

# Kazakhstan- EU Weekly Briefing

**Issue 23**

**April 20-26, 2026**

# Highlights

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## Middle Corridor

On April 26, 2026, Kazakhstan signaled a major expansion of the Middle Corridor's reach during high-level talks with Qatari logistics giant Milaha (Qatar Navigation) and Power International Holding. The discussions focused on integrating Qatari capital and maritime expertise into Kazakhstan's Caspian ports, Aktau and Kuryk, to globalize the route beyond the existing EU-China axis. Simultaneously, on April 23, KMG Kashagan confirmed that Kazakhstan is actively weighing the Middle Corridor (TITR) as the definitive alternative for oil exports to the European Union. This move is designed to mitigate long-term reliance on the Caspian Pipeline Consortium (CPC) and ensure that Kazakh energy supplies reach European markets through a multi-modal path that avoids current regional geopolitical bottlenecks.

**Implications:** By bringing Qatari logistics expertise and capital into the Middle Corridor, Kazakhstan is diversifying the financial backing of the route, moving it from a regional project to a global trade node. For the EU, the implication is a significantly more resilient energy supply chain. The shift of oil exports to the TITR reduces the risk of sudden energy disruptions caused by external political pressures on existing pipeline routes, effectively securing Europe's strategic autonomy while establishing Kazakhstan as a reliable, multi-directional energy hub.



Credit: MFA of Kazakhstan

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## Critical Raw Materials

The Regional Ecological Summit (RES 2026), held in Astana from April 22–24, marked a transformation in the EU-Kazakhstan CRM Roadmap. This week, the focus shifted from raw extraction to the 'circular economy,' with the United Nations Environment Programme (UNEP) and the EU launching partnerships to recycle mining and metallurgical waste. The summit concluded with a commitment to extract rare earth elements from existing mining tailings, leveraging a new regional climate and ecology investment portfolio. This ensures that the minerals produced for the EU market meet the high ESG (Environmental, Social, and Governance) standards required for the European green transition, while specifically addressing the water-intensive nature of metallurgical processing in Central Asia.

**Implications:** This shift toward circularity ensures that Kazakhstan remains the preferred partner for the EU's automotive and defense sectors, which are increasingly sensitive to 'clean' supply chains. By extracting critical minerals from waste rather than new mines, the partnership reduces the environmental footprint of the Global Gateway. For Kazakhstan, it allows for industrial modernization and the reclamation of environmentally degraded land, turning legacy industrial liabilities into strategic economic assets.



Credit: Xinhua news

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## Trade

A significant milestone for regional trade stability was reached on April 24, 2026, with the signing of the Astana Declaration on Ecological Solidarity. The declaration establishes a unified regional position on climate action and trade, linking industrial growth directly to sustainable water governance. On April 23, Kazakhstan furthered this agenda by initiating UN-level consultations for the creation of an International Water Organization. This initiative aims to manage transboundary water resources that are critical for the production of green hydrogen and agricultural trade between Kazakhstan and the European Union, positioning Astana as a global diplomatic center for resource security.

**Implications:** Trade stability in the EU-Kazakhstan Gateway is now being explicitly tied to water security. By leading the charge for a UN Water Organization, Kazakhstan is attempting to de-risk the region from climate-induced resource conflicts that could disrupt rail and energy corridors. This proactive diplomacy makes the region a more 'bankable' destination for European institutional investors who prioritize geopolitical stability and long-term environmental sustainability in their portfolios.

## Digitalization

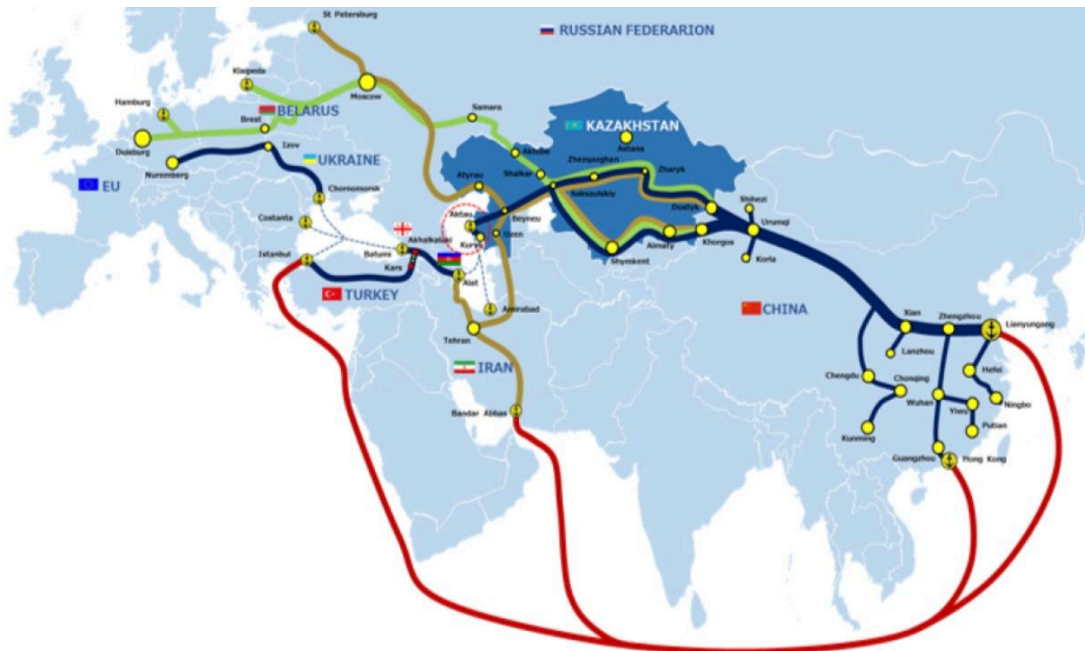
Following the sessions in Qatar on April 26, Kazakhstan and Qatar reached a technical agreement to intensify cooperation in telecommunications and digital port infrastructure. The partnership aims to power 'smart' transit hubs along the Middle Corridor using advanced gas processing and Qatari telecommunications technology. This initiative is designed to implement paperless customs technologies and machine learning-based data analysis for satellite-aided logistics. By integrating Qatari digital capital into the Caspian port ecosystem, the project intends to provide real-time tracking and automated document processing, fulfilling the high-tech requirements of the EU's Global Gateway digital connectivity pillar.

**Implications:** The integration of Qatari telecommunications expertise accelerates the 'Smart Corridor' vision, making the Middle Corridor a digital-first trade route. Digitalizing the tracking and customs process at the Caspian ports will significantly reduce transit friction and administrative wait times. For the EU, this translates to a transparent, data-driven Gateway where every container is a trackable data point, ensuring that the overland route can match the operational efficiency of modern maritime hubs.

# Kazakhstan-Centric Trends: Developments on the Ground

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This week, **Kazakhstan launched a structured clean energy investment platform, advanced major transport corridor infrastructure, and initiated a long-term geological exploration program.** On clean energy, the government signed a memorandum with the European Bank for Reconstruction and Development to establish QaJET, targeting 10 gigawatts of new renewable capacity by 2035 and requiring an estimated \$20 billion in financing. The platform's first project is a 1 GW wind plant backed by a \$548 million EBRD-led loan involving TotalEnergies, Société Générale, China Construction Bank, and Standard Chartered. A separate \$180 million waste-to-energy facility broke ground in Astana, designed to process 1,500 tons of municipal waste daily and generate 50 MW of electricity. On transport, Kazakhstan committed to building 5,000 additional kilometers of rail over the next four years and confirmed port upgrades at Aktau and Kuryk to expand container capacity to 300,000 TEUs annually by 2029, while the TezCustoms digital border system already cut China clearance times from 8 hours to 30 minutes. The national oil company separately launched a five-year exploration program across 23 projects targeting pre-salt formations in the Caspian Basin to offset declining output at mature fields.



Credit: kyruk.kz

# Kazakhstan-Centric Trends: Developments on the Ground

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## **Trend Analysis:**

Kazakhstan is building investment deals that are financeable by design rather than by diplomatic intent. The QaJET platform combines an intergovernmental agreement, a sovereign power purchase agreement, and a diversified international lending syndicate before a single turbine is ordered. This is a structural shift from announcing renewable targets and waiting for investors. In transport, Kazakhstan is moving beyond operating a corridor toward owning it, investing in terminals in China, pursuing acquisitions in Europe and the Caucasus, and digitizing border systems to compete with maritime shipping on time and cost.

## **Why it Matters:**

For EU-Kazakhstan cooperation, the EBRD memorandum and the Mirny wind project are the most concrete alignment to date between Kazakhstan's energy transition and European development finance. Société Générale's direct participation in the lending syndicate signals that European commercial banks are now taking on Kazakhstani clean energy risk, not just multilateral institutions. On connectivity, improvements to Trans-Caspian corridor capacity have a direct operational effect on European supply chains that have rerouted away from Russian transit infrastructure since 2022. The geological exploration program is relevant to EU energy security planning that continues to factor in Caspian crude through the 2030s.

## **What to Watch:**

The critical indicator is whether the Mirny wind project reaches financial close on the full \$548 million facility, testing whether QaJET functions as a replicable financing template or a one-off deal. On transport, the 2026 port upgrade schedule at Kuryk and Aktau is the operational bottleneck for the container capacity target. The new China rail border crossing, with its first phase due in 2027, is the structural milestone for long-term corridor growth. Finally, watch whether the waste-to-energy model is replicated in other regions, which would confirm it as a scalable investment category rather than a single showcase project.

# News Sources

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- 2) Regional Ecological Summit in Astana Produces Ecology Declaration and Broader Regional Agenda ([The Times of Central Asia](#))
- 3) Kazakhstan weighs Middle Corridor for oil exports ([Report.az](#))
- 4) Talks Begin on Kazakhstan-Initiated UN Water Organization at RES 2026 ([Astana Times](#))
- 5) New regional partnerships to drive joint environmental action in Central Asia ([UN Environment Programme](#))
- 6) KazMunayGas Bets on Deep Exploration to Secure Future Energy Supplies ([Astana Times](#))
- 7) Astana Launches \$180 Million Waste-to-Energy Ecopark in Partnership with Chinese Company ([Astana Times](#))
- 8) Transit Along Trans-Caspian Route Triples Over Five Years as Kazakhstan Expands Port Infrastructure ([Astana Times](#))
- 9) Kazakhstan Expands Rail Network and Transit Corridors to Strengthen Eurasian Connectivity ([Astana Times](#))
- 10) Kazakhstan Unveils Investment Platform to Drive Energy Transition, Partners with EBRD ([Astana Times](#))



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