



# Kazakhstan-EU Weekly Briefing

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# Highlights

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## Middle Corridor

Kazakhstan assumed the 2026 chairmanship of the Union of Turkic Chambers of Commerce and Industry (TCCI), announcing that it will prioritise industrial cooperation projects, the creation of a portfolio of joint initiatives, and the expansion of transport and logistics corridors, including the Middle Corridor. The decision was confirmed at the TCCI General Assembly, alongside the appointment of Raimbek Batalov as President of the Union for 2026. The mutual trade between Kazakhstan and OTS member states reached approximately \$10.4 billion between January and October 2025, with exports rising by around 17%, reflecting intensifying economic exchanges within the corridor space. Kazakhstan's officials also reiterated their intention to strengthen logistics connectivity and develop value-added supply chains across the Turkic region.

### **Implications:**

The chairmanship places the Middle Corridor high on the institutional agenda of Turkic economic cooperation. The focus on project development and logistics expansion links political coordination with practical connectivity efforts, while the trade figures demonstrate that this cooperation is accompanied by tangible growth in intra-regional exchange.



# EU-Centric Trends: Brussels' Point of View

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## EBRD Continues to Expand Its Investment Portfolio in Central Asia

The European Bank for Reconstruction and Development (EBRD) approved two new financing operations in Central Asia, supporting infrastructure and industrial capacity in Kazakhstan and Uzbekistan. In Kazakhstan, the EBRD is providing up to **€25 million to Sarens Kazakhstan** to expand heavy-lifting and transport capacity for renewable energy and logistics projects, including those linked to the Trans-Caspian Corridor. In Uzbekistan, the EBRD is extending up to **US\$ 20 million to pharmaceutical producer Nika Pharm** to modernise facilities, increase output, and achieve GMP certification.

**Trend Analysis:** Kazakhstan's request reflects practical concerns about project timelines and the need for predictable financing. While the EU has announced significant financial commitments for the region, many projects remain in preparatory phases. Kazakhstan is seeking clearer schedules, more rapid decision-making, and faster movement from planning to implementation. The appeal also highlights increasing competition for infrastructure investment in the region.



Credit: EBRD

**Why it Matters:** Accelerating EU investment would support Kazakhstan's efforts to diversify export routes, strengthen energy security, and modernise infrastructure. For the EU, demonstrating progress on Global Gateway commitments would reinforce its credibility as a long-term regional partner and provide a counterweight to faster-moving competitors in the infrastructure space.

**What to Watch:** Look for detailed project timelines, financing decisions, and tender announcements, particularly in Middle Corridor upgrades, renewable-energy development, and digital connectivity. Any EU statements responding to Kazakhstan's call for faster delivery will also be important signals.

# Kazakhstan-Centric Trends: Developments on the Ground

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## 1. Kassym-Jomart Tokayev Sets Strategic Priorities for 2026

In an interview with the newspaper *Turkistan* on January 5, President Kassym-Jomart Tokayev reviewed Kazakhstan's 2025 outcomes and set out priority directions for the next phase of national modernisation. The few core areas discussed were: **digitalisation and artificial intelligence**, framed as a strategic driver of state capacity and economic competitiveness; **nuclear energy**, linked to energy security and technological development; **transit and logistics**, reflecting Kazakhstan's role at the centre of Eurasian transport corridors; and **constitutional reform**, with extensive amendments under preparation following the referendum.

**Trend Analysis:** The outlined four priorities can be situated within an ongoing, phased modernisation process, reflecting a continuation and consolidation of long-term presidential directives. Digitalization, AI development, and transit initiatives indicate a sustained focus on technological advancement and regional connectivity, while energy and constitutional reforms demonstrate integrated planning across industrial, economic, and governance sectors.



Credit: Akorda

**Why it Matters:** The interview provides a crucial insight into Kazakhstan's strategic direction for 2026, serving as an authoritative source on the government's priorities for the year ahead. As well as the administration's long-term vision for modernization, economic resilience, and geopolitical positioning, allowing for assessment on how Kazakhstan intends to balance technological innovation, energy security, infrastructural development, and political reform in shaping its future trajectory.

# Kazakhstan-Centric Trends: Developments on the Ground

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**What to Watch:** Attention should be given to the implementation of AI and digital infrastructure projects. Progress in nuclear power and rare earth cooperation with global partners will indicate Kazakhstan's industrial and technological capacity. Development of transit corridors, rail and road networks, and integration into international logistics projects will be important indicators of strategic positioning. On constitutional reform, the scope of amendments and the degree of public and institutional engagement will be central to assessing the depth of political transformation.



# Kazakhstan-Centric Trends: Developments on the Ground

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## 2. Foreign Companies Accelerate Manufacturing Localisation in Kazakhstan

Kazakhstan is seeing a growing shift by foreign companies from import-based market presence to local manufacturing. This trend is supported by strong industrial dynamics: in January–September 2025, manufacturing output grew by around 6.2%, while foreign direct investment into manufacturing reached approximately USD 3.2 billion, more than 20% higher year-on-year and exceeding investment in the mining sector for the first time in over a decade.

**Trend Analysis:** This development reflects the continued implementation of Kazakhstan's industrial diversification policy in the context of global supply chain reconfiguration. International companies are increasingly using Kazakhstan as a regional production base rather than only a sales market. This is visible in sectors such as automotive (KIA), engineering and transport equipment (Wabtec), consumer goods (Mars) and pharmaceuticals, alongside above-average growth in machinery, chemicals and metal products.

**Why it Matters:** Growing localisation strengthens Kazakhstan's manufacturing base, increases value-added production and supports export capacity. For external partners, including the EU, this reinforces Kazakhstan's role as a more integrated industrial partner rather than primarily a resource supplier.

For European companies, Kazakhstan's attractiveness as a manufacturing location is based on a combination of structural and policy factors: access to the EAEU single market, which allows tariff-free exports to a regional market of more than 180 million consumers; the availability of Special Economic Zones offering tax and customs preferences and ready industrial infrastructure; and improving transport connectivity to both European and Asian markets via transcontinental corridors.

Investments in localisation and processing also signal growing business confidence in Kazakhstan's long-term economic trajectory and investment environment, as such projects require long-term commitments to fixed assets and production chains. This, in turn, underlines the country's increasing integration into regional and global value chains.

**What to Watch:** Attention should focus on the implementation of announced localisation projects and whether manufacturing continues to attract a rising share of foreign investment relative to the extractive sector.

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# News Sources

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- 1) Kazakhstan to lead Turkic chambers of commerce and industry in 2026 ([Qazinform](#))
- 2) Kazakhstan's Astana Becomes Hub for Turkic Economic Dialogue ([Caspian Post](#))
- 3) Kazakhstan Strengthens Trade and Economic Cooperation With Turkic States ([Astana Times](#))
- 4) EBRD facilitates development of renewables and logistics infrastructure in Kazakhstan ([EBRD](#))
- 5) EBRD promotes domestic production of pharmaceuticals in Uzbekistan ([EBRD](#))
- 6) International Corporations Land in Kazakhstan: Boost in Production and Localization ([World Financial Review](#))
- 7) Tokayev Outlines Foreign Policy, Reform Agenda for 2026 in Interview ([Astana Times](#))
- 8) Tokayev Says 2026 Will Be Decisive for Kazakhstan's Modernization in Interview ([Astana Times](#))
- 9) Head of State convened a working meeting on parliamentary reform ([Akorda](#))
- 10) President proclaims Kazakhstan's year of AI off to good start ([Eurasianet](#))



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