities; the fiscal inability to transit goods through Russian and Belorussian territories due to the imposition of sanctions; and the practical or moral decisions to cease transiting goods through Russia and Belarus (Keuper, 2022).

The most important factor is, of course, the international sanctions on Russia and Belarus; although, according to international agreements, the sanctions are not to be applied to goods produced in countries other than Russia and Belarus, and thus, the New Eurasian Land Bridge is partially (at least, at the time of writing) safe from the sanctions, despite Russia and Belarus getting only partial benefit from it. As the European Parliament in its "Russia's War on Ukraine: Implications for EU Transport," published on March 14, 2022, stated "While Russian railways are targeted by EU sanctions, freight trains can still run through Russia, but they are not allowed to stop there."

A short section of road in the China Europe Railway Express route (western route) has been cut off by the war, but since railway transportation accounts for only 5 % of the cargo trade between China and Europe, the inactivity on this part of the western route through the territory of Ukraine was offset by a reorientation of logistics. In the long-term perspective, however, the negative impact will persist, since it undermined the reputation of the New Eurasian Land Bridge as an alternative to the South China Sea route (Wong, 2023). The EU's caution toward the BRI has only intensified since the outbreak of the 2022 Russo-Ukrainian war. For example, the EU Economic Security Strategy 2023 aimed at "making our economy and supply chains more resilient... [and ensuring the] physical and cyber security of critical infrastructure, technologic security and leakage and weaponization of economic dependence or economic coercion" (European Commission, 2023b).

In the mid-term perspective, the EU extended the use of the Middle Corridor as a bypass route; however, it has not been able to fully replace the New Eurasian Land Bridge. In the long-term perspective, the EU is developing its Connecting Europe Facility, its instrument for strategic investment in transport infrastructure. In 2023, the EU invested €6.2 billion in 107 transport infrastructure projects, cross-border rail connections, and maritime ports in Ireland, Greece, Latvia, Lithuania, the Netherlands, and Poland (European Commission, 2023a). Therefore, the Russo-Ukrainian war triggered an intense diversification of the supply chains between China and the EU; however, the measures taken by European and Chinese authorities were, in fact, preventive in nature.

The Ukrainian government is also making active efforts to diversify the logistic routes for trade, exploiting all kinds of corridors – the Danube as a river corridor, the Black Sea as a sea corridor, and land corridors through Poland, Slovakia, Hungary, and Romania. These efforts, however, are not about reviving the transit potential of Ukraine but are rather about connecting Ukrainian producers with their main markets.

The absence of radical shifts in the nature of Ukraine – China economic power relations after the large-scale Russian invasion is a consequence of the deepening dependence of the Ukrainian economy (and the very existence of the Ukrainian state) on the West. Yet Ukrainian exports of agricultural products to China were not interrupted by the armed conflict, and these exports were not supplemented by Chinese investments in the logistical infrastructure, as they were before the conventional war. China has demonstrated high adaptability with regard to its proactive foreign policy, evident in its diversifying the transit routes in the framework of the BRI affected by the Russo-Ukrainian war, and is benefitting as much as possible from wartime trade with Ukraine by lobbying for lower prices for Ukrainian products, reducing risky investments, and using the infrastructure created with the aid of EU funds.

Conclusions

A postwar restoration of Ukraine's transit potential will be a resource-intensive process that requires rethinking the Ukraine's geo-economic positioning, foreign policy, and domestic economic strategy as well as concerted international support with close cooperation between the Ukrainian government and bilateral and multilateral donors. Possible future cooperation between Ukraine and China in the framework of the BRI will depend on a number of factors, with the first being the nature of China's cooperation with the EU, which Ukraine is trying to become a part of; the end of the Russo-Ukrainian war and China's role in the peace process are other important elements.

One of two macro scenarios concerning the future of Ukraine's transit potential may develop in the long-term. The first scenario cements the "dead-end" transit and geo-economic position of Ukraine; in this scenario, existing and new transit routes will be used predominantly for bilateral foreign trade between Ukraine and its partners (the concept is of Ukraine as a frontier state). The second scenario is the re-emergence of Ukraine as a bridge state between the EU and Eurasia; however, for the implementation of this scenario, Ukraine needs to receive security guarantees from major great powers covering its transportation infrastructure.

In light of the parameters and limitations discussed above, Ukraine can still cooperate with China in its connectivity programs with the EU. Based on the foregoing analysis, the following recommendations are offered.

- Retain, expand, and further invest in analysis, monitoring, and evaluation to drive connectivity programs, potentially covering Ukraine's territory with the participation of the EU and China.
- Work closely with partner countries and international organizations to facilitate security guarantees for Ukraine's transportation infrastructure.
- Maximize existing cooperation in the framework of EU-funded Solidarity Lanes and the TEN-T program, since the newly built infrastructure facilities can be used and expanded after the war ends and can contribute to the recovery of the Ukrainian economy.

However, as previous experience with Ukrainian diplomacy demonstrates, focusing exclusively on communications and cooperation with Western countries and isolating oneself from the rest of the world can create obstacles when global support for Ukrainian initiatives is needed. The revival of Ukrainian transit potential is impossible without cooperation with non-Western regional and global powers (China, Turkey, India), which might be willing and able to invest in the postwar recovery of Ukraine.

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Малаяренко Т. Асиметричні економічні відносини між Україною та Китаєм: що буде після BRI? – Стаття.

У статті аналізується динаміка асиметричних владних відносин між Україною та Китаєм у сферах економічної співпраці та інфраструктурних проєктів, на які вплинула подія “сірого носорога”, а саме російсько-український збройний конфлікт. Авторка стверджує, що і Китай, і Україна пристосувалися до порушення транзитних шляхів, зокрема функціонування ініціативи “Один пояс, один шлях”, що зумовлене бойовими діями на території України та міжнародними санкціями, засто-

сованими щодо Росії та Білорусі. Китаю, як більш потужному акторові, завдяки активній економічній дипломатії та стратегії диверсифікації вдалося отримати додаткові вигоди від торгівлі з Україною під час війни та переорієнтації транзитних шляхів через Євразію. Україна, як менш потужний актор, втратила статус транзитної держави, що становив її природну геоекономічну нішу в 1990-х і 2000-х роках; незважаючи на це, зв'язок країни зі світом для експорту української сільськогосподарської продукції забезпечується через фінансовані Європейським Союзом (ЄС) програми "Solidarity Lanes" та Чорноморську зернову ініціативу. Незважаючи на те, що під час війни українська економіка функціонувала у кризовому режимі, післявоєнне відновлення транзитного потенціалу України, ймовірно, залежатиме від широкого співробітництва між ЄС і Китаєм на основі програм взаємовигідних зв'язків. Однак точний характер українсько-китайської співпраці залежить від термінів та результатів російсько-української війни.

Ключові слова: взаємозв'язок, торгівля, співробітництво, Китай, Україна.

