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Agenda Item 4: Emerging technologies, new business models and other associated aspects
4.1: Economic regulatory frameworks on emerging technologies

ADVANCED AIR MOBILITY IN KAZAKHSTAN: THE ALATAU CITY AIR-TAXI ECOSYSTEM

(Presented by Kazakhstan)

EXECUTIVE SUMMARY

Kazakhstan is developing an integrated urban air mobility ecosystem at Alatau City, comprising electric vertical take-off and landing (eVTOL) air-taxi demonstration flights in 2026, a dedicated test center, a planned network of six vertiports by 2028, and national legislation adopted in 2026 that gives legal status to eVTOL aircraft, vertiports and two categories of advanced air mobility operations. This paper presents that experience as a national case study on enabling and regulating a frontier sector, and as the practical basis for the economic regulatory principles proposed by Kazakhstan under this agenda item.

1. INTRODUCTION

1.1 Advanced air mobility (AAM) is moving from trials to early commercial service, and States are now taking the first practical decisions on how these operations are authorized, accommodated and regulated. This paper describes Kazakhstan's approach at Alatau City and the lessons drawn from it.

1.2 It complements the working paper presented by Kazakhstan under this agenda item, which proposes that the International Civil Aviation Organization (ICAO) develop high-level economic regulatory principles for advanced air mobility and unmanned aircraft (UA). The experience described here is the practical basis for that proposal.

2. DISCUSSION

2.1 Alatau City has been designated as the site of an integrated urban air mobility (UAM) ecosystem. Its components are being developed together rather than in sequence: electric vertical take-off and landing (eVTOL) air-taxi demonstration flights scheduled for 2026, a dedicated test center for the evaluation of aircraft and operations, and a planned network of six vertiports to be completed by 2028.

2.2 In 2026, Kazakhstan adopted legislation giving legal status to eVTOL aircraft and to vertiports, and establishing two categories of AAM operations. Providing a legal basis before commercial operations begin, rather than after, was a deliberate choice: it gives operators, investors and infrastructure developers the certainty they need to commit.

2.3 Three lessons have emerged so far. First, the safety and airspace questions are the easier part; the economic questions of market entry, charges for vertiport access and the treatment of privately developed infrastructure have had to be answered nationally with little international reference. Second, a dedicated test environment shortens the path from demonstration to authorization by letting the authority and the operators learn on the same ground. Third, a phased vertiport network allows demand and charging models to be tested before larger commitments are made.

2.4 Kazakhstan's geography also shapes its interest. Beyond the urban use case, the same technologies may offer connectivity to remote areas that conventional services cannot serve on a commercial basis, and the economic rules set now will determine whether that potential is realized.

3. CONCLUSION

3.1 Kazakhstan's experience at Alatau City indicates that the economic regulatory framework for AAM is the least developed part of the picture and the part most in need of common international reference points.

3.2 Kazakhstan offers this experience to other States considering similar developments and invites exchange with States and organizations working on advanced air mobility.

3.3 The Conference is invited to note the information contained in this paper.

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