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# The Chinese are coming! US think tanks and the Belt and Road Initiative in the Middle East and North Africa

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## ABSTRACT

It is now common for US government officials and policy analysts to cite China as the most significant current threat to US foreign policy interests. This article examines how the US foreign policy community mobilizes this ‘China threat’ to make longstanding foreign policy concerns salient in an age of great power competition. To illustrate our argument, we focus on US foreign policy think tanks, which portray infrastructure projects tied to China’s Belt and Road Initiative (BRI) as threatening to US interests in the Middle East and North Africa (MENA). This is in spite of the fact that BRI projects remain only a minor feature of the region’s political economy. Drawing on a corpus of 3,006 US think tank reports on the MENA, we use quantitative text analysis to examine how the BRI has been constructed as a threat to US interests in the region—and how, in turn, this threat is used to motivate a range of policy recommendations. The findings point to a downstream consequence of great power competition: The threat posed by China’s BRI can be used to energize longstanding US interests and goals, even in regions where Chinese overseas development finance is nascent at best.

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**KEYWORDS** BRI; infrastructure projects; great power competition; think tanks; China; United States

## Introduction

China’s Belt and Road Initiative (BRI) appears to be redefining the international relations of the Middle East and North Africa (MENA). We are

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told that ‘China’s announcement of the Belt and Road Initiative in 2013 signaled a change in its role in the Middle East’ (European Council on Foreign Relations, 2019) and that ‘China has expanded its engagement with the Middle East and North Africa (MENA) region through President Xi Jinping’s Belt and Road Initiative’ (Brookings Doha, 2019). All North African states have signed BRI memorandums of understanding with China, ‘demonstrating that it is expanding its foothold in the region’ (Brookings Institute, 2019). More concretely, it is argued, China has been ‘fortifying its strategic ties and expanding its cooperation [in the MENA] by heavily investing in local Belt and Road Initiative projects’ (Atlantic Council, 2023). In consequence, states in the region are ‘unwilling ... to disregard China’s new global role and the scale of its influence in the Middle East and the global economy, represented by the Belt and Road Initiative’ (Washington Institute for Near East Policy, 2023). In short, ‘[T]he BRI ... has given China an unprecedented degree of influence in places where it was previously limited such as the Middle East and North Africa’ (Cato Institute, 2022).

This is but a selection of recent references to China’s BRI that now regularly appear in foreign policy think tank reports and analyses on the MENA. In this paper, we suggest that—when viewed across a range of different measures—the actual scale of BRI-related development activities found in the region is orthogonal to the degree of attention afforded the initiative by the United States’ (US) foreign policy community. This is whether counting the absolute number of BRI-funded infrastructure projects in the MENA, as relative to the number of BRI-funded development projects found in other non-OECD contexts, or when comparing the value of BRI-funded projects to lending figures from Western development finance institutions such as the World Bank. There is also very little evidence to suggest that MENA countries are at risk of entering into ‘debt bondage’ to China—a situation that is often presented as facilitating China’s geopolitical ambitions. In fact, MENA countries stand out for having very low levels of indebtedness to China. To be clear, this does not imply that Chinese influence in the MENA is not increasing through other means or that the BRI has not been an important feature of development finance in other world regions. Rather, the evidence suggests that the specific role of China’s BRI as a threat to US interests in the MENA is being inflated.

We suggest that this mismatch—between think tanks assertions and economic political reality—presents a timely opportunity to understand how the US foreign policy community is constructing Chinese development finance as a threat to established US interests in key world regions. Here, we focus on two inter-related aspects of how US foreign policy think tanks invoke the BRI in their analyses and policy documents on the

MENA. First, a common complaint is that the term ‘BRI’ is often vague and undefined (see e.g., Ang, 2019; Stec, 2018; Zhang, 2018). We turn this complaint into an opportunity by asking: What do US foreign policy think tanks mean by the ‘Belt and Road Initiative’ in a region where Chinese development finance is nascent at best? Second, given the small number of BRI projects in the MENA, we suspect that it is being used as a foil to mobilize attention to other, preexisting US foreign policy concerns in the region. We therefore ask: When US think tanks invoke the BRI, what other foreign policy issues do they talk about?

We take up these questions by analyzing an original corpus of 3,006 reports, policy briefs, podcast transcripts, and blogs on the MENA produced by 13 US foreign policy think tanks between 2018 and 2024. This period coincides with a roughly threefold increase in attention given to the role of the BRI and China in the region. We match this corpus with tools from quantitative text analysis to identify how the BRI threat is constructed in US foreign policy analysis and how it is invoked alongside other foreign policy concerns. In doing so, we show how constructivist research on threat inflation can be usefully illuminated using a text-as-data approach. We begin by using our corpus to generate word embedding layers to identify semantic relationships between the BRI and China with other terms. This allows us to capture what US foreign policy think tanks mean by the ‘BRI’ by measuring the distance between that term and proximate words in vector space. We then estimate a structural topic model to identify the universe of latent foreign policy topics in our corpus of MENA-focused think tank publications. From these, we use social network analysis and regression models to estimate which topics are most likely to be invoked alongside discussions of China and the BRI. We deepen our understanding of these associations through qualitative readings of US think tank reports that mention the BRI alongside other foreign policy issues.

Our word embedding results show that the US foreign policy community often relates the BRI to terms connoting physical infrastructure, financial coercion, and expanding Chinese influence. This is in spite of the small number of BRI-related infrastructure projects in the MENA and generally low levels of indebtedness to China. Subsetting to MENA-focused think tank publications that reference the BRI, we find that China is often mentioned alongside other rival great powers, as well as terms suggesting competition with the US in the region, particularly in the realm of economic power. Viewed as a discrete topic, we show that discussion of China and its BRI frequently appears alongside key US geo-strategic interests, in particular, longstanding US security concerns regarding Iran, the Strait of Hormuz, and the Persian Gulf, great power competition in the region, managing relations with US client states, and threats to preexisting

US diplomatic initiatives, among others. A qualitative reading of reports that invoke the BRI shows how Chinese development finance projects have become a shorthand for China's increasing influence in the region. This manifests in typically superficial descriptions of the BRI followed by declarative statements asserting that China is now an important actor in MENA politics and a threat to key US interests that justify policy interventions.

In making sense of these findings, we suggest that the US foreign policy community has transformed the BRI into a totem for 'Chinese threat' to US geo-strategic interests within a broader discourse on the return of 'great power competition'. This threat framing influences the meaning and invocation of the BRI to a larger degree than do actual Chinese infrastructure projects on the ground. We relate this process to incentives for foreign policy actors—specifically US foreign policy think tanks—to recast familiar interests and objectives as remaining relevant to foreign policy elites due to an association with China. Here, the purported proliferation of BRI projects is invoked to illustrate a material shift in the regional security order: from a US-led, unipolar framework, to a more diffuse order where China and other actors increasingly exert their economic influence through infrastructure projects and other forms of development finance. By invoking the BRI in this way, foreign policy think tanks are able to better motivate familiar issues and policy prescriptions. These calls to action are in spite of the fact that the actual scale of the BRI in the MENA—however measured—is modest at best. Taken together, our findings provide a window into how a Western foreign policy community securitizes the emergence of a peer competitor through the lens of international political economy, and how the supposed threat posed by Chinese development finance can be used to energize other, long-standing US foreign policy interests and goals.

## **Great power competition and the BRI**

It is now common to assert that we are witnessing a 'great power competition' brought on by the rise of China and the relative decline of the US. This was first formalized in the US government's (2017) national security strategy, which declared the return of great power competition, and follows the much-heralded US 'pivot to Asia' that began in the mid-2000s (see here Silove, 2016). In 2022, the Biden administration went further, singling out China as 'our most consequential strategic competitor for the coming decades' (US Department of Defense, 2022). For their part, China's leadership has argued that the US and its allies have implemented an antagonistic policy of 'allaround containment,

encirclement, and suppression’ (Bradsher, 2023). Taking their lead from the US government, great power competition has also become a touchstone in US foreign policy think tank reports and policy-oriented publications, where the narrative suggests that an international system heretofore dominated by the US is giving way to a ‘revisionist’ China that seeks to contest US hegemony through its economic power (see e.g., DiCicco & Onea, 2023). Against this backdrop, we consider how the rise of great power competition—and the urgency of countering this ‘China threat’—can figure as an engine for the US foreign policy community to generate policy prescriptions, even in areas where this threat is less relevant.

### ***US foreign policy think tanks***

Why focus on US foreign policy think tanks? A body of literature has suggested that these institutions play a key role in the construction and development of US foreign policy. This is, in part, due to the ‘revolving door’ between think tanks and centers of foreign policy decision making, such as the US Congress, the intelligence community, and government agencies (Abelson, 2006, 2014; Medvetz, 2012). As well as staffing the foreign policy elite, US think tanks also figure as epistemic communities that generate knowledge, identify issues, and propose solutions that determine the scope of policy options discussed within foreign-policy-making institutions themselves (see Haas, 1992). As Jacobs and Page (2005) have shown, such ‘thinktankers’ have often featured as originators of key ideas, while offering ‘third-party validation for ambitious policies’. US foreign policy think tanks also affect the policymaking processes by placing particular issues on the agenda and mobilizing audiences around novel policy platforms (Fischer, 1991; Jacobs & Page, 2005; Luther-Davies et al., 2022; Mearsheimer & Walt, 2007).

What distinguishes US think tanks from advocacy groups and lobbying firms is their ability to appeal to scientific norms of autonomy and objectivity. This strength, however, is in tension with the precarious political economy of the think tank industry, which often relies on ‘soft money’ funding and ties to policy elites to remain relevant (see Medvetz, 2012). As Drezner (2017, pp. 129–130) has argued, this leads to an incentive structure whereby think tanks will often uncritically reproduce fashionable wisdom and prevailing narratives, especially if these align with the interests of donors and sponsors. This power/knowledge nexus—in which US think tanks have to serve multiple constituencies—ensures that policy recommendations or analyses are not necessarily value-free or based on an exhaustive presentation of the facts. This has seen US think tanks reproduce and perpetuate ‘myths’ and narratives about US primacy and

interests in certain arenas that have later turned out to be spurious (see Snyder, 1991).

This political economy, along with the broader Washington Beltway think tank ecology, offers few incentives to downplay, fully contextualize, or measure threats. As Walt (2018) has argued, a proclivity to assert threats as a basis for interventions into other countries' affairs is often a 'full employment policy' for US foreign policy experts, thereby stimulating demand for their expertise (see also Levinson, 2021). This has, in turn, led to US think tanks participating in 'threat inflation', whereby an actor or policy is depicted as more threatening and severe than an impartial analysis would justify (Thrall & Cramer, 2009). One infamous example relates to the 2002 debate over invading Iraq, when US think tanks produced influential reports and analyses that strengthened the case for an interventionist foreign policy (Levinson, 2021). Taking these points together, we can begin to see how government priorities, a need to attract funding, and the banalities of knowledge production, can align in ways that lead US foreign policy analysts to participate in the framing of an actor or object as a security threat, even when there is little evidence to support this assessment (Buzan et al., 1998).

### ***The 'China threat' and the BRI***

We suspect that the rise of China and the onset of great power competition present both an opportunity and a challenge to US foreign policy think tanks. Important regions such as the MENA, which host significant US military assets, key allies, and resources, have tended to attract large communities of foreign policy analysts and think tank funding. For such contexts, analysts must identify how great power competition will encroach on well-established spheres of interest, while also assessing whether those interests remain relevant given limited resources and the supposed decline in US influence. At the same time, invoking China can bring significant attention to an issue. As Snyder (1991, p. 13) has argued, policymakers can often successfully justify parochial interests by aligning them with predominant national security concerns. Given the prominence of great power competition in US foreign policy discourse, highlighting a Chinese connection in this way can potentially mobilize key audiences—and funding—to intervene in a given policy area (see e.g., Chubb, 2023).

This reading of US foreign think tanks does not imply that the US government's concerns over Chinese development finance initiatives like the BRI are unfounded, nor does it suggest that the BRI or related development finance initiatives arise from China's benevolent intentions. Rather, it is to draw attention to one possible downstream consequence of great power competition and the invocation of the 'China threat' for how

foreign policy analysts evaluate cases and motivate their recommendations. In this, we should be agnostic to whether spurious invocations of a threat are driven by conviction, cynicism, or simply ignorance. In some cases, it may be that foreign policy think tanks have become politically entrapped in a narrative in which all discussion must ultimately be linked back to the most politically salient threat of the day (Snyder, 1991, p.42). It could also be that US foreign policy analysts are simply operating in an echo chamber, in which certain claims, having become established, come to be repeated uncritically by others. For our purposes, it is enough to note that invoking the ‘China threat’ can not only inflate the objective danger posed by China but also serve to advance and elevate other interests and issues.

Against this backdrop, our expectation is that the BRI can feature as a tangible and material indicator of a Chinese presence that acts as a rhetorical catalyst through which to motivate policy recommendations, even when these development finance projects are limited, not fully realized, or non-existent (Rogelja & Tsimonis, 2020; Summers, 2019). In this, the BRI presents a convenient vehicle through which to establish a link between a given context and a threat posed by Chinese encroachment into traditional spheres of US influence. With over US\$1 trillion (tr) lent to 155 countries, the BRI has been called ‘China’s Marshall Plan’ (Beeson & Crawford, 2023; Shen & Chan, 2018), triggering debates about its political motivations and possible consequences (Callahan, 2016). The BRI has also been characterized as a large geo-economic initiative (Li, 2020), a form of self-serving economic nationalism (Jamali et al., 2024), and as a soft-power strategy to win over US allies (Siddique & Shafqat, 2021). A related argument portrays the BRI as a ‘debt trap’ (Bennon & Fukuyama, 2023).<sup>1</sup> This is all in spite of the fact that the BRI has also been notoriously difficult to define. The BRI has been described as a ‘decentralized jumble of deals and projects that all loosely fall under the same banner of infrastructure development’ (Lu, 2023). Zhang has argued that ‘the BRI should be seen as a slogan, not a single program’ (cited in Ibid.). A tendency for BRI projects to be announced and then canceled has also seen it characterized as ‘a road to nowhere’ (Blanchard, 2021). As Stec (2018) has observed, in light of the enormous global attention on the BRI, ‘it is remarkable how ambiguous the initiative remains’, and concludes that it should be considered a process rather than a clear strategy or vision. Furthermore, the amorphous nature of the BRI, coupled with Beijing’s failure to officially define its scope and nature, has generated confusion among potential recipients regarding the status and seriousness of BRI projects, as well as suspicion from Western governments (Ang, 2019).

We suspect that the ambiguity of the BRI—that it can be defined and operationalized in multiple ways—also provides the US foreign policy

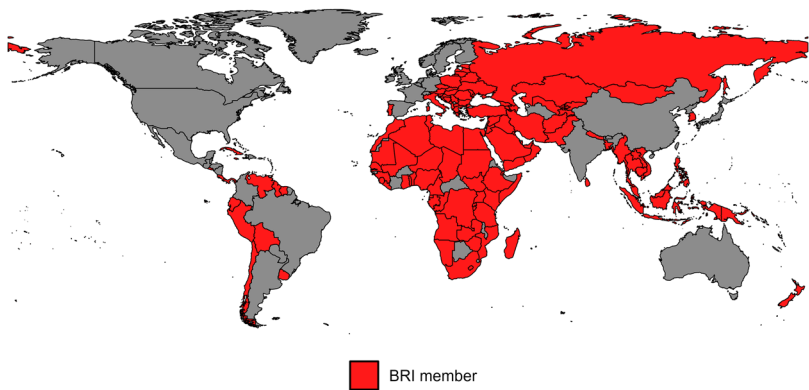


community leeway to invoke the initiative in politically convenient terms, reflecting particular interests and incentives. As we will see below, nearly every non-OECD country—and some OECD countries—has now signed up to the BRI, making the threat posed by the initiative to established US interests at least *prima facie* plausible, even in the many cases where membership has not yielded any concrete development projects. Moreover, as discussed above, there is good reason to suspect that an incentive to remain relevant pushes think tanks to conform to the prevailing narrative of China as a key threat, even in key regions where the US dominates. We might therefore expect think tanks to not only talk up the possibility of great power competition encroaching on US interests, but also to engage in ‘issue-linkage’, invoking China and its BRI as a threat of relevance to *other* foreign policy interests (see Baker-Beall & Mott, 2022). Viewed in this mode, we can begin to see how associating a threat with a given policy domain does not necessarily follow from a granular, fact-based analysis, and that by linking a policy domain to the BRI can positively influence the level of attention that a recommendation receives. In what follows, we examine how the US foreign policy community invokes the BRI and how it can become layered with other, familiar US foreign policy concerns.

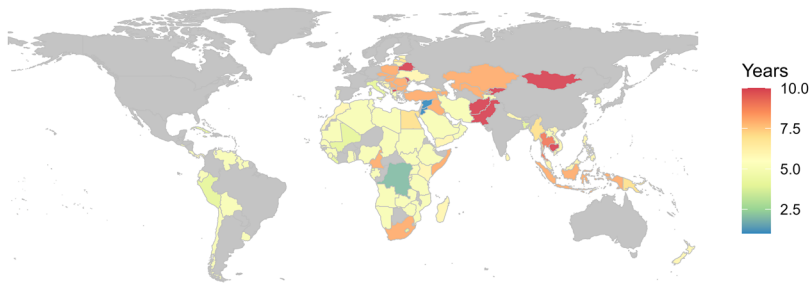
### China’s Belt and Road Initiative in the MENA

Before proceeding further, it is necessary to establish the recent extent of China’s BRI in the MENA. Given the ambiguity inherent to the BRI, we focus on its material instantiations in the region; that is, infrastructure projects and Chinese development finance for public services and works. As we show later, this aligns squarely with what the US foreign policy community mean by the BRI. Figure 1 shows those countries in the world that have signed a memorandum of understanding or cooperation agreement with China to participate in the BRI using data compiled by the Council on Foreign Relations (2023). Figure 2 shows the number of years a country has been a member of the initiative. We see that all MENA countries are now members of the BRI—and that the modal MENA country has been a part of the initiative for five years or more. Taking membership in isolation, one could conclude that foreign policy analysts are justified in pointing to the BRI as evidence of an increasing Chinese presence in the region.

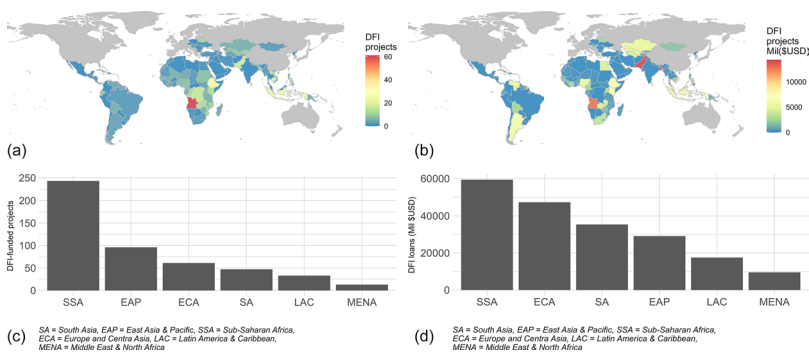
The picture becomes more complicated when assessing what that membership has actually produced in terms of BRI-funded infrastructure projects and the value of development loans from Chinese state-owned development banks. Figure 3a shows the number of BRI projects by country funded by China’s two main development finance institutions



**Figure 1.** Membership in the BRI by country as of 2023.



**Figure 2.** Years in the BRI by country as of 2023.



**Figure 3.** How Chinese DFI loans vary by country and region.

(DFIs)—the China Development Bank (CDB) and Export-Import Bank of China (Exim Bank)—to governments, majority state-owned entities, and minority state-owned entities with sovereign guarantees.<sup>2</sup> This map draws on an updated version of a geo-referenced dataset of DFI-funded projects

produced by the Global Development Center at Boston University (see Ray et al., 2021). We consider this peer-reviewed dataset to be the best empirical source for BRI-related infrastructure projects currently available, due to its data verification protocols, its use of multiple sources for each entry, and its consistent coding criteria.<sup>3</sup> Taking this as the most up-to-date measure suggests that only five countries in the MENA have so far hosted a completed BRI project: Sudan, Morocco, Mauritania, Egypt, and Jordan.

Figure 3c puts these figures into regional perspective using the World Bank's regional designations. Looked at globally, it is clear that, despite all MENA countries having signed up to the BRI, this has not produced a large number of BRI-funded infrastructure projects. This aligns with work by Atkins et al. (2023), who have shown that signing the memorandum of understanding to join the BRI is a very low cost act that is not actually correlated with a country's infrastructure needs. In consequence, joining the BRI has become, for many countries, a symbolic marker of openness to China, rather than a predictor of subsequent Chinese-funded development initiatives. To anticipate an obvious criticism of the above analysis, we should also consider the value of DFI loans. This is because a small number of very large loans to fund key infrastructure projects may still be consequential in shaping a MENA country's bilateral relations with China. Figure 3b shows the value of DFI loans by country. Again, no MENA country stands out for having received very large loans from a Chinese state development bank. Per Figure 3d, putting these figures into comparative perspective, we see that the MENA has in fact been the lowest total recipient of Chinese development finance by region.

We can further triangulate these patterns using data on Chinese energy infrastructure projects attributed to the BRI, compiled by the Council on Foreign Relations (2023). This is a key policy area for measuring the BRI's footprint: Investment in energy has accounted for nearly half of all BRI spending (Council on Foreign Relations, 2021). Note that this dataset draws on five different sources, including the Ray et al. (2021) dataset

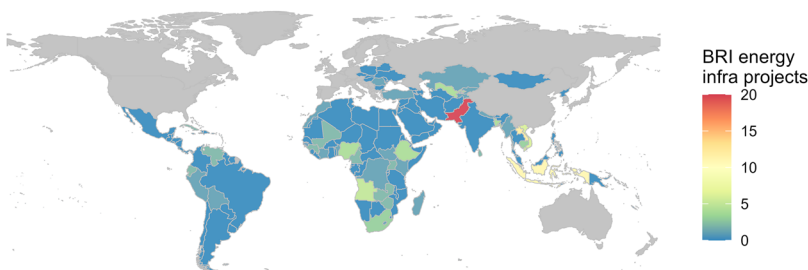


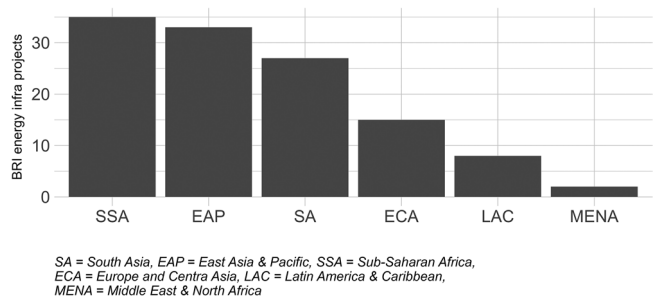
Figure 4. BRI energy infrastructure projects by country.

reported earlier. We find a consistent story. [Figure 4](#) maps the country-level distribution, and [Figure 5](#) aggregates the count of energy infrastructure projects by World Bank region. This exercise suggests that the MENA region has hosted only two such BRI projects and lags behind all other world regions. Revealingly, the other laggard is Latin America—a world region heavily penetrated by the US.

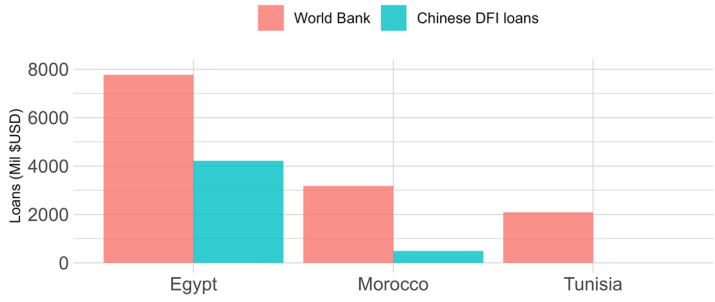
We can also benchmark the scale of Chinese financial development assistance for large scale infrastructure projects in the MENA by comparing the Global Development Policy Center’s (2024) ‘Chinese Loans to Africa’ dataset, which includes loans for projects in North Africa, to figures from the World Bank’s (2025) International Bank for Reconstruction and Development, the lending arm of the World Bank for the same period.<sup>4</sup>

This is a salient comparison as the annual value of Chinese loans has come to exceed those of the World Bank in some non-OECD contexts. Note that the World Bank primarily lends to low- and middle-income countries. For comparability, we spotlight North African countries that are reported to have hosted BRI projects financed through overseas development loans and that are also eligible for World Bank development financing.

[Figure 6](#) shows data for Egypt, Morocco, and Tunisia matched with data from the World Bank for the period 2013 to 2023.<sup>5</sup> In those three



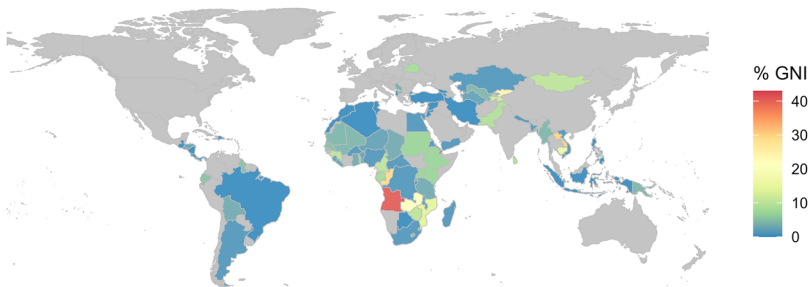
**Figure 5.** BRI energy infrastructure projects by region.



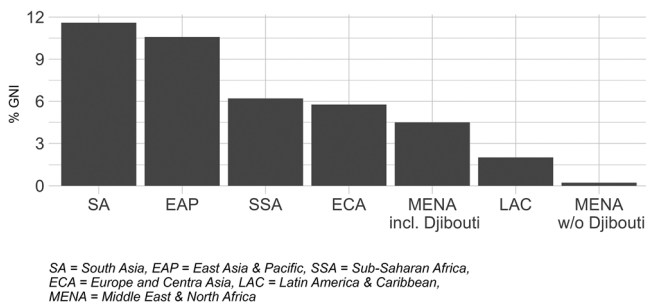
**Figure 6.** Comparing the value of World Bank and Chinese DFI loans for three MENA countries, 2013–2023.

contexts, the tendency is clear: The sum of Chinese state development finance does not approach the value of loans received from the World Bank. Note that this comparison is before accounting for equivalent lending and support from other US and Western development agencies. These sums are also non-trivial. To give an example: In the last several decades, USAID has provided over US\$30 billion (bn) in support for Egyptian infrastructure projects and public services (see USAID, 2023). Most importantly, recent analysis has also suggested that the total value of Chinese development finance is in decline worldwide, and is now less than the annual value of World Bank loans (see Ray, 2023).

Tellingly, World Bank data analyzed by Buchholz (2023) also shows that MENA countries do not appear to be at risk of falling under Chinese debt tutelage. Note that the exception is Djibouti, a country that accounts for just 0.2% of the region's population and where indebtedness to China runs to an eye-watering 42% of gross national income (GNI). Figure 7 shows World Bank figures recording countries' indebtedness to China as a percentage of GNI. Put into regional perspective, countries in the MENA—notwithstanding the tiny country of Djibouti—stand out for having very low levels of indebtedness to China (see Figure 8). If a key concern amongst US policymakers is that the BRI allows China to exercise significant influence over countries' political agendas *via* debt tutelage,



**Figure 7.** Indebtedness to China as % of GNI by country.



**Figure 8.** Average indebtedness as % of GNI to China by region.

this does not seem to apply to the MENA. The lack of indebtedness reported in World Bank data also independently corroborates the general tendency described above—that the region has not received many loans from Chinese development banks.

Finally, media reports also suggest that a number of BRI projects have been agreed in the MENA, only to then be subject to considerable delay, or outright cancelation. To give several prominent examples: The largest recipient of Chinese state development finance in the MENA appears to be Egypt, which has received a little over US\$4bn in DFI loans. However, this sum represents only a fraction of the original US\$20bn in loans that were agreed when Egypt signed an MoU with China in late 2017 (Knecht, 2017). Similarly, China has signed agreements for BRI-related infrastructure projects worth over US\$7bn in Jordan, including plans to build a new university, a national railway network, and an oil pipeline connecting Jordan with Iraq. None of these loans were ever received and the projects have effectively been canceled (Davis, 2023). So too in Tunisia, another country that has signed up to the BRI, plans for China to participate in the construction of a major port, railway line, and free trade zone, have come to nothing after the Tunisian government withdrew from initial negotiations, in part due to pressure from the US (Meddeb, 2022). However, perhaps the most striking example of over-hyped BRI projects is Iran. In 2019, Western analysts reacted with alarm after it was announced that China would be providing over US\$400bn in BRI-related loans and projects to the country. Several years later, no such investment has materialized (Figueroa, 2021).

## US think tank publications

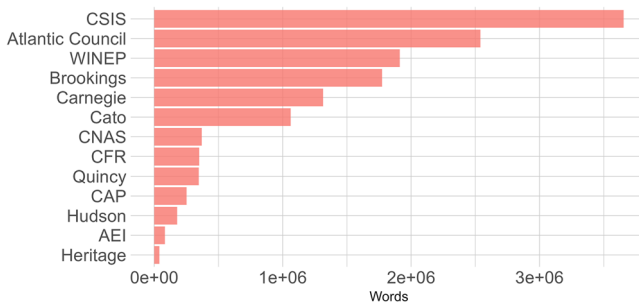
If US think tank commentary on the BRI does not simply reflect and reproduce empirical reality on the ground, this lends weight to our suspicion that the threat posed by the initiative is being inflated. In this section, we turn our attention to the US foreign policy community and their publications to identify how the BRI is being invoked as a threat to US interests in the MENA region.

## Data

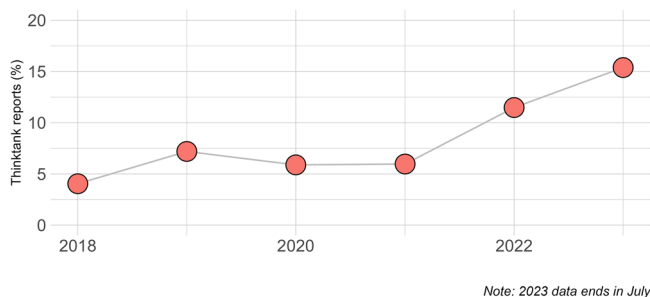
To create an initial sample frame of relevant US foreign policy think tanks that enjoy substantive relations with the US foreign policy elite, we first draw on a list published by the Policy Planning Staff at the US Department of State (2017), which names ‘think tanks and research institutions whose work on all aspects of foreign policy we at Policy Planning [in the State Department] have found particularly useful’.

We subset this list to US-based think tanks, as this allows us to hold constant the particular logics and influence of the Washington Beltway ecosystem. We further confine our attention to think tanks that cover Middle East policy. This yields 11 major foreign policy think tanks: the American Enterprise Institute (AEI), the Atlantic Council, the Brookings Institution, the Carnegie Endowment, the Cato Institute, the Center for Strategic and International Studies (CSIS), the Center for American Progress (CAP), the Council on Foreign Relations (CFR), the Heritage Foundation, the Hudson Institute, and the Washington Institute for Near East Policy (WINEP). We supplement this list with two newer but nonetheless influential US foreign policy think tanks—the Quincy Institute and the Center for a New American Security (CNAS)—both of which are staffed by former State Department officials and publish analyses on the MENA.

We sought to systematically collect all reports, analyses, and policy-related blog posts and podcast transcripts published by these institutions for the period 2018 to mid-2023 (for the number of words contained in these publications by think tank, see [Figure 9](#)). We focus on this time period to ensure a consistent corpus as our reports are sourced from online venues that change over time. This also coincides with the period when most MENA countries joined the BRI. We completed the majority of our data collection in mid-2023, and so reports from this period represent a natural endpoint of our analysis period. To identify MENA-relevant content, we queried think tanks' websites and filtered content by region of interest or keywords. In total, we collected 3,006 texts, comprising nearly 14 million words. The median text contains 2,394 words; the maximum has 112,123. [Appendix Table 1](#) shows the top five terms by frequency in the corpus. These suggest that MENA-focused US think tank publications texts are especially concerned with security and military issues as they relate to the US; the top policy concern is Iran, which is mentioned in over half of all documents.



**Figure 9.** Tokens in corpus by US think tanks, 2018–2023.



**Figure 10.** US thinktank reports on the MENA that mention the Belt and Road Initiative, 2018–2023.

### *The BRI in US foreign policy reports*

Figure 10 shows the percentage of US foreign policy think tank reports on the MENA that mention either the terms ‘Belt and Road’, ‘BRI’ or equivalents in our corpus. By 2023, the BRI appears in more than 15% of MENA-focused foreign policy reports and other outputs. To put this into perspective, it is worth remembering the sheer size of the universe of possible topics and issues concerning the US in the MENA region. There are over 20 countries in the region and a range of important issues from the perspective of US foreign policy—from energy security and democratization efforts to women’s rights and the Israel/Palestine conflict, and more. Naturally, this places an upper limit—approximating a ceiling effect—on the attention that any one topic can receive, because the denominator of potential topics is so large. Viewed in raw frequencies, the term ‘Belt and Road’ and its derivatives appear in 220 reports included in our corpus. In comparison, ‘International Monetary Fund’ is mentioned in 203 documents, while ‘World Bank’ appears in 456 publications. In terms of simple mentions then, the BRI now approaches established Western development finance institutions in the level of attention that it receives, and this is in spite of the fact that BRI-related funding represents only a fraction of the monies loaned by Western development finance institutions to MENA governments.

To get a sense of the ideological positioning of these publications, Figure 11 shows the percentage of publications that mention the ‘BRI’ or derivatives at least once. We see that five think tanks contribute the majority of these publications: the Atlantic Council, CSIS, Brookings, Carnegie, and WINEP. In Figure 12, we use the scaling algorithm proposed by Slapin & Proksch (2008) to estimate the ideological positions of these think tanks publications. This approach uses word frequencies to estimate the relative positions of texts along a continuous latent dimension, assuming that word choice varies systematically with ideological stance. It recovers familiar



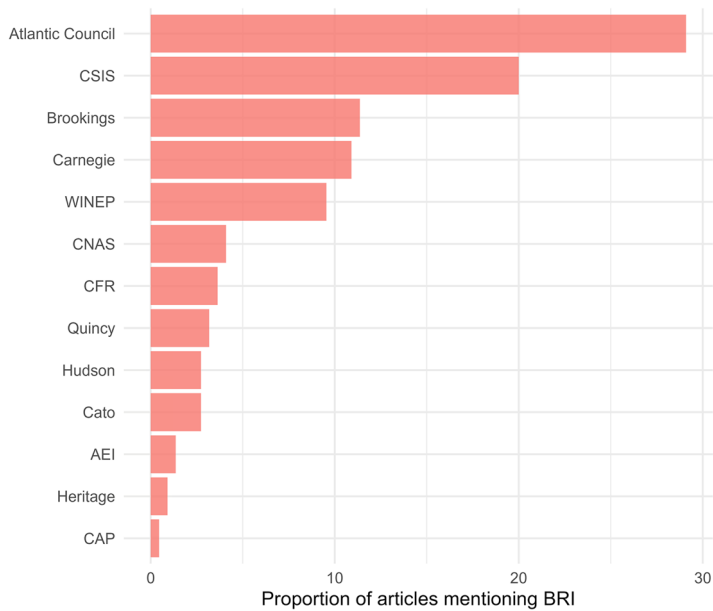


Figure 11. Publications mentioning ‘BRI’ at least once by think tank.

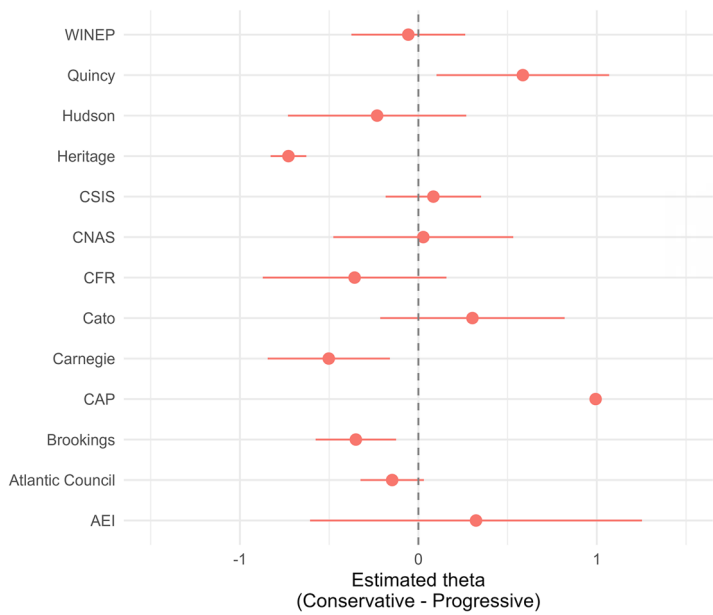


Figure 12. Estimated ideological positions of think tank reports that mention the BRI.

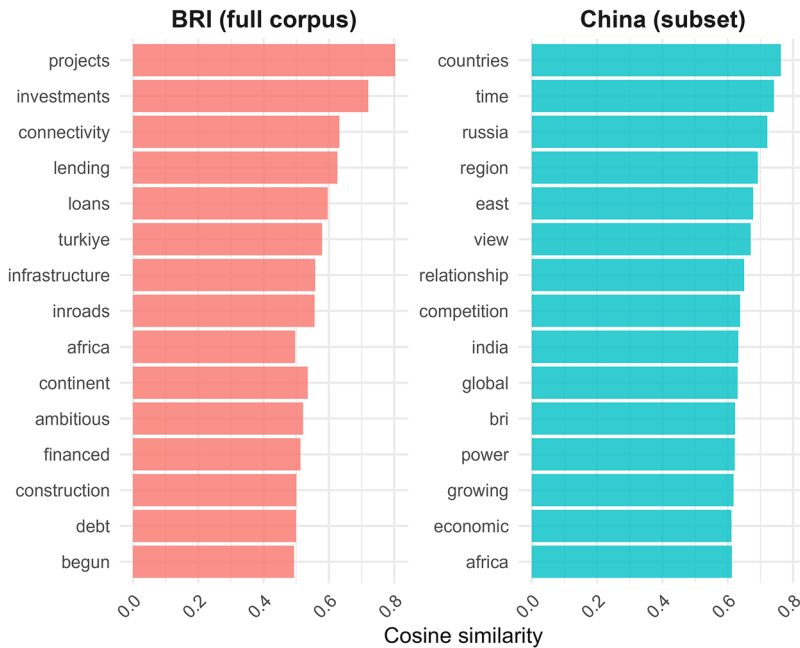
trends: The CAP and the Quincy Institute appear more progressive, while publications from the Heritage Foundation are more conservative. Interestingly, traditionally Democrat-leaning think tanks—e.g., Brookings

and Carnegie—appear to use language associated with more conservative positions, perhaps reflecting the hawkish turn on China often attributed to the Democratic Party following President Obama’s ‘pivot to Asia.’ Taken together, we see that the majority of the BRI-related analysis appears to be centrist or conservative-leaning in nature.

### ***What do US think tanks mean by the BRI?***

Researchers and analysts often complain that the BRI frequently refers to an amorphous and largely undefined set of practices and policy goals (see especially Ang, 2019). While the Chinese government has not provided an official definition of the BRI, it is possible to examine the meaning of the BRI as it is used by the US foreign policy community in the context of MENA politics. To do so, we generate a word embedding layer from our corpus and examine how the term ‘BRI’ is used in conjunction with other words.<sup>6</sup> The intuition here, per Firth (1957, p. 11), is that ‘You shall know a word by the company it keeps’—we can understand the semantic meaning of a term by the way that it co-occurs with other terms within a defined window.<sup>7</sup> For example, if the word ‘pipe’ frequently appears close to the terms ‘oil,’ ‘gas’ and ‘drill’ in a set of documents we can surmise that it is being used to refer to hydrocarbon production. This is a rather straightforward definitional issue. But even more importantly, if a term like ‘Palestine’ is semantically close to terms like ‘apartheid,’ ‘genocide,’ and ‘liberation,’ we learn something about the author’s worldview as it relates to the Israel-Palestine conflict. A word embedding layer formalizes this process by creating vector representations of a particular word encoded in a coordinate system where related words are placed together (Rodriguez & Spirling, 2022). If words or concepts absorb meanings from neighboring terms and concepts, then mapping the BRI’s relationship to other terms in semantic space gets us closer to what US foreign policymakers mean when they invoke the initiative (Leira, 2019).

Figure 13 visualizes the top 15 terms that are most proximate to ‘BRI’ in semantic space by cosine similarity comparing across the nearly quarter of a million unique tokens found in our corpus.<sup>8</sup> When viewed across our corpus, the BRI appears to have four overlapping connotations: a material footprint (e.g., ‘construction,’ ‘projects,’ and ‘infrastructure’), financial leverage (e.g., ‘lending,’ ‘loans,’ ‘financed,’ and ‘debt’), encroachment (e.g., ‘inroads’), and scale (e.g., ‘ambitious’). The emphasis on construction and infrastructure projects is striking given the vanishingly small number of BRI-funded infrastructure projects that have actually been implemented in the MENA region. Equally, the tendency to equate the BRI with financing and debt does not align with the fact that MENA countries have very low levels of indebtedness to China. But



**Figure 13.** Terms associated with ‘BRI’ (full corpus) and ‘China’ (subset) by cosine similarity score.

perhaps most telling is the association between the BRI and terms that portray China as self-confident and ambitious—a country that is ostensibly expanding its footprint through the medium of infrastructure deals and loans in a region historically dominated by the US. We can illuminate this further by subsetting to MENA-related articles that reference the BRI and then estimating a new embedding layer to see how China is being discussed in these settings. Per [Figure 13](#), we find a complementary set of associations: In the context of references to the BRI, China is more likely to appear alongside the US’s other important rival, i.e., Russia, as well as terms related to that rivalry, e.g., ‘competition’. The proximity of the terms ‘BRI’, ‘growing’, ‘economic’, and ‘power’, suggests that the US think tank community views Chinese influence in primarily economic terms—and that the BRI constitutes an important element in the expansion of China’s power in the MENA region.

### ***The topics that co-occur with China and the BRI***

We can also conceptualize the BRI as part of a broader topic on Chinese encroachment into the MENA region—and that this topic may be linked to other topics to give them more salience. To estimate the prevalence of such a topic, we use a structural topic model (Roberts et al., 2019). This



**Table 1.** Examples of invoking the BRI while discussing the 'Iran/Maritime security'.

| Title                                                                         | First mention of the BRI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Policy takeaway                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Topic (θ) | Think tank       |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------|
| China and the Persian Gulf in the Aftermath of a U.S. Withdrawal              | China's engagement in the Persian Gulf is motivated primarily by four factors: maintaining access to energy resources; expanding market access for trade and investment, especially in infrastructure, manufacturing, and telecommunications; developing infrastructure projects for its <b>Belt and Road Initiative</b> ; and demonstrating its great power status.                                                                                                                                                                            | Many Americans in and outside of government will no doubt use the threat of China filling in for the U.S. military to justify a continuing American military presence in the Gulf states. The critical question is not what China would do under these circumstances. Rather, it is what core U.S. interests are and how they can best be protected. The GCC states are more likely to look elsewhere—to the European Union, Russia, Australia, India, or Japan—to replace U.S. security guarantees, but none of these will prove as reassuring as the Pentagon's over-the-horizon ability to prevent a significant and sustained interruption in the flow of Gulf oil of a magnitude that could trigger a global recession. | >0.1      | Quincy Institute |
| Great power rivalry in the Red Sea                                            | Chinese loans, construction contracts, and infrastructure investments in the Horn of Africa and the wider Red Sea region—most now folded into the much-debated <b>Belt and Road Initiative (BRI)</b> —far exceed those of the United States. That gap is due to widen, and underscores a larger difference in the two countries' approach to date.                                                                                                                                                                                              | Concern among U.S. strategists has been amplified by corruption and poor governance atop Djibouti's political system, a president whose authoritarian style resembles that of his new patrons, and technological inroads made by Chinese telecommunications firms. In this, Djibouti evinces the larger contest between China and the West—marked by different approaches to governance, economic development, and individual liberties.                                                                                                                                                                                                                                                                                     | >0.2      | Brookings        |
| Why China Is Emerging as a Main Promoter of Stability in the Strait of Hormuz | The U.S. Defense Department lists the strait as a 'known focus area' for Chinese military planners. The Middle East, with its strategic position at the crossroads of Africa, Asia, and Europe, also represents a key node of China's <b>Belt and Road Initiative (BRI)</b> . Furthermore, the Gulf region is an area of significant opportunity for China in its global geostrategic competition with the United States, as, unlike Washington, Beijing enjoys close bilateral relations with countries on both sides of the Strait of Hormuz. | The Saudi Arabia-Iran deal reflects only a part of Beijing's wider ambitions in the Middle East. The success of the deal will have far-reaching implications not only for the region but also for the great power competition between China and the United States. To counter Chinese interests, Washington will continue to build on the Abraham Accords, prioritizing a normalization of relations between Saudi Arabia and Israel. This would allow the formation of a unified bloc of U.S. regional allies, potentially leading to greater security cooperation in confronting Iran while simultaneously containing the expansion of Chinese influence.                                                                  | >0.3      | Carnegie         |

To begin to understand how China and its Belt and Road Initiative feature in US foreign policy think tank reports on the MENA, [Figure 15](#) plots the network of topics found in the corpus. Topics that are connected tend to appear together within the same document. Several thematic patterns emerge in how the US foreign policy community analyzes the MENA. In line with our simple term frequencies in [Table 1](#), a substantial proportion of attention in US think tank reports on the MENA is devoted to US-Iran relations and related foreign policy issues, e.g., the sanctions regime, Iran's nuclear ambitions, Hezbollah, etc. There is also non-trivial attention paid to the Israel-Palestine conflict and Trump's foreign policy in the region. For our purposes, it is noteworthy that the 'China/BRI' topic is not on the periphery of the network and appears to have ties to several other foreign policy issues.

This is formalized in [Figure 16](#), which is a correlation heatmap showing the strengths of these ties. This shows how often a given topic co-appears within the same document as the ‘China/BRI’ topic. Viewed in this mode, discussion of increased Chinese influence and the BRI is most likely to co-occur with two principal topics in our corpus: 1) US interests related to Iran and longstanding maritime security concerns in the Persian Gulf, the Red Sea, and Indian Ocean, relating to oil production, the Strait of Hormuz, and naval power; and 2) great power competition in the region, and in particular, increasing US rivalry with China and Russia, alongside the general implications of Chinese encroachment for US interests in the region. To give a better sense of what these topics relate to, [Appendix Tables 2 and 3](#) reports the titles for the top 20 publications containing these topics and the think tank producing them, ranked by topic prevalence ([Appendix Tables 4 and 5](#) show the key terms in each topic). Based on the ideological position analysis in [Figure 12](#), the think tanks contributing to these topics are overwhelmingly situated on the



**Figure 16.** Pairwise topic correlation heatmap for 'China/BRI'.

conservative or centrist end of the spectrum with regard to the BRI and China. [Figure 16](#) suggests that the ‘China/BRI’ topic also appears alongside discussion of relations with key US clients in the region, important US diplomatic initiatives such as the Abraham Accords, digital media, and regimes in North Africa.

In [Appendix Section A](#), we reflect on these results and provide additional statistical tests to ensure that our network analysis is not being driven by a general discussion of China’s role in the region rather than by the BRI per se. In [Appendix Section B](#), we provide descriptive and statistical evidence to rule out any concerns that our findings are being driven by Djibouti, an extreme outlier case.

### **Example texts**

We can further illuminate some of the ways in which the BRI is being put to work by qualitatively reading texts related to these two topics. To do this, we first query our structural topic model to identify documents that both mention the BRI and devote attention to either US concerns related to Iran and maritime security, or to great power competition in the region. To maximize variation and to aid comparison, we select texts at different moments of topic prevalence, akin to different levels of focus ( $\theta > 0.1$  to  $\theta > 0.3$ ). Per [Figure 12](#), we also vary these texts by the ideological position of think tanks as they relate to the BRI. [Tables 1](#) and [2](#) give three examples for the topics relating to great power competition and Iran/maritime security, highlighting the first instance where the BRI is mentioned, and the main policy takeaway.<sup>9</sup> Of course, when choosing from a number of possible examples, there is naturally a question of selection and representativeness. Mindful of this, we suggest that these examples can at least highlight some of the concrete ways in which the BRI is being used in these documents.

One immediately striking feature of these examples—regardless of the relative ideological position of the think tank—is how the BRI is invoked as an established feature of the region’s political economy. Here, discussion of the BRI is not investigative in the sense of trying to establish the facts of the matter as they relate to BRI-related projects on the ground, such as they exist. Instead, the BRI appears as part of a set of declarative statements—the initiative is presented as an established part of the region’s political economy and international relations. Even from the short texts reproduced in [Tables 1](#) and [2](#), we also see how the examples closely align with both the word embedding and structural topic model results reported above. While all six relate to either US security concerns regarding Iran and maritime security or great power

competition, we also find other key themes that are linked with the BRI and China topic, e.g., US diplomatic initiatives, securing relations with key US client states such as Saudi Arabia, US interests in North Africa, and digital media.

In all of these examples, we see how the threat posed by China and the BRI appears in texts as a call to action, irrespective of the facts on the ground. In the examples provided in [Table 1](#), which discuss US security interests relating to Iran, maritime security and the Persian Gulf, China's motives for expanding the BRI are related to efforts to secure energy flows, gain market access, and boost China's great-power status. The BRI is presented as far exceeding US investments in the MENA region, amounting to a difference in strategy, and the MENA is described as a critical node of the BRI. In response to these representations, there are calls for the US to position itself as the go-to power to secure oil flows; to focus on Djibouti, an extreme outlier case, as it is said to exemplify a broader geopolitical trend; expand the Abraham Accords to longstanding US clients in a bid to create a diplomatic bulwark against further Chinese encroachment; and building regional alliances to counter both Iran and China simultaneously. In analyzing great power competition in the region, the reports in [Table 2](#) depict a surge in Chinese investments through the BRI, continuous growth of the BRI in the region, and the roles of Iran and the Gulf states in helping China expand the BRI. The reports introduce the BRI as a strategic challenge to US hegemony alongside a range of policy prescriptions. These include increasing US scrutiny of Chinese financial investments in the region; countering Chinese diplomatic initiatives that threaten to undermine the US-led regional order; and maintaining a US military presence in the region for strategic and ideological reasons, in spite of an acknowledged wariness at home in Washington.

## Conclusions and discussion

In our analyses, a picture emerges of how the BRI has been constructed as a threat within US foreign policy discourse on the MENA. Rather than being a mirror of China's projects and involvement in the region, the BRI is depicted as a material, expanding presence in a region of historical importance to US interests at a time when those interests are being reevaluated—an empirical totem of China's broader geopolitical intentions. This portrayal is consistent across both the language used in association with the BRI and how the BRI is invoked alongside other foreign policy concerns. This is in spite of the small number of actually completed BRI infrastructure projects in the region, a longstanding reliance on equivalent Western development finance institutions, and generally low levels of





**Table 2.** Examples of invoking the BRI while discussing 'Great power competition'.

| Title                                                                        | First mention of the BRI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Policy takeaway                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Topic (θ) | Think tank       |
|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------|
| What are the implications of expanded Chinese investment in the MENA region? | <p>China's surge in investment is underpinned by the China-Arab States Cooperation Forum (CASF) and the <b>Belt and Road Initiative (BRI)</b>, also known as the Silk Road Economic Belt. The CASCF is a formal dialogue initiative that promotes various types of cooperation, including economic and trade exchanges. The BRI is a major trade and infrastructure project that links some seventy one countries- with high-speed railroads, gas and oil pipelines, and motorways- to promote and facilitate global trade.</p> | <p>The United States potentially has the most to lose. Projects like the BRI suggest that Beijing has the desire to augment its growing economic and strategic influence with a 'soft power' narrative that presents China as an alternative leader to the global hegemony of the United States. Essentially, China is continuing to use financial mechanisms to become an international player deeply embedded in the MENA region's geopolitical landscape. As China moves forward with its own agenda, its MENA investments should be closely monitored.</p> | >0.1      | Atlantic Council |
| Iran-Saudi Arabia Rapprochement Threatens to Upend US-led Regional Order     | <p>China, too, has its own interests in peace in the Middle East—over 50% of its oil is imported from the region, and both Iran and the Gulf states have played crucial roles in expanding Beijing's <b>Belt and Road Initiative</b>.</p>                                                                                                                                                                                                                                                                                       | <p>Iran and Saudi Arabia have deep-seated ideological differences and there are no guarantees that either side will live up to its end of the bargain. Nevertheless, striking a peace deal has positioned China as a formidable challenge to US-led regional order. And if we don't take seriously the threat to democratic interests and values that Chinese dominance in the Middle East poses, we risk losing the whole game.</p>                                                                                                                           | >0.2      | WINEP            |
| Israel and the Middle East amid U.S.-China competition                       | <p>Beijing's importance to the region will likely continue to rise, with commercial and investment ties to the region growing within the rubric of China's far broader <b>Belt and Road Initiative (BRI)</b>. For Beijing, an overriding need for energy imports underlies its interest in the region. With its high volumes of energy imports, China is the largest trading partner of many countries in the Middle East. It is, further, an enormous investor in construction and infrastructure, primarily through BRI.</p>  | <p>For the United States, China's interest in the Middle East may actually prove an impetus for staying there. If China's regional role does increase amid rising U.S.-Chinese rivalry, the defining regional question for American policymakers may be how to balance their own wariness of Middle Eastern affairs with a desire to contain China's influence.</p>                                                                                                                                                                                            | >0.3      | Brookings        |

indebtedness to China. Of course, part of this discussion is future-oriented in nature—US foreign policy think tanks naturally speculate about the actions of other great powers in anticipation of what is to come. At the same time, most MENA countries have been members of the BRI for half a dozen years or more. In other words, the rough contours of Chinese development finance are now settled, and all current indications are that these initiatives are in decline (Ray, 2023).

To reiterate: We are not suggesting that China's influence in the MENA is not increasing, or that it is otherwise materially unimportant. Over the past two decades, China has emerged as a key trade partner for most MENA countries, as it has for nearly every OECD and non-OECD economy. China's role in brokering a recent rapprochement between Saudi Arabia, a key US client, and Iran, underlines the new position that the country enjoys in the region's evolving international relations. However, to date, Chinese influence in the region does not appear to be flowing through infrastructure projects or parallel forms of overseas development finance in ways seen in other world regions. Moreover, this focus on the BRI serves to occlude and excise arguably more important forms of infrastructure building and development initiatives in the MENA, especially those undertaken by the United Arab Emirates and Saudi Arabia (see e.g., Reuters, 2024).

As we have shown, US think tank analysis and commentary on the BRI are not investigative in nature. Instead, the BRI is asserted to be a feature of the region's political economy, regardless of the material reality. To make sense of this, we have argued that US foreign policy think tanks have incentives to invoke the BRI as a means to link a 'China threat' to other interests and issues on which they claim expertise. In this way, the economic incentive structure of think tanks serves to reinforce and broaden threat inflation by multiplying the implications of the BRI for a broader set of issues. As we have argued, this interplay between the political economy of the D.C. Beltway and the international political economy (IPE) of Chinese development finance is a downstream effect of the general securitization of China. In this, invoking the BRI allows US think tanks to overlay a geopolitical narrative of an expanding and revisionist China strategically using infrastructure projects and debt traps onto well-established and familiar US foreign policy interests—at a time when those interests are being reevaluated in light of perceived overcommitment and relative decline.

In making sense of this, we suspect that references to the BRI in relation to established and familiar issues in US foreign policy in the MENA give them more urgency, simultaneously reinforcing the meaning of the BRI as an ambitious geopolitical challenge of existential importance in US strategic thinking on the MENA. In this way, traditional US

concerns in the MENA are given renewed salience within a new master-framework of threat focused on China. While our focus here is on foreign policy think tanks, there are good reasons to think that this also holds for other part of the US foreign policy community: To stay relevant and be persuasive within a new threat-framework, all actors have to adjust how they formulate positions and locate particular interests in relation to China. Foreign policy think tanks also have few incentives to downplay this threat, while simultaneously being under pressure to bring attention—and funding—to their specialist policy area. Regardless of what foreign policy think tanks' particular motives may be, however, by continuing to invoke the BRI, US think tanks are shaping US—and by extension possibly other Western foreign policy analysis—narratives about the BRI, expanding its commonsense meaning and its connotations far beyond a focus on Chinese infrastructure and development finance—even to regions where these elements are manifestly not prevalent or expanding.

It is an open empirical question for future research to identify the effects of this threat inflation. Reading the most recent report from the US-China Economic and Security Review Commission (2024, pp. 333–402), which is tasked by Congress with providing recommendations on US-China relations, it is notable that, for the first time in ten years, there is an extended section devoted to the MENA. A simple keyword search suggests that this section includes over 40 references to the BRI or its derivatives. These references are frequently framed as threats to US interests. Crucially, the report cites a number of the experts and think tanks—e.g., the Atlantic Council, CSIS, Brookings, and Carnegie—whose publications are analyzed in this paper. This holds out an important implication for IPE scholarship on the BRI and China more broadly: There is a risk that a term used for practical political purposes is conflated with a scholarly defined term. Here, scholars may inadvertently become involved in a political project to secure US interests against an emerging 'China threat' (Khanal & Zhang, 2024). It is also an open question as to how the BRI is being invoked in foreign policy analysis of other word regions, e.g., in Europe or Latin America. Our expectation is that it is also being layered onto preexisting US security interests there, too, and that these vary depending on the local priorities, norms, and historical interactions between local states and great powers. In all of these instances, we suspect the downstream effects of the securitization of China and its international development finance are likely to continue shaping how the international order is discussed and how regional policies are justified in both scholarship and public policy for the foreseeable future.

## Notes

1. Note here that others have argued that references to a 'debt trap' are overblown or misleading (Brautigam & Rithmire, 2021; Singh, 2020).
2. Note that this excludes other forms of financial support not related to development projects, e.g., short-term foreign exchange transfers to central banks.
3. For comparison, the China Connects dataset (<https://chinaconnects.iiss.org/>), compiled by the International Institute for Strategic Studies, includes commercial projects that are either unrelated to development finance or infrastructure, or that pre-date the launch of the BRI. Similarly, the 'BRI-tagged' Chinese finance dataset collected by Burgess and Custer (2022), appears to report inflated figures due to the inclusion of similar non-development-related projects, some portion of which also precede the BRI's initiation.
4. Note that we focus on Chinese loans tied to investment or development projects, rather than interbank lending, which the World Bank does not provide.
5. We include Tunisia here because, as discussed below, it had agreed to host a BRI project, albeit one that was eventually cancelled.
6. To estimate our embedding layer, we used the GloVe algorithm available in the text2vec R package.
7. We use a 6 term context window either side of our target word.
8. Note that we do not display non-informative proper nouns, e.g. 'China', 'Chinese', 'Beijing', 'Belt', 'Road', etc., which naturally dominate.
9. This is typically the concluding or penultimate paragraph.

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