



Kazakhstan - EU August Briefing

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**KAZAKHSTAN-EU
GATEWAY**

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Transport, logistics and connectivity

EU-Kazakhstan air services agreement advances to the next approval stage ([4 September 2026, Council of the EU](#); [23 June 2026, European Council](#))

The EU-Kazakhstan agreement on air services was placed on the 4 September agenda of the **Permanent Representatives Committee (Coreper I)**. The agenda sought agreement in principle on the Council decision concluding the agreement and a request for the European Parliament's consent. Signed in Brussels on 23 June, the agreement forms part of a wider package intended to strengthen EU-Kazakhstan connectivity.

Relevance: Progress through the EU approval process shows that commitments made at the June summit are moving towards implementation. The agreement could support more direct and competitive air links, complementing road, rail and digital connectivity projects under the **Global Gateway**. For Kazakhstan, stronger aviation links could reinforce its gateway role; for the EU, they add another mode to efforts to diversify Eurasian transport connections.

Critical Raw Materials

Kazakhstan reviews critical minerals strategy amid rising global competition ([20 August 2026, Qazinform](#))

President Kassym-Jomart Tokayev chaired a Security Council meeting on Kazakhstan's critical materials industry, including rare and rare-earth metals. Authorities were instructed to improve regulation, expand geological exploration and processing, strengthen laboratory and workforce capacity, and remove barriers to sectoral growth. The government was also asked to develop a more comprehensive approach to domestic production chains.

Relevance: The policy direction aligns with the EU's interest in diversifying critical raw material supply chains. The EU-Kazakhstan partnership covers raw materials, batteries and renewable hydrogen, with attention to joint projects, private investment, recycling, sustainable mining technologies and **environmental, social and governance (ESG) standards**. Kazakhstan's central challenge is to convert geological potential into processing capacity that meets international standards.

Digitalisation and innovation

Kazakhstan completes a key stage of the Trans-Caspian fibre-optic cable project ([6 August 2026, The Astana Times](#))

Kazakhstan completed the technically most challenging stage of the **Trans-Caspian Fibre-Optic Cable** project when the undersea cable reached its Caspian coast on 5 August. Kazakhtelecom and AzerTelecom International are implementing the project, while CaspiLink B.V. will oversee construction and operation. The cable is intended to create a high-speed digital route between Kazakhstan and Azerbaijan.

Relevance: The cable could complement the physical Trans-Caspian Transport Corridor with a parallel digital route between Asia and Europe. It is relevant to the EU's Global Gateway agenda, where digital connectivity is developing alongside transport infrastructure. Greater international bandwidth could support cloud services, artificial intelligence, data centres and digital trade, while creating opportunities for cooperation in cybersecurity and resilient data connectivity.

Kazakhstan approves the Digital Qazaqstan action plan through 2029 ([26 August 2026, Prime Minister of Kazakhstan](#))

Kazakhstan approved an action plan for the Digital Qazaqstan strategy through 2029. It targets large-scale adoption of **artificial intelligence (AI)** across government, education and the economy. By 2029, at least **80% of school, college and university graduates** are expected to have basic AI skills, while public-service delivery times are intended to fall by at least 50%.

Relevance: The plan creates potential areas for EU cooperation in AI, digital government, education, cybersecurity and infrastructure. Its **Smart Cargo** initiative also provides for digital cargo passports and end-to-end tracking across priority corridors and multimodal hubs, connecting the digital agenda to transport cooperation. The plan further targets a **50% increase in exports of IT services and digital solutions by 2029**.

Kazakhstan's AI ambitions highlight the need for domestic capability ([28 August 2026, EU Reporter](#))

Kazakhstan is expanding its AI agenda through investment in computing infrastructure, skills, startups and Kazakh-language technologies. Analysis in EU Reporter argues that the central challenge is building durable domestic capability, including research, university-industry collaboration and venture financing, rather

than simply adopting tools. These priorities add an innovation and industrial-development dimension to the country's wider digital strategy.

Relevance: AI and digital transformation were identified as priorities at the June Brussels summit. Cooperation could extend beyond technology transfer to research, skills, cybersecurity, responsible AI, data governance and digital infrastructure. European engagement could also encourage trusted standards and interoperability as Kazakhstan positions itself between European, Chinese and Russian technology ecosystems. The key issue is whether policy ambition generates sustained research and commercial capacity.

Policy and diplomacy

Kazakhstan's revised Foreign Policy Concept preserves a balanced course ([20 August 2026, The Astana Times](#))

Kazakhstan amended its Foreign Policy Concept for 2020–2030, with the changes taking effect on 14 August. The revision maintains the country's balanced and pragmatic approach while adapting it to the new constitutional framework and geopolitical environment. It gives greater emphasis to protecting citizens and businesses abroad and replaces personalised references to continuity with an institutional formulation.

Relevance: For European partners, the emphasis on strategic autonomy and pragmatic diversification could support Kazakhstan's role as a predictable partner in transport, trade, energy and critical raw materials. The move towards institutional continuity may also make external policy less dependent on individual political figures. Future EU engagement will be shaped by how this balanced approach is applied amid intensifying geopolitical competition.

Kazakhstan and the EU review implementation of the June strategic agreements ([12 August 2026, Ministry of Foreign Affairs of Kazakhstan](#))

Foreign Minister Yermek Kosherbayev spoke with EU High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission Kaja Kallas on 12 August. They reviewed implementation of agreements reached during President Tokayev's June visit to Brussels, trade and economic ties, and upcoming

engagements. Energy cooperation and the **Caspian Pipeline Consortium (CPC)** received particular attention.

Relevance: The call indicates that the June summit has entered an implementation phase. This matters because the agreed agenda spans transport, investment, energy, critical raw materials and digital connectivity. Kazakhstan's role as an energy supplier to Europe adds strategic weight to the relationship. The next point to monitor is whether high-level commitments produce specific financing, infrastructure and business projects.

Tokayev and Costa continue high-level follow-up to the June Brussels summit ([23 August 2026, European Council](#); [23 June 2026, European Council](#))

European Council President António Costa and President Tokayev spoke by telephone on 23 August, continuing discussions after Tokayev's June visit to Brussels. The leaders addressed bilateral cooperation and recent global developments. The June meeting had set priorities across connectivity, critical raw materials, energy, digitalisation, trade and investment, making the August contact an important high-level follow-up.

Relevance: The call suggests that the June summit is being treated as an implementation agenda rather than a one-off political event. Delivery will depend on whether commitments translate into financing, infrastructure and commercial projects. The sequence of contacts with Kaja Kallas on 12 August and António Costa on 23 August also demonstrates follow-up at both foreign-policy and European Council levels.

EU calls for continued democratic reforms after Kazakhstan's parliamentary elections ([25 August 2026, European External Action Service](#))

Following Kazakhstan's 23 August parliamentary elections, the EU acknowledged efforts to organise the vote in a well-prepared and orderly manner and welcomed participation by political parties and citizens. It also cited preliminary findings by the **Organization for Security and Co-operation in Europe Office for Democratic Institutions and Human Rights (OSCE/ODIHR)** on limited pluralism, legal shortcomings and procedural violations.

Relevance: The statement illustrates the continuing balance in EU-Kazakhstan relations: strategic economic cooperation is expanding while governance remains part of the political dialogue. The EU linked future cooperation to human rights, the rule of law and democratic governance. Although the immediate economic impact is likely to be limited, governance standards remain relevant to the partnership framework and investment environment.

Other relevant developments

King Philippe's planned state visit strengthens Kazakhstan's bilateral European diplomacy ([23 August 2026, Qazinform](#); [25 August 2026, The Astana Times](#))

King Philippe of Belgium is expected to make his first state visit to Kazakhstan from **12 to 15 October 2026**, following an invitation from President Tokayev. It would be the first visit by a Belgian monarch since diplomatic relations began in 1992. The visit follows Tokayev's June meetings in Brussels with EU and Belgian leaders.

Relevance: Although bilateral, the visit has a wider European dimension because Belgium hosts the main EU institutions and is an important investor and logistics partner. It could create an additional channel for cooperation in investment, transport, critical raw materials and technology. The visit illustrates Kazakhstan's parallel use of EU-level engagement and ties with individual Member States.