



# Kazakhstan- EU Weekly Briefing

**Issue 21**

**April 6-12, 2026**

# Highlights

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## Middle Corridor

On April 7, Kazakh Foreign Minister Yermek Kosherbayev visited Georgia to expand cooperation on transport routes in the Caspian-Black Sea basin. The visit prioritized the development of the Trans-Caspian International Transport Route (TITR) and the launch of a new multimodal terminal in the Georgian port city of Poti, which will act as a critical link in the Middle Corridor's logistics chain.

**Implications:** The visit underscores Kazakhstan's continued prioritisation of the Middle Corridor as a strategic alternative to traditional transit routes. By strengthening coordination with Georgia, especially in key areas such as Poti, Kazakhstan is addressing logistical bottleneck. In the medium term, this enhances the route's attractiveness for European and regional trade flows, particularly in a context of ongoing geopolitical fragmentation and shifting supply chains.

## Critical Raw Materials

On April 11, 2026, a major step forward was taken in the Critical Raw Materials (CRM) sector as the Kazakh company 'Aidarly Mining' announced plans for a \$4.5 billion mining and processing complex in the Abai region. The project aims to



Credit: gov.kz

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produce 1.1 million tons of copper concentrate annually, a strategic material for the EU's green transition. This development follows a policy shift where Kazakh mining champions are moving beyond extraction toward local value addition, aligning with the EU's requirement for domestic refining. This week, technical discussions centered on how such large-scale facilities can meet the 65% non-single-source mandate of the EU's CRM Act while leveraging the new green energy frameworks to offer carbon-neutral minerals to European automotive and defense giants.

**Implications:** The integration of massive processing facilities inside Kazakhstan allows the country to offer refined, high-purity materials directly to the European market. As EU regulations on supply chain traceability and carbon footprints tighten, Kazakhstan's move toward green refining will make it the preferred partner over traditional suppliers. This creates a high-tech industrial cluster within the country, moving the partnership from a raw materials for cash model to one of deep industrial interdependence and shared technological standards.

## Trade

The World Bank's April 8, 2026, Economic Update for Europe and Central Asia highlighted the growing role of industrial policy and fragmentation in regional trade. While the report forecasted a moderate slowdown in regional growth to 2.1% due to geopolitical tensions, it noted that Kazakhstan's strategic focus on the Middle Corridor is a primary driver of economic resilience. Bilateral trade between the EU and Kazakhstan remains a cornerstone of the region, and this week's updates suggest a scissors effect where institutional trust and trade volumes remain high despite external economic pressures. The push for Visa Facilitation continues to be viewed as an economic necessity to offset potential slowdowns by easing the movement of business professionals and technical experts.

**Implications:** The trade relationship is currently navigating a period where external economic pressures are rising. The World Bank's findings highlight that the Global Gateway is no longer just a bonus for growth but an essential buffer against trade fragmentation. For the EU, the implication is that accelerating trade-related reforms and the Visa Facilitation Agreement is the most effective way to sustain trade volumes and ensure that the Gate remains open even as global energy and commodity markets experience volatility.

## Digitalization

In alignment with the official designation of 2026 as the 'Year of Digitalization and

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AI,' the Kazakh Ministry of Artificial Intelligence and Digital Development launched the 'AI Leaders 2026' program on April 9, 2026. Created in partnership with Stanford University and OpenAI, the initiative is designed to train top executives in systemic digitalization and AI integration across all economic sectors. Simultaneously, the Presidents of Kazakhstan and Uzbekistan attended an AI hackathon on April 11, underscoring the regional push for a unified Smart Corridor ecosystem. These efforts are aimed at synchronizing regional GovTech with European digital standards to ensure that transcontinental trade remains transparent and corruption-free through AI-powered risk assessment and automated customs.

**Implications:** Kazakhstan is attempting to code its way out of logistical bottlenecks. By focusing on AI and satellite connectivity, the country is bypassing traditional bureaucratic hurdles that have historically slowed trade along the Middle Corridor. For the EU, this results in the creation of a Smart Gateway where every container is a trackable data point. This level of transparency is essential for European regulators to verify ESG standards, potentially making the Middle Corridor the world's first fully audited and AI-optimized trade route.

# EU-Centric Trends: Brussels' Point of View

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On 9 April 2026, Kazakhstan's Senate approved the law ratifying the agreement on strategic partnership in the production and transmission of green energy among Azerbaijan, Kazakhstan, and Uzbekistan. The deal establishes a framework for cross-border renewable electricity transmission and for joint production and trade of green hydrogen and ammonia, with the stated aim of building export routes to Europe. The agreement also provides for a joint steering committee, a working group, confidentiality rules, and dispute-resolution procedures, indicating that it functions as an operational instrument rather than a political declaration.

## **Trend Analysis:**

The Senate ratification moves the trilateral green energy partnership from a political commitment, first signalled at COP-29, into a binding legal framework with governance structures. The inclusion of a joint steering committee and working group means the three countries now have institutional machinery to advance implementation, coordinate regulatory positions, and engage with European



Credit: ortcom.kz

# EU-Centric Trends: Brussels' Point of View

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counterparts on the technical and commercial parameters of future exports. The scope of the agreement, covering both electricity transmission and green hydrogen and ammonia, reflects the full range of clean energy products that the EU is seeking to diversify into under its Global Gateway and REPowerEU frameworks.

## **Why it Matters?**

For the EU, the ratification by all three parties transforms the Trans-Caspian green energy corridor from a declared ambition into an agreement with enforceable provisions and a governance architecture. This materially advances the feasibility of the corridor as a supply route for renewable electricity, hydrogen, and ammonia to European markets, directly supporting EU energy diversification and decarbonisation goals. Kazakhstan's role as a transit and production hub within this framework also reinforces its strategic value to the EU beyond hydrocarbons, at a moment when Brussels is deepening engagement on critical raw materials and clean industrial supply chains.

## **What to Watch?**

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# Kazakhstan-Centric Trends: Developments on the Ground

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This week, Kazakhstan made **tangible progress in industrial processing, energy modernization, and investment governance**. The government continues to treat value-added manufacturing and legal predictability as central to its economic strategy, linking industrial output to enhanced regulatory protection. In the Zhambyl Region, the launch of the first amino acid production facility in Central Asia marks a shift toward high-tech agro-industrial exports. At the same time, the country is modernizing its energy sector through a national coal project focused on generation capacity and digital distribution. Capping these developments, the introduction of dedicated prosecutorial oversight for investment projects aims to institutionalize legal security across the economy.

## Trend Analysis:

This week's developments illustrate how the strategy for value-added industrial production is being operationalized across multiple sectors simultaneously.



Credit: Zhambyl Region's Akimat

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In the agro-industrial sector, the move into amino acid manufacturing signals an intent to anchor regional supply chains in processing rather than simple commodity exports. In energy, the strategy focuses on increasing the downstream value of domestic resources through high-efficiency generation, coal chemistry, and digital monitoring systems. Supporting these shifts is a move toward administrative transparency; by installing a "prosecutorial filter" to block unjustified state actions, the government is attempting to reduce the unpredictability that has historically constrained the investment climate.

## **Why it Matters:**

For EU-Kazakhstan cooperation, these steps reduce the friction and risk premiums that have complicated deeper economic engagement. The expansion into specialized manufacturing creates concrete commercial channels within Special Economic Zone structures that are familiar to European trade frameworks. In the energy sector, the emphasis on clean coal technologies and emissions benchmarks moves Kazakhstan's profile closer to EU-aligned sustainability criteria, lowering the barrier for energy connectivity projects. Most significantly, the investment protection framework addresses a core structural concern for European firms: the risk of arbitrary administrative interference. If successful, this mechanism creates the predictable legal environment necessary for long-term manufacturing and infrastructure investment.

## **What to Watch:**

Key indicators include whether the prosecutorial protection framework produces consistent outcomes in high-value disputes involving foreign firms. On the industrial side, watch the operational ramp-up of the Zhambyl facility to see if Kazakhstan can sustain the logistics required to be a reliable regional exporter. Finally, the credibility of the Coal Power Development project will depend on whether clean technology commitments translate into measurable procurement standards.

# News Sources

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- 1) Kazakhstan's Senate passes agreement to export green energy to Europe ([Kazinform](#))
- 2) Kazakhstan says ready to expand cooperation with Georgia on development of regional transport routes ([Anadolu Ajansı](#))
- 3) Economic Growth to Slow in Europe and Central Asia as Risks Rise ([World Bank Group](#))
- 4) Top Kazakhstani executives to undergo AI training with professors from Stanford, OpenAI Academy ([Kazinform](#))
- 5) Zhambyl Region Advances Corn Processing Project with First Amino Acid Output ([Astana Times](#))
- 6) Kazakhstan Strengthens Coal Sector with Clean Tech, Digital Push ([Astana Times](#))
- 7) Kazakhstan Assigns Prosecutors to Oversee Each Major Investment Project ([Astana Times](#))



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