

Kazakhstan- EU Weekly Briefing

Issue 20

**March 30 - April 5,
2026**

Highlights

Middle Corridor

This week, the development of the Trans-Caspian International Transport Route (TITR) gained significant momentum following the high-level meeting of the Organization of Turkic States (OTS) in Baku on April 2, 2026. Prime Minister Olzhas Bektenov announced that Kazakhstan and Azerbaijan are preparing to sign a comprehensive agreement in 2026 specifically designed to strengthen the status and operational efficiency of the Middle Corridor. A critical focal point of this new agreement is the integration of the Zangezur Corridor (linked to the 'Trump Route for Peace and Prosperity' or TRIPP), which is expected to provide a streamlined, high-capacity connection between mainland Azerbaijan and the West. This legislative push is being supported by a new proposal to form a special working group for a digital monitoring center to provide real-time oversight of cargo flow across the Caspian Sea.

Implications: The formalization of a legal 'status' for the Middle Corridor addresses one of the primary concerns for European investors: jurisdictional and regulatory consistency. By linking the Trans-Caspian route to the newly emerging TRIPP/ Zangezur connections, Kazakhstan is ensuring that its 'Gateway' is not an isolated project but the central node in a wider Eurasian network. This reduces the risk of bottlenecks at the Caucasian border and provides the 'hard' legal guarantees necessary for private institutional capital to fund the next generation of port and rail upgrades.

Critical Raw Materials

On April 1, 2026, the European Court of Auditors (ECA) released a landmark special report (04/2026) evaluating the EU's strategy for Critical Raw Materials (CRM). The report specifically scrutinized the effectiveness of EU funding and the robustness of the 'Strategic Raw Material' lists that underpin partnerships with countries like Kazakhstan. The audit found that while the Critical Raw Materials Act sets ambitious targets, such as ensuring no more than 65% of any strategic material originates from a single non-EU country by 2030, so the underlying data and projections currently lack the granularity needed for precise industrial planning. This report has sparked immediate calls for the European Commission to improve trade data reliability and refine demand projections for materials like lithium and rare earth elements.

Implications: For Kazakhstan, this audit serves as a catalyst for more transparent and data-driven mining partnerships. The ECA's call for 'improved granularity' means

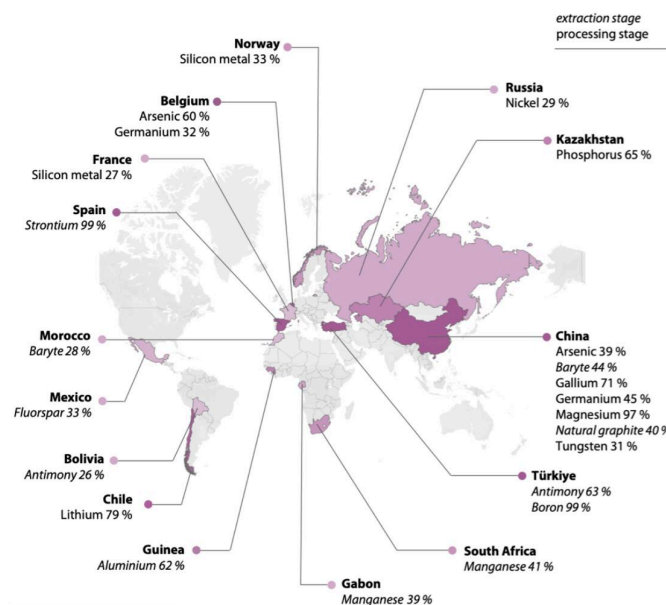
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that future EU investments in Kazakh mining projects will likely come with stricter requirements for geological reporting and supply chain traceability. While this increases the 'compliance burden' for Kazakh mining firms, it also filters out lower-quality projects and ensures that the materials entering the EU market are of a 'gold standard' quality, ultimately making Kazakhstan a more attractive, de-risked partner for European industrial giants.

Trade

Trade highlights this week centered on the synchronization of digital standards to reduce non-tariff barriers between Kazakhstan and its major trading blocs. On March 31, 2026, Deputy Prime Minister Serik Zhumangarin held extensive talks with the Eurasian Economic Commission to discuss the digitalization of public procurement and the elimination of barriers to ensure equal market access. While these talks focused on the EAEU, the 'systematic interaction' and 'data exchange' models discussed are being directly aligned with the EU's Global Gateway digital standards to ensure that Kazakh businesses can compete on a level playing field in both Eastern and Western markets. This effort is part of a broader 'Innovation over

Figure 1 | Main EU suppliers of selected critical raw materials



Credit: 2025 Mapbox © OpenStreetMap

Highlights

Bureaucracy' strategy aimed at making Kazakhstan a frictionless hub for transcontinental trade.

Implications: The move toward digitalizing public procurement and harmonizing trade competition rules is a significant 'soft infrastructure' win for European companies operating in the region. By adopting transparent, AI-supported digital procurement platforms, Kazakhstan is reducing the potential for corruption and increasing the predictability of the business environment. This aligns the Kazakh domestic market more closely with European 'Single Market' principles, making it significantly easier for EU firms to scale their operations and participate in large-scale infrastructure tenders along the Gateway.

Digitalization

The final week of March and the beginning of April saw a major acceleration in Kazakhstan's human capital development through the AI-Sana initiative. On April 1, 2026, a Memorandum of Cooperation was signed between the Eurasian Development Bank (EDB) and the Ministry of AI and Digitalization to fund and implement joint AI projects. This was followed on April 2 by a strategic briefing for President Tokayev on the launch of the 'AI-Enabled University' project, a new type of industrial university that integrates artificial intelligence directly into educational and production processes. Simultaneously, the Ministry of Science and Higher Education renewed its partnership with Coursera this week to provide over 235,000 students with industry-recognized certifications in AI, Data Science, and Digital Ethics.

Implications: By embedding AI literacy at the university level, Kazakhstan is building the 'technical brain' needed to operate a 21st-century logistics hub. The 'AI-Enabled University' model ensures that the future workforce will not just be consumers of technology, but developers of the AI-driven logistics and customs platforms that define the Global Gateway. For the EU, this means that the Gateway's local partners will be technically proficient and interoperable, reducing the need for expensive 'imported' expertise and ensuring the long-term sustainability of the corridor's digital infrastructure.

EU-Centric Trends: Brussels' Point of View

The First EU-Central Asia Interparliamentary Cooperation Forum is held this week in Samarkand, marking the formal institutionalisation of a new dimension in EU-Central Asia relations. As a result of an event, the adoption of a joint statement was made. The forum signals a shift in the EU's regional engagement strategy toward multi-level governance and political embedding.

Why Is the EU Doing This?

The development reflects the EU objective to de-risk its engagement in Central Asia by strengthening institutional ties. Parliamentary diplomacy provides a softer but more durable tool for shaping the legislative environment. Especially in areas linked to connectivity, and green transition. In this sense, the forum complements flagship initiatives such as the EU's Global Gateway by targeting long-term cooperation.



Credit: The Times of Central Asia

EU-Centric Trends: Brussels' Point of View

What it Changes?

The establishment of a regular interparliamentary track suggests that EU-Central Asia relations are entering a more institutionalised phase. Engagement is not limited only to high-level summits, but embedded in socio-political level.

Kazakhstan-Centric Trends: Developments on the Ground

This week, Kazakhstan made progress on **water governance, digital infrastructure, clean energy, and subsoil transparency**. The government continues to treat digitalization and regulation as key to economic growth, linking laws to infrastructure planning and capacity building. At the regional level, Kazakhstan is introducing unified systems for water accounting, and distribution, along with proposals for formal cooperation mechanisms. At the same time, the country is improving its energy and resource sectors, combining foreign investment with efforts to increase transparency and efficiency.

Trend Analysis:

Kazakhstan is trying to reduce uncertainty by making systems measurable and easier to manage. In water, automated accounting and shared monitoring aim to make allocation clearer and disputes less political. Proposed regional frameworks focus on rational use, preventing transboundary harm, and sharing hydrological data. In digital policy, regulation is treated as infrastructure, supported by



Credit: Ministry of Energy of the Republic of Kazakhstan

Kazakhstan-Centric Trends: Developments on the Ground

large-scale projects and data solutions focused on sovereignty. In energy and resources, projects are designed for bankability and transparency, with clearer licensing and better access to subsurface data, creating more predictable conditions for investors.

Why it Matters:

For EU-Kazakhstan cooperation, these steps reduce uncertainty in sectors where European involvement matters. In water, shared monitoring could make transboundary management more predictable, supporting EU-backed connectivity, agriculture, and climate programs. In energy, clearer investment conditions and reliable systems make Kazakhstan more attractive for EU clean energy and power-intensive projects. In digital policy, laws and infrastructure could provide secure conditions for EU firms handling east-west data. In resources, improved transparency and access align with EU supply-chain priorities and lower risks for investors.

What to Watch:

Key indicators include whether water initiatives move from intent to action. In digital policy, watch decisions on financing, governance, and operational data solutions. In clean energy, follow procurement and grid integration, especially storage, which is critical for reliability. In resources, transparent licensing and steady private investment will show whether reforms are lasting and credible.

News Sources

- 1) The TRIPP agreement has given impetus to the development of the Middle Corridor ([Caucasian Knot](#))
- 2) Critical raw materials for the energy transition ([European Court of Auditors](#))
- 3) EDB fund and Kazakhstan ministry sign AI cooperation memorandum ([DigWatch](#))
- 4) Kazakhstan's Ministry of Science and Higher Education renews partnership with Coursera, further institutionalizing world-class learning from leading companies and universities ([Coursera Blog](#))
- 5) Kazakh President tasks to further commercialize scientific research ([Kazinform](#))
- 6) Digitalization, Competition and Access to EAEU Markets ([Official Information Source of the Prime minister of the Republic of Kazakhstan](#))
- 7) First EU-Central Asia summit, 4 April 2025 ([European Council](#))
- 8) Kazakh PM Bektenov Signals Water Cooperation Push ([Astana Times](#))
- 9) Kazakhstan Sees AI as Key to Growth, Kazakh PM Says at Digital Qazaqstan Forum ([Astana Times](#))
- 10) China's SPIC Launches \$1.2 Billion Wind Farm Project in Kazakhstan ([Astana Times](#))
- 11) Kazakhstan Boosts Exploration Push, Announces Major Onshore Discovery ([Astana Times](#))



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