

TALAP

Center for Applied Research

China Perception Index in Kazakhstan in 2023

Sociological Monitoring Study



chinabook.kz

Astana 2024

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PREFACE

China and Kazakhstan's relationship is currently growing in a spirit of friendship, good neighbourliness, and long-term strategic partnership.

Together with President Xi Jinping, we have started a new "golden thirty years" of cooperation between Kazakhstan and China. The two visits I made to China last year are clear evidence of that.

During substantive discussions with the Chinese leader in Xi'an and Beijing, we reached important arrangements and outlined particular ways to implement them.

Such personal contacts fully reflect the high level of ties between Astana and Beijing. Kazakh-Chinese relations can be confidently called model relations.

Trade turnover in mutual trade is showing unprecedented growth: at the end of the first 10 months of 2023, it reached \$24.3 billion, setting a new record.

We are actively working to expand the range of exports of our products and increase the volume of supplies to China.

In addition, China has traditionally been one of the largest investors in Kazakhstan's economy. Our country has already accumulated \$24 billion of Chinese investment.

The common border with China and Kazakhstan's beneficial geographical position between East and West — all this opens up broad opportunities for our country in terms of the transit of Chinese goods in various directions. During my participation in the Third Belt and Road Forum in Beijing, we signed such important agreements as the Agreement on the Joint Development of the Trans-Caspian International Transport Route and the Memorandum on the Joint Construction of the Ayagoz-Tacheng Railway. I am sure they will boost the development of our country's transport and logistics sector. Kazakhstan is a strong supporter of China's BRI initiative, as demonstrated by my speech at the Beijing Summit last October.

The enactment of a visa-free regime between Kazakhstan and China is of utmost importance — now Kazakhstanis have the right to freely visit this country. I hope many of our fellow citizens will seize the opportunity.

When it comes to China, we should not let perceptions of the past or outside threats influence our concerns. Today, China is a highly developed country, including in high-tech. This is recognised by the



Photo source: acorda.kz

entire world. Therefore, it is crucial for Kazakhstan to cooperate with our eastern neighbour in order to fully benefit from their cordial relationship and shared trust.

*President of the Republic of Kazakhstan,
Kassym-Jomart Tokayev¹*

¹ <https://kazpravda.kz/n/prezident-respubliki-kazahstan-kasym-zhomart-tokaev-kak-progressivnaya-natsiya-my-dolzhen-smotret-tolko-vpered/>

INFORMATION ABOUT THE STUDY

Purpose of the Study

The purpose of the study is to calculate the perception index of China in Kazakhstan in 2023, analyse its dynamics since 2020, and identify the determining factors based on the public opinion survey.

Differences from Previous Studies

This is the third measurement as part of a dedicated monitoring research programme of the TALAP Center for Applied Research, launched in 2020.

There are two important aspects that distinguish it from previous studies.

First, the chronology of the study. The previous measurement of public opinion took place at the end of 2021, before the start of the Russian-Ukrainian military conflict. The latter was implemented two years later — at the end of 2023.

Thus, serious conceptual shifts in public opinion took place during this period of time, which was intense with a large number of critical events.

Secondly, the study design. The previous study included a large number of data sources: public opinion survey results, expert interviews, regulations, and event lines. The latter study focuses on a detailed analysis of sociological data and its dynamics.

Thus, the extensive approach to the study, a kind of attempt to take a bird's-eye view of everything, was replaced by an intensive one, involving a detailed study of one aspect — the image of China in public opinion.

Data Used

The study utilised three main sources of data

1. Opinion poll was conducted in December 2023. 1,616 people over 18 years old were interviewed in all regions of the country. The sample represents the population of Kazakhstan by gender, age, ratio of urban to rural population, and regional distribution (see Annex 1 for a detailed description).
2. Results of quantitative and qualitative research conducted by the TALAP Center for Applied Research in 2023. In particular, the results of the public opinion survey and focus groups conducted in February 2023 as part of the in-house monitoring programme of the Centre were used.
3. Data from a previous survey of perceptions of China in Kazakhstan, but not included in the report published in 2022. This data is conservative and continues to be relevant. They were therefore considered appropriate to be used to illustrate particular issues.

Logic of the Report

The report includes the following sections:

1. Indicators of Chinese presence in the personal information space of Kazakhstanis: the level of their involvement in the topic under study, sources of information about it, the main types of its consumption.
2. A methodological description of the calculation of the four indicators and a detailed analysis of the variables on which they are based. Additionally, data from other studies are used to bring out the most about the topic.
3. Analysis of the dynamics of indicators in 2020-2023. This includes analysing structural dynamics to understand which variables led to changes in each indicator. Calculating the total perception index and analysing the nature and causes of its changes.
4. Factor analysis based on the study of contingency tables. The influence of the main socio-demographic variables on the opinion of the population was studied. Numerous maps have been compiled to show geographical differences in responses.
5. The position of China on Kazakhstan's foreign policy map is described, with conclusions regarding the reasons behind trends in Kazakhstan's perception of China and possible opportunities based on the findings of mathematical analysis.
6. Findings of the study include possible forecasts of the prospects of the index change and the risks associated with it.

Materials from Previous Studies

The results of the first two stages of the study can be found at <http://www.chinabook.kz/>

All information about the results of sociological research of the TALAP Center can be found on the organisation's website <http://talap.org>.



INFORMATION MAP

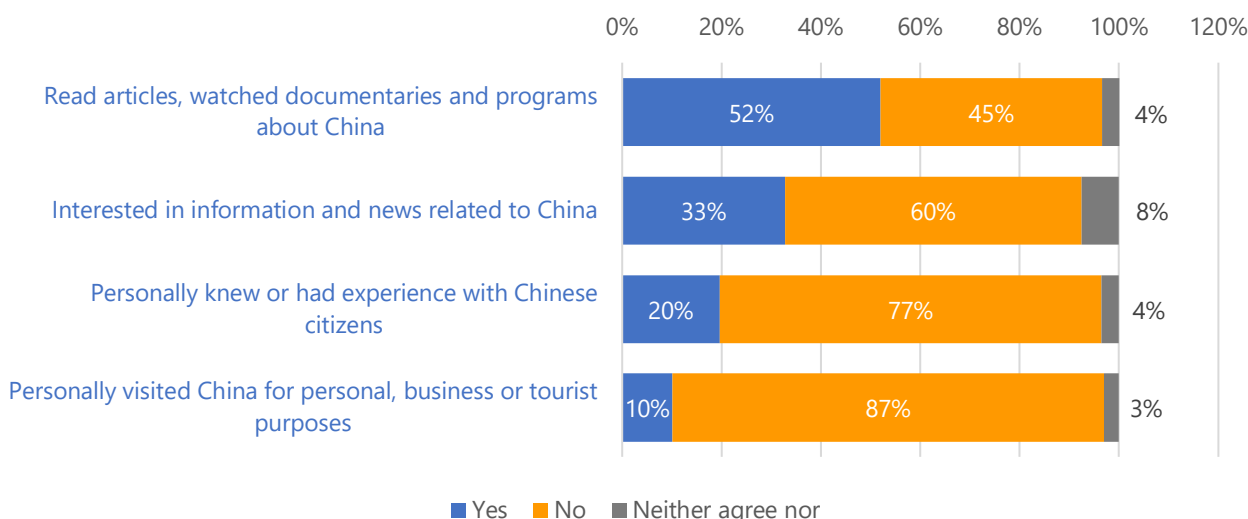
In order to understand how big the Chinese presence is in the personal information space of Kazakhstanis, we considered three indicators: availability of such information, sources of its emergence and frequency of its presence. These indicators were used to draw conclusions about the "inclusion funnel" formation and the primary "consumption types" of sources that carry content oriented toward Chinese².

Inclusion Funnel

According to the survey, 52% of respondents have ever read articles, watched documentaries, or programmes about China. Also, 33% say they are interested in learning more about China. 20% have some experience with communication with Chinese citizens, and 10% of respondents have personally visited China.

It may be claimed that the population of Kazakhstan has been drawn into the Chinese topic via the formation of a sort of inclusion funnel: 10% have been to China, 20% have had personal communication experience there, 33% are curious about learning more, and 52% have ever come into contact with it through reading articles, watching documentaries, or watching programs about it; in other words, they have intentionally and thoroughly ingested information about China.

FIGURE 1. SOURCES OF INFORMATION ABOUT CHINA



² According to a survey published in 2022

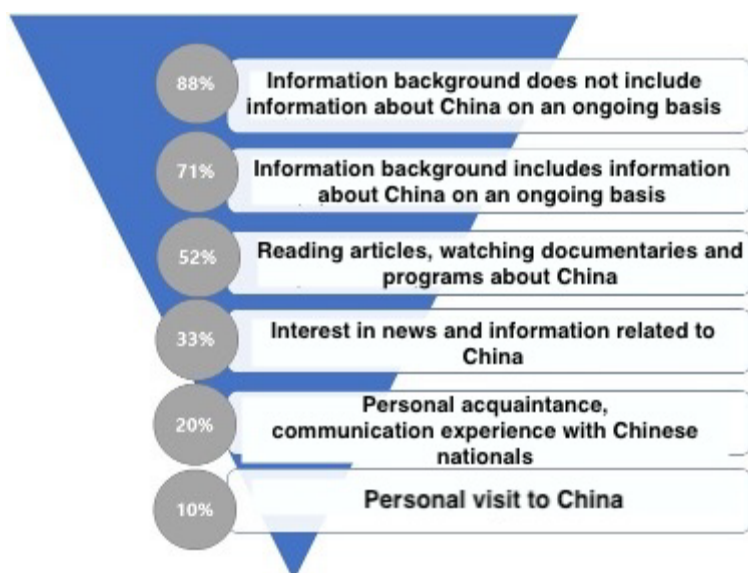
We can also add two more levels to this funnel, which we receive by asking a question

"How often do you hear/come across news or information related to China?" According to the responses received, 36% of respondents often come across news, information related to China and 52% come across rarely. 12% said they never come across such information.

In other words, 88 % of respondents have China in their information coverage. If we cut off those who very rarely come across information about China, we get 71% of those who have the presence of China in the background more or less constantly.

As a result, we get a six-level funnel of China's presence in the personal information space of Kazakhstanis.

FIGURE 2. INFORMATION PRESENCE FUNNEL



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Sources of Information

According to the survey, social media and messengers are **the main sources** of information about China. Internet sites and Russian-language TV channels are in second place. The third place is personal communication with friends, relatives, and acquaintances.

This structure of sources well explains the inclusion funnel described above. And also the fact that Kazakhstanis are relatively deeply involved in Chinese content, and that the communication field is dominated by the Russian language rather than the Kazakh language.

TABLE 1. SOURCES OF INFORMATION ABOUT CHINA

SOURCES	%
Social networks (Facebook, Instagram, VKontakte, etc.), forums	47.8
Messengers (WhatsApp, Telegram, etc.)	37.6
Web-sites in Russian	28.8
Kazakh TV channels in Russian	25.6
Personal communication (friends, family, acquaintances)	23.6
Kazakh TV channels in Kazakh	22.6
Web-sites in Kazakh	11.4
Russian media	10.5
Radio stations in Russian	9.0
Kazakh newspapers in Kazakh	8.1
Kazakh newspapers in Russian	6.9
Radio stations in Kazakh	6.0
Other foreign media (European, American, etc.)	5.1

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A comparison of the source structure and frequency of consumption of information about China provides interesting insights. For convenience, we calculated the **ratio** of responses "often come across news, information related to China" and "rarely ...".

As we can see, China is not often talked about on the **most popular** information platforms. In social networks and messengers, the calculated ratio is 0.67-0.70.

At the same time, **on the least** popular platforms (newspapers in two languages, radio in Kazakh) this indicator ranges from 1.16 to 1.27. That is, information about China comes across to readers/listeners frequently rather than rarely.

TABLE 2. FREQUENCY RATE OF INFORMATION ABOUT CHINA BY TYPE OF SOURCE

SOURCES	COEFFICIENT
Radio stations in Kazakh	1.27
Kazakh newspapers in Kazakh	1.19
Kazakh newspapers in Russian	1.16
Other foreign media (European, American, etc.)	1.04
Kazakh TV channels in Kazakh	0.90
Radio stations in Russian	0.88
Personal communication (friends, family, acquaintances)	0.84
Kazakh TV channels in Russian	0.80
Web-sites in Kazakh	0.77
Web-sites in Russian	0.71
Messengers (WhatsApp, Telegram, etc.)	0.70
Social networks (Facebook, Instagram, VKontakte, etc.), forums	0.67
Russian media	0.52

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Types of Consumption

As evidenced by the survey data, different information sources shape a different image of China in the eyes of Kazakhstanis. To illustrate this, let's calculate the ratio of positive to negative responses about China and correlate them with sources of information.

As we can see, a **positive** perception of China (coefficient 1.32 — 1.80) prevails among those who read Kazakhstani newspapers in Russian, watch Kazakhstani TV channels in Russian, listen to radio stations in Russian, visit Internet sites in Russian, and use information from Russian media.

On the contrary, a relatively high percentage of **negativity** (0.61 — 0.82) is present among the audience of Kazakh newspapers in Kazakh, Kazakh TV channels in Kazakh, radio stations in Kazakh, and Internet sites in Kazakh.

A **coefficient value of about 1** is inherent in predominantly TOP sources built on people's interactions with each other. Such as personal communication and social media.

TABLE 3. SOURCES OF INFORMATION ABOUT CHINA AND POSITIVE/NEGATIVE RESPONSE RATIO

SOURCES OF INFORMATION ABOUT CHINA	COEFFICIENT
Radio stations in Russian	1.80
Russian media	1.47
Kazakh newspapers in Russian	1.44
Kazakh TV channels in Russian	1.34
Web-sites in Russian	1.32
Social networks (Facebook, Instagram, VKontakte, etc.), forums	1.03
Personal communication (friends, family, acquaintances)	0.99
Kazakh newspapers in Kazakh	0.85
Messengers (WhatsApp, Telegram, etc.)	0.84
Kazakh TV channels in Kazakh	0.82
Web-sites in Kazakh	0.72
Other foreign media (European, American, etc.)	0.71
Radio stations in Kazakh	0.61

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BASELINE INDICATORS

The China Perception Index in Kazakhstan is based on four indicators. In this section, each of them is discussed and described in detail.

Initial indicators were developed in 2020. These might be reinterpreted now, but for the purposes of this study, we have left them as is with only minor adjustments to guarantee the most trustworthy monitoring.

Calculation Method

Calculating the indicators involves a three-level methodology. According to this methodology, the composite perception index of China in Kazakhstan is calculated as the arithmetic mean of four indicators, each of which, in turn, is the average of responses to several basic questions.

TABLE 4. INDICATORS AND THEIR DESCRIPTION

NAME	DESCRIPTION
General Perception	Describes the attitudes of Kazakhstanis towards China in general.
Geopolitical influence	Describes the perception of China by Kazakhstanis as a center of a foreign policy force. Its place in the modern world, development potential, attitude to Kazakhstan assessed based on 6 indicators.
Economic impact	The indicator shows to what extent Kazakhstanis would like to develop economic relations with China and in what areas (11 options for cooperation). To disclose the topic, the report also considers the attitude of respondents to individual projects that China has already implemented or plans to implement in Kazakhstan.
Cultural Influence	To calculate it, 9 indicators are used that describe the potential of China's "soft power". In order to achieve this, respondents were questioned regarding the nation's social, cultural, and political aspects, and the intended degree of communication was evaluated.

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The indicators are calculated according to the formula (G. Tatarova's methodology): the difference between the number of positive and negative answers is divided by 100, thus forming indicators from (-1) to (+1)³.

In 2021 and 2023, minimal changes were made to the calculation methodology. New variables were added to the economic and cultural influence indicators (2021), the formula for calculating the general perception indicator was simplified, and one variable in the geopolitical indicator was reduced (2023).

In order to correctly calculate the dynamics, the values of the geopolitical indicator in previous years were recalculated in accordance with the new methodology. The parameters of the economic indicator did not change in the dynamics.

³ This formula is used in this report both to calculate the indicators and the variables forming them.

Indicator 1. General Perception

The indicator of general perception is 0.56

According to the survey, 73% of respondents believe that Kazakhstanis have a rather good attitude towards China. This is four times the amount of people who think poorly of their eastern neighbour. The number of such respondents is 18 %.

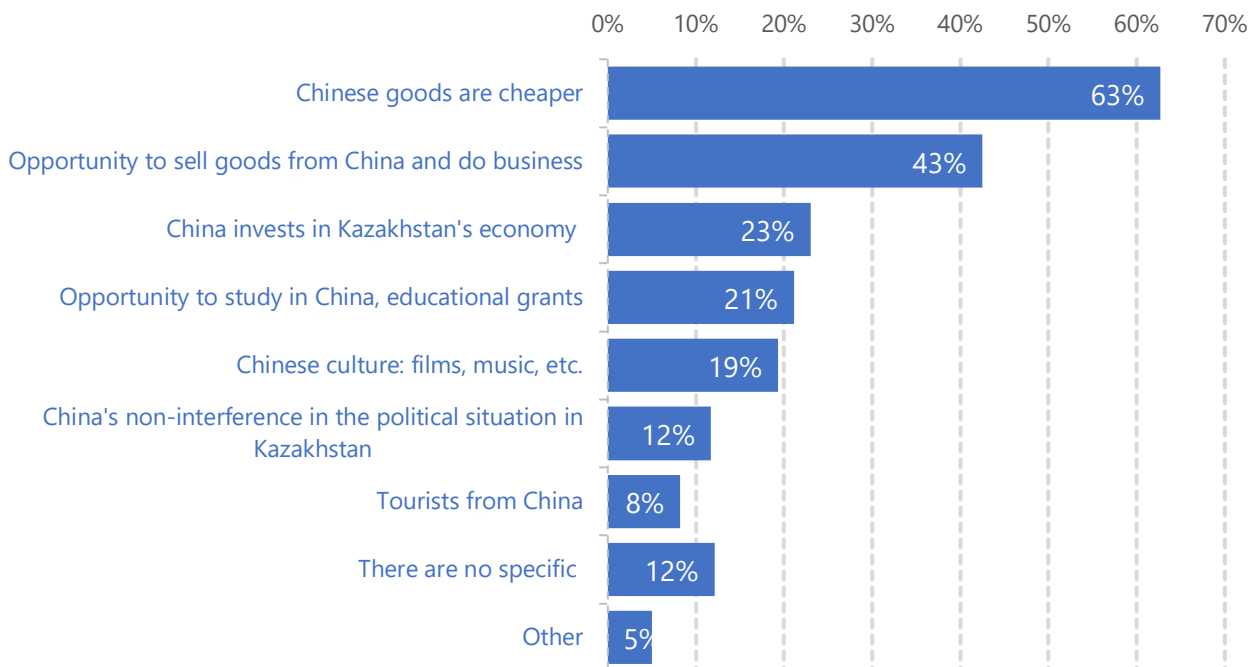
Regarding how Kazakhstanis' perception of their eastern neighbour has changed over the past three years, 74% of respondents believe that it has improved. That is nearly five times as many as those who stated that things were getting worse. Such were 15%, based on the survey.

The low cost of Chinese goods is a major factor in the **positive** attitude⁴. Being able to trade profitably with China is the second reason, which is connected to the first.

Chinese investment in Kazakhstan's economy, the opportunity to study in China, and Chinese culture also play a significant role.

Interestingly, 12% of responses were about having a good attitude towards China with no specific reasons for this. And the same number of answers about China's non-interference in the political situation in Kazakhstan.

FIGURE 3. REASONS FOR POSITIVE ATTITUDES TOWARDS CHINA? ⁵



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⁴ According to a study published in 2022.

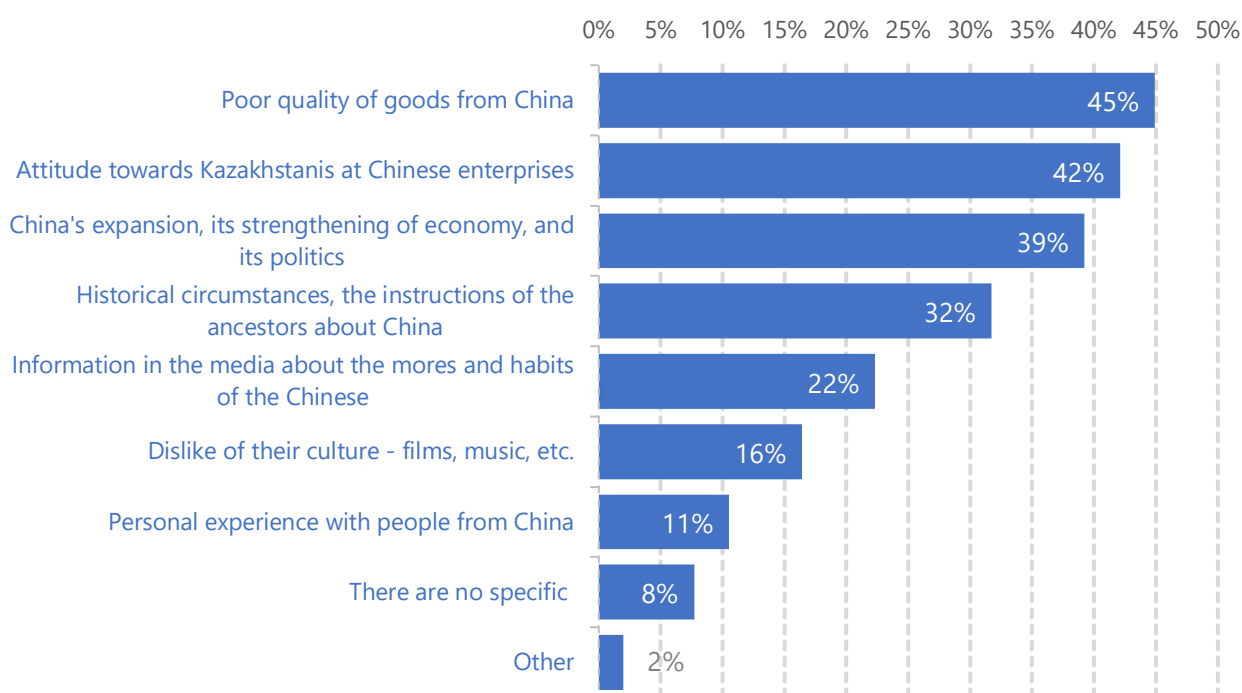
⁵ Up to 3 possible answers. Calculation from the number of those who rate the relations between Kazakhstan and China positively.

Three main reasons for the **negative** attitude are highlighted: the poor quality of goods from China, the treatment of Kazakhstani workers at Chinese enterprises, and fears of Chinese expansion.

In addition, historical circumstances, ancestral instructions about China, and information in the media and social networks have a serious influence on the opinion about China.

In addition, respondents talked about their dislike of Chinese culture and their personal negative experiences with the Chinese.

FIGURE 4. REASONS FOR NEGATIVE ATTITUDES TOWARDS CHINA? ⁶



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⁶ До 3-х вариантов ответа. Расчет от числа тех, кто **плохо** оценивает отношения Казахстана и Китая.

Indicator 2. Geopolitical influence

Geopolitical influence indicator — 0.50.

Based on the survey results, most participants believe that China is a wealthy and powerful country with a growing global influence. They also think that China is a friendly state toward Kazakhstan (the ratio of positive to negative responses is between 5 and 7).

Also, more than half of the respondents say that China is a socially responsible state, which has more weight in the world than Russia (the ratio of the number of positive and negative answers drops to 2).

It is indicative that as we move from "strong" variables — which receive the highest level of support from respondents — to "weak" ones, there is an increase in both disagreement and the percentage of respondents who find it difficult to respond, which establishes the likelihood of a future shift in position (for further information, see the section on indicator dynamics).

TABLE 5. ATTITUDES TOWARDS JUDGMENTS ABOUT CHINA (ECONOMIC IMPACT)

STATEMENT (%)	I RATHER AGREE	I RATHER DISAGREE	NEITHER AGREE NOR DISAGREE	AGREEMENT COEFFICIENT
China is an economically developed country	80.4	11.3	8.4	7.1
China's influence in the world has been growing recently	77.0	13.9	9.1	5.5
China is a rich country	75.2	13.7	11.0	5.5
China is a friendly state towards Kazakhstan	67.7	20.5	11.8	3.3
China is a socially responsible state	57.3	22.1	20.6	2.6
China has more influence in the world than Russia	51.4	25.2	23.4	2.0

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Respondents' concerns about China's expansion into Kazakhstan, however, persist. In particular, the previous study conducted a series of expert interviews as well as an analysis of the Chinese-related information space⁷. Based on their findings, 13 pertinent issues regarding Kazakhstan-China relations were identified and posed to the respondents, thereby establishing their "social weight".

The survey found that the fear of selling land to citizens of the People's Republic of China ranked first with the largest gap, while Chinese enterprises moving into Kazakhstan ranked second. Concerns related to the increasing presence of Chinese in Kazakhstan through inter-ethnic marriages and labour migration, fear of China's growing economic and political influence in Kazakhstan, and the situation of ethnic Kazakhs in the PRC were also recorded.

TABLE 6. MAIN CONCERNS OF KAZAKHSTANIS ABOUT CHINA

CAUSE OF CONCERN	%
Selling land to the Chinese	56.3
Transfer of Chinese enterprises to the territory of Kazakhstan	30.8
Inter-ethnic marriages of Kazakhs with the Chinese	20.7
Labour migration flows	20.5
Kazakhstan's growing economic dependence on China	14.6
The situation of ethnic Kazakhs in China	11.7
Strengthening China's political influence in Kazakhstan	7.5
Expansion of China	6.4
Situation of Kazakhstani workers at Chinese enterprises	5.2
China's trade war with the US	4.8
Possibility of opening Chinese military bases in Central Asia	3.9
PRC policy towards Muslims in XUAR	3.9
China's promotion of the Belt and Road Initiative	1.8
There are no concerns	13.6
Other or don't know/No answer	0.7

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⁷ According to a study published in 2022

Indicator 3. Economic impact

Economic impact indicator — 0.54.

According to the survey, 79% of respondents are in favour of **developing relations** with China. Only 16% are in favour of loosening ties.

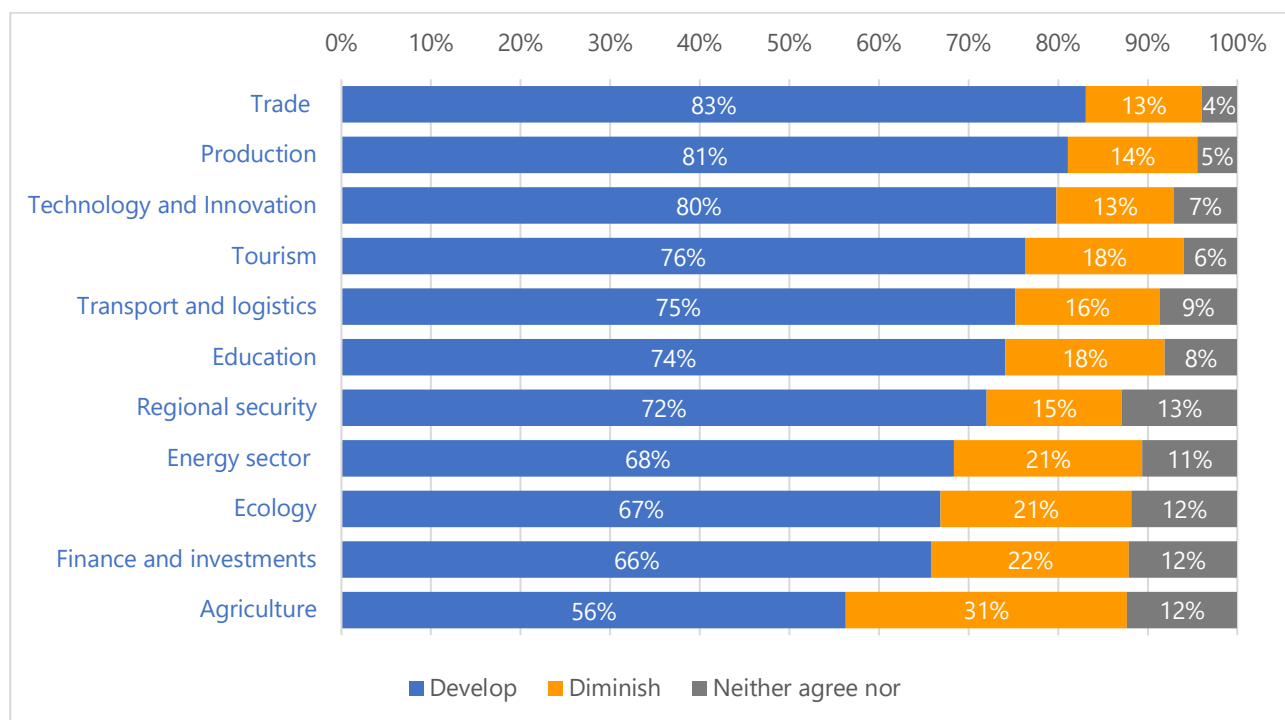
First of all, it is proposed to develop trade relations (positive to negative ratio — 6.4), industrial relations, technology and innovation (5.6).

These figures are supported by qualitative research conducted in 2023. They show that there is a strong public call for the transition of the country from a resource-based economy with strong foreign participation and an "unfair" distribution of income to an economy with a strong manufacturing industry created by national capital and a fair distribution of the resulting high added value (owner-worker).

Respondents are weakest in their support for co-operation in agriculture (1.8). This is an area in which Kazakhstan, in the opinion of respondents, can do a lot on its own. Nevertheless, even here, 56% are in favour of developing cooperation with China.

As in the case of geopolitical influence, the smaller number of answers in favour of certain positions of cooperation is not only an increase in their denial but also an increase in the number of those who find it difficult to answer.

FIGURE 5. ATTITUDES TOWARDS AREAS OF COOPERATION BETWEEN KAZAKHSTAN AND CHINA



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Calculating the ratio between positive and negative responses also allows us to draw two important conclusions.

Firstly, the second place in the ranking of priorities goes to the request for cooperation in the field of technology and innovation, i.e., what will make it possible to achieve high added value from production, which comes down to the third place.

And secondly, **regional security** issues are being moved up from seventh to fourth place, three steps at once in the ranking of priorities.

TABLE 7. COEFFICIENT OF POSITIVE RESPONSES REGARDING AREAS OF COOPERATION WITH CHINA

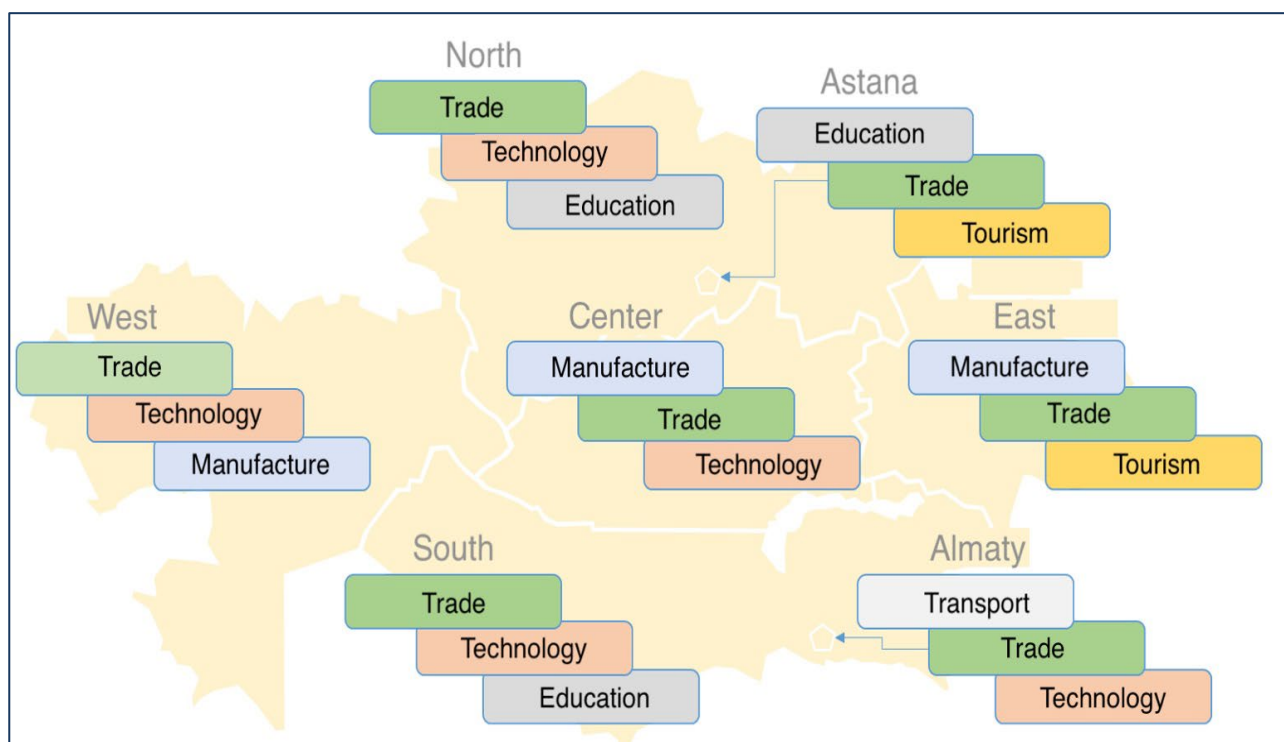
SECTOR	COEFFICIENT	DYNAMICS OF RANK ⁸
Trade	6.44	0
Technology and innovation	6.09	+1
Production	5.63	-1
Regional security	4.77	+3
Transport and logistics	4.67	0
Tourism	4.31	-2
Education	4.16	-1
Energy sector	3.26	0
Ecology	3.14	0
Finance and investments	3.00	0
Agriculture	1.79	0

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⁸ Calculated by comparing the ranking tables of percentage distribution and positivity rate

In **regional** breakdown, the priority in relations with China is the same as in the overall ranking of results — the sphere of trade. It is prioritised by residents of the Northern, Western, and Southern macro-regions and is in second place in most of the rest. Manufacturing is the main industry in China's immediate neighbours to the east and in the country's center. Residents of Astana value collaboration in the fields of education and tourism, while those of Almaty value cooperation in the transportation sector.

FIGURE 6. PRIORITIES OF COOPERATION WITH CHINA IN THE CONTEXT OF MACRO-REGIONS



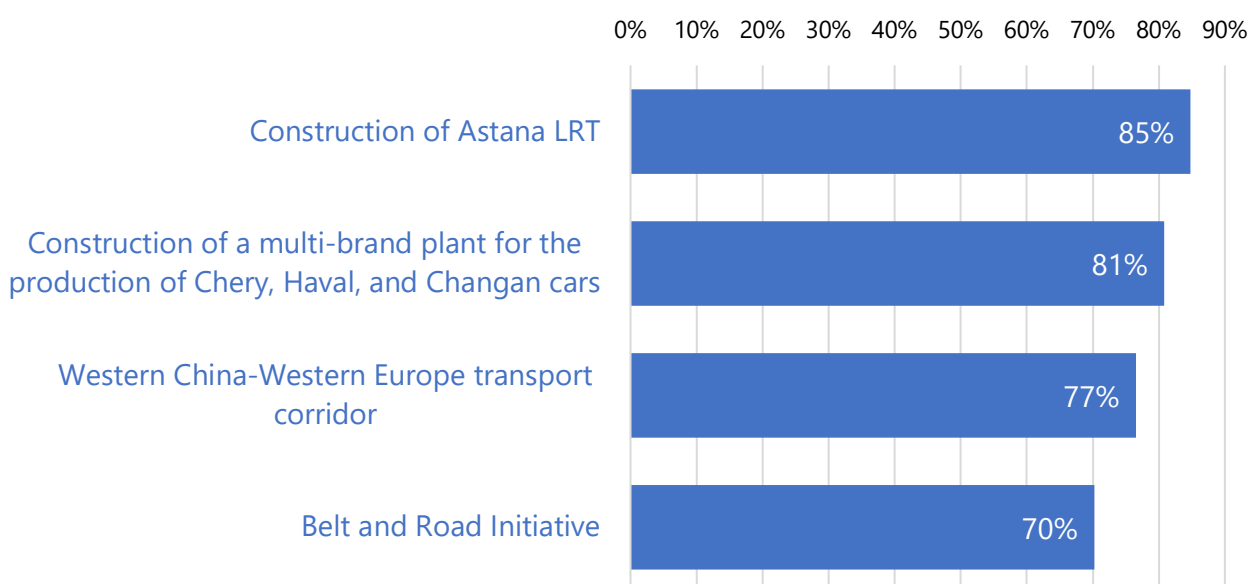
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In this regard, it is interesting to understand how Kazakhstanis feel about specific **projects** that China is implementing in Kazakhstan. In total, we considered four projects: the Western Europe-Western China transport corridor, the Belt and Road initiatives, the construction of a multi-brand plant for the production of Chery, Haval, and Changan cars, and the construction of the Astana LRT.

According to the survey, between 70 and 85% are aware of these projects, indicating a high level of awareness of China's economic presence in the country. And suggests that the social assessment of the projects described below is justified.

As we can see, of the listed projects, the best known is the Astana LRT (Astana Light Rail Transit) project; the decision to build it was made back in 2005, and the least known is the Belt and Road Initiative, which was launched in 2015.

FIGURE 7. LEVEL OF PROJECT VISIBILITY



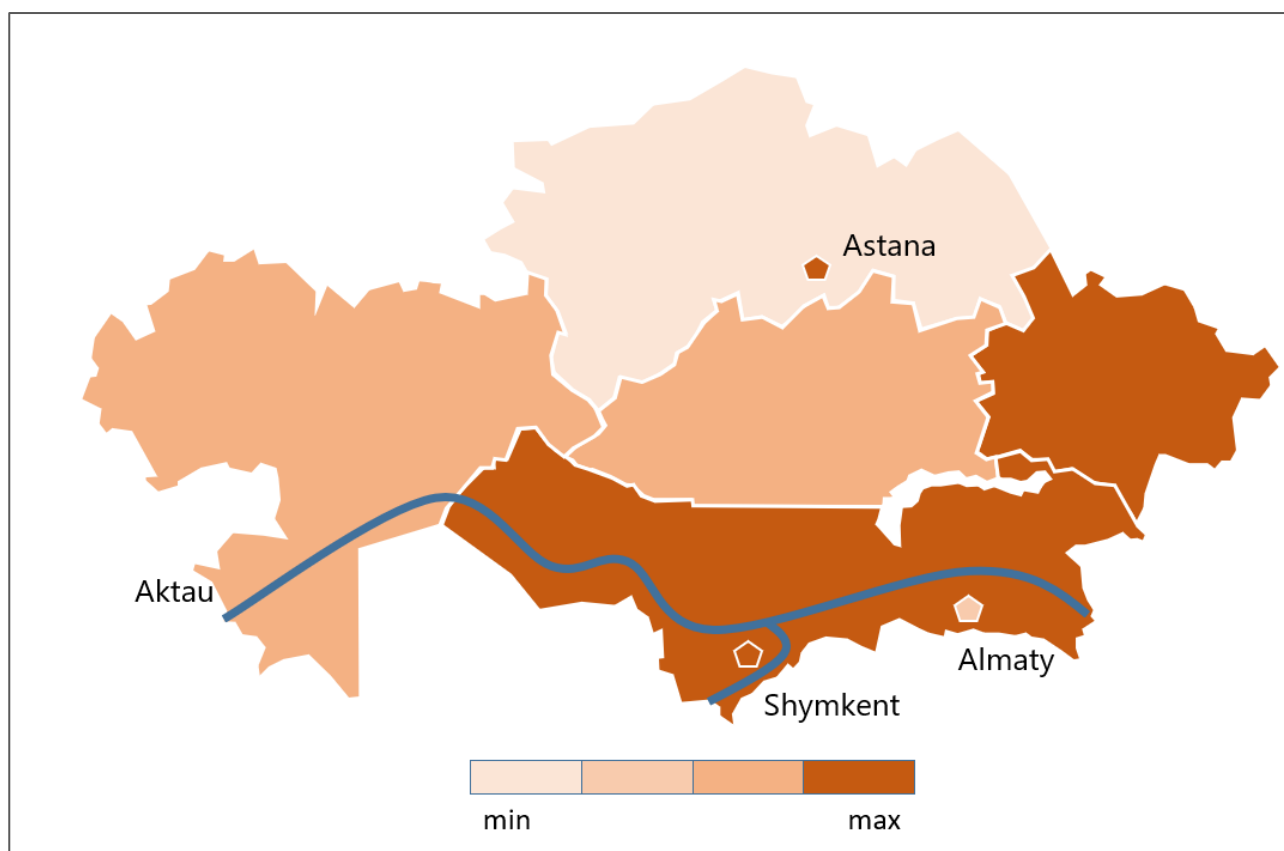
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Information about the Western China — Western Europe transport corridor

One of the projects included in the Belt and Road Initiative is a transport corridor from Northern Europe to Western China. This is a transnational infrastructure project that involves the construction of a motorway from the Russian port in St. Petersburg to the Chinese port in Lianyungang. The length of the route is more than 8.5 thousand kilometers, of which 2.8 thousand kilometers

are in Kazakhstan. The primary benefit of the project is its shorter travel time—10 days as opposed to up to 45 days by sea and 14 days by Transsib — when compared to the current alternative corridors (overland Transsib and sea via Suez Canal). The Chinese and Kazakh segments of the corridor have already been constructed. Throughout the entire corridor, 2.4 thousand kilometers of roads were rebuilt in Kazakhstan, and major population centers' bypasses were added. The geometric parameters of the route were also improved. In Russia, more than half of the planned sections have been commissioned by the end of 2023. The map below shows the level of Kazakhstani support for the Western China-Western Europe transport corridor project and its working area in Kazakhstan.

FIGURE 8. TRANSPORT CORRIDOR AND LEVEL OF ITS APPROVAL IN MACRO-REGIONS OF KAZAKHSTAN IN 2023



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For every project under consideration, positive and neutral evaluations predominate. The denial of their necessity does not exceed 15%.

The implementation of the Western China-Western

Europe transport corridor in Kazakhstan is most welcomed. It is supported by 63% of respondents, and the ratio of positive to negative answers reaches 12.9.

The Astana LRT project has the **lowest** level of approval (47%) due to its unpromising long construction period and associated corruption scandals (3.0).

Construction of a multi-brand plant to manufacture cars under the Changan, Haval, and Chery brands receives a **high coefficient** (5.6). While the old Chinese cars were often perceived negatively, the new ones enjoy growing trust in Kazakhstan. Their competitive pricing policy and qualitative advancements have resulted in a significant decrease in car prices, thereby enhancing affordability.

TABLE 8. SUPPORT BY RESPONDENTS FOR THE IMPLEMENTATION OF JOINT PROJECTS BETWEEN KAZAKHSTAN AND CHINA⁹

PROJECTS (%)	I APPROVE	NEUTRAL	I DO NOT APPROVE	I AM NOT SURE	COEFFICIENT ¹ ₀
Western China-Western Europe transport corridor	62.8	28.9	4.9	3.5	12.93
Belt and Road Initiative	47.2	41.4	7.0	4.5	6.77
Construction of a multi-brand plant to manufacture Chery, Haval and Changan cars	54.9	30.1	9.8	5.2	5.60
Construction of Astana LRT (Astana Light Rail Transit)	46.5	32.8	15.3	5.4	3.05

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⁹ В процентах от тех, кто знает о проекте

Information about Astana LRT (Astana Light Metro)

Astana LRT is an aboveground light metro project in Astana. The capital's Akimat decided to build it in 2005. After a series of postponements and even a formal cancellation of the project in 2013, work began on the first lines in 2017. In 2019, President Kassym-Zhomart Tokayev said he did not believe in the profitability of light rail transit (LRT) in Astana and believed the project would be a "burden" on the government, but the project should not be stopped given the costs incurred. In the summer of 2022, President Tokayev stated that LRT is an issue that annoys the public, especially residents of the capital city, and has turned from a mere infrastructure project into a serious problem that is damaging Kazakhstan's reputation. After raising significant funds, work on the project continued, and in February 2023, Astana's Akim, Mr Zhenis Kassymbek, announced that the LRT would be completed by the end of 2024. Trains for the project will be manufactured by Chinese carriage manufacturer CRRC Tangshan Co.

Information on the Belt and Road Initiative

The Belt and Road Initiative envisages the development of a network of transport corridors across Eurasia that will reduce the cost and increase the speed of delivery of goods to Southeast Asia, Africa, the Middle East, and Europe. The initiative was launched in September 2013 by Chinese President Xi Jinping. So far, more than 150 countries have already signed cooperation agreements with China under the programme. The estimated project implementation period is 30 years. According to President Kassym-Jomart Tokayev's estimation, Kazakhstan will be responsible for 80 transit overland transports along the China-Europe route in 2023. Transported cargo weighed about 1.7 million tonnes, which is twice as much as in 2021. Kazakhstan now accounts for about 85% of all overland transit traffic from China to Europe. Over the past 15 years, Kazakhstan has allocated more than 35 billion dollars for the development of transport corridors. Such major infrastructure projects as the Kazakh-Chinese logistics center in Lianyungang, the Khorgos dry port, the Western Europe-Western China transit highway, and the railway corridor from China to Iran have been launched. At the 2023 Belt and Road Forum, Kassym-Jomart Tokayev spoke about plans to lay 1,300 kilometres of new railway tracks within three years, open a third railway checkpoint on the border with China, and build new dry ports of Bakhty and Kalzhat.

Information on the construction of a multi-brand plant for the manufacture of Chery, Haval and Changan cars

Construction of a Changan, Chery, and Haval automobile manufacturing plant in Almaty started in 2022. The facility for the manufacturing of cars by small-assembly method is scheduled to open in the 4th quarter of 2024. The area of production facilities will be more than 100 thousand square meters. After commissioning, the production capacity of the new plant will be more than 90 thousand cars per year. Total investments will amount to more than 100 billion tenge, and the creation of 2.2 thousand jobs is envisaged.

Indicator 4. Cultural Influence

The cultural power indicator is -0.06

China's core cultural power seems to be rooted in its perception as a rapidly emerging power that will firmly occupy its position in the future.

According to the survey, 68% of respondents would like to visit China for tourism purposes, 47% would like to learn more about Chinese history and culture, and 45% would like their child to learn Chinese.

Chinese medicine, which combines age-old practices whose efficacy has been verified by contemporary research and enhanced by their outcomes, is trusted by 56% of respondents.

Evaluation of the quality of products manufactured in China is fascinating. According to the survey, 43% trust and 42% don't trust their quality.

TABLE 9. ATTITUDES TOWARDS JUDGMENTS ABOUT CHINA (CULTURAL INFLUENCE)

STATEMENTS, (%)	YES	NO	NEITHER AGREE NOR DISAGREE
Would you like to visit China for tourism?	68.3	26.2	5.6
Do you trust Chinese medicine?	55.7	29.8	14.5
Would you like to learn more about the history and culture of China?	47.0	45.7	7.2
Would you like your child to learn Chinese?	45.2	41.7	13.1
Do you trust the quality of goods produced in China?	43.3	41.4	15.3
Would you like more Chinese tourists to visit Kazakhstan?	41.1	46.1	12.8
Would you like to have a friend from China?	36.3	50.9	12.8
Do you like Chinese cuisine?	36.0	54.4	9.7
Would you like to get an education for yourself or send your child to study in China?	35.0	52.0	12.9
Do you like the political system in China?	27.3	40.6	32.1
Would you like to move to China?	10.7	82.1	7.2

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Calculating the ratio of positive to negative evaluations is instructive in this regard. Depending on its value, the indicators included in the cultural influence indicator can be divided into three groups.

Only two indices are **above 1**: the possibility for Kazakhstanis to visit China for tourism purposes and trust in Chinese medicine.

Four indicators are **about 1**: the arrival of the Chinese in Kazakhstan, the child's learning of the Chinese language, the desire to learn more about the culture and history of China, and the attitude towards the quality of Chinese goods. According to these indicators, public opinion is split approximately equally.

Five of the eleven attributes studied are **below 1**. The majority of respondents said they would not want to live in China, have a friend from China, go to school in China, or send their child to study there. Also, many people do not like China's political system and national cuisine.

We may say that Kazakhstani people's perception of China often takes place within the **"risks and opportunities" matrix**. The attitude towards tourism is indicative. If traveling to China is perceived rather as an opportunity, arrivals from there is a risk associated with the potential assimilation of Kazakhs by the Chinese, following the example of Muslims in the Xinjiang Uygur Autonomous Region (according to qualitative research in southwestern Kazakhstan).

In other words, respondents support the theses that strengthen the positions of Kazakhstanis and ambiguously perceive everything that concerns the strengthening of China's positions in Kazakhstan.

TABLE 10. POSITIVE RESPONSE COEFFICIENT

STATEMENTS	COEFFICIENT
Would you like to visit China for tourism?	2.6
Do you trust Chinese medicine?	1.9
Would you like your child to learn Chinese?	1.1
Would you like to learn more about the history and culture of China?	1.0
Do you trust the quality of goods produced in China?	1.0
Would you like more Chinese tourists to visit Kazakhstan?	0.9
Would you like to have a friend from China?	0.7
Do you like Chinese cuisine?	0.7
Would you like to get an education for yourself or send your child to study in China?	0.7
Do you like the political system in China?	0.7
Would you like to move to China?	0.1

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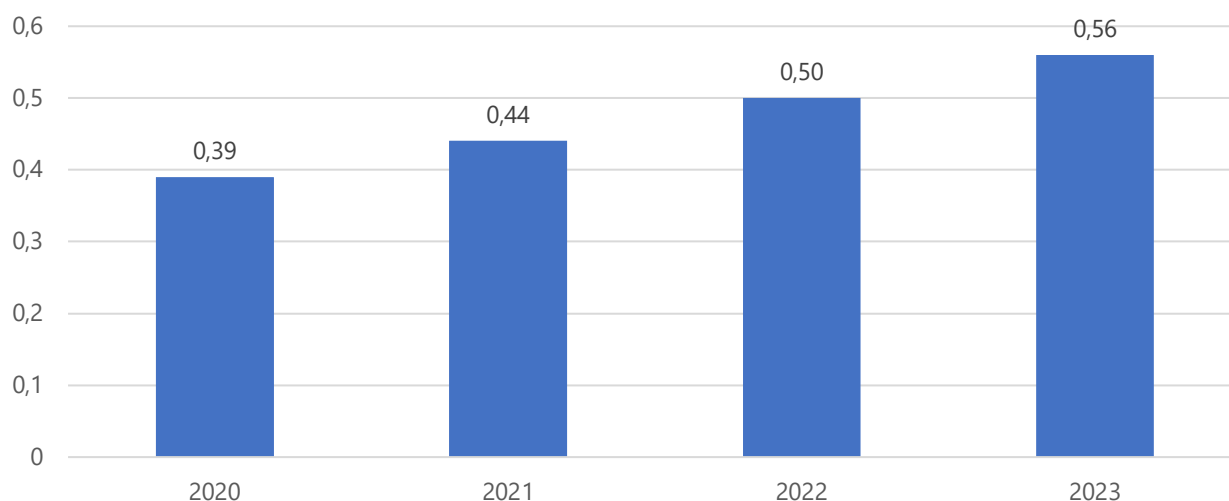
DYNAMICS ANALYSIS

The section presents an analysis of the dynamics of indicators in 2020-2023. We analyse the variables that comprise the outcome indicators, as well as the indicators themselves, to gain insight into the causes of the changes that have taken place. Additionally, the section provides an answer to the question of which social groups contributed to the favourable dynamics of Chinese perceptions. Finally, a comparison of the indicators is shown at the end of the section, along with the calculation of the total perception index.

Dynamics of the general perception indicator

There is a steady increase in the general perception indicator from 0.39 to 0.56 over the study period. On average, the indicator is growing by 5-6 points per year ¹⁰.

FIGURE 9. DYNAMICS OF THE GENERAL PERCEPTION INDICATOR¹¹



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At the expense of which **social groups** is this growth occurring? In order to understand this, we analysed the dynamics of answers to this question by the main socio-demographic clusters and came to the following conclusions:

- growth of the indicator is observed in most socio-demographic groups, while the rate of change is different.
- accelerated growth of the indicator was given by respondents aged 25–55 years, which led to a levelling of the age structure of responses in 2023 compared to 2020. Young people in Kazakhstan still lead in positive perceptions of China, but their gap with the

¹⁰ The data for 2020–2021 have been adjusted to reflect the adjustment of the calculation methodology.

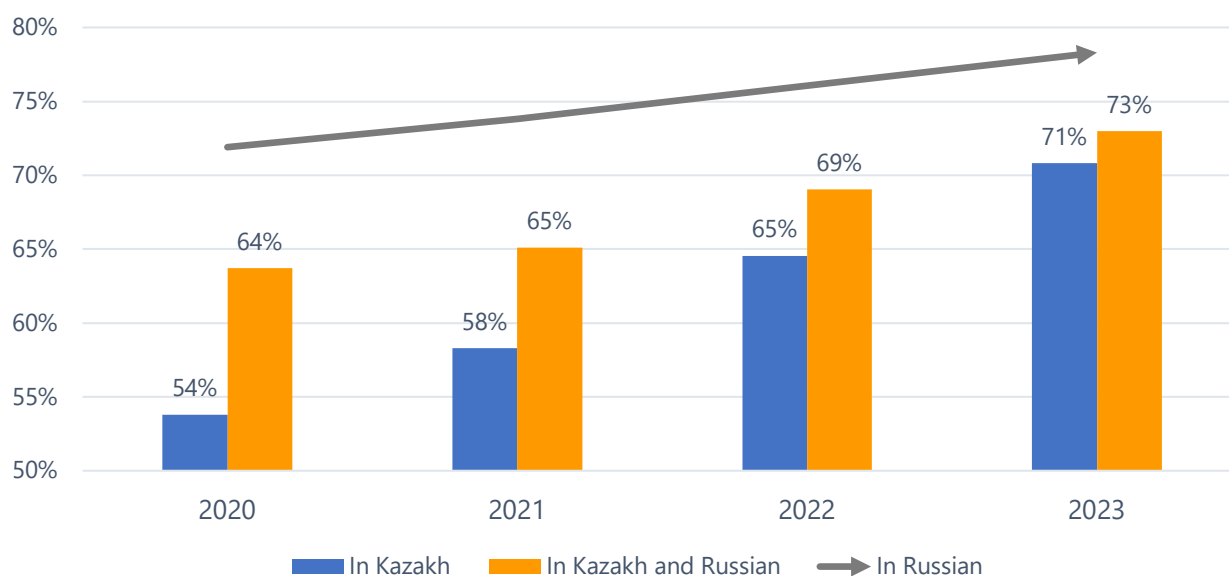
¹¹ The figures for 2022 are hereafter calculated as an average between the 2021 and 2023 figures and inserted in this and the following figure to illustrate the trend

middle-aged group has seriously narrowed. The exception to the general trend is the elderly, whose opinion changes more slowly than in other age groups.

- accelerated growth is also demonstrated by those respondents whose standard of living (in their subjective understanding) is above average, as well as those who have a level of education higher than the general average.
- by ethnicity groups, no major differences in responses are observed. However, the answers to the question about what language respondents speak at home show significant differences. In particular, over the past two years there has been a sharp increase in the rate among those who speak Kazakh at home. This applies both to families where only Kazakh is spoken and to families where both Russian and Kazakh are spoken. This has led to a decrease in differences in perceptions of China between Russian-speaking and Kazakh-speaking residents.
- finally, an increase in positive attitudes towards China is observed among those who are married (official or common-law) and is virtually absent among those who are single, divorced, unmarried, widowed, or widowers.

To summarize, we can say that the increase in the number of those who have a positive attitude towards China occurred primarily in the Kazakh-speaking, middle-aged segment, among people with education and income above average, and with a stable family situation. These social groups have become the drivers of the improvement of Kazakhstanis' attitudes towards China over the past years.

FIGURE 10. ATTITUDES TOWARDS CHINA DEPENDING ON THE LANGUAGE OF COMMUNICATION AT HOME

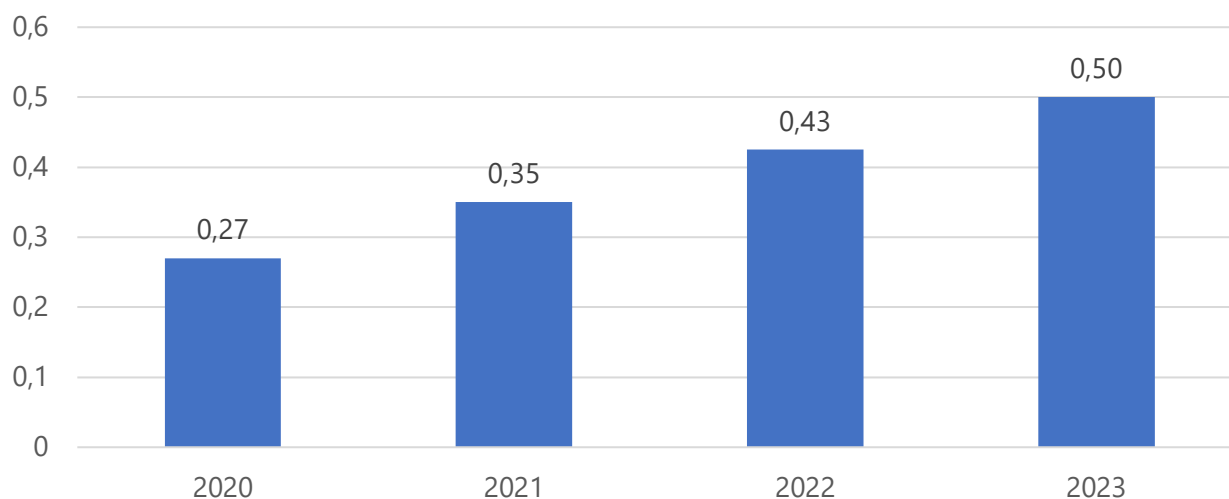


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Dynamics of the geopolitical influence indicator

Similar to the overall perception indicator, the geopolitical influence indicator exhibits a consistent yearly increase of roughly 7 points.

FIGURE 11. INDICATOR OF CHINA'S GEOPOLITICAL INFLUENCE



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There are two kinds of dynamics that are seen in the variables that comprise the indicator.

The first type is a decelerating dynamic, characteristic of variables that initially have a "high" weight. These are two basic theses: that China's influence in the world has been growing recently, and that China is an economically developed state.

The second type of dynamics is inherent in variables that initially had a "low" weight, but they are also the fastest growing. One of them is the statement that China has more weight in the world than Russia. While this statement had an estimated value of about zero before the Russia-Ukraine conflict, it rose to 0.26 after February 2022. We can therefore conclude that Chinese positions in Kazakhstan have largely replaced Russian ones as a result of the military conflict.

The support for statements that China is rich and friendly to Kazakhstan has also increased. Given the correlation between the other questionnaire questions and the comments provided by the respondents, it can be inferred that the actions of the head of state have played a significant role in changing the perception of China from one of a threat to one of a friend (see details on the evolution of Kazakhstan-China relations below).

TABLE 11. DYNAMICS OF VARIABLES OF GEOPOLITICAL INFLUENCE¹²

VARIABLES	2020	2021	2023	
China's influence in the world has been growing lately	0.41	0.55	0.63	Slowing growth
China is an economically developed country	0.54	0.62	0.69	
China is a rich country	0.36	0.42	0.62	Accelerated growth
China is a friendly nation towards Kazakhstan	0.16	0.24	0.47	
China has more influence in the world than Russia	-0.02	0.03	0.26	

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Информация о развитии отношений между Казахстаном и Китаем

The year 2022 marked 30 years since the establishment of diplomatic relations between Kazakhstan and China. It is symbolic that this very year, Chinese President Xi Jinping paid his first foreign visit to Kazakhstan after the pandemic. In May 2023, during the visit of the President of Kazakhstan to Beijing, an agreement on the mutual visa-free regime for citizens of Kazakhstan and China was signed. Kazakhstan plays a major role in the implementation of the global Belt and Road initiative to create a system of transportation for goods across Eurasia.

At the end of 2022, trade turnover between Kazakhstan, China, and Central Asian countries increased by 31.9 and amounted to \$32.1 billion (2021–\$24.3 billion). Today, Kazakhstan supplies China with oil, copper and copper cathodes, ores and copper concentrates, natural gas, ferroalloys, uranium, and sunflower oil. From China, Kazakhstan imports mainly equipment and technology.

In 2022, China invested \$1.4 billion, or 5 of the total foreign investment in Kazakhstan. Cumulatively, the PRC's accumulated investments in Kazakhstan's economy since 2005 totaled \$44.5 billion as of the beginning of 2023.

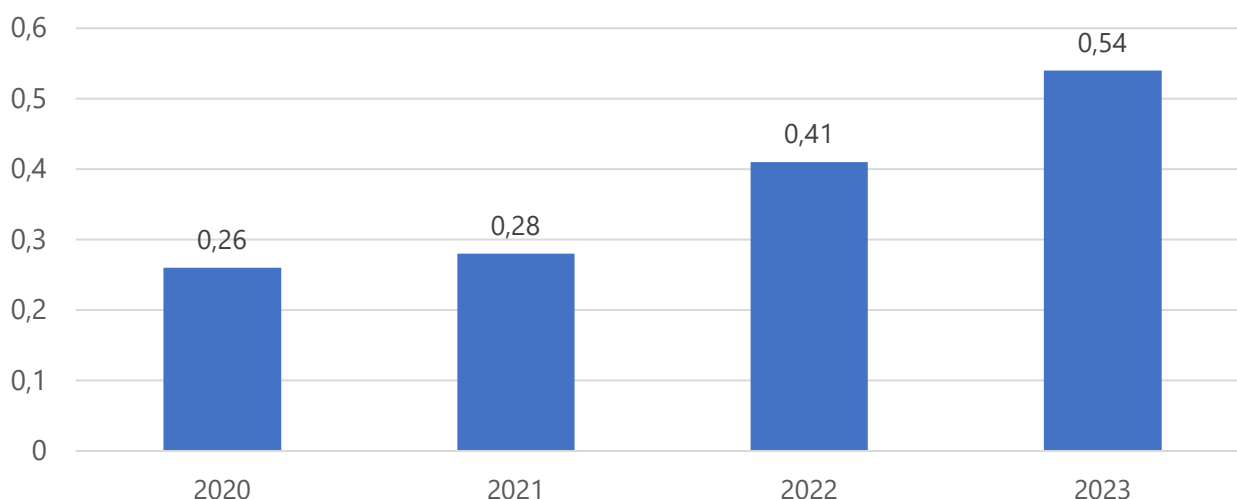
A large number of joint investment projects are being implemented. In the East Kazakhstan region, A small Turgusun-1 hydroelectric power station has been built. Chinese logistics company COSCO Shipping invests in the development of the Khorgos-Eastern Gate special economic zone. A large number of projects are being implemented in the automotive industry. In Kostanay region, Chinese company Genertec (CMC) together with SaryarkaAvtoProm launched manufacturing of JAC brand passenger cars using large- and small-unit assembly methods. In November 2022, Kassym-Jomart Tokayev launched the construction of a plant to manufacture cars of Chinese brands Changan, Chery and Haval.

¹² Calculated by the method of G. Tatarova

Dynamics of the economic impact indicator

While the general perception and geopolitical influence indicators have shown steady growth, the economic power indicator has shown accelerated growth only in the last two years. While it was 0.26 to 0.28 in 2020–2021, it doubled to 0.54 by 2023.

FIGURE 12. INDICATOR OF CHINA'S ECONOMIC IMPACT



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We determined the rate of change for each variable in the indicator to determine which ones contributed the most **growth**.

The analysis revealed that every variable exhibited significant growth. In 2023, it fluctuated between 20 and 42 points.

Similar to the geopolitical index, the variables that were deemed initially

"strong" at the top of the list of priorities for economic cooperation determined the minimum growth of 20 or more: trade, technology and innovation, transportation and logistics

The maximum growth (40 points and more), on the contrary, was given by the "weak" variables in the lower half of the list of priorities: regional security, agriculture, energy sector, and ecology.

It is indicative that the agro-industrial complex, ranked last in the list of priorities for cooperation, received the exceptional largest increase in support from respondents (85).

One of the reasons for this growth is most likely the Russian-Ukrainian conflict, which has jeopardized regional security, including food security.

The results of the survey showed that Kazakhstan's new economic policy, which declared the nation's re-industrialization and extensive renewal of energy-producing capacities, was in response to the emergence of a **new economic reality**.

TABLE 12. DYNAMICS OF ECONOMIC PRIORITIES OF COOPERATION BETWEEN KAZAKHSTAN AND CHINA¹³

VARIABLES	2020	2021 ¹⁵	2022 ¹⁶	2023	2023 / 2022
Trade	0.42	0.47	0.59	0.70	1.20
Production	0.34	0.35	0.51	0.67	1.31
Technology and innovation	0.39	0.45	0.56	0.67	1.20
Transport and logistics	0.27	0.37	0.48	0.59	1.23
Tourism		0.34	0.47	0.59	1.27
Regional security	0.25	0.24	0.41	0.57	1.41
Education	0.25	0.34	0.45	0.56	1.24
Energy sector		0.19	0.33	0.47	1.42
Ecology		0.19	0.33	0.46	1.42
Finance and investments	0.10	0.17	0.31	0.44	1.44
Agriculture	0.04	0.02	0.14	0.25	1.85

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¹³ Calculated by the method of G. Tatarova

How did the different rate of change of different variables affect the **structure of Kazakhstani people's requests** for interaction with China? To answer this question, the indicators have been ranked.

The main conclusions of the analysis are that the priorities for the development of relations with China have not changed. First place goes to trade relations, followed by manufacturing and technology in second and third place, and tourism and transportation logistics in fourth and fifth place.

Thus, over the course of the three years of measurements, the structure of Kazakhstanis' requests in relation to issues of interaction with China has remained mostly stable. Accelerated growth of the "weak" indicators went along with a significant increase in the "strong" ones. And to date, it has not led to structural change.

TABLE 13. RANKING THE PRIORITIES OF COOPERATION

AREAS OF INTERACTION	2020	2021	2023
Trade	1	1	1
Production	3	3	2
Technology and innovation	2	2	3
Tourism		5	4
Transport and logistics	5	4	5
Education	4	6	6
Regional security	6	7	7
Energy sector		9	8
Ecology		8	9
Finance and investments	7	10	10
Agriculture	8	11	11

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Changes in the perception of two **global economic projects** implemented jointly with China are indicative: the Western Europe-Western China transport corridor and the Belt and Road Initiative.

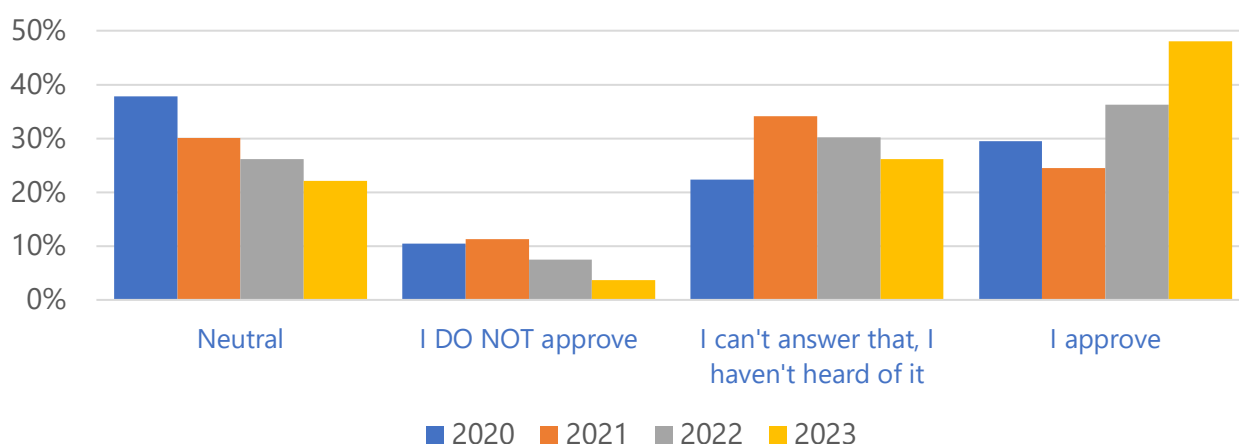
Around 2021, social disillusionment with these transit projects — which date back to the tenth — started to emerge. It is important that, in doing so, it has not moved into their denial but has gone into "I find it difficult to answer" and "I don't know about these initiatives" responses.

The situation changed in 2022-2023. During these years, the level of approval of projects has risen sharply, while the number of "disapprovers" and those who find it difficult to answer has decreased by 2-3 times.

In parallel with these fluctuations, there was a steady decline in those who were neutral about the projects in all three years of measurement. This dynamic is also not accidental. It reflects the public's current desire, as evidenced by several studies conducted by our Center, for a new image of the nation and its promotion both domestically and internationally.

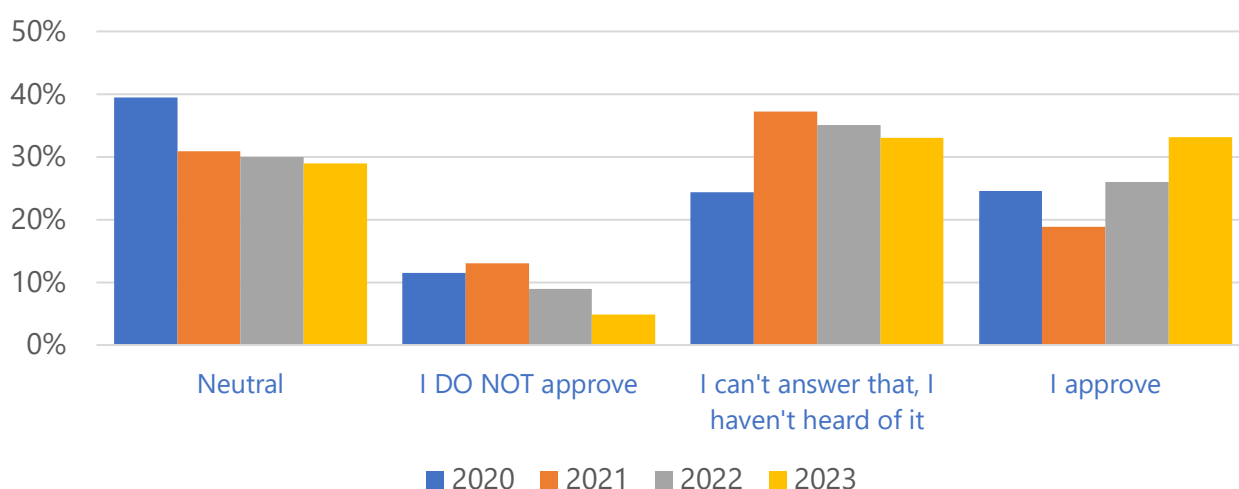
The described dynamics are most indicative of the project of the Western Europe-Western China transport corridor. At the same time, for the Belt and Road Initiative project, the described trends are much weaker. Social disillusionment associated with the unrealisation of inflated expectations of these projects persists, and is an illustrative example of the possible risks of implementing Chinese projects in Kazakhstan.

FIGURE 13. DYNAMICS OF ATTITUDES TOWARDS THE WESTERN EUROPE — WESTERN CHINA TRANSPORT CORRIDOR PROJECT



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FIGURE 14. DYNAMICS OF ATTITUDES TOWARDS THE BELT AND ROAD INITIATIVE

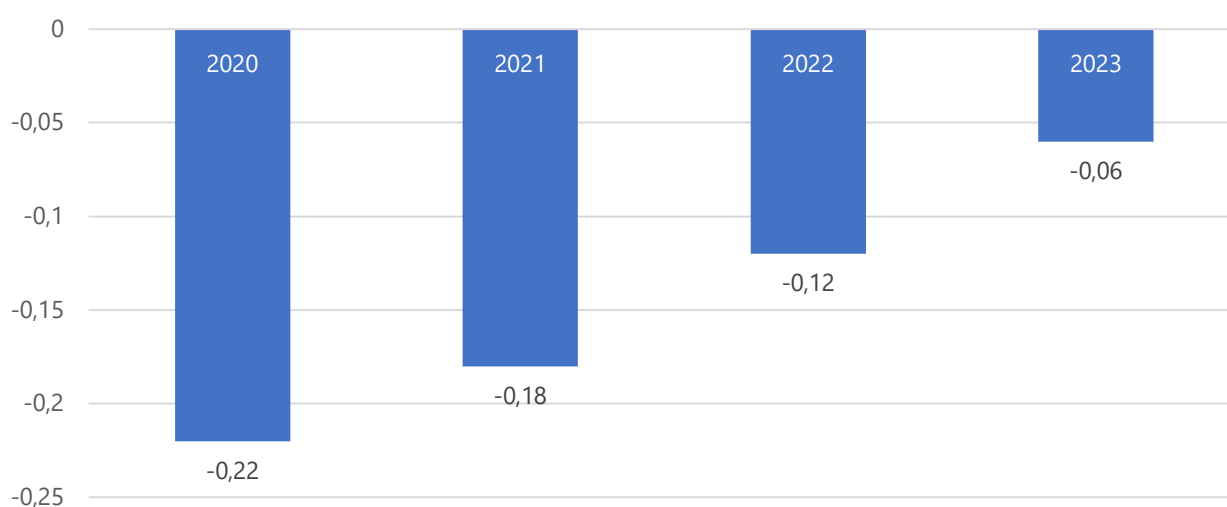


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Dynamics of the cultural influence indicator

The dynamics of the cultural influence indicator demonstrate **steady growth**, which has accelerated in recent years. It was 4 points in 2020–2021, and it increased to 6 points in 2022–2023. As a result of this dynamic, the indicator rose from (-0.22) in 2020 to (-0.06) in 2023 but never managed to overcome the zero mark.

FIGURE 15. DYNAMICS OF THE CULTURAL INFLUENCE INDICATOR



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To examine the dynamics of the variables that comprised the indicator, we used a **complex methodology** that involved calculating variables based on the indicator formula, estimating priorities (ranks were calculated to understand the change in structure), and measuring growth rates to determine the speed of dynamics. This provided insight into how the variables that make up this internally complex indicator change.

The main findings that come out of the analysis are:

- There is an increase in interest in China for most of the variables considered.
- The desire to teach Chinese to children and learn more about Chinese history and culture demonstrate maximum growth rates. This says a lot about Kazakhstanis' shaping perception of the future. And it also allows us to assume a further increase in the indicator of cultural power.
- Trust in the quality of goods is growing relatively rapidly, which, as we saw earlier, is gradually leading to a shift away from the prevailing distrust of Chinese goods.
- There is also a growing openness to visits by Chinese tourists to Kazakhstan. For the responders, it is crucial that the behaviour is short-term (related to tourism) rather than long-term (related to migration).
- While in 2020 only 2 variables out of 11 were above zero, in 2023 there were already

5 such variables.

- Based on extrapolating the current data, it is plausible that in 2024, a new indicator — positivity toward Chinese tourists — may be included. However, much will depend on how the visa-free regime between the countries will actually work and what social consequences it will lead to.
- The only thing that does not change over time is the attitude of Kazakhstanis to their own move to China. The variable remains at its maximum negative level throughout all years of measurement.
- The attitude towards China's political system is interesting. On the one hand, a minority of respondents like her. On the other hand, negativity towards it has almost halved since 2021.

Generally speaking, there is a certain **logic to the rise** of China's "soft power" in Kazakhstan: first, there is a growing perception of China as a global centre of power for the future, which leads to a growing demand for communication between countries and their citizens, and, finally, begins to influence personal behaviour. Accordingly, the variable "interest" gives the highest growth, "communication" — medium, and "personal activity" — minimum.

TABLE 14. DYNAMICS OF CULTURAL INFLUENCE VARIABLES¹⁴

STATEMENTS	2020	2021	2023
Would you like to visit China for tourism?	0.20	0.24	0.42
Do you trust Chinese medicine?	0.10	0.20	0.26
Would you like your child to learn Chinese?	-0.21	-0.13	0.04
Do you trust the quality of goods produced in China?	-0.24	-0.14	0.02
Would you like to learn more about the history and culture of China?	-0.22	-0.19	0.01
Would you like more Chinese tourists to visit Kazakhstan?		-0.24	-0.05
Do you like the political system in China?		-0.25	-0.13
Would you like to have a friend from China?		-0.26	-0.15
Would you like to get an education for yourself or send your child to study in China?	-0.34	-0.26	-0.17
Do you like Chinese cuisine?	-0.31	-0.27	-0.18
Would you like to move to China?	-0.73	-0.73	-0.71

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¹⁴ Calculated by the method of G. Tatarova

Dynamics of the China Perception Composite Index

Over the period from 2020 to 2023, all indicators showed positive growth.

In most cases, this is **steady growth** (assuming that 2022 is calculated as the average between 2021 and 2023).

The exception was an economic indicator that showed a sharp acceleration only in the last two years. The reason for this was a **resonant overlap of causes**: external (the Russian-Ukrainian economic conflict) and internal (political reform and new economic policy in Kazakhstan).

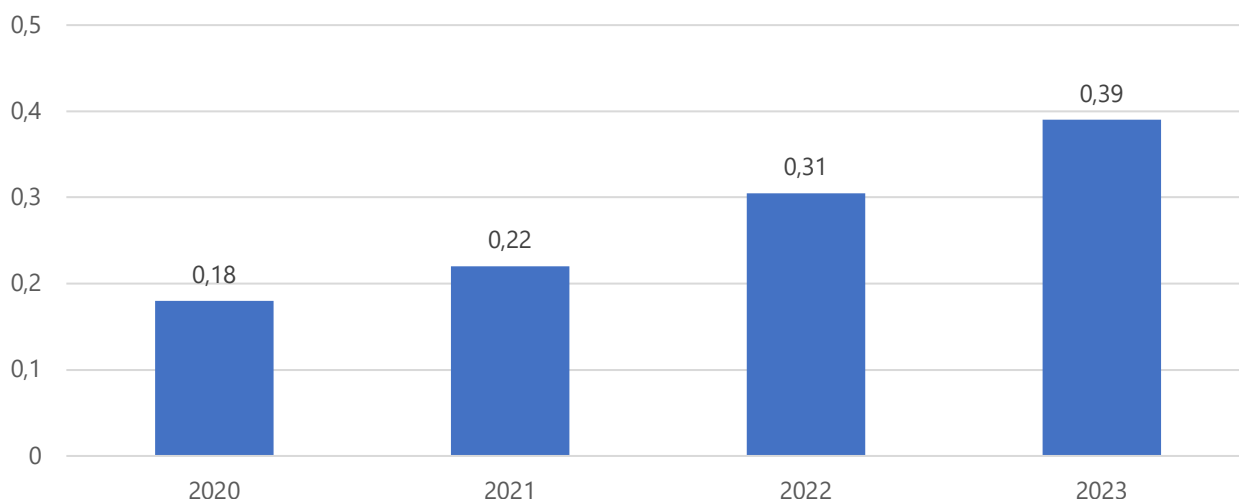
As a result, "economics" caught up with "geopolitics", which in turn led to a narrowing of the gap between them and the initially leading "perception indicator". At the end of 2023, three of the four indicators reached approximately the same values (0.50–0.56).

The following figure illustrates clearly how the pattern of attitudes towards China changed each year before reaching the levelling off point recorded in 2023.

At the same time, the fourth indicator of cultural influence, despite steady growth, is still an exception, is below the zero mark, and stands at -0.06.

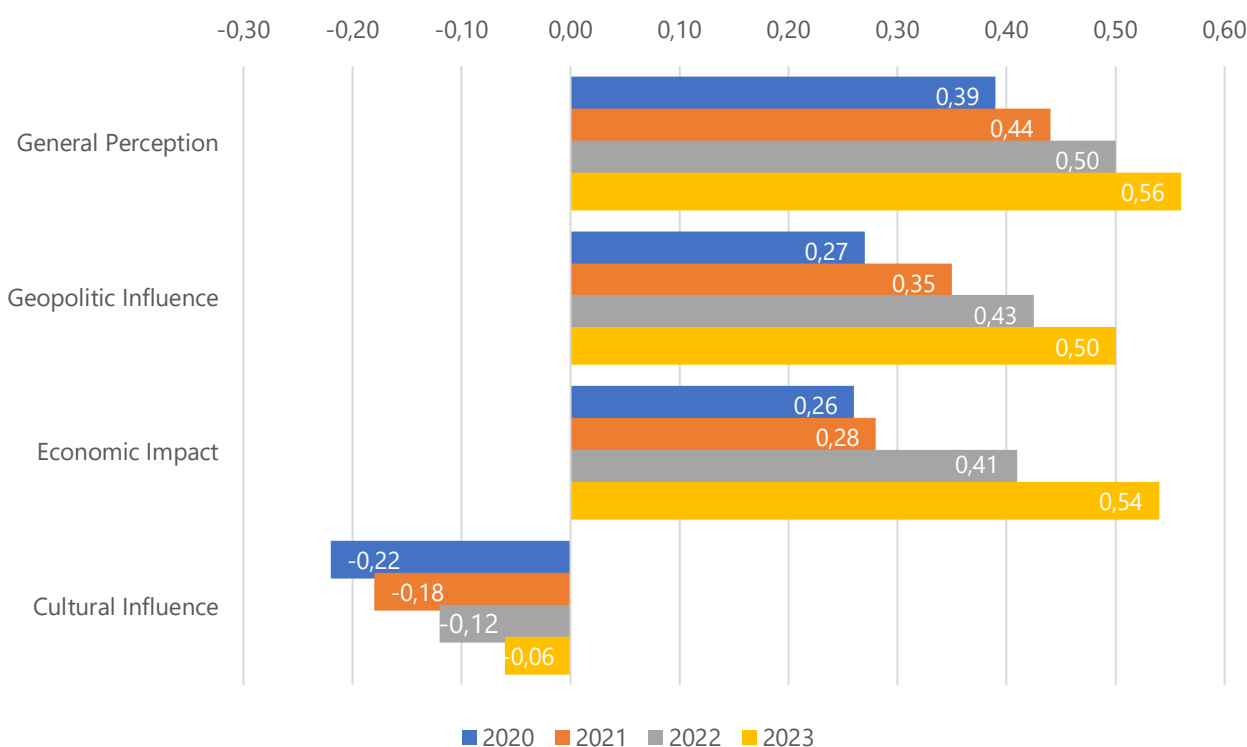
The **composite perception index** of China in Kazakhstan, calculated as the average of four indicators, was 0.39. Since 2020, it has more than doubled from 0.18 to 0.39.¹⁸ Its accelerated growth in the past two years has been driven by a combination of trends of steady growth in indicators of general perception, geopolitical and cultural power, and a trend of accelerated growth in the importance of China's economic power.

FIGURE 16. DYNAMICS OF THE PERCEPTION COMPOSITE INDEX



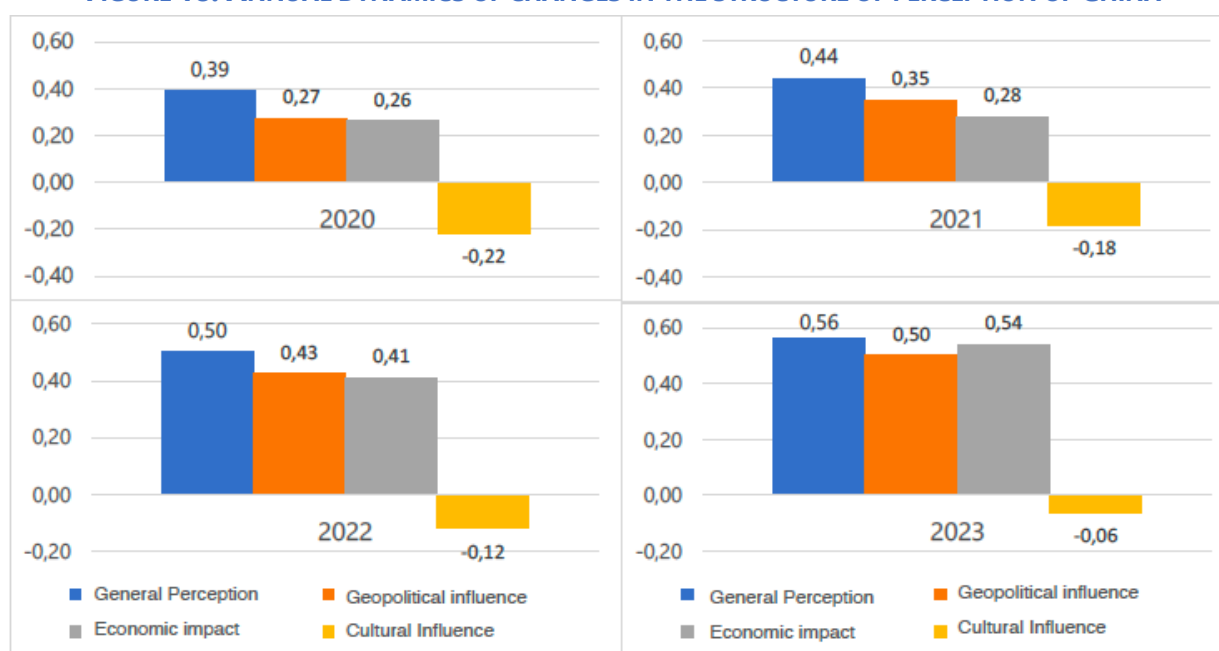
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FIGURE 17. CONJUGATE DYNAMICS OF INDICATORS



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FIGURE 18. ANNUAL DYNAMICS OF CHANGES IN THE STRUCTURE OF PERCEPTION OF CHINA



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FACTOR ANALYSIS

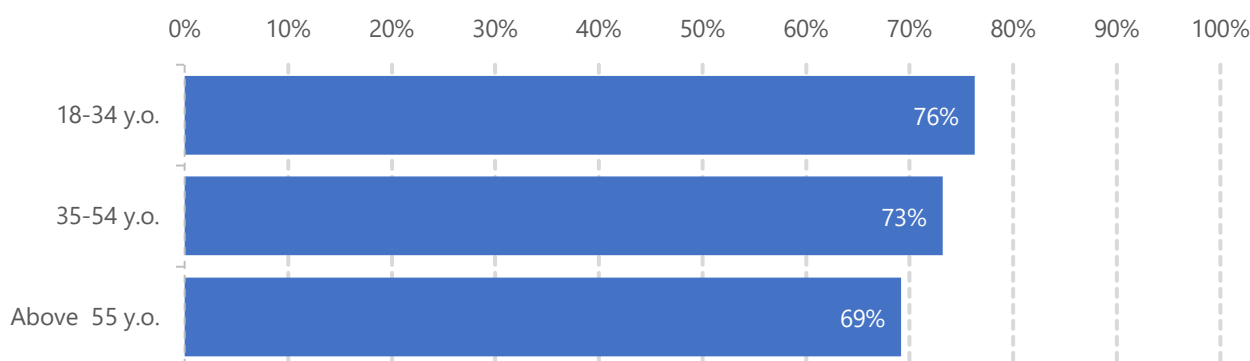
As part of factor analysis, the differences between the variables that make up the indicators and the indicators themselves based on the main socio-demographic parameters recorded in the course of the survey are considered. Six main factors were examined.

1. Age
2. Welfare
3. Ethnicity
4. Language of everyday communication
5. Level of education
6. Type of settlement

Age Factor

Analysis of the table of contingency shows that the overall **perception** of China deteriorates with age. Thus, among those under 34 years old, 76% have a positive attitude towards the PRC, and among those over 55 years old — 69%. However, as we can see, these differences are small. This resulted from the recent age levelling processes that have been described earlier in the report.

FIGURE 19. POSITIVE ATTITUDE TOWARDS CHINA BY AGE GROUP



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Geopolitical assessments also vary little by age. There is a weak tendency for the number of those who believe that "China has more influence in the world than Russia", "China is a socially responsible state", and even that "China is a friendly state towards Kazakhstan" to decrease with age. Seniors are also slightly more likely to believe that "China's influence in the world has been growing recently."

TABLE 15. VARIABLES OF CHINA'S GEOPOLITICAL INFLUENCE INDICATOR BY AGE GROUP

STATEMENT (%)	18-34 y.o.	35-54 y.o.	ABOVE 55 y.o.
China's influence in the world has been growing recently.	76.7	76.3	78.5
China is a friendly nation towards Kazakhstan	69.0	67.3	66.2
China has more influence in the world than Russia	53.2	51.2	48.7
China is an economically developed country	81.0	79.2	81.3
China is a rich country	77.6	73.7	73.7
China is a socially responsible state.	59.7	56.8	54.3

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On the contrary, **economic** variables are more clearly distributed by age. Among those under 34, there are more of those who support economic cooperation with China on almost all fronts than those in the middle and older age generations. Although there are some exceptions: attitudes towards the importance of engagement with China on regional security issues are similar across all age cohorts.

TABLE 16. VARIABLES OF THE ECONOMIC IMPACT INDICATOR BY AGE GROUPS

SECTOR, (%)	18-34 y.o.	35-54 y.o.	ABOVE 55 y.o.
Production	83.5	79.8	79.3
Education	74.6	74.1	73.5
Regional security	71.4	72.2	72.5
Trade	84.9	82.9	80.6
Technology and innovation	82.4	78.6	77.5
Transport and logistics	79.0	73.2	72.2
Agriculture	59.2	55.4	53.0
Finance and investments	70.3	65.4	59.6
Energy sector	70.5	68.6	64.9
Tourism	77.1	75.1	76.8
Ecology	67.3	67.1	65.9

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The age differences are most pronounced within the framework of the cultural influence indicator. They are observed for almost all its constituent variables.

The questions that show the biggest proportional differences between the ages of young and old are "Would you like to go live in China?", "Would you like to send your child to study in China or would you like to get an education there yourself?", "Would you like to have a friend from China?" and "Do you like Chinese cuisine?" All these are issues of communication between Kazakhstanis and representatives of the neighbouring country.

TABLE 17. VARIABLES OF THE CULTURAL INFLUENCE INDICATOR BY AGE GROUP

QUESTION, (%)	18-34 y.o	35-54 y.o.	ABOVE 55 y.o.
Do you like Chinese cuisine?	45.7	33.1	24.7
Do you trust Chinese medicine?	58.6	55.3	51.8
Do you trust the quality of goods produced in China?	46.2	45.8	35.1
Would you like to learn more about the history and culture of China?	51.7	45.1	42.4
Would you like to visit China for tourism?	77.0	67.6	55.3
Would you like more Chinese tourists to visit Kazakhstan?	45.6	39.2	36.9
Would you like to have a friend from China?	42.1	37.1	26.0
Would you like your child to learn Chinese?	47.9	47.8	37.1
Would you like to get an education for yourself or send your child to study in China?	42.5	34.9	23.2
Would you like to move to China?	13.3	10.5	6.8
Do you like the political system in China?	29.2	25.9	26.3

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An analysis of the **dynamics of indicators** combining the variables described above allows us to draw three conclusions.

- The composite index shows that there are serious differences in the perception of China in Kazakhstan by age groups. The magnitude of the fluctuations is 13 points.
- The greatest age differences are shown by the indicator of cultural power — 27 points, and the indicator of general perception is 16 points.
- At the same time, age differences within the economic and geopolitical indicators are minimal and amount to 4-6 points.

Thus, it can be said that young people are more exposed to China's soft power, which affects their general perceptions of China, less on their openness to economic interactions, and minimally on their geopolitical assessments.

TABLE 18. INDICATORS BY AGE GROUP

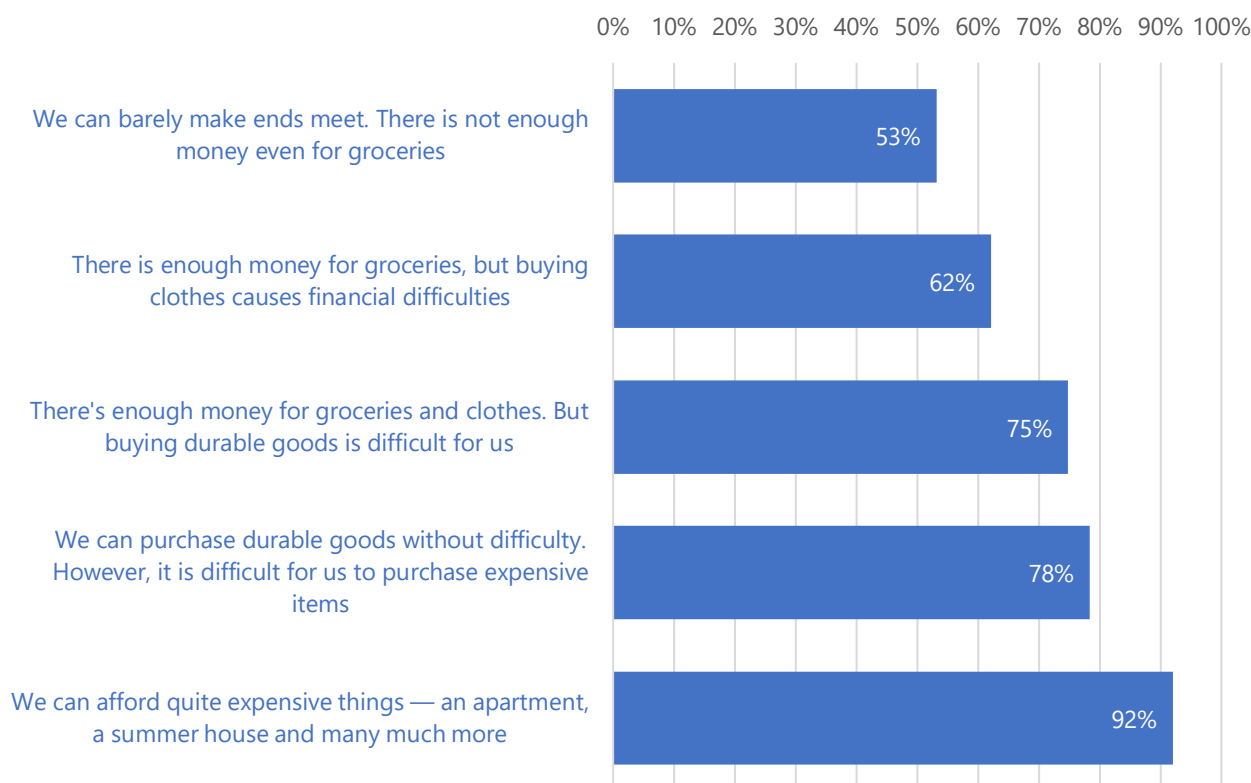
INDICATORS	18-34 y.o	35-54 y.o.	ABOVE 55 y.o.	DIFFERENCE
General Perception	0.62	0.55	0.46	0.16
Geopolitical influence	0.52	0.5	0.48	0.04
Economic impact	0.57	0.53	0.51	0.06
Cultural Influence	0.05	-0.06	-0.22	0.27
Composite index	0.44	0.38	0.31	0.13

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Welfare Factor

Much more than the age factor, attitudes towards China are influenced by the wealth factor. While 53 % of those who can barely make ends meet have a **positive** perception of the PRC, the number rises to 92 % among those who can afford expensive items.

FIGURE 20. POSITIVE ATTITUDES TOWARDS CHINA DEPENDING ON RESPONDENTS' WEALTH



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The variables included in the **economic** indicator change in a similar way. They show preferential growth with income levels.

The only difference is that it is a gradual growth that stabilises after overcoming a certain threshold. For example, the desire to develop manufacturing with China is stabilised at the third property group, while having joint educational projects is stabilised at the second property group.

TABLE 19. VARIABLES OF THE INDICATOR OF ECONOMIC IMPACT DEPENDING ON THE INCOME OF RESPONDENTS

SECTOR, (%)	1	2	3	4	5 ¹⁹
Production	66.1	78.9	82.5	83.2	82.0
Education	58.1	70.3	75.2	79.9	74.0
Regional security	50.0	70.7	74.1	73.6	72.0
Trade	74.2	81.9	83.2	86.3	84.0
Technology and innovation	69.4	75.9	81.1	83.8	88.0
Transport and logistics	62.9	71.6	75.7	78.9	86.0
Agriculture	30.6	55.2	58.7	56.3	62.0
Finance and investments	56.5	59.5	64.2	73.9	76.0
Energy sector	59.7	65.1	69.3	69.0	78.0
Tourism	66.1	75.4	75.7	78.7	84.0
Ecology	51.6	63.8	68.4	69.5	64.0

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The dependence on variables within the framework of the **geopolitical** indicator is not so obvious.

1. The number of positive responses to the questions about China being an economically developed state and about its influence growing recently increases in tandem with the level of prosperity, as do the previously described indicators
2. At the same time, the wealthiest respondents express serious doubts on a number of issues. In particular, they are less likely to see China as a wealthy and socially responsible state.
3. Interestingly, when answering a separate question of the questionnaire, "Do you believe that China poses a threat to Kazakhstan?" — the most affluent respondents gave the maximum number of affirmative answers — 40%.

As a result, as incomes rise, so do the fears surrounding China's power, as evidenced by the responses to the questions pertaining to the creation of the geopolitical indicator.

TABLE 20. VARIABLES OF THE INDICATOR OF GEOPOLITICAL INFLUENCE DEPENDING ON THE ON THE INCOME OF RESPONDENTS

STATEMENT (%)	1	2	3	4	5
China's influence in the world has been growing recently.	62.9	78.9	77.8	76.9	80.0
China is a friendly nation towards Kazakhstan	46.8	55.2	70.2	75.4	66.0
China has more influence in the world than Russia	25.8	46.6	54.1	52.0	54.0
China is an economically developed country	79.0	76.3	81.3	82.2	84.0
China is a rich country	77.4	74.6	76.9	75.1	62.0
China is a socially responsible state.	33.9	52.6	60.6	60.7	48.0

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Attitudes towards China's **cultural** influence are also heterogeneous. For example, the number of those who like Chinese cuisine is the same in all groups. As well as the trust in Chinese medicine, which is higher only among the wealthiest.

Wealthy Kazakhstanis are more likely to go to China. They are also more open to the child learning Chinese and getting Chinese education. At the same time, the attitude of all property groups to the arrival of tourists from China is rather the same.

It can be said that attitudes towards China's soft power depend on the standard of living as much as the extent to which people are willing and able to engage with China. And, importantly, it is based more on future prospects rather than on the current situation.

TABLE 21. VARIABLES OF THE INDICATOR OF CULTURAL INFLUENCE DEPENDING ON THE WEALTH OF RESPONDENTS

QUESTION, (%)	1	2	3	4	5
Do you like Chinese cuisine?	38.7	37.5	35.4	36.3	38.0
Do you trust Chinese medicine?	50.0	57.3	55.6	58.1	62.0
Do you trust the quality of goods produced in China?	35.5	39.2	42.7	48.7	48.0
Would you like to learn more about the history and culture of China?	33.9	44.0	46.3	51.8	62.0
Would you like to visit China for tourism?	61.3	69.4	64.9	76.9	76.0
Would you like more Chinese tourists to visit Kazakhstan?	41.9	39.2	40.3	45.2	38.0
Would you like to have a friend from China?	27.4	31.5	35.1	43.9	36.0
Would you like your child to learn Chinese?	40.3	44.4	44.1	51.5	48.0
Would you like to get an education for yourself or send your child to study in China?	30.6	31.0	34.7	36.3	58.0
Would you like to move to China?	12.9	13.4	9.7	9.9	18.0
Do you like the political system in China?	29.0	27.6	28.0	26.1	32.0

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The analysis of the **composite** index confirms the correlation: the higher the standard of living, the higher the level of the positive attitude towards China among the respondents. The average index difference between the least and most wealthy respondents is 33 points.

The index of general perception exhibits the largest variation among the indicators, ranging from 0.23 to 0.88 based on the wealth level. That's almost a fourfold difference.

The economic impact indicator is at the medium level. Here, the differences between the groups are 34 points, forming a two-fold fluctuation.

On the contrary, indicators of cultural and geopolitical influence show minimal differences by income groups.

Moreover, the maximum values of the geopolitical indicator are not given by the wealthiest respondents, but rather by the upper middle stratum and the lower upper stratum.

It can be concluded that the perception of China varies according to the standard of living. To date, these are primarily differences at the level of general perception. This is partly peculiar to understanding interactions in the economic sphere. Geopolitical and cultural indicators are less related to the property differentiation of society in Kazakhstan.

TABLE 22. INDICATORS DEPENDING ON THE WEALTH OF RESPONDENTS

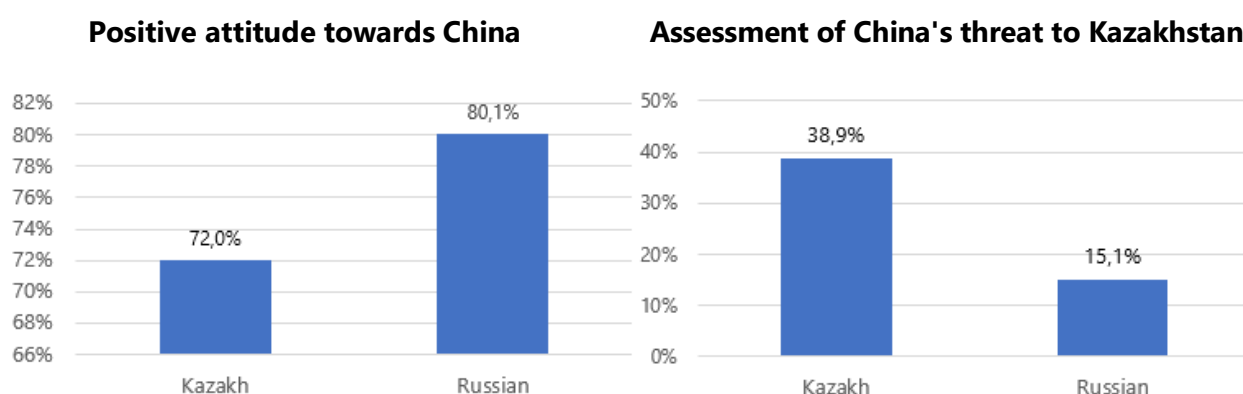
INDICATORS, (%)	1	2	3	4	5	DIFFERENCE
General Perception	0.23	0.38	0.57	0.65	0.88	0.65
Geopolitical influence	0.30	0.46	0.53	0.54	0.44	0.14
Economic impact	0.30	0.49	0.55	0.59	0.64	0.34
Cultural Influence	-0.12	-0.09	-0.09	0.01	0.05	0.17
Composite index	0.17	0.31	0.39	0.45	0.50	0.33

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Ethnicity Factor

As the survey data show, positive **perceptions** of China in the country are more common among respondents identifying themselves as Russians than among those identifying themselves as Kazakhs. This affects other ethnic group responses as well. Thus, "Russian" respondents are less likely to believe that China is a hostile state. Among them, only 15 % think so, while among Kazakhs, the number of those who are fearful of Chinese intentions reaches 39 % (refer to the information section).

FIGURE 21. VARIABLES OF PERCEPTIONS OF CHINA DEPENDING ON ETHNICITY



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Kazakhs are also more likely to believe that China's influence in the world is growing and that China now carries more weight than Russia. And they interpret this in terms of growing **geopolitical** risks rather than opportunities.

At the same time, other less sensitive questions show less variation in responses between ethnic groups. For example, 79% of "Kazakhs" and 84% of "Russians" say that China is an economically developed state.

TABLE 23. VARIABLES OF THE INDICATOR OF THE GEOPOLITICAL INFLUENCE DEPENDING ON THE ON THE ETHNICITY OF RESPONDENTS

STATEMENT (%)	KAZAKH	RUSSIAN	OTHER
China's influence in the world has been growing recently.	78.9	68.0	76.7
China is a friendly nation towards Kazakhstan	63.5	82.0	83.3
China has more influence in the world than Russia	54.3	40.4	43.3
China is an economically developed country	79.0	83.8	88.9
China is a rich country	75.0	75.7	77.8
China is a socially responsible state.	55.7	62.9	63.3

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China's **economic** power is also higher among the "Russian" population. The difference in answers between

"Russians" and "Kazakhs" can reach 20%. However, it is 8 — 12% for most parameters.

It is indicative that the issues of cooperation between Kazakhstan and China on the development of manufacturing and enhancement of regional security have minimal differences — about 6%.

However, if the desire to develop production in Kazakhstan unites the respondents, the issue of regional security has different implications. For "Kazakhs", it is more about minimising risks, while for "Russians" it is about the country's development prospects.

TABLE 24. VARIABLES OF THE INDICATOR OF CULTURAL INFLUENCE DEPENDING ON THE ETHNICITY OF RESPONDENTS

SECTOR, (%)	KAZAKH	RUSSIAN	OTHER
Production	80.1	86.4	80.0
Education	72.0	84.2	73.3
Regional security	70.7	77.2	73.3
Trade	81.5	90.1	84.4
Technology and innovation	77.6	87.1	88.9
Transport and logistics	73.4	82.4	78.9
Agriculture	53.6	69.1	55.6
Finance and investments	64.3	73.5	65.6
Energy sector	66.3	78.3	67.8
Tourism	74.6	83.5	78.9
Ecology	62.8	83.1	75.6

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The analysis of cultural indicator variables is particularly interesting. There are 11 of them in total. "Kazakhs" are more likely to speak well of China in five cases;

"Russian" respondents are more likely to speak well of China in five cases; and in one case, the perspectives of both ethnic groups on China are essentially the same.

Thus, "Kazakhs" more often like Chinese cuisine and medicine. Also, "Kazakhs" more often would like to teach their children Chinese language, give them Chinese education, and are even ready to move to China themselves.

At the same time, "Russians" would more often like to have a friend from China, are more open to Chinese tourists, and would like to learn more about Chinese culture and history. They are also more likely to like China's political system and the quality of Chinese goods.

Summarizing, it can be said that "Russians" are more open to communication with the Chinese, but at the same time, Kazakhs are more often ready for practical actions in these communications.

TABLE 25. VARIABLES OF THE INDICATOR OF CULTURAL INFLUENCE DEPENDING ON THE ON THE ETHNICITY OF RESPONDENTS

STATEMENT (%)	KAZAKH	RUSSIAN	DIFFERENCE
Would you like to have a friend from China?	32.6	47.8	15.2
Would you like to learn more about the history and culture of China?	44.6	57.0	12.4
Would you like more Chinese tourists to visit Kazakhstan?	38.7	49.3	10.6
Do you like the political system in China?	26.1	33.8	7.7
Do you trust the quality of goods produced in China?	42.6	46.3	3.7
Would you like to visit China for tourism?	67.9	68.0	0.1
Do you like Chinese cuisine?	35.7	34.6	-1.1
Would you like to move to China?	11.5	7.7	-3.8
Would you like to get an education for yourself or send your child to study in China?	35.8	29.8	-6.0
Would you like your child to learn Chinese?	46.5	38.6	-7.9
Do you trust Chinese medicine?	57.1	48.2	-8.9

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As a result, the **composite** index of perception of China among "Russians" is higher than among "Kazakhs" by 13 points. The largest differences (20–21 points) are observed in the indicators of general perception and economic impact. At the same time, in the geopolitical and cultural indicators, the differences are only 5-7 points (as previously seen, their external similarity hides serious internal differences).

TABLE 26. INDICATORS DEPENDING ON RESPONDENTS' ETHNICITY

INDICATORS	KAZAKH	RUSSIAN	DIFFERENCE
General Perception	0.52	0.72	0.20
Geopolitical influence	0.49	0.54	0.05
Economic impact	0.50	0.71	0.21
Cultural Influence	-0.08	-0.01	0.07
Composite index	0.36	0.49	0.13

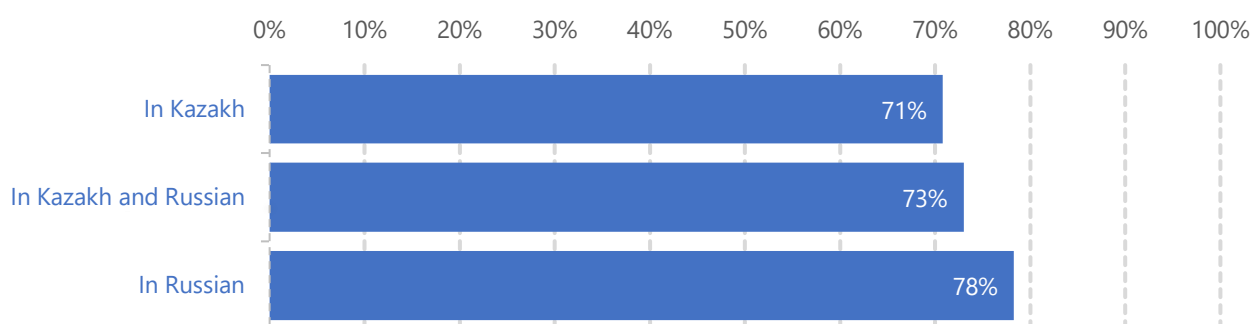
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Linguistic Factor

Analyses of differences in responses to the question of what language respondents speak at home complement the analyses by ethnicity well. Ethnic differences are transformed into ethno-cultural differences.

The development of an assessment tool enables the monitoring of opinion shifts from respondents who speak Kazakh to those who are bilingual (using two languages at the same time in their home) and Russian-speaking respondents. This is already readily apparent when asking about people's overall **perception** of China. Among those who communicate in Kazakh at home, 71% have a positive attitude towards the PRC. Among those who communicate in two languages — 73%. And among those who speak Russian — 78%.

FIGURE 22. POSITIVE ATTITUDES TOWARDS CHINA DEPENDING ON THE LANGUAGE OF COMMUNICATION AT HOME

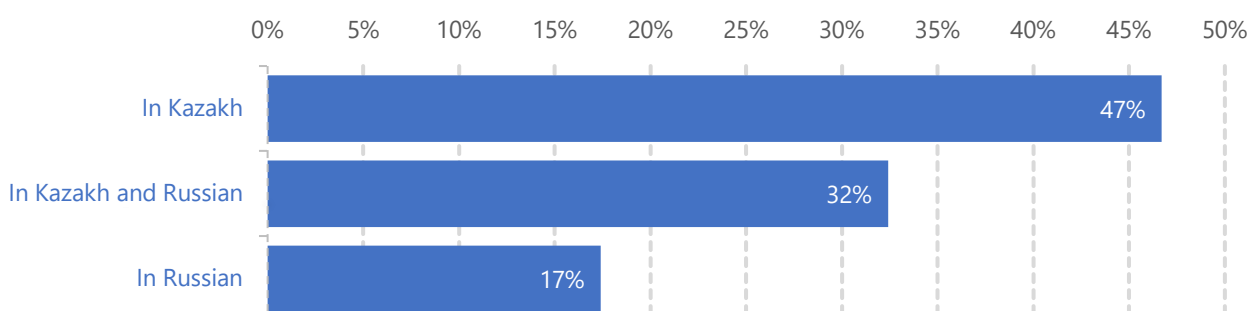


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When assessing the variables that form the **geopolitical** indicator, it is clearly visible when bilinguals are similar to Russian-speakers and when they are similar to Kazakh-speakers.

In particular, supporting the thesis that China's influence in the world is growing and that today it has more influence than Russia, bilinguals are more oriented toward Kazakh speakers. At the same time, assessing the level of China's social responsibility and China's friendliness, bilinguals are more oriented to the Russian-speaking ones. At the same time, bilinguals adopt a neutral stance when directly questioned about China's possible threat to Kazakhstan.

FIGURE 23. AGREEING THAT CHINA IS A THREAT DEPENDING ON THE LANGUAGE OF COMMUNICATION



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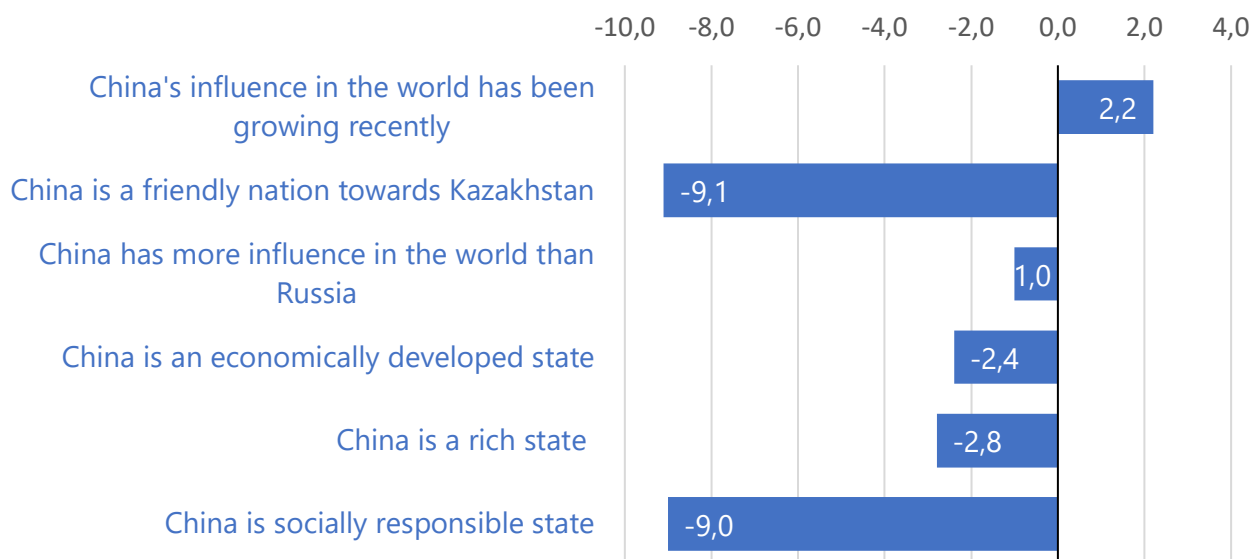
TABLE 27. VARIABLES OF THE INDICATOR OF GEOPOLITICAL INFLUENCE DEPENDING ON THE LANGUAGE OF COMMUNICATION AT HOME

STATEMENT (%)	IN KAZAKH	IN KAZAKH AND RUSSIAN	IN RUSSIAN
China's influence in the world has been growing recently.	81,1	77,1	70,9
China is a friendly nation towards Kazakhstan	54,4	73,6	79,6
China has more influence in the world than Russia	53,3	54,6	45,8
China is an economically developed country	76,6	82,3	83,3
China is a rich country	72,2	78,6	75,7
China is a socially responsible state.	46,7	64,4	63,2

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It is interesting to compare the answers of "Kazakhs" by ethnic self-identification and Kazakh speakers by behaviour. In most cases, the differences in responses do not exceed 3%. The exception is two questions showing differences of 9%. "Kazakhs" are less likely to regard China as a friendly and socially responsible state.

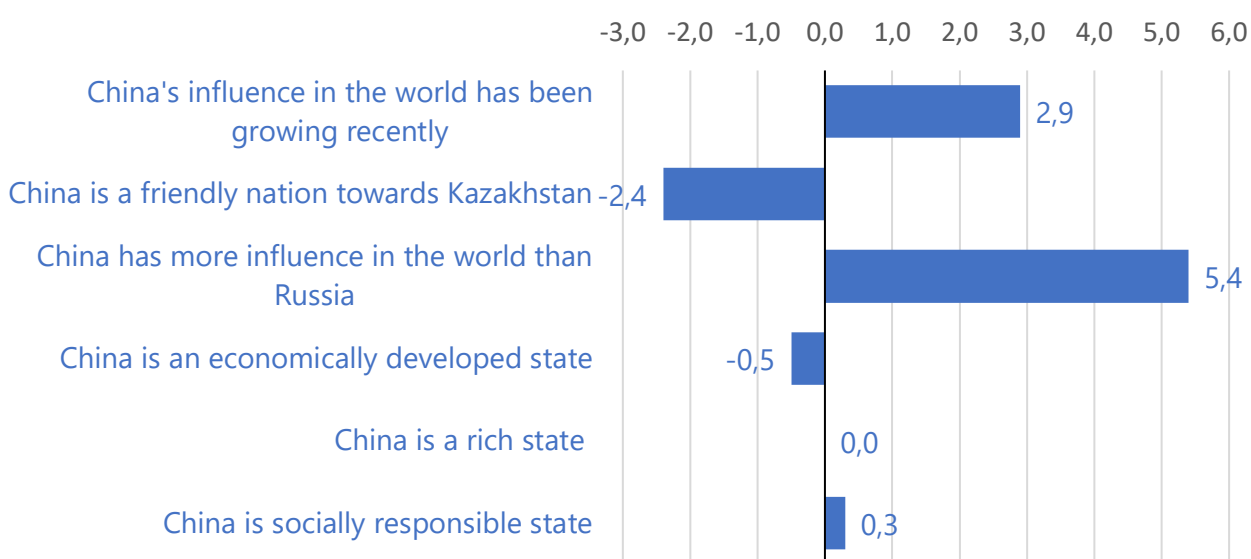
FIGURE 24. THE DIFFERENCE OF ANSWERS BY LINE "KAZAKH-SPEAKING — KAZAKH"



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A similar picture of the predominant coincidence of ethnic and linguistic identities emerges when comparing the answers of "Russian" and Russian-speaking respondents. Only one significant difference in responses is observed. "Russians" are less likely than Russian speakers to believe that China has more weight in the world than Russia.

FIGURE 25. THE DIFFERENCE OF ANSWERS BY LINE "RUSSIAN-SPEAKING — RUSSIAN"



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The majority of the variables in the **economic** impact indicator fall into the previously mentioned ethnic distribution.

When it comes to issues of education, trade, tourism, and regional security, bilinguals are more similar to Kazakh speakers, and when it comes to issues of ecology and agriculture, they are more similar to Russian speakers, according to an analysis of their distance from the extreme groups. In issues such as transport, finance, and technology, they occupy the middle ground.

TABLE 28. VARIABLES OF THE INDICATOR OF ECONOMIC IMPACT DEPENDING ON THE LANGUAGE OF COMMUNICATION AT HOME

ОТРАСЛЬ, (%)	HA KAZAXCKOM	HA KAZAXCKOM И PYCCKOM	HA PYCCKOM
Production	79,3	80,6	84,0
Education	64,9	78,0	82,4
Regional security	66,7	74,7	76,2
Trade	75,3	87,7	88,1
Technology and innovation	74,2	80,8	86,0
Transport and logistics	69,5	76,4	82,2
Agriculture	52,7	54,4	64,5
Finance and investments	60,4	66,1	73,2
Energy sector	66,4	65,0	75,5
Tourism	69,1	79,3	82,4
Ecology	58,6	65,5	80,1

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Within the cultural influence indicator, there is an interesting phenomenon that shows the "strength" of bilingual families. Among them, there are more of those who would like their child to learn Chinese and those who would like their child to study in China. Apparently, they have a higher appreciation of their children's ability to learn a third language than those who will have it as a second language used in everyday life.

TABLE 29. VARIABLES OF THE INDICATOR OF CULTURAL INFLUENCE DEPENDING ON THE LANGUAGE OF COMMUNICATION AT HOME

QUESTION, (%)	IN KAZAKH	IN KAZAKH AND RUSSIAN	IN RUSSIAN
Do you like Chinese cuisine?	33,3	37,4	37,5
Do you trust Chinese medicine?	56,2	57,7	53,1
Do you trust the quality of goods produced in China?	39,9	45,4	45,8
Would you like to learn more about the history and culture of China?	37,3	49,7	57,4
Would you like to visit China for tourism?	62,8	71,1	72,1
Would you like more Chinese tourists to visit Kazakhstan?	35,5	40,6	49,9
Would you like to have a friend from China?	26,8	38,9	46,2
Would you like your child to learn Chinese?	40,7	53,1	42,8
Would you like to get an education for yourself or send your child to study in China?	35,9	37,6	30,2
Would you like to move to China?	13,4	10,2	7,3
Do you like the political system in China?	22,8	28,5	32,3

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The dynamics of the **composite perception index** of China among the linguistic groups well demonstrate the smooth transition between them. Such dynamics are also typical for the majority of indicators forming this index. The only exception is the geopolitical indicator, where bilinguals' and Russian speakers' indicators are as similar as possible.

However, the main differences between the linguistic groups will be clear if we look at which indicator has the highest value in each of them. Among those who speak Kazakh at home, positive perceptions of China are primarily related to general perceptions of China. Among those who speak both Kazakh and Russian — with its geopolitical influence. Among those who speak Russian — with its economic indicator. And although the gap between the maximal figures and the subsequent ones is very small, it seems that the highlighted focuses make sense.

TABLE 30. INDICATORS DEPENDING ON THE LANGUAGE OF COMMUNICATION OF RESPONDENTS AT HOME

INDICATORS	IN KAZAKH	IN KAZAKH AND RUSSIAN	IN RUSSIAN	DIFFERENCE
General Perception	0,48	0,56	0,66	0,18
Geopolitical influence	0,41	0,57	0,55	0,14
Economic impact	0,44	0,56	0,67	0,23
Cultural Influence	-0,14	-0,02	0,01	0,15
Composite index	0,30	0,41	0,47	0,17

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Education

According to the survey data, the influence of education on the attitudes of Kazakhstanis towards China is relatively small. There is an increase in the level of positive **perception** as the level of education increases.

However, when comparing the variables included in the **geopolitical** influence indicator, for instance, there are not many differences between secondary and higher education. The main drop is observed at the level of secondary specialised education; here all variables have lower values.

Certain differences are observed when analysing the variables of the **cultural** influence indicator. In particular, the high level of education is more oriented towards learning Chinese and getting an education in China than the low level of education. In addition, as the level of education increases, respondents are more likely to like Chinese food. But China's political system is more appealing to those with only a general secondary education.

The largest educational differences are observed when answering the question about the **threat** from China. As we can see, as education grows, there is not only an increase in positivity towards it but also an increase in fears of its escalation.

To summarise, the education factor only seriously affects the level of general perception of China. When evaluating particular country interaction parameters, however, it is negligible and yields differences more based on the individual demands and capabilities of respondents — which are higher among those with higher education. This is reflected in the **composite index** of perceptions of China, with similar values for general and secondary education, and higher values for higher education.

TABLE 31. INDICATORS DEPENDING ON THE LEVEL OF EDUCATION

INDICATORS	GENERAL SECONDARY	PROFESSIONAL	HIGHER	DIFFERENCE ²⁰
General Perception	0,49	0,55	0,58	0,09
Geopolitical influence	0,56	0,46	0,53	-0,03
Economic impact	0,51	0,52	0,58	0,07
Cultural Influence	-0,13	-0,11	-0,03	0,10
Composite index	0,36	0,36	0,42	0,06

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Differences by line "urban — rural"

The results of the survey indicate that Kazakhstanis' **overall** opinion of China is not significantly influenced by whether the survey was conducted in urban or rural areas. The difference in responses between the two is one tenth of a percent.

Simultaneously, the variables comprising the **geopolitical** strength indicator exhibit location-specific variations in their scores: virtually all variables exhibit higher values in urban regions as compared to rural ones.

The gap is 7–11% for each position and is maximum for answers to the questions "China has more weight in the world than Russia" and "China is a socially responsible state".

TABLE 32. VARIABLES OF THE INDICATOR OF GEOPOLITICAL INFLUENCE DEPENDING ON THE AREA OF RESIDENCE

STATEMENT (%)	URBAN	RURAL
China's influence in the world has been growing recently.	81,0	70,9
China is a friendly nation towards Kazakhstan	70,5	63,5
China has more influence in the world than Russia	55,9	44,5
China is an economically developed country	84,0	75,0
China is a rich country	78,4	70,5
China is a socially responsible state.	61,7	50,7

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A similar situation is observed when assessing areas of **economic** cooperation with China. The rural areas are not as active in their expectations of interaction.

However, in economic variables, unlike geopolitical ones, urban excess is often of a minimal nature. Thus, the rural demand for cooperation in production, agriculture, and investment is only 2–5% weaker than in the city.

At the same time, support for cooperation with China in education, tourism, and trade is 11–15% higher in urban areas than in rural ones.

TABLE 33. VARIABLES OF THE INDICATOR OF ECONOMIC IMPACT DEPENDING ON THE AREA OF RESIDENCE

SCOPE OF COOPERATION, (%)	URBAN	RURAL
Production	82,9	78,5
Education	80,3	64,9
Regional security	75,9	66,2
Trade	87,3	76,8
Technology and innovation	83,9	73,7
Transport and logistics	79,1	69,6
Agriculture	57,2	55,0
Finance and investments	67,9	62,9
Energy sector	72,0	63,1
Tourism	81,7	68,2
Ecology	69,7	62,8

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The variables that make up the **cultural** influence indicator provide an even greater diversity of responses. On the one hand, citizens more often want to learn about the history and culture of China and would like to visit China for tourism purposes. Rural residents, on the other hand, are more likely to wish to relocate to China. Otherwise, approximately the same values are observed for urban and rural residents.

Interestingly, such similar values are characteristic of answers to the question about China's **threat** to Kazakhstan: 34% of respondents in both urban and rural areas believe that such a threat exists.

TABLE 34. VARIABLES OF THE INDICATOR OF CULTURAL INFLUENCE DEPENDING ON THE AREA OF RESIDENCE

STATEMENT (%)	URBAN	RURAL
Do you like Chinese cuisine?	35.6	36.5
Do you trust Chinese medicine?	57.9	52.4
Do you trust the quality of goods produced in China?	45.5	40.0
Would you like to learn more about the history and culture of China?	51.5	40.3
Would you like to visit China for tourism?	71.7	63.1
Would you like more Chinese tourists to visit Kazakhstan?	42.5	38.9
Would you like to have a friend from China?	36.5	36.0
Would you like your child to learn Chinese?	45.9	44.2
Would you like to get an education for yourself or send your child to study in China?	34.7	35.5
Would you like to move to China?	8.7	13.8
Do you like the political system in China?	28.7	25.2

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The **composite** index shows serious differences between urban and rural perceptions of China in Kazakhstan. This is primarily because of geopolitical and economic indicators that point to a more optimistic view of the interactions amongst urban residents. However, differences in perceptions in these areas have had little impact on the overall perception of China and its soft power potential. It remains roughly the same in urban and rural areas.

TABLE 35. INDICATOR VALUES DEPENDING ON THE PLACE OF RESIDENCE

INDICATORS	URBAN	RURAL	DIFFERENCE
General Perception	0.55	0.57	-0.02
Geopolitical influence	0.58	0.39	0.19
Economic impact	0.61	0.44	0.17
Cultural Influence	-0.04	-0.09	0.05
Composite index	0.42	0.33	0.09

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Integral Table of Factors

The results of the analysis demonstrate that the impact of sociodemographic variables varies depending on the indicator. Therefore, we will draw a table, where we will highlight only those indicators that showed the greatest differences across social groups.

As we can see, the **economic** impact indicator, which showed the highest growth over the previous two years, was most impacted by the socio-demographic characteristics that were studied. It was influenced by 4 out of 6 factors.

The indicator of the general **perception** of China is in second place. Age, education, and standard of living can all be said to have a significant influence on it.

The third place belongs to the indicator of **geopolitical** influence. There are only two factors that have an impact on it: the language used in daily communication, which primarily reflects existing ethno-cultural differences, and the type of area (urban or rural).

And the fourth place belongs to the indicator of **cultural** influence. It is influenced by the only factor studied — age. To simplify, the younger the respondent, the more receptive they are to Chinese cultural influences.

TABLE 36. INTEGRAL TABLE OF FACTORS

	GENERAL PERCEPTION	GEOPOLITICAL INFLUENCE	ECONOMIC IMPACT	CULTURAL INFLUENCE
Age	+			+
Welfare	+		+	
Ethnicity			+	
Language of everyday communication		+		
Level of education	+		+	
Type of settlement		+	+	
Total	3	2	4	1

REGIONAL DIFFERENCES

In this section, we will draw geographic maps. We first examine the conventional macro-regional distribution. After that, we will propose an alternative model of regional division in Kazakhstan, which we are going to build on the basis of clustering regions according to

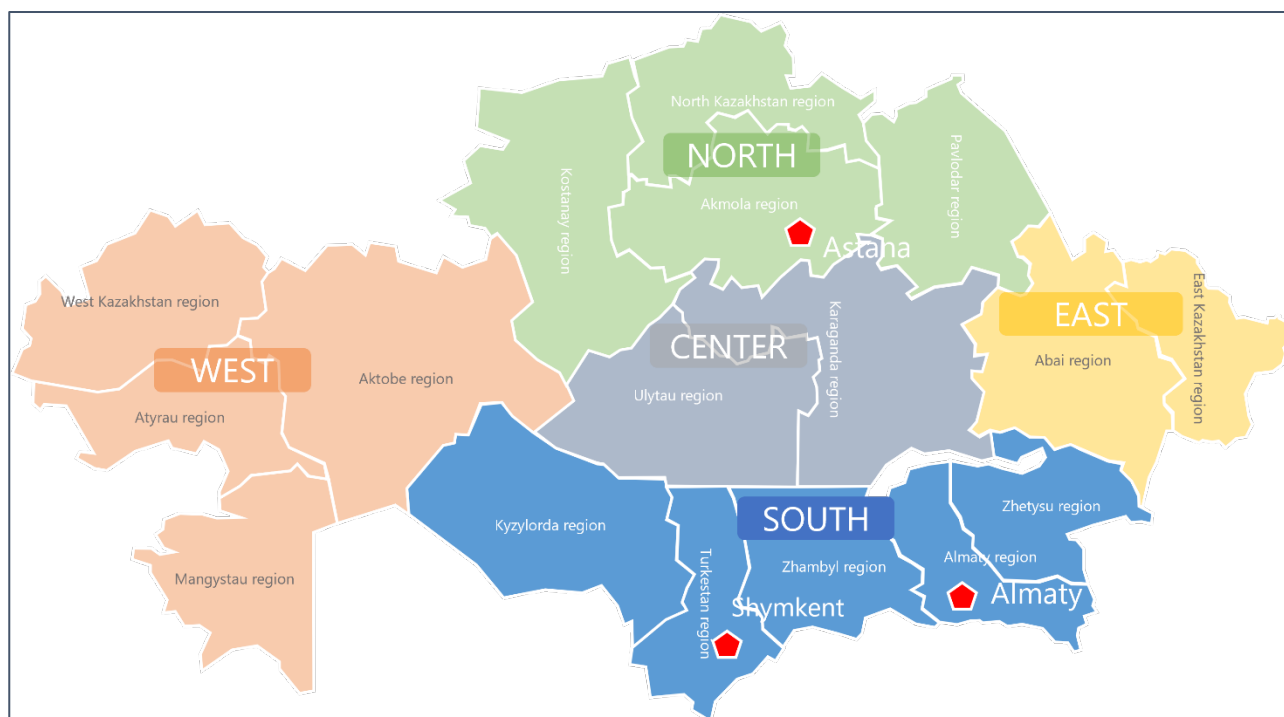
27 criteria. Later, in the section describing the social risks of the Chinese presence in Kazakhstan, we will additionally consider the main axial fractures of the country.

Macro-Regional Distribution

Initially, the macro-regional approach — a standard method in sociological research — was employed to analyse territorial variations in indicator values since the research sample was not representative of any particular region.

Typically, five macro-regions are distinguished: Eastern, Northern, Western, Southern, and Central. They also take into account data on three cities of republican importance (Astana, Almaty, and Shymkent), whose opinions often differ from those of the surrounding area.

FIGURE 26. MACRO-REGIONS OF KAZAKHSTAN

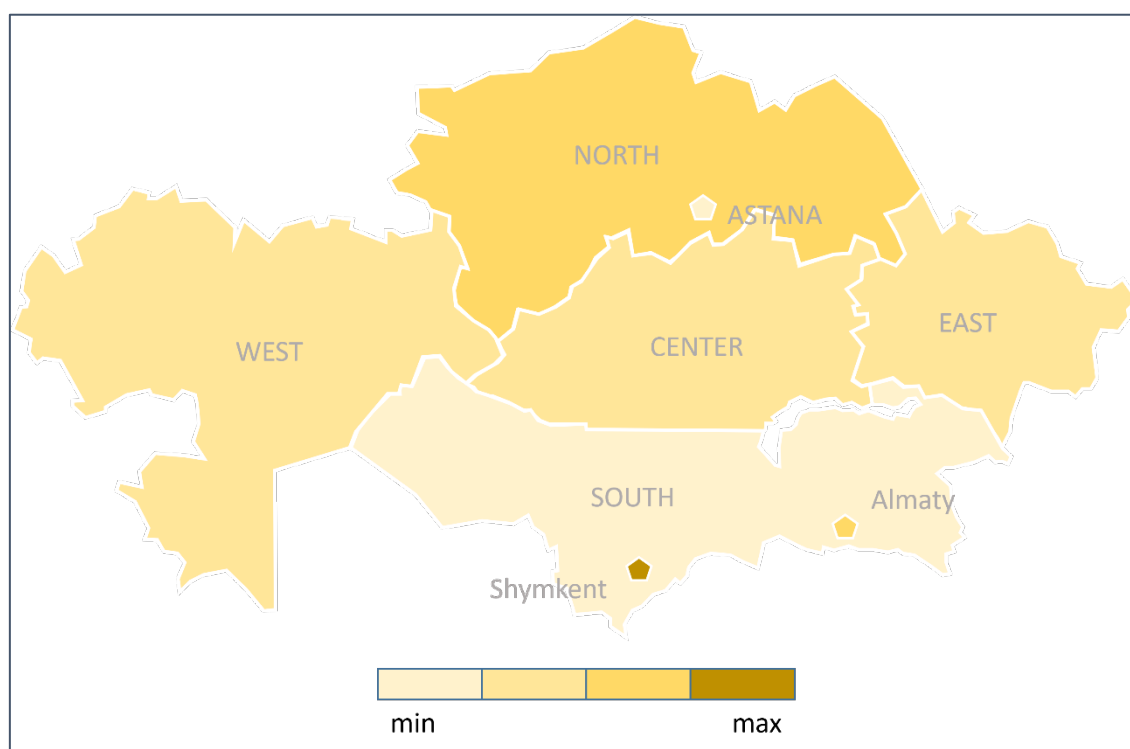


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The **composite index** of perception of China in Kazakhstan changes in the direction from north to south. The maximum values of the index are observed in the North of the country, while the minimum values are observed in the South. In between is the Middle Belt stretching from west to east.

As expected, the indexes of large cities differ from those of their surrounding regions: the index of northern Astana is the same as that of the Southern macro-region, while that of southern Shymkent is the same as that of the Northern macro-region. The index of Almaty, the economic capital of Kazakhstan, corresponds to the values of the Middle Belt.

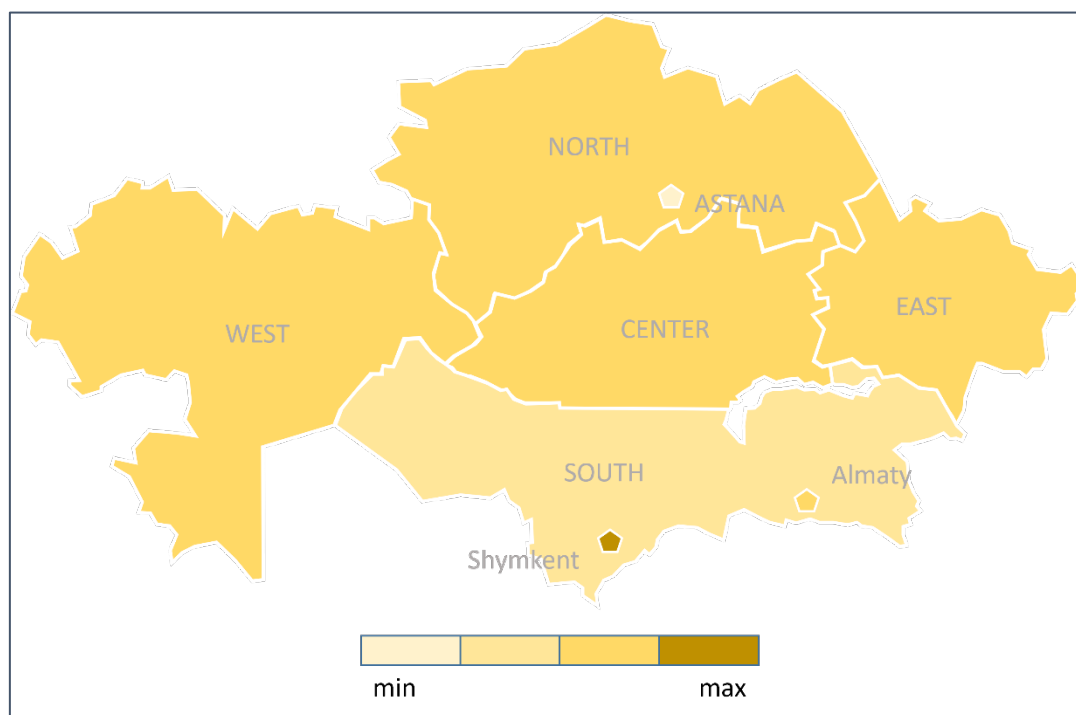
FIGURE 27. COMPOSITE INDEX OF PERCEPTION OF CHINA ON THE MAP OF MACRO-REGIONS



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The **general perception indicator** unites the North and the Middle Belt. Three cities of national importance duplicate their position as in the final perception index.

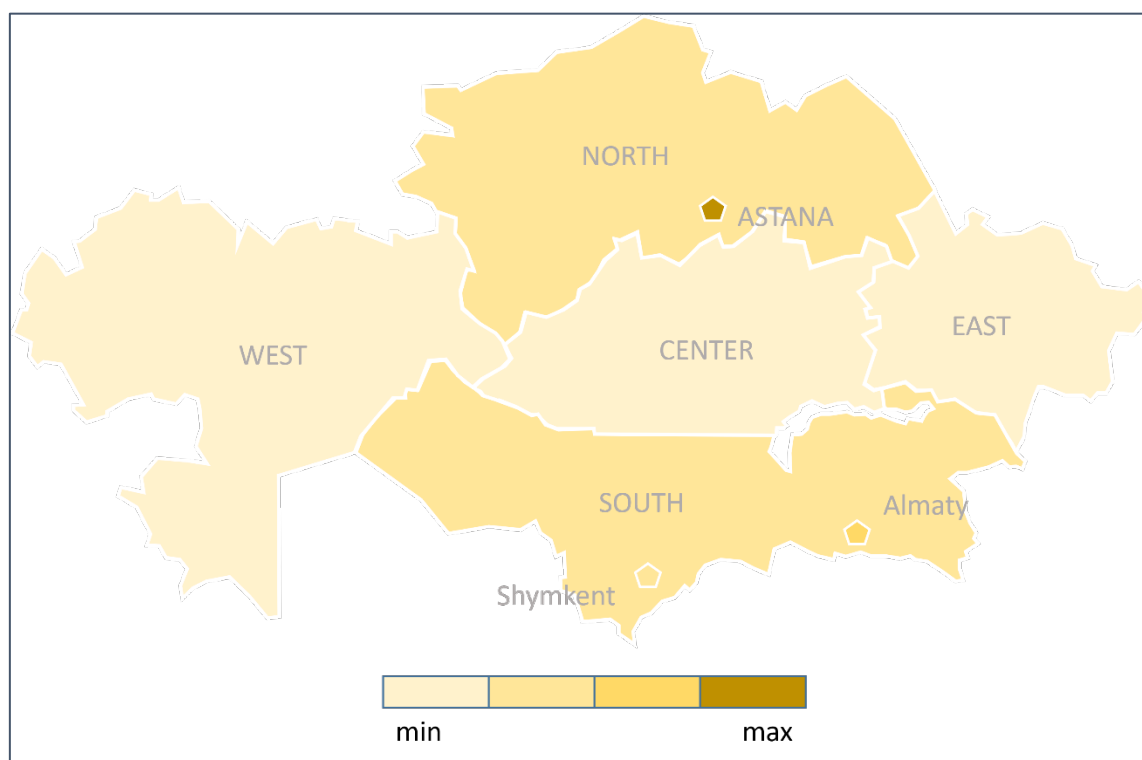
FIGURE 28. GENERAL PERCEPTION INDICATOR ON THE MAP OF MACRO-REGIONS



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The **geopolitical indicator** reaches its maximum in Astana. In the capital of Kazakhstan, the geopolitical importance of China in the modern world is most highly appreciated. In second place is the city of Almaty, the former political capital and still the economic centre of the country. The third place is occupied by the South and North macro-regions. The lowest value of the indicator is inherent in the Middle Belt.

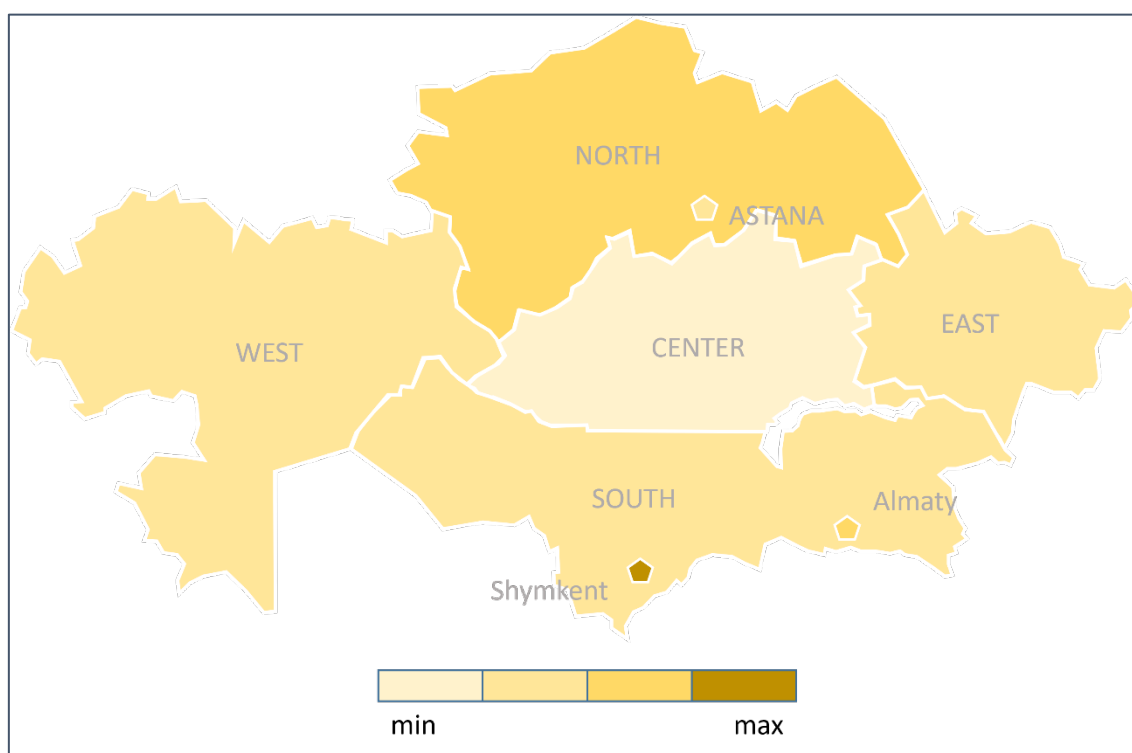
FIGURE 29. GEOPOLITICAL INDICATOR ON THE MAP OF MACRO-REGIONS



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The values of the **economic indicator** are maximum in the North of the country, on the border with Russia, and in the southern cities of Shymkent and Almaty. The Southern, Western, and Eastern macro-regions, which have borders with other states, have average index values. The Central macro-region, which has no foreign policy borders, demonstrates the minimum values of the index.

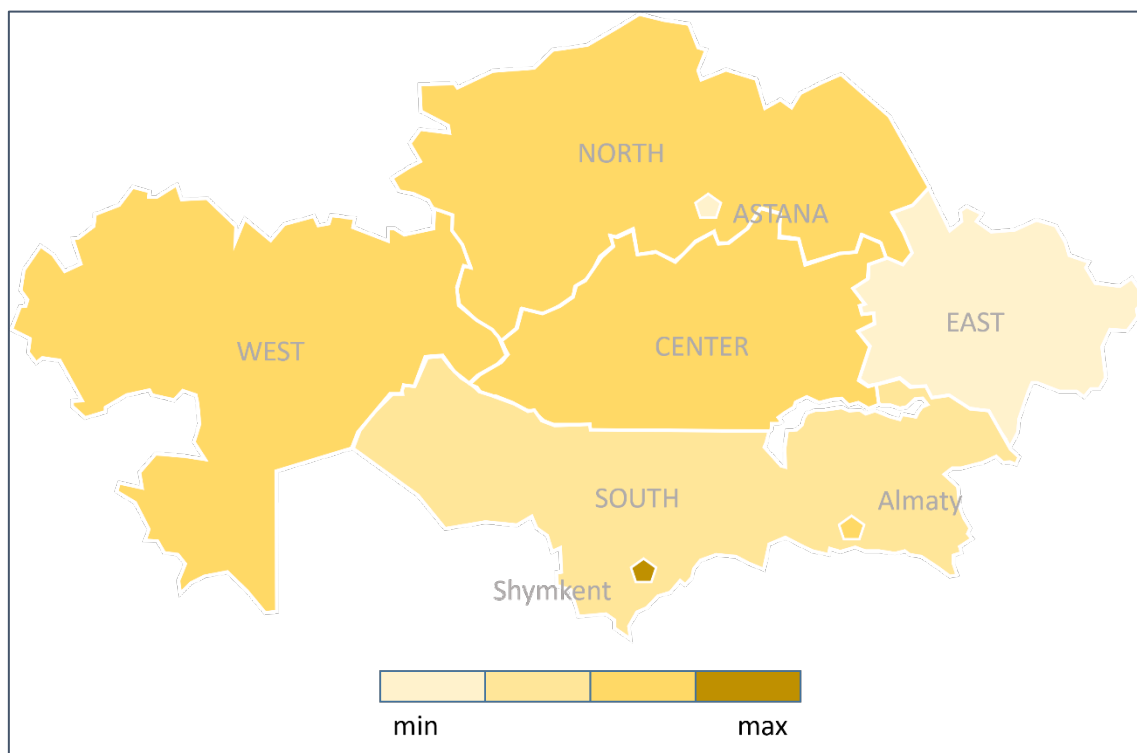
FIGURE 30. ECONOMIC INDICATOR ON THE MAP OF MACRO-REGIONS



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It is indicative that the indicator of China's **cultural influence** is minimal on Kazakhstan's border with China. The average level of PRC's soft power is demonstrated in the Southern macro-region, and the maximum in the Northern, Central, and Western macro-regions.

FIGURE 31. INDICATOR OF CULTURAL INFLUENCE ON THE MAP OF MACRO-REGIONS



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Regional Clustering

Apart from examining the macro-regional variations in individual metrics, we endeavoured to evaluate the aggregate impact of all variables on the geography of perceptions of China in Kazakhstan.

In order to achieve this, we employed the **clustering** method, which enables us to place each region in the multidimensional space they form according to a set of indicators. The selected measurement was correlation (Pearson correlation coefficient). The data for the analysis were all the questionnaire questions related to China, all 27 basic variables.²¹

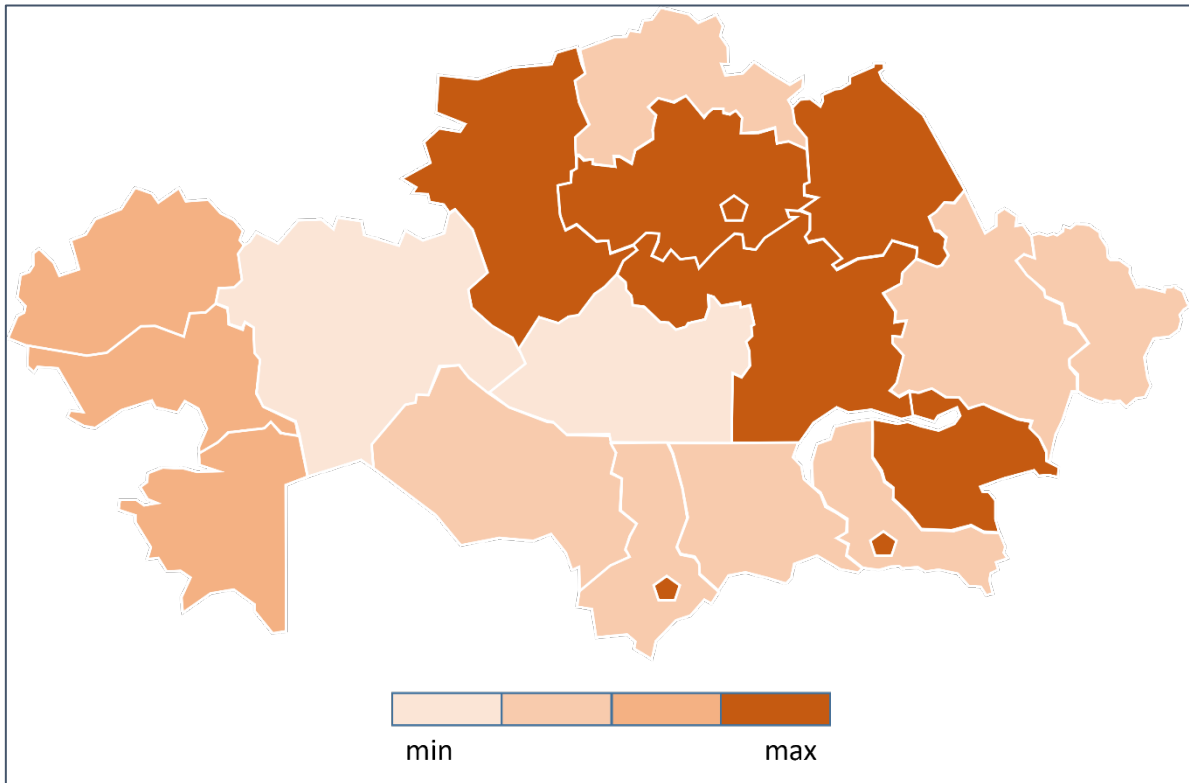
The results of the analysis were initially presented in the form of a dendrogram, where the length of the line connecting the regions showed their level of similarity. Then, for ease of viewing, a map was made that indicated how similar each region was to the others.

Indicatively, the cluster analysis did not yield a division into explicit macro-regions. It demonstrated that all three cities of republican significance and a number of regions in the east of the country, stretching from south to north, are similar to each other in terms of the totality of all issues in the attitude of Kazakhstanis towards China.

At the second level of similarity, three areas in the West, which have shown impressive growth in the China perception index, are added. At the third level of similarity, the Southern region are added to the baseline areas, and the remaining Eastern and Northern regions are added. At the fourth level of similarity-two conditionally central regions of Kazakhstan.

Summarizing, we can say that China's penetration is maximum in large cities and has a regional core, which is gradually growing in semi-peripheral and peripheral areas. At the same time, the three western areas have their own scenario of Chinese presence.

FIGURE 32. CLUSTER ANALYSIS OF REGIONS ON THE MAP



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PECULIARITIES OF CHINA'S POSITIONING

Two questions are attempted to be addressed in this section: "What are the reasons behind Kazakhstan's China Perception Index's growth?" and "And what risks accompany this process?".

To answer the first question, we have drawn a foreign policy map based on the respondents' answers and determined China's position on it. To answer the second question, we described the contradictions in the perception of China in Kazakhstan revealed in the course of the research.

Foreign Political Positioning

In early 2023, the TALAP Center conducted a survey in which Kazakhstanis, were asked questions related to Kazakhstan's international positioning.

The question "With which countries should Kazakhstan develop friendly relations?" was among them with the possibility to give up to three answer options.

Analysis of its results shows that Kazakhstanis want to be friends with their neighbours, primarily China and Russia, which are often considered in "tandem" — their audiences coincide by two thirds.

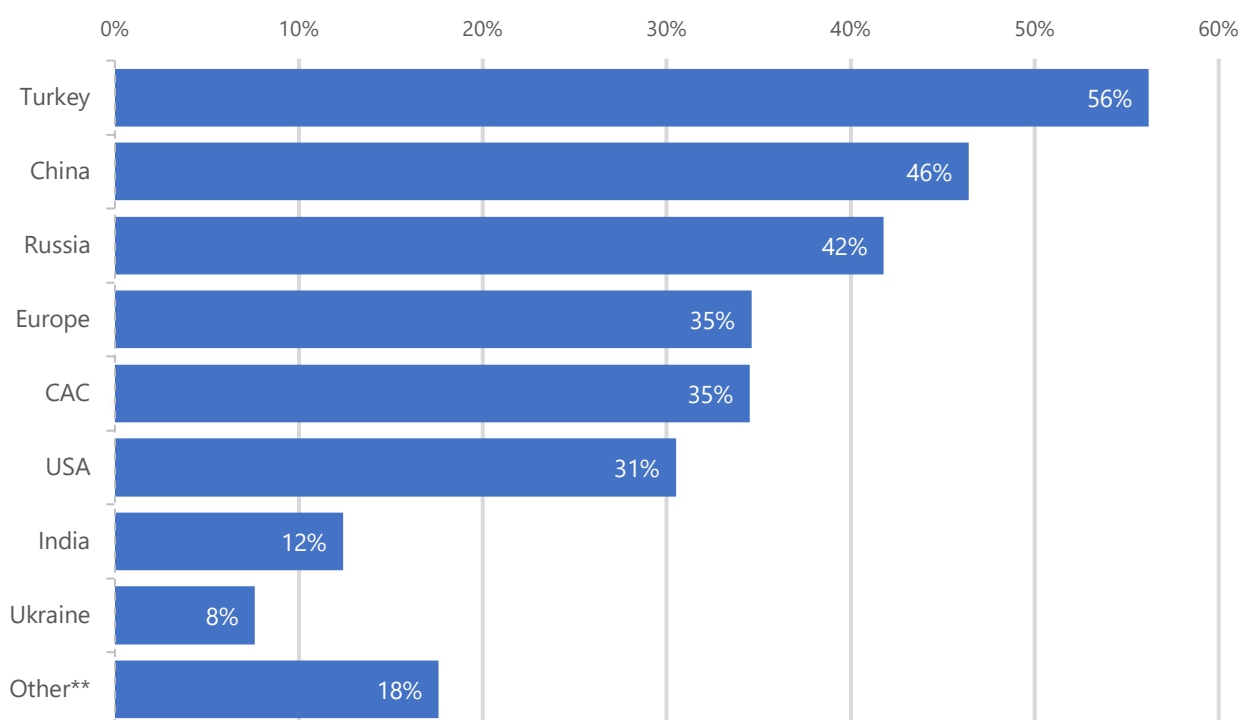
But most of all they want to be friends with Turkey. The reason for this popularity is that the poll was conducted at the time of the earthquake in this country. So to the desire for good neighbourliness among Kazakhstanis, we can add one more important trait: openness to situational empathy.

In third place in the ranking of friends are other Central Asian countries; as well as the United States and European countries. Despite popular belief, the latter are not perceived in Kazakhstan as a single entity. Their audience overlap is lower than that of China and Russia, at 50 %.

Thus, the people of Kazakhstan do not see themselves as a "country of one ally." There is no foreign policy position that the majority of the population adheres to.

The map of attitudes of Kazakhstanis toward the world around them is complex and mosaic and built on a personal understanding of the links of good neighbourliness and tension. Suffice it to say that of those who choose friendship with Russia, one in three also choose friendship with the US. Because we should talk to everyone, including those who don't talk to each other.

FIGURE 33. MENTAL FOREIGN POLICY MAP OF A KAZAKHSTANI CITIZEN



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** Others included South Korea, Japan, Gulf Arab countries, etc., and answers about being friends with everyone

Nevertheless, the foreign policy map of Kazakhstan formed by public opinion can be structured. For this purpose, we have drawn conjugation tables, where we divided the answers for each country and then distinguished three priorities for them. And since there were only 5 possible answer options, we essentially eliminated the two least important ones, concentrating on the main areas.

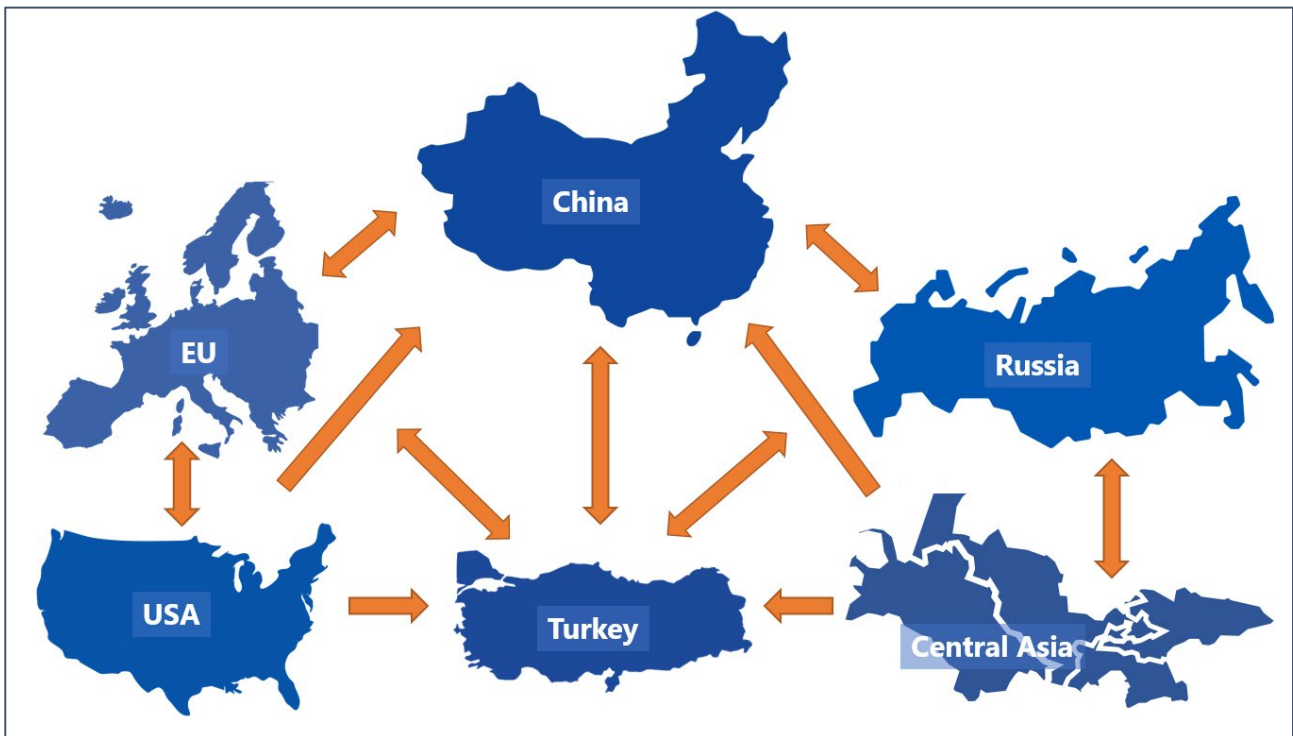
TABLE 37. TABLE OF CONTINGENCY OF ANSWERS TO THE QUESTION ABOUT FRIENDLY COUNTRIES

(%)	CAC	CHINA	TURKEY	RUSSIA	USA	EUROPE
Other Central Asia countries	x	40	38	41	32	40
China	54	x	56	70	58	55
Turkey	62	68	x	63	77	74
Russia	49	63	47	x	45	41
USA	28	38	42	33	x	53
Europe	40	41	46	34	60	x

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Based on the results of the analysis, a mental foreign policy map of a Kazakhstani was drawn. The countries are connected by lines on it. If countries prioritise each other, the line has two-way arrows. Otherwise, the arrow is one-way, and its direction shows which country is prioritised over the other.

FIGURE 34. MENTAL FOREIGN POLICY MAP OF A KAZAKHSTANI CITIZEN



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The map clearly illustrates that China, as well as Turkey, are essential elements of the world order in the minds of Kazakhstanis. Whatever geopolitical alliances are formed therein; it is important for the people of Kazakhstan to have China present in these alliances.

China has links with all five other entities on the map. Including 3 bilateral (the maximum possible number) and 2 unilateral (for example, those who would like Kazakhstan's friendship with the USA can hardly imagine it without China).

The example of Russia and the EU countries is indicative. Each of them has three bilateral ties, including China and Turkey. And these geopolitical opponents differ only by a third partner: the US for the EU and Central Asia for Russia.

This positioning of China creates great opportunities for its penetration into the territory of Kazakhstan. However, this progression also has serious risks, which will be discussed in the next section.

TABLE 38. NUMBER OF LINKS ESTABLISHED BETWEEN COUNTRIES

	ONE-WAY LINKS	TWO-WAY LINKS	TOTAL LINKS
China	2	3	5
Turkey	2	3	5
Russia		3	3
Europe		3	3
Other Central Asian countries		1	1
USA		1	1

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Social risks

Based on the previously discussed data, it is possible to identify at least four points of social tension related to China's presence in the country.

Point 1. The ambiguous role of China in the economic future of Kazakhstan

Qualitative research indicates that there is a strong social demand in the nation for a shift from the structure of a commodity economy with significant foreign participation and "unfair" income distribution to an economy with a robust manufacturing sector built by national capital and a fair distribution of the high added value that results along the lines of "private owner-employee-state."

At the same time, there are widespread doubts in the community that this can be done on its own. The reasons include: weak state efficiency and widespread, in the eyes of the population, corruption. Therefore, there is a demand for China's economic presence in Kazakhstan. The PRC is seen by many as proof that creating an efficient industrialised economy is possible. Among the respondents, there is an opinion that Chinese specialists could help launch Kazakhstan's manufacturing industry. And at the same time, there are fears that it will eventually become part of Chinese manufacturing, just as the country's extractive industry once became part of the Western industrial complex.

Point 2. Social consequences of economic decisions

Another fear associated with China's growing economic presence is its social implications. For example, the attitude of Chinese enterprise owners to Kazakhstani workers was cited by many respondents as one of the reasons for the poor attitude towards China.

Since in the list of previously considered relevant fears this option raised only 5%, we can conclude that at the time of the survey, social negativity about the relationship "Chinese employer-Kazakh employee" existed but was not relevant.

As China's economic presence in Kazakhstan increases, it may become more relevant and seriously affect the value of the perception index.

Point 3. Preservation of cultural identity

Chinese culture serves as a showcase for this crucial aspect of "soft power." In Kazakhstani public opinion, there are only modest differences between the degrees of acceptance and non-acceptance despite the growing interest.

One of the reasons limiting the promotion of Chinese culture in Kazakhstan is the large-scale social demand for strengthening their own culture.

As indicated by the qualitative research, the country already has tangible cultural achievements to be proud of. The respondents stated that despite pressure from Western, Eastern, Northern, and Southern cultures, Kazakhstan is able to establish and preserve its national identity because of its rich cultural heritage. And over time, it could become as much of a country's export commodity as raw materials.

Point 4. Fear of labour migration and its consequences

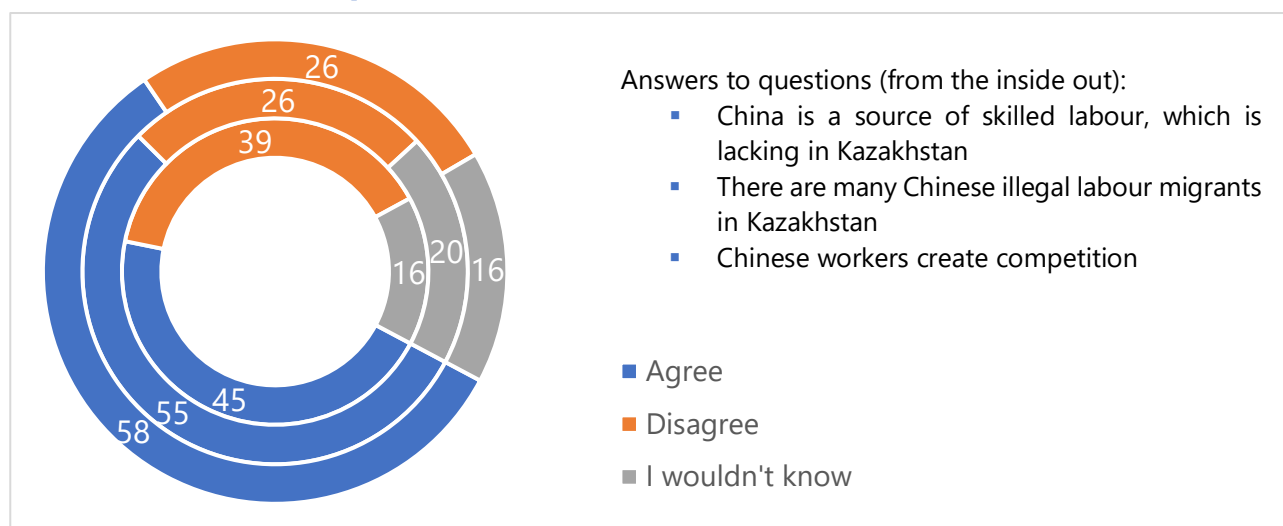
There have been findings earlier in the report indicating a fear of assimilation of Kazakhs by the Chinese through labour migration and subsequent inter-ethnic marriages. These can be supplemented by the results of studies conducted in 2021.

On the one hand, these data show that Kazakhstan objectively lacks skilled labour, and China provides a source of it. 45% of respondents agree with this.

On the other hand, 55% of respondents believe that there are many illegal labour migrants from China in Kazakhstan, and 58% believe that Chinese workers are already competing with Kazakh workers in the labour market.

This semantic contradiction is projected onto other issues as well. For example, on cautious estimates of interstate tourist flows between the countries.

FIGURE 35. ANSWERS TO QUESTIONS ABOUT THE ATTITUDE OF KAZAKHSTANIS TO LABOUR MIGRATION¹⁵



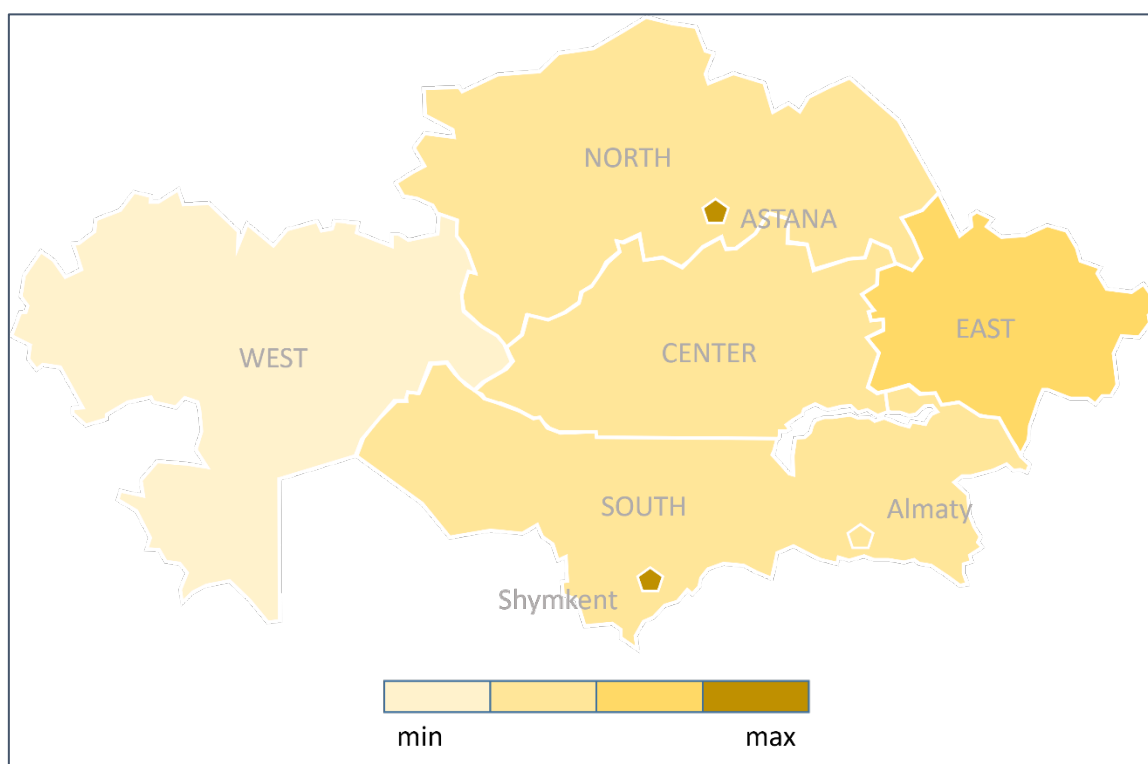
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¹⁵ The complex diagram shows the percentage distribution of responses to three different questions with the same response scale.

Point 5. Interregional tension

The previously analysed socio-demographic factors affecting the position of respondents, as well as the points of social tension described in this section, have geographical implications. So we see that from east to west, the number of those who believe that China's influence in the world is growing. The Eastern region demonstrates the maximum values, while the Western region shows the minimum values.

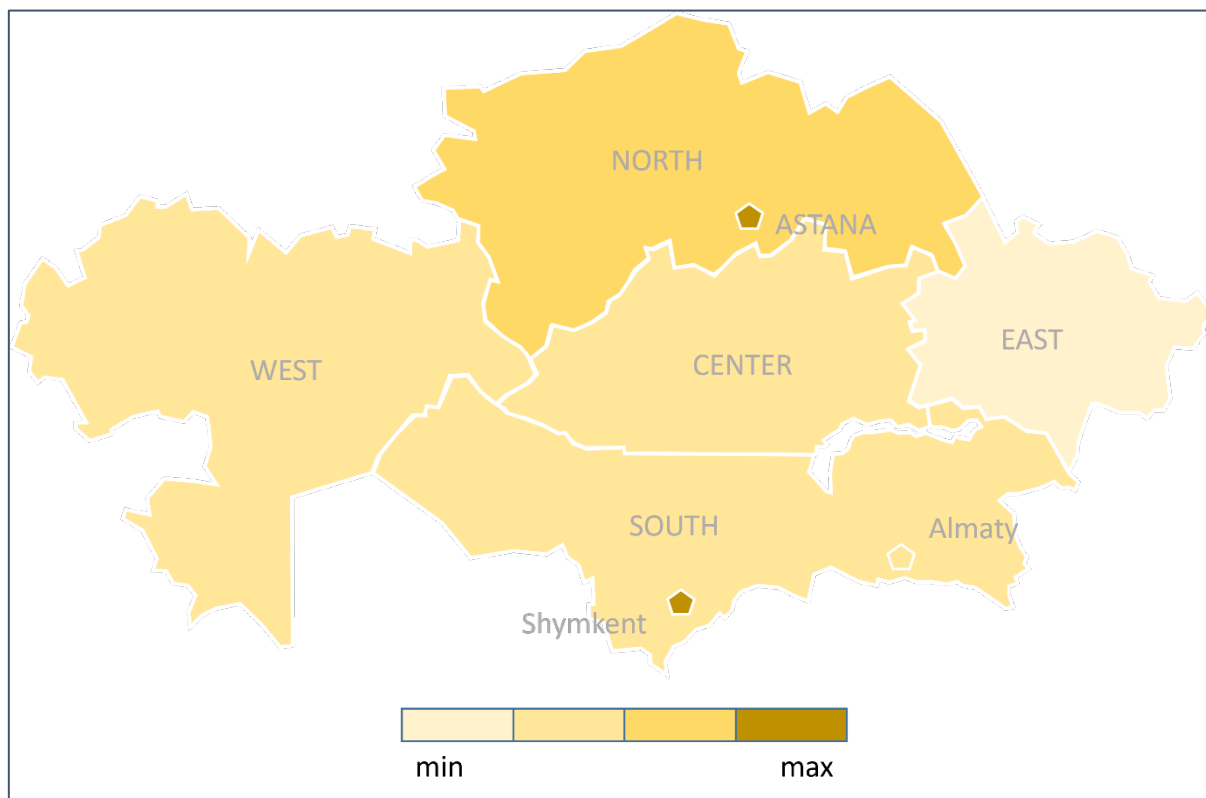
FIGURE 36. DEGREE OF CONSENT THAT CHINA'S LEADERSHIP IS GROWING IN THE MODERN WORLD



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At the same time, China is considered friendly, first of all, in the North of Kazakhstan. In contrast, the Eastern macro-region, confident in the rise of China's power, shows minimal appreciation for it.

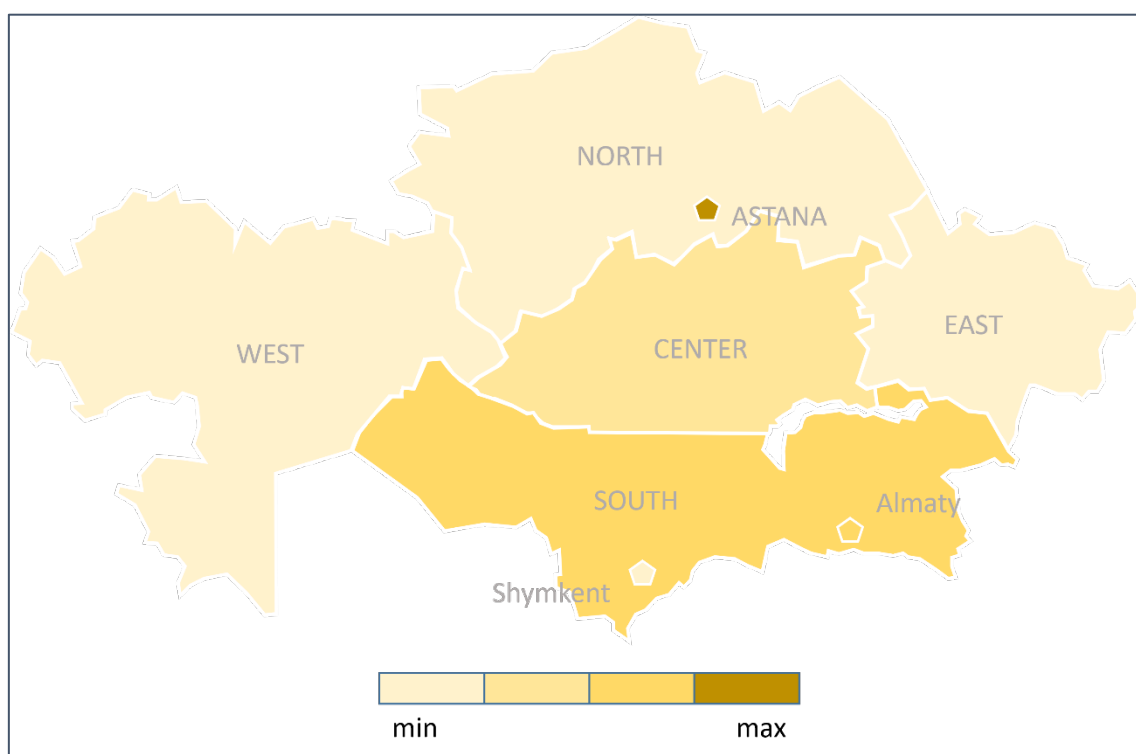
FIGURE 37. DEGREE OF CONSENT THAT CHINA IS A FRIENDLY STATE TOWARDS KAZAKHSTAN



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The Northern macro-region more often than others considers China a friendly state and less often than others agrees that China means more than Russia in the modern world. The Northern macro-region more often than others considers China a friendly state and less often than others agrees that China matters more than Russia in the modern world. To a lesser extent, this is common to the Central macro-region.

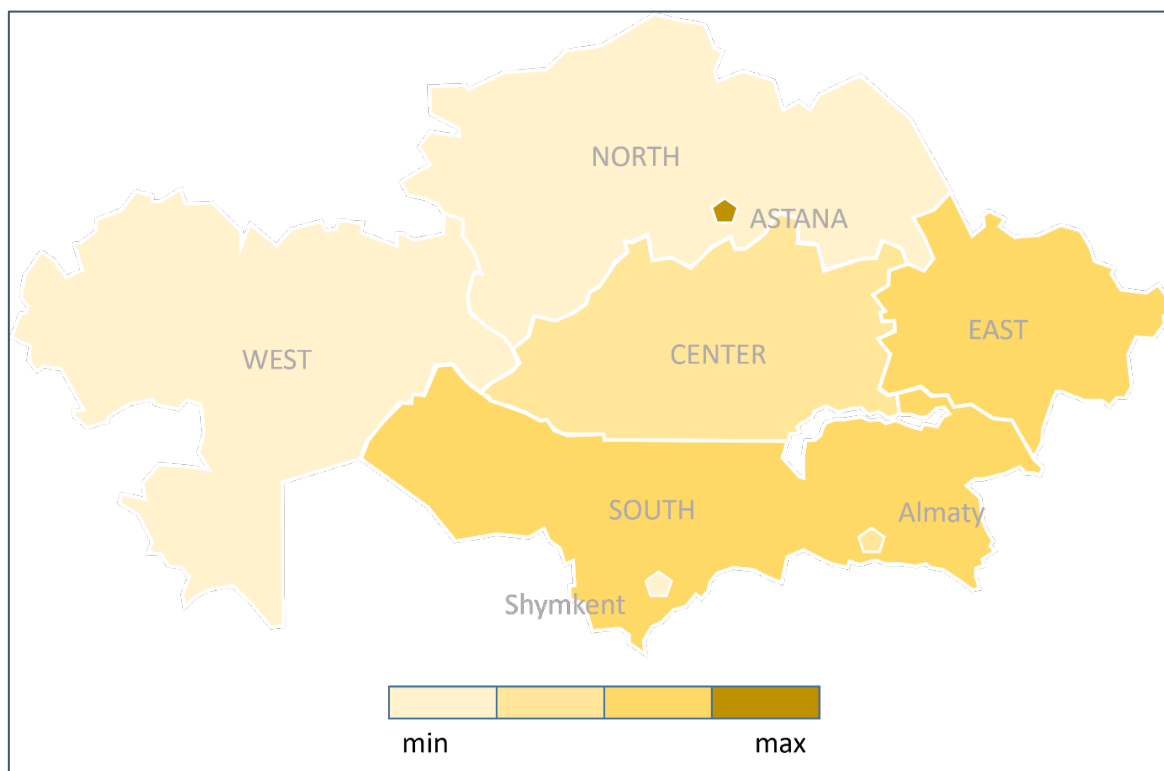
FIGURE 38. DEGREE OF CONSENT THAT CHINA HAS MORE WEIGHT IN THE WORLD THAN RUSSIA



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As a result, when asked whether China poses a threat to Kazakhstan, the South and East are united in a positive response, while the West and North show minimal values and the Central macro-region are averaged.

Рисунок 1. DEGREE OF CONSENT THAT CHINA POSES A THREAT TO KAZAKHSTAN



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KEY FINDINGS

OVERALL EVALUATION

- According to the survey, 73% of respondents believe that Kazakhstanis have a good attitude towards China. 74% believe that this attitude has improved over the past three years. 79% of respondents are in favour of further developing relations with China.
- The majority of respondents believe that China is an economically strong and wealthy state whose influence in the world is growing and which is friendly towards Kazakhstan.
- It is suggested, first and foremost, to establish production and trade ties with China through the application of contemporary innovations and technologies. In transport and logistics projects, the possibility of cooperation is greatly valued.

PERCEPTION INDEX

- Despite this general positive vector, Kazakhstanis' perception of China has a complex internal structure.
- In 2020, TALAP has developed a three-level indicator system, which includes 27 basic variables grouped into 4 indicators: general perception, geopolitical, economic, and cultural influence. The composite index of perception of China in Kazakhstan is calculated on their basis.
- Based on the results of calculations in 2023, the composite index was equal to 0.39, while the maximum possible value is 1.00. Three of its four constituent indicators range from 0.50 to 0.56. The fourth, the cultural influence indicator, is an exception. It is below the zero and equals -0.06. This is a major social fault line in the perception of China today.

■

CHANGE DYNAMICS

- The monitoring showed a steady increase in indicators at all three levels. The composite index (the top level of monitoring) has doubled since 2020 from 0.18 to 0.39. Its constituent indicators (average level) grew by 5-7 points per year. The exception was the economic indicator, which accelerated sharply in 2022-2023.
- At the lower level, variables with a high initial "weight" experience decelerating dynamics, while those with a low initial "weight" grow more quickly. This causes the differences between the variables to decrease while their interrelationships increase.
- Despite these dynamics, the internal structure of the indicators remains similar to that observed at the beginning of the measurements, in 2020. However, if the existing trends continue, we can expect serious structural changes that can shape a new quality of perception of China in Kazakhstan in the coming years.

FACTOR MODEL

- The observed growth in the perception of China was primarily driven by Kazakh-speaking, middle-aged people with above-average education and income and a stable family situation. This resulted in lower socio-demographic differences in responses compared to 2020.
- A factor model constructed using the data from 2023 describes the persistent differences. It shows that each perception indicator depends on its own set of social and demographic parameters.
- The general perception of China depends largely on age, educational differences, and living standards. Geopolitical variables are perceived differently depending on the type of locality and the language used for communication at home.
- Indicators of cultural influence are seriously altered by only one factor age. The younger the respondents, the more sensitive they are to Chinese cultural influences.
- The economic indicator shows the highest level of dependence on socio-demographic factors. It is influenced by four parameters at once: education, ethnicity, wealth, and type of locality.

REGIONAL CLUSTERING

- The general perception of China depends largely on age, educational differences, and living standards. Moreover, in a number of cases they overlap with each other, forming an axis of south-east and north-west. It is indicative that the number of those who believe that China's influence in the world is growing and who think that China poses a threat to Kazakhstan is maximised in the East.
- A distinct regional model was created in addition to the macro-regional analysis to evaluate the similarity of regions in all 27 baseline variables using multivariate statistical analysis methods.
- Its application allowed for discussing not only the presence of geographical differences in the perception of China in Kazakhstan but also the mechanism of their formation. In particular, China's penetration is maximised in major cities and has a regional core stretching from south to north, which gradually grows into semi-peripheral and peripheral areas. At the same time, the three western areas have their own scenario of Chinese presence.

INFORMATION SPACE

- 88% of respondents say China is present in their personal information space. These respondents can be structured into 6 levels of "inclusion" in the perception funnel:
- from personal visits to China to occasional information in the media.
- The main source of information about China is social media and messengers. Internet sites and Russian-language TV channels are in second place. The third place is personal communication with friends, relatives, and acquaintances.
- The information space about China in Kazakhstan is highly structured by language, frequency, and "sign". Even though the report discusses differences for 2021, we can presume that they are still highly relevant today.

FOREIGN POLICY IMAGE

- The map of attitudes of Kazakhstanis toward the world around them is complex and mosaic and built on a personal understanding of the links of good neighbourliness and tension. And therefore, it is difficult to structure it properly.
- The study proposed its own solution to this issue: structuring according to the priority vector of interaction. The results of the calculations were presented in the form of a "mental foreign policy map of a Kazakhstanian".
- We came to the conclusion that China, in the perception of Kazakhstanis, is a necessary element of the world order. Whatever geopolitical alliances are formed therein; it is important for the people of Kazakhstan to have China present in these alliances.

TENSION POINTS

- In Kazakhstani public opinion, China is not only becoming more popular, but there are also a lot of anxieties and perception inconsistencies.
- There is a widespread social ambivalence, or duality of experience, when one and the same object can cause two opposite feelings in a person at the same time. This often occurs within a rational risk-opportunity perception matrix.
- This often occurs within a rational risk-opportunity perception matrix.

ANNEXES

Parameters of the Public Opinion Survey

The submitted report is based on the results of a public opinion survey that was conducted between **5 and 27 December 2023**. In the course of the research, **1,616 people** over 18 years old were interviewed in all regions of the Republic of Kazakhstan. The study utilised multistage sampling with quota values at the last stage of respondent selection.

The **sample** is representative, i.e. the composition of respondents is close to the corresponding proportions in the general population, taking into account the population aged 18 years and older according to the statistical data of the Committee on Statistics of the MNE RoK. The representativeness of the sample was observed for the following attributes: region, type of locality, gender and age.

Data collection was carried out through the **TALAP Surveys mobile application** with the support of regional interviewers. The app is designed for qualitative data collection and captures the geolocation of the survey location, date, and time.

A toolkit, or questionnaire, was created to conduct the study. It has 22 questions and is divided into multiple blocks: 1. Filter questions to select respondents (gender, age, language). 2. Basic questions (attitude toward countries, dynamics of relations, cooperation in various spheres, attitude toward international projects, attitude toward international conflicts). 3. Socio-demographic data of respondents (ethnicity, marital status, level of education, wealth status, occupation, type of locality, language of communication).

Following the collection of data, each interviewer called the respondents as part of **field control** to ensure the data's validity and quality. In this study, 50 questionnaires from each interviewer in each region were validated. Further, culling of questionnaires and cleaning of the dataset were done. Data processing was carried out in the **IBM Statistics ver. 24** software.

According to the survey, 52.7% of the respondents are women, and 47.3% are men. The most numerous age group is people aged 25–34 years, which make up 24.2 %. 77.6 percent of respondents are representatives of the titular ethnicity, and 16.8 % are Russians. More than half (56.6%) are officially married, and the majority have higher education (47.8%). A sizable majority of respondents said their lives were fulfilling. 26.5% are wage earners in the private sector.

FIGURE 39. DISTRIBUTION OF RESPONDENTS BY REGIONS OF THE ROK (%)

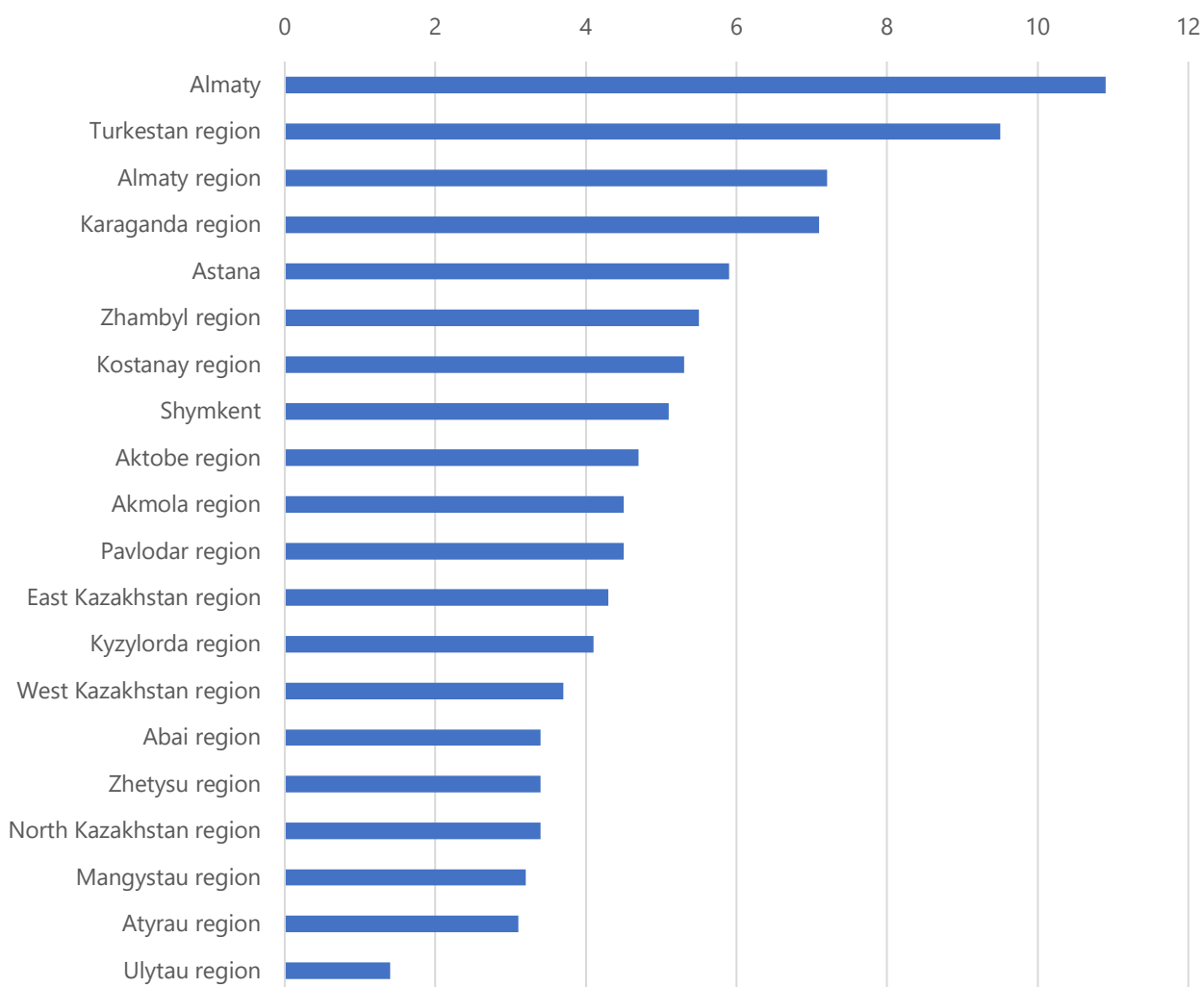


FIGURE 40. SOCIO-DEMOGRAPHIC PARAMETERS OF THE RESPONDENTS (%)

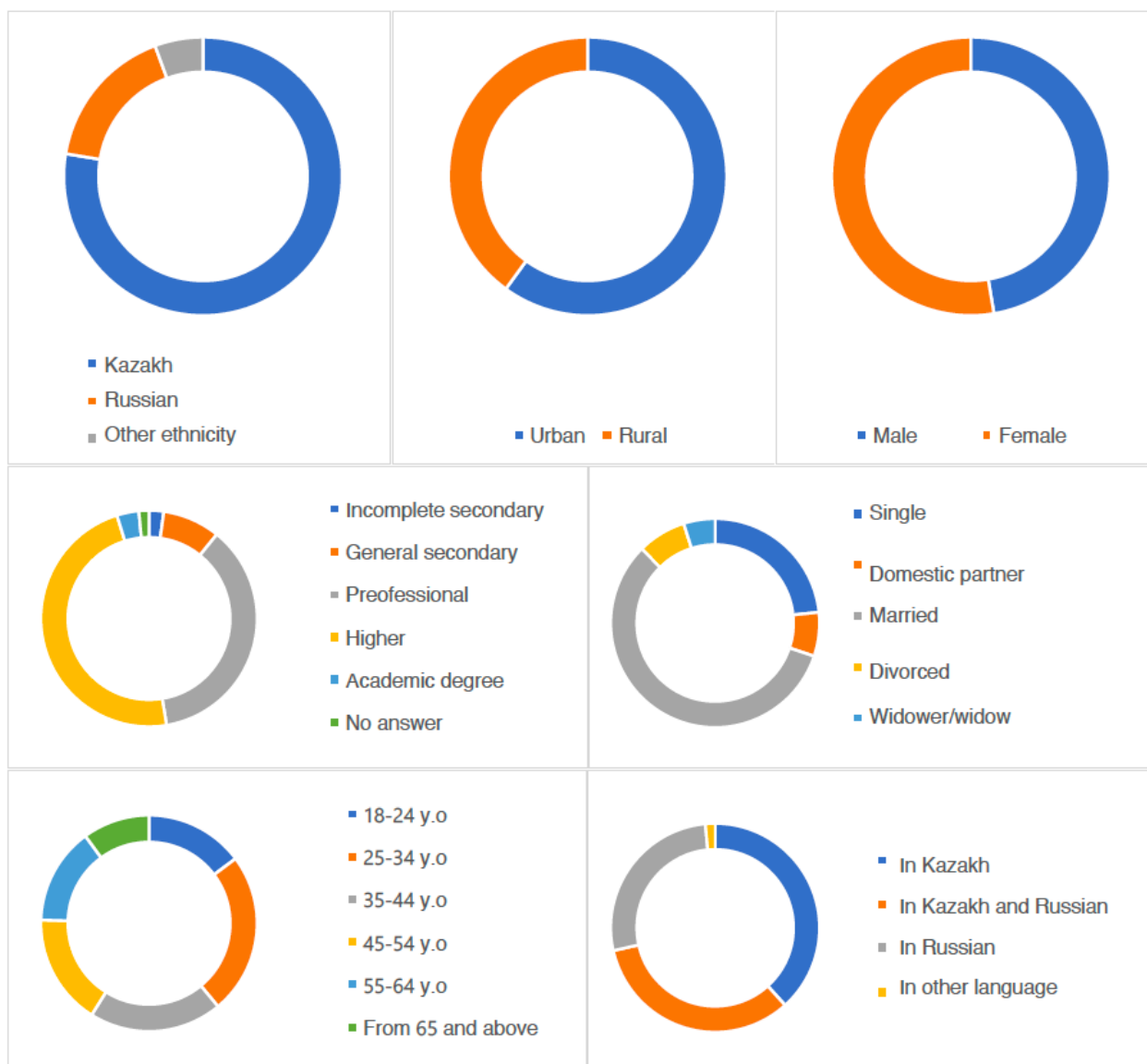
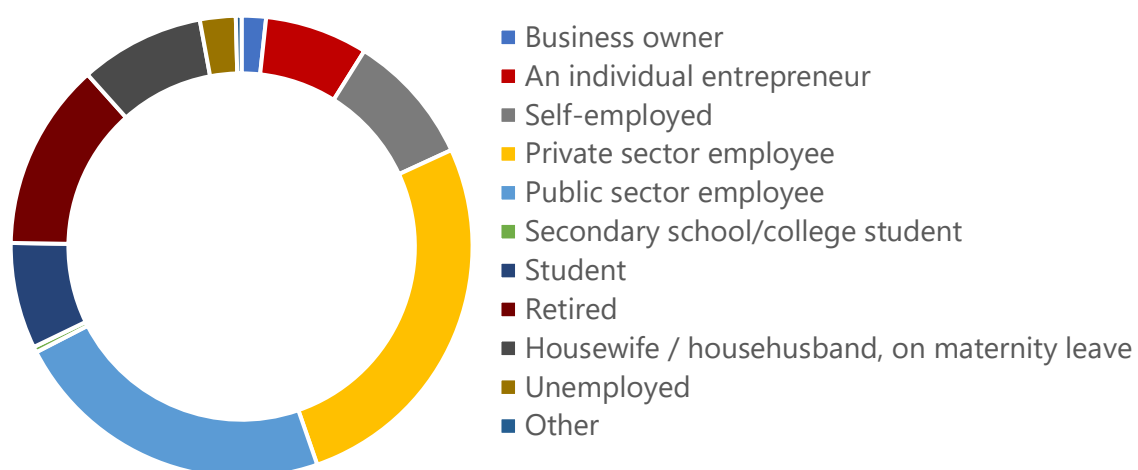


FIGURE 41. SOCIO-DEMOGRAPHIC PARAMETERS OF THE RESPONDENTS (%)



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TALAP Center for Applied Research

The **TALAP Center for Applied Research** is an independent and non-profit think tank established to promote sustainable development in the Republic of Kazakhstan.

The **ideological framework** for our research and civic activities is the UN Sustainable Development Goals, which are a comprehensive and methodologically elaborated set of goals, targets, and indicators to improve the quality of life of citizens, socio-economic development, and environmental protection.

The **sociological department** of the TALAP Center provides services for a full research cycle, which includes the development of a research tool using modern global practices, simultaneous data collection using various methods, data processing using modelling techniques and in-depth analysis, preparation of reports in the required format, public support of the project, creation of a strategy for further development, and consultation in the process of its implementation.

The TALAP Center for Applied Research has extensive opportunities for conducting quantitative research

- A team of interviewers and supervisors in all regions of Kazakhstan. Conduct up to 4 field surveys simultaneously. The maximum number of respondents within one survey is 12 thousand people.
- The original TALAP survey mobile app. Data storage on servers in Kazakhstan. Three-factor authentication and geolocation tracking for data quality.
- Modern data processing algorithms. We don't just look at figures, we model the processes and reveal the causes.

Extensive experience in conducting **qualitative research**

- Different forms of group discussions: from classical focus groups to projective groups
- Work in all regions of Kazakhstan. Both in urban and rural areas
- Expert panels both in-country and abroad
- Various types of interviews, including in-depth, public, etc.

It works as a **methodological center**

- Extensive international networking, joint research with experts from Central Asian, European and American Think Tanks.
- Testing of international research methodologies on the territory of Kazakhstan to assess the possibility of their effective application.
- Ability to use separate methods and different data within Framework Analysis
- Methodology.
- Reporting in the format required by the customer: from a classic scientific report to an analytical presentation and dashboard in Brand Analytics.
- Creating an optimal research tool considering the current world developments and organizing necessary training programs.

The Talap Center for Applied Research runs its own monitoring research programme and offers **omnibus research** opportunities

- We measure the well-being of the population and perception of its dynamics, the level of economic adaptation, cross-national and migration indicators, indicators of the social system's resilience to impacts, indicators of the extent to which the political/governance system is able to absorb threats and possible negative consequences, including protests and violent conflicts, and build a general matrix of development risks, etc.
- Our tools contain practical case studies, closed and open-ended questions, emotional and rational components, and are designed to be filled in "in the same breath" during data collection and to build multidimensional models afterwards.
- Questions from an external customer can be built into the survey tool to a limited extent (omnibus surveys). In this case, the client can be provided not only with the results of answers to its questions but also with a report based on the analysis of their interrelation with other questions of the questionnaire.

Performs monitoring evaluation and learning on individual projects. Develops full-fledged "Monitoring Evaluation and Learning" platforms for adaptive management.

The TALAP Center for Applied Research has extensive experience working with businesses and non-profit organisations, research centers and government agencies, the media, and international organisations.