

Convergence of Kazakhstan's "Nurly Zhol" Program and China's "Belt and Road" Initiative

Abstract

In 2013, some countries announced alternative ways of global development and started new integration projects. Among these initiatives, the most significant is the "Belt and Road" Initiative, announced by Xi Jinping, the Chairman of the Communist Party of the People's Republic of China. This initiative will fundamentally influence the world economy and interstate cooperation. With more than 100 countries having joined it and an array of integration projects having been put into action, the Chinese project is considered the most large-scale initiative since its inception. Furthermore, the announcement of the Chinese initiative has prompted other countries to develop projects that align with their national interests. Among these countries is the Republic of Kazakhstan, which announced the implementation of a new "Nurly Zhol" economic development policy in 2014. Due to strong economic ties between China and Kazakhstan, the two countries quickly discussed the possibility of cooperating to implement their respective development strategies. Thus, this study aims to examine Kazakh-Chinese interactions by exploring ways to integrate the "Nurly Zhol" program and the "Belt and Road" initiative.

Kazakistan'ın "Nurly Zhol" Programı ile Çin'in "Kuşak ve Yol" Girişimlerinin Birleşmesi

Özet

2013 yılında bazı ülkeler alternatif küresel kalkınma yolları açıkladı ve yeni entegrasyon projeleri başlattı. Bu girişimler arasında en önemlisi, Çin Halk Cumhuriyeti Komünist Partisi Genel Başkanı Xi Jinping tarafından açıklanan "Kuşak ve Yol" Girişimi'dir. Bu girişim, dünya ekonomisini ve devletlerarası işbirliğini temelinden etkileyecektir. 100'den fazla ülkenin katıldığı ve bir dizi entegrasyon projesinin hayata geçirildiği Çin projesi, başlangıcından bu yana en büyük ölçekli girişim olarak kabul edilmektedir. Ayrıca, Çin'in bu girişiminin duyurulması, diğer ülkeleri de ulusal çıkarlarına uygun projeler geliştirmeye teşvik etmiştir. Bu ülkeler arasında, 2014 yılında yeni bir "Nurly Zhol" ekonomik kalkınma politikasının uygulanacağını duyuran Kazakistan Cumhuriyeti de bulunmaktadır. Çin ve Kazakistan arasındaki güçlü ekonomik bağlar nedeniyle, iki ülke kendi kalkınma stratejilerini uygulamak için işbirliği yapma olasılığını hızla tartışmıştır. Bu nedenle, bu çalışma "Nurly Zhol" programı ile "Kuşak ve Yol" girişiminin entegre edilme yollarını araştırarak Kazakistan-Çin etkileşimlerini incelemeyi amaçlamaktadır.

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1 Introduction

In September 2013, the “*Belt and Road*” Initiative was first announced to the world community in the capital of Kazakhstan. In *October*, the maritime route of the Initiative was represented by the Chinese Leader in Indonesia. Overall, the *Chinese Global Economic Development Strategy* encompasses two key directions: the “*Maritime Silk Road of the 21st century*” and the “*Silk Road Economic Belt*,” which spans the land routes of Central Eurasia, particularly through Kazakhstan (Huang, 2016).

This Chinese strategy has a global character, and its transformation of the world market is directed toward mutually profitable cooperation with countries along the trade routes, marking the beginning of the era of *Win-Winism* (Hu, 2018). It is mentioned that *Win-Win Cooperation* implies an equal dialogue with all participants of the global community based on mutual respect for sovereignty, cultural diversity, and economic and political traditions (Danzhi, 2019).

Today, more than 150 countries have joined the BRI (Chen & Chen, 2024). According to the Asia Institute of Griffith University, the total volume of Chinese investments since the Initiative’s approval in 2013 has exceeded \$1.1 trillion, of which \$704 billion was allocated to implementing construction contracts and \$470 billion to investments. In 2024, \$70.7 billion was spent on construction contracts, and \$51 billion was invested, respectively. The most significant investments were made in the oil and gas sector (\$24.2 billion), the metallurgy and mining sector (\$22 billion), and technology (\$30 billion) (Nedopil, 2025).

2 The “Nurly Zhol” Program

On 11 November 2014, the former President of the Republic of Kazakhstan, Nursultan Nazarbayev, noted in his *Address to the nation* the negative impact of the financial crisis and sanctions regime on the global economy. Under existing conditions, it was necessary to resort to measures that could ensure sustainable development, provide opportunities to implement the given tasks, and prevent a decline in economic growth rates. A new economic policy that focused on widening and modernizing the infrastructure was suggested as a panacea. It was intended to implement 6 tasks in transport logistics, energy, and social infrastructure (IPS “Adilet”, 2014).

The 2012 and 2014 Addresses of the Head of State to the people of Kazakhstan, dated December 14, 2012 and January 17, 2014 and the Instruction of the Head of State given at the XXVI plenary session of the Foreign Investors Council under the President of the Republic of Kazakhstan were the basis for the Program mentioned above (AKJ “Adilet”, 2014). Thus, based on the 2012 *Address*, Kazakhstan aimed to join the top 30 most developed countries in the world by 2050. Achieving such a goal was impossible without implementing tasks such as preserving and adhering to the principles of statehood, creating a new economic policy, modernizing education and healthcare, etc. (AKJ “Adilet”, 2012). The *Address to the nation* on January 17, 2014, highlighted the need to implement specific priorities outlined in Kazakhstan’s concept for entering the world’s 30 most developed countries. For example, the ex-president noted that it is necessary to improve and accelerate the process of innovative industrialization, which includes the development of modern technologies in various fields. In addition, *Nursultan Nazarbayev* drew attention to the need to expand the development of rare earth metals, which are valuable for the development of knowledge-intensive industries (medical and communications equipment, electronics, and laser technology). The development of a *knowledge-intensive economy* is closely linked to the construction of *Agglomerations*, which should become the leading economic centers (Akorda, 2014). The close connection between innovations and education, as well as the scientific and technical sphere, was also noted by the first President of the Republic of Kazakhstan during the *26th Plenary Session of the Council of Foreign Investors under the President of the Republic of Kazakhstan* (Yurist, 2013).

Thus, on 6 April 2015, the *Government Program for Infrastructure Development*, “*Nurly Zhol*,” for the period 2015-2019 was approved. The Program aimed to transform city hubs such as *Almaty*, *Astana*, *Ust-Kamenogorsk*, *Shymkent*, and *Aktobe* into major economic and financial centers, as well as cities at the forefront of modern technologies and resources. Besides, the State intended to address the growing urbanization, lack of social infrastructure, and transport networks necessary for the timely and unhindered movement of goods, services, human resources, and to transform the uneven distribution of labor toward “*North-South*” (MNE RK, 2015). The cities mentioned above are designed to be transformed into technological and resource centers. This decision was based on the fact that these areas have a high economic importance. Thus, Southeast Kazakhstan, where Almaty is also located, has a relatively high investment potential (25%) due to its strong base in the light industry and pharmaceutical sector, as well as significant consumer demand. Central Kazakhstan, including Astana, accounts for 18% of the investment potential, as the region has developed a robust transport and logistics infrastructure, as well as a strong agricultural sector. Moreover, this part of the country is rich in minerals. West Kazakhstan represents 16% of the investment potential of the RK because of its oil and gas reserves, chromium, and ferroalloys. South Kazakhstan accounts for 11% of the region’s economy, which is driven by a developed agricultural sector, oil refining, and a chemical industry (GACE, 2024).

Considering the issue of urbanization, it is necessary to note the country's population distribution. In *early 2016*, the population of the Republic of Kazakhstan was 17,670,579 people, of whom 3,828,570 people were concentrated in the northern regions of the country (including the capital city), and 6,804,998 people in the southern areas (Qazstat, 2016). By the end of the first five-year plan of the *Program*, i.e. *at the beginning of 2020*, these figures reached 18,631,779 people (the total population of RK), with a population balance between the North and South of 4,042,364 and 8,960,365 people, respectively (Qazstat, 2020). In *early 2025*, the population indicators in terms of “*North-South*” were as follows: country’s total population – 20,300,618; North – 4,421,403; South – 10,034,717 (Qazstat, 2025).

Such an imbalance caused a growing migration imbalance in some areas of the country, increasing pressure on cities’ social infrastructure. For example, based on 2022 data, Astana (33,798 people) and Almaty (35,302 people) became leaders in interregional migration within Kazakhstan (Qazstat, 2023). This trend also continued in 2024, when the positive migration balance between Astana and Almaty amounted to 73,238 people and 36,061 people, respectively (Qazstat, 2025).

It should be noted that modernizing education and integrating innovative technologies into science remains a pressing task, given the population growth and the increasing proportion of children. For example, in 2010, the number of children under 15 was 4,290,053 (Qazstat, 2013). In *early 2024*, this figure was 6,215,458 children (Qazstat, 2024). Although the UN has registered a decline in the birth rate from 4.8 in 1970 to 2.2 in 2024 (UN, 2025), the birth rates in Kazakhstan have remained relatively stable. On average, there are 2.58 children per woman in Kazakhstan. For comparison, in the Republic of Türkiye, the birth rate is 1.9; in China, it is 1.55; and in Russia, it is 1.52 (WPR, 2025). Overall, rising fertility and urbanization put a strain on local infrastructure; as a result, there is a lack of social facilities such as kindergartens and schools.

By the end of 2019, a total of 667 preschool organizations had been established in the Republic of Kazakhstan. In addition, 55 new schools were built, including 23 to address the issue of three-shift education, 3 to replace emergency facilities, and 22 to alleviate the shortage of pupil places. Seismic reinforcement was also carried out in 7 schools in Almaty (MON RK, 2020). In 2024, the number of public preschools increased to 32 compared to 2021 (1) and 2023 (19). Additionally, from 2023 to 2024, the number of schools put into operation increased from 165 to 257, which enabled the resolution of the issues with 32 emergency schools, 71 three-shift schools, and 298 schools with a shortage of pupil places. Additionally, 1000 schools were modernized by modern standards (KR OAM, 2025).

Moreover, the second five-year *Plan for Industrial Development*, launched in 2020, like the *2015-2019 Plan*, emphasized the evolution of the transport sector as a significant part of Kazakhstan’s economy. Regional integration, the growth of trade between Asia and Europe, and increased demand for logistics infrastructure resulting from China’s “*Belt and Road Initiative*” advancement were identified as key factors influencing the development of the transport and logistics sector in Kazakhstan (MIIR RK, 2019). As of *April 2024*, the largest share (53%) of freight loads fell on railway transport. For example, during 2014 and 2023, the volume of freight transportation by railway increased from 214 billion tons to 327 billion tons, while the volume of transportation by highways, which shared 24%, fluctuated from 149 to 183 billion tons, and by pipelines (23%) between 115 and 144 billion tons. To date, the total length of railways is 16,000 km, highways are 94,800 km, and pipeline systems are 29,000 km, including oil pipelines (9,200 km) and gas pipelines (16,500 km) (AIFC, 2024).

3 The Kazakh Chinese Cooperation

At the end of summer 2016, the Republic of Kazakhstan and the People’s Republic of China signed a Cooperation Plan to Link the New Economic Policy “*Nurly Zhol*” and the Construction of the “*Silk Road Economic Belt*”, which was preceded by the “*Joint Communiqué between the Government of the Republic of Kazakhstan and the Government of the People’s Republic of China*” of *December 2015*. The *Plan* identified transport, namely the construction of new and modernization of existing automobile and railway networks, as priority areas of cooperation. In particular, the two countries aimed to establish economic corridors such as the “*China-Kazakhstan-West Asia*,” “*China-Kazakhstan-Russia-West Europe*,” and “*China-Kazakhstan-South Caucasus/Türkiye-Europe*”. Increased cooperation in trade was also noted as deserving of great attention (IPS “*Adilet*”, 2016).

According to the data provided, the volume of Chinese investment under the “*Belt and Road*” *Initiative* from 2013 to 2020 totaled \$18.69 billion. Most of this amount, namely \$ 9.53 billion, was allocated to the energy sector. Additionally, \$3.81 billion, \$2.65 billion, and \$1.91 billion were allocated for the implementation of projects in the transportation, chemical industry, and metallurgy sectors, respectively (Taliga, 2021). It is essential to note that there is no clear distinction between projects within the *BRI* and those that commenced implementation prior to 2013. In this regard, all joint projects implemented by Kazakhstan and China since the 1990s are often considered as part of cooperation within the framework of the Chinese Initiative. As of 2021, joint activities between Kazakhstan and China were reported in over 130 projects worth nearly \$99 billion. Thus, 53 projects worth \$40.7 billion were concentrated in the industry, of which 25 projects worth \$27.4 billion were aimed at cooperation based

on petrochemical enterprises. Energy is one of the most significant sectors of Kazakh Chinese cooperation. The presence of China in 34 energy projects worth \$32.9 billion is declared. In addition, the parties are involved in 16 transport projects (worth \$15.6 billion), 19 agricultural projects (worth \$1.3 billion), five finance and IT projects (worth \$8.1 billion), and others (Ivleva, 2021). In *March 2025*, it was reported that the Republic of Kazakhstan and the People's Republic of China were collaborating on 224 investment projects valued at \$66.4 billion (Sakenova, 2025). According to *the Ambassador of the People's Republic of China to the Republic of Kazakhstan, Han Chunling*, 62 projects out of the \$8.7 billion investment package were implemented, and 55 projects worth \$13.5 billion are currently at the implementation stage (Kapital, 2025).

As of *September 1, 2024*, 59,010 foreign enterprises were registered in the Republic of Kazakhstan, of which 4,674 have Chinese participation. The largest share of Chinese companies' presence (26%) is noted in the mining and quarrying industry. Thus, China has a stake in such companies as *JSC SNPS-Aktobemunaygaz*, *JSC Mangistaunaygaz*, *FC Buzachi Operating LTD*, *PetroKazakhstan*, *LLP SP CASPI BITUM*, *LLP DP ORTALYK*, *LLP Semizbay-U*, and *LLP Ulba-TVS* (HF, 2024).

Currently, five oil and gas pipelines run through Central Asia, with two of them passing directly through the Republic of Kazakhstan. These are the *Kazakhstan-China pipeline* and the *Central Asia-China gas pipeline*, through which gas from Turkmenistan is further supplied to Uzbekistan and Kazakhstan, ultimately reaching its final destination in China (Khodjaeva, Musaev, Rasulev, & Turaeva, 2021).

It is worth noting that 13 International Transport Corridors run through the Republic of Kazakhstan, comprising 5 railway corridors and 8 transit corridors (24KZ, 2024). In *early March 2025*, Kazakhstan and China launched a new container route from Chengdu (China) to Lodz (Poland). The route will take about two months to deliver goods and pass through Turkmenistan, Iran, and Türkiye (Omarova, 2025). Additionally, the sides also discussed the launch in 2025 of the logistics complex in Almaty, the logistics center in the Moscow region (Russian Federation), and the terminal at the port of Alyate (Republic of Azerbaijan) (Sakenova, 2025). The opening of terminals in *Svisloch (Belarus)* and *Budapest (Hungary)* is planned for 2026 (RAILWAYPRO, 2025). At the same time, there are already 2 Kazakh-Chinese terminals in Lianyungang, launched in 2014 (Akorda, 2014), and Xi'an, which opened in February 2024 (Xi'an, 2024).

In 2023, the turnover between Kazakhstan and China exceeded \$31 billion, which was 22% of the total turnover of the Republic of Kazakhstan (\$139.8 billion) (Torgpred RF, 2024). Furthermore, in that year, China entered the top 10 of Kazakhstan's major partners in terms of export-import exchange and direct foreign investment. During the specified period, China's share of Kazakhstan's exports and imports was 18.7% (\$14.7 billion) and 27.4% (\$16.8 billion), respectively. Regarding FDI, China accounted for 7.1% (AIFC, 2024). In 2024, China's trade turnover with Central Asian countries totaled \$94.82 billion, of which \$43.82 billion represented bilateral trade with the Republic of Kazakhstan (Temirgaliyeva, 2025). Exports from Kazakhstan accounted for \$15.8 billion of the total trade turnover (Mosunova, 2025). According to statistics as of *March 2024*, China became Kazakhstan's second-largest partner in exports and its most significant partner in imports. In 2024, China's share in the RK's imports and exports was 32.2% and 14.7%, respectively (Qazstat, 2025). According to *2024 data*, the volume of cargo traffic between the two countries has exceeded 32 million tons. 13.7 million tons of this volume consisted of goods exported from Kazakhstan, primarily grain, iron, and colored ore, as well as ferrous and non-ferrous metals (MT RK, 2025).

Furthermore, in June 2024, the Republic of Kazakhstan, jointly with the People's Republic of China and the Russian Federation, signed an *Agreement on the Creation of a Single Digital Platform (SDP)*. The signing of this document implies not only increasing trade, expanding logistics communications, and facilitating customer procedures along the *China-Kazakhstan-Russia route*, but also strengthening trilateral relations (KTZ Express, 2024). As is well-known, Russia and China also have close economic ties. In 2024, the volume of Russian-Chinese trade reached \$245 billion, a 2% increase from 2023, when bilateral trade turnover hit a record \$240 billion (InfraNews, 2025).

Lastly, returning to China, in 2015, *Xi Jinping* proposed the introduction of digital technologies in the promotion of the *Digital Silk Road* (Ghimire, Ali, Long, Chen, & Sun, 2024), which is a part of the global Chinese "*Belt and Road*" Initiative (Cheng & Zeng, 2024). In Kazakhstan, the introduction of modern technologies is taking place within the framework of the "*Digital Kazakhstan*" State Program, which was approved in *December 2017* and included the implementation of such points as "*Digitalization of economic sectors*", "*Transition to a digital state*", "*Implementation of the Digital Silk Road*", "*Development of human capital*", and "*Creation of an innovative ecosystem*" (AKJ "Adilet", 2017).

4 Conclusion

In summary, Kazakhstan's Infrastructure Development Program, initiated in 2014, was implemented in response to both internal and external socio-economic imperatives. As evidenced by *the Presidential Addresses of 2012 and 2014*, the strategic urgency of economic modernization was framed as essential for enhancing national competitiveness and mitigating emerging social pressures. The program's social impact was particularly notable

in addressing deficits in educational infrastructure, as internal migration and population growth intensified the demand for schools in key urban centers such as *Astana* and *Almaty*. The resulting increase in preschool and school facilities underscores the program's effectiveness in this domain. Furthermore, the *2016 Agreement*, which aligned the "*Nurly Zhol*" Program with China's "*Belt and Road*" Initiative, expanded the program's significance beyond domestic development goals, integrating Kazakhstan into a broader Eurasian cooperation framework. Thus, this convergence of national priorities with international economic initiatives highlights the evolving role of infrastructure policy not only as a driver of internal modernization but also as a mechanism for regional integration.

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