Kazakhstan-EU Briefing

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Policy and diplomacy

President Tokayev, António Costa and Ursula von der Leyen reaffirm ambition to deepen Kazakhstan-EU relations in a joint statement (23 June, European Council)

President Kassym-Jomart Tokayev visited Brussels on 23 June and met European Council President António Costa and European Commission President Ursula von der Leyen. The issued joint statement presented the visit as a signal of the growing strategic partnership between Kazakhstan and the EU. It covered transport, critical raw materials, energy, digitalisation, emerging technologies, visa facilitation, education, research and political reform dialogue.

The President met European Commissioner for Trade and Economic Security Maroš Šefčovič, He also highlighted the partnership with the EIB, saying further cooperation with the bank should support Kazakhstan's sustainable development and regional connectivity.

Brussels meetings mark a new phase of EU–Kazakhstan economic partnership (24 June, Caspian News/Qazinform)

The discussions focused on expanding cooperation in strategic sectors including transport, renewable energy, digitalisation, critical raw materials, advanced manufacturing and industrial value chains. On 23 June, President Tokayev participated in the EU-Kazakhstan Business Roundtable, with EU Special Representative for Central Asia Eduards Stiprais, European Investment Bank Vice-President Marek Mora. And European Commission Executive Vice-President Maroš Šefčovič. The event brought together senior representatives of European businesses to explore new investment opportunities and strengthen commercial partnerships. Commercial agreements and memoranda worth more than €10 billion had been signed during the visit, presenting this as evidence of European business confidence in Kazakhstan's economy and reform course.

Why it matters:

The Brussels meetings indicate that EU–Kazakhstan economic relations are gradually moving beyond traditional energy exports towards a broader investment partnership centred on industrial modernisation, technology transfer and supply-chain resilience. The strong emphasis on business engagement suggests that both parties increasingly view private-sector investment as the primary mechanism for translating political commitments into tangible economic cooperation. The focus on critical raw materials, transport infrastructure and industrial cooperation also reflects the EU's wider strategy of diversifying supply chains and reducing strategic dependencies. Future investment decisions, regulatory alignment and implementation of business agreements will provide important indicators of whether the partnership is entering the "more mature phase" described by both sides following the visit.

What to watch:
The following developments are set to strengthen the cooperation between two sides. Watch implementation of the aviation agreement, signature of visa agreements, progress on the Critical Raw Materials Roadmap, and concrete financing under Global Gateway-linked projects.

Kazakhstan's new Constitution enters into force on 1 July as snap parliamentary election is set for 23 August (30 June, Reuters)

Kazakhstan's new Constitution entered into force on 1 July after being approved by a national referendum in March. New basic law creates a vice-presidency and changes Kazakhstan's previous two-chamber parliament into a one-chamber legislature. A parliamentary election has been set for 23 August. President Tokayev considers the changes as part of a wider political reform agenda and a strengthening of Kazakhstan's democracy.

Under the new electoral system, women, young people and persons with disabilities must collectively make up at least 30% of candidates. Kazakhstan has also reversed its recent experiment with direct elections for district akims and akims of cities of regional significance. These local executive leaders (roughly equivalent to mayors or district governors) will now be appointed by regional akims instead of directly elected.

Why it matters:

This domestic political development matters for EU-Kazakhstan relations because governance, rule of law and political reform are part of the wider partnership framework. The EU-Kazakhstan joint statement recognised Kazakhstan's reform agenda while also referring to continued dialogue on human rights, rule of law and anti-corruption.

What to watch:
Monitor the conduct of the August election, reactions from EU institutions and the Organisation for Security and Co-operation in Europe, and the appointment of the vice-president. The reform agenda may affect Kazakhstan's international image and the political context for investment and regulatory cooperation.

Belgium and Kazakhstan target cooperation in strategic sectors (23 June, The Astana Times)

Kazakhstan and Belgium discussed deeper cooperation in strategic industries, connectivity, the Trans-Caspian route, trade, investment, education, science and innovation. Belgium highlighted opportunities in semiconductors, energy, defence, nuclear power and critical raw materials. The article also notes 2025 trade of $582.4 million, Belgian FDI inflows of $1.044 billion, and 110 Belgian-capital companies operating in Kazakhstan.

Why it matters:
This gives the Brussels visit a concrete Belgium, linking Kazakhstan's role as a Central Asian hub with Belgium's logistics, research and industrial strengths. Relevant for companies in logistics, critical minerals, energy, semiconductors and applied research.

What to watch:
King Philippe of Belgium is scheduled to undertake a historic state visit to Kazakhstan in autumn 2026

Kazakhstan and Germany discuss deeper cooperation in energy and critical minerals
(30 June, The Astana Times)

Kazakhstan and Germany discussed trade, investment, energy, transport logistics and critical minerals during German Minister for Economic Affairs and Energy Katherina Reiche's visit to Astana. Bilateral trade reached $4.4 billion in 2025, while German investment in Kazakhstan rose by 28.5% to $700 million last year. Reiche framed Kazakhstan as relevant to German supply security and industrial resilience.

Why it matters:

As Germany looks for more resilient supply chains and Kazakhstan seeks technology, capital and industrial localisation, the partnership has room to move beyond supply contracts. Germany's industrial weight gives the EU-Kazakhstan raw materials agenda a stronger business and manufacturing dimension.

What to watch:

With political interest from Berlin now visible, watch for specific projects in critical minerals, energy infrastructure, green hydrogen, industrial equipment and processing capacity. The main outcome will be whether cooperation produces valuable exports, technology transfer and local value creation.

Transport, logistics and connectivity

EU and Kazakhstan sign Horizontal Aviation Agreement during President Tokayev's Brussels visit (23 June, European Commission)

The EU and Kazakhstan signed a Horizontal Aviation Agreement during Tokayev's Brussels visit. Once internal procedures are complete, any eligible EU airline will be able to operate between Kazakhstan and 17 EU member states whose current bilateral arrangements do not already allow such services. It replaces earlier restrictions that limited routes mainly to airlines owned or controlled by national airlines of an EU member state or Kazakhstan.

Why it matters:
This practical connectivity measure gives airlines a clear legal basis for new routes and aims to support business travel, tourism and cargo movement. In addition to developments in railways, it enhances connectivity between the two sides.

What to watch:
Watch when both sides launch new routes and whether it will be followed by an increase in air travel between Kazakhstan and the EU. The practical value of the agreement will depend on new routes, pricing, passenger demand and cargo use.

EIB and EBRD back new Trans-Caspian road infrastructure financing in Kazakhstan (23–26 June, European Investment Bank)

The European Investment Bank signed a €150 million framework loan to support road rehabilitation along the Trans-Caspian Transport Corridor, covering around 1,370 kilometres of roads in central and southern Kazakhstan. The European Bank for Reconstruction and Development additionally announced up to €230 million to help complete upgrades to a 234-kilometre road section between Aktobe and Ulgaisyn in western Kazakhstan.

Why it matters:
EU's Global Gateway agenda shows that Kazakhstan is an important strategic partner, as financing is directed towards improving connectivity in the region.

What to watch:
The key outcomes could be fewer delays, smoother border crossings, better road quality and more predictable transit times. It will also matter whether these projects are coordinated with other upgrades along the wider Trans-Caspian route.

Kazakhstan's transport programme targets roads, rail, airports and the Middle Corridor (1 July, Prime Minister of the Republic of Kazakhstan)

Kazakhstan reported work on major rail projects including Moyynty–Kyzylzhar, Darbaza–Maktaral, Astana–Karaganda and Arys–Kazaly, plus modernisation of 124 railway stations. The government also pointed to 10,000 km of road repairs, airport modernisation, a five-year cargo aviation plan, Caspian container-hub development, transshipment terminals and dredging linked to the Trans-Caspian International Transport Route.

Why it matters:
This is the domestic infrastructure counterpart to EU Global Gateway priorities. It affects customs, freight reliability, port capacity, aviation logistics and route resilience for companies using Kazakhstan as a Europe–Asia transit node.

Critical Raw Materials

EU and Kazakhstan reaffirm Critical Raw Materials Roadmap and laboratory cooperation (23 June, European Council)

During Tokayev's Brussels visit, EU and Kazakh leaders reaffirmed the Roadmap for the EU-Kazakhstan Strategic Partnership on Sustainable Raw Materials, Batteries and Renewable Hydrogen value chains. The joint statement also welcomed an EBRD Memorandum of Understanding for the development of an internationally accredited national chemical-analytical laboratory in Kazakhstan. The visit also produced agreements in the raw-materials sector. Zhezkazganredmet signed an agreement with EIT RawMaterials to train Kazakh specialists, and another with P&P Industries AG to prepare a feasibility study for a sulfuric acid plant. Industry Minister Yersayin Nagaspayev also met with Alphamar Resources, Danieli Group and BAUER Röhren- und Pumpenwerk to discuss possible cooperation in critical minerals, metallurgy and agricultural engineering.

Why it matters:
As Kazakhstan aims to move beyond raw extraction towards testing, certification, and processing, this development could help increase cooperation with the EU on critical raw materials. For Kazakhstan, internationally recognised laboratory capacity would support quality control, standards compliance and higher-value

participation in supply chains. For the EU, it would reaffirm Kazakhstan's credibility as a partner not only for resource access, but for reliable and verifiable supply.

What to watch:
Watch whether the roadmap produces relevant projects in the field of critical raw materials. The outcomes of this cooperation will depend on technical standards, environmental performance and downstream value creation in Kazakhstan.

Kazakhstan presents itself as supplier of 21 EU-listed critical raw materials (24 June, The Astana Times)

At the Kazakhstan-EU business roundtable in Brussels, Tokayev said Kazakhstan is ready to supply 21 of the 34 critical raw materials included on the EU list. He also proposed an offtake-based cooperation model linking access to strategic resources with investment, technology and domestic processing. Kazakhstan highlighted potential in lithium, nickel, vanadium and cobalt.

Why it matters:
As the EU searches for alternatives to concentrated critical raw materials supply chains, Kazakhstan is positioning itself as more than a source of unprocessed minerals. The cooperation aims to grant the EU resource access and seeks for investment, technology transfer and higher value-added production in Kazakhstan.

What to watch:
With Kazakhstan now making a clearer offer to European companies, watch whether interest turns into agreements, exploration partnerships, processing facilities and financing.

Digitalisation, AI and innovation

Kazakh Minister of Science and Education meets with EU representatives, strengthens scientific and innovation ties with European institutions (23 June, The Astana Times)

Kazakhstan and the EU signed a package of agreements on science, innovation, artificial intelligence and higher education as part of Tokayev's Brussels visit. Additionally, Minister of Science and Higher Education Sayasat Nurbek met with Maria Cristina Russo, European Commission's Deputy Director-General for Research & Innovation, and Michiel Scheffer, President of the European Innovation Council. The discussion included Kazakhstan's efforts to associate with Horizon Europe, the EU's research and innovation program. Serikbayev East Kazakhstan Technical University, KU Leuven, the SIM² Institute for Sustainable Metals and Minerals and Astana Hub signed a memorandum, which aims to support joint research on critical raw materials, sustainable technologies, industrial digitalisation and artificial intelligence in metallurgy and materials science.

Why it matters:
These agreements help link the raw materials agenda to skills, technology and innovation. Cooperation between two sides is moving towards applied research, standards, creation and sharing of processing and industrial knowledge.

What to watch:
Watch whether Kazakhstan's Horizon Europe ambitions move forward and whether the university agreements produce funded projects, joint research or researcher mobility.

Kazakhstan showcases digital government and artificial intelligence achievements at the UN (24 June, qazinform.com)

Kazakhstan presented its digital transformation and artificial intelligence agenda at the UN. Officials highlighted digital public infrastructure, artificial intelligence in the public sector, trust in digital technologies, international cooperation on digital transformation, and the planned Data Center Valley.

Why it matters:
As Kazakhstan turns digital government into part of its international profile, governance standards are becoming as important as technical capacity. Digital public services and artificial intelligence can support Kazakhstan's development, but privacy, accountability and cybersecurity safeguards must keep pace.

What to watch:
Watch whether Kazakhstan's digital governance framework converges with European expectations on personal data, cybersecurity and AI regulation.

Kazakhstan joins US-led Pax Silica initiative to advance AI economy (29 June, The Astana Times)

Kazakhstan formally joined the US-led Pax Silica initiative and the AI Opportunity Partnership during the second Pax Silica Summit in Washington, D.C. Deputy Prime Minister and Minister of Artificial Intelligence and Digital Development Zhaslan Madiyev signed Kazakhstan's accession declaration and a joint statement on the AI Opportunity Partnership. The initiative brings together countries and partners working on secure AI supply chains, including semiconductors, energy, critical minerals, data centres, advanced manufacturing and workforce development. The EU, Germany and the Netherlands are among the listed signatories. Kazakhstan also announced plans to develop education programmes with Stanford University.

Why it matters:
As Kazakhstan tries to build an AI-driven economy, Pax Silica links its digital ambitions to the supply chains behind artificial intelligence. Although US-led, the initiative is relevant for Kazakhstan-EU cooperation because the EU is also listed among the signatories and shares an interest in secure AI supply chains, trusted infrastructure and diversified inputs for advanced technologies.

What to watch:
With Kazakhstan now inside the Pax Silica framework, watch whether the initiative becomes a platform for deeper Kazakhstan-US technology cooperation. The main signs would be follow-up visits, semiconductor or data-centre projects.

Trade and investment

Tokayev's Brussels visit yields €10 billion major investment and commercial announcements with European partners (24 June, euronews)

Tokayev's Brussels visit included a Kazakhstan-EU business roundtable with European companies. Public reporting gives different aggregate figures: Euronews reported around €10 billion in commercial deals. Areas include aviation, transport, critical minerals, energy, high-tech agriculture, artificial intelligence and finance.

European partnerships advance Kazakhstan's agricultural machinery (24 June, Trend)

Kazakhstan also announced several industry-focused partnerships with European companies during the Brussels visit. Agricultural machinery producers Dewulf NV and Väderstad Group plan to localise production in Kazakhstan through projects worth a combined €500 million, with facilities in Kostanay and Turkistan developed together with AgromashHolding KZ and Eurasia Group AG.

Dewulf will produce potato-harvesting equipment, while Väderstad will focus on soil-cultivation machinery. The projects support Kazakhstan's wider efforts to strengthen domestic manufacturing, attract European technology and build more advanced industrial capacity outside the extractive sector.

Air Astana-Airbus agreement underlines European corporate presence in Kazakhstan
(24 June, euronews)

Among the largest announced agreements was a certificate agreement between Air Astana and Airbus covering up to fifty A320neo and A321neo aircrafts. The EU-Kazakhstan joint statement cited a value of €7.145 billion. Deliveries are expected to begin in 2031.

President Tokayev holds Foreign Investors' Council in Astana, focuses on AI, investment climate and digital investment services (2 July, Akorda.kz)

At the 38th plenary session of the Foreign Investors' Council, Tokayev presented Kazakhstan as a stable investment destination and referred to the new Constitution as strengthening investor protections. He also announced the launch of a National Digital Investment Platform intended to operate as a one-stop-shop for investors, alongside the Altyn Visa programme for foreign entrepreneurs.

Why it matters:
Kazakhstan seeks to facilitate foreign investment. In light of the political reforms, this could be an interesting venue for European entrepreneurs. The focus on digital investment services, artificial intelligence and investor protections aims to position Kazakhstan as Central Asia's leading destination for foreign direct investment. As Kazakhstan works to attract investment beyond oil and gas, the Brussels roundtable gave the visit commercial weight. The announced package supports Kazakhstan's pitch as a platform for logistics, minerals, energy, food security and digital infrastructure between Europe and Asia.

What to watch:
Watch which agreements move into financing, procurement and delivery. Developments in the areas of transport, energy, agriculture, artificial intelligence and finance are to be expected soon. Watch for increased Central Asia-EU tourism, and whether it supports greater connectivity between Kazakhstan and European destinations after the Horizontal Aviation Agreement enters into force.

People-to-people connections

Kazakhstan and EU complete talks on visa facilitation and readmission agreements (26 June, The Astana Times)

Kazakhstan and the EU completed negotiations on the draft Visa Facilitation and Readmission Agreements. Following the conclusion of negotiations, both agreements entered the respective internal approval procedures before signature and entry into force. Once implemented, the agreements are expected to simplify visa procedures for Kazakh citizens travelling to the Schengen Area while establishing a common framework for readmission cooperation.

Why it matters:

The completion of visa facilitation negotiations represents one of the most concrete deliverables in EU–Kazakhstan relations in recent years and has the potential to substantially increase mobility between the two sides. Easier travel procedures would facilitate business contacts, academic exchanges, tourism and civil society cooperation while strengthening broader societal links underpinning the strategic partnership. The readmission agreement is also important for a more secure migration governance in the EU.

What to watch:
The next indicator will be a clear signing timeline and details on the categories of applicants covered first. The agreement will be most meaningful if it improves mobility for students, researchers, entrepreneurs and business representatives.

Other developments

VEON plans an additional $1 billion investment in Kazakhstan's digital sector (2 July, The Astana Times)

VEON, a Dubai-headquartered international digital operator and the parent company of Beeline Kazakhstan, said it plans to double the scale of its Kazakhstan operations over the next three years and invest an additional $1 billion in the country. The company also expressed interest in supporting Digital Kazakhstan, while Beeline Kazakhstan is considering building a new data centre in Astana.

Why it matters:
As Kazakhstan positions itself as a regional digital hub, large-scale investment in telecoms, cloud services and computing infrastructure strengthens the country's digital offer to foreign investors. Although not EU-specific, it shapes the broader environment for future cooperation in the digital sphere.

What to watch:
Watch whether the data centre proposal becomes a committed project, where it is located, and how it is powered. For European partners, the key issues will be cybersecurity, data protection, energy supply and regulatory frameworks.