



Kazakhstan-EU Weekly Briefing

**Issue 3 | November
17-23, 2025**

Highlights

Middle Corridor

This week saw significant structural and diplomatic updates for the Middle Corridor (Trans-Caspian International Transport Route). On November 18, the **China Railway Container Transport (CRCT) officially joined the "Middle Corridor Multimodal"** joint venture as a shareholder, alongside the railway operators of Kazakhstan, Azerbaijan, and Georgia. This expansion coincided with a **high-level roundtable in the European Parliament on November 19**, where officials discussed the practical implementation of the EU's connectivity strategy and the reduction of transit times. Simultaneously, the route's geography is diversifying: during Prime Minister Nikol Pashinyan's state visit to Astana, **Kazakhstan and Armenia aligned on integrating the South Caucasus "Crossroads of Peace" initiative with the Middle Corridor**. Additionally, Kazakhstan is scaling up its Baltic logistics: having already exported 200,000 tons of grain through Estonian ports this year, the government announced plans to increase this volume tenfold, while domestic "Green Corridor" reforms are being implemented to digitalise and speed up customs procedures.

Implications: The entry of a Chinese state-owned entity into the Middle Corridor's management structure introduces a new level of coordination from the route's primary source market. While the EU continues to provide political and financial frameworks through the Global Gateway, the operational side is seeing increased participation from diverse stakeholders. The active inclusion of Armenia and the planned expansions of export via Estonian ports indicate that Kazakhstan is pursuing a strategy of diversification. By expanding the number of entry and exit points, the corridor reduces its reliance on any single transit bottleneck, adapting to the evolving security landscape in the South Caucasus.

Critical Raw Materials

Global competition for critical raw materials increases the strategic importance of Central Asia for the EU. Recent Kazakhstan-Uzbekistan initiatives provide new opportunities for cooperation. During his visit to Tashkent, **President Tokayev proposed establishing a joint Kazakhstan-Uzbekistan mechanism for rare earth metals development**. He suggested creating a dedicated working group to study all aspects of potential cooperation and prepare concrete proposals for mutually beneficial partnership in this field.

Highlights

Implications: Kazakhstan-Uzbekistan cooperation on rare earth metals strengthens Kazakhstan's strategic role as a potential CRM partner for the EU. The creation of a joint working group and the focus on industrial cooperation signs a shift toward more organized, value-added development rather than simple raw-material supply. For the EU these initiatives offer opportunities to diversify supply chains, engaging in partnerships that support sustainable and mutually beneficial CRM production.

Digitalisation

During his visit **Estonian President Karis highlighted collaboration in digital governance, AI regulation, and academic exchanges.** He praised Kazakhstan for achieving 90% of public services online and emphasised that transparency and adaptation to local needs are essential for successful digital transformation. At the same time, **Kazakhstan has adopted Central Asia's first AI law, which created a framework for safe and transparent use of AI.** The law protects personal data and bans harmful practices and requires labeling of AI-generated content. This development establishes a national AI platform to support local innovation and technological development.

Implications: These developments position Kazakhstan as a regional leader in digitalisation. It gives opportunities for the EU to engage through investment, technology transfer, and collaborative projects. Estonia's experience in technology offers a stable model for digital governance and AI integration, while Kazakhstan's AI law demonstrates regulatory maturity and readiness for international partnerships.

EU-Centric Trends: Brussel's Point of View

Sanctions Diplomacy: David O'Sullivan's Visit Postponed

The scheduled visit of David O'Sullivan, the EU International Special Envoy for the Implementation of Sanctions, to Kazakhstan (Nov 18-19) has been postponed due to illness. The EU Delegation confirmed the delay but has not yet provided a new date.

Trend Analysis: This postponement interrupts a consistent series of high-level consultations; this was set to be O'Sullivan's fifth visit to Astana in three years. The frequency of these visits indicates that Brussels continues to rely on direct dialogue to address compliance issues rather than remote monitoring alone.

Why it Matters: The delay does not signal a policy shift. Sanctions compliance remains a priority for the EU-Kazakhstan economic relationship, particularly regarding the re-export of "high priority" dual-use goods.

What to Watch: Observers should look for the rescheduling of the visit. Until then, technical-level cooperation between EU and Kazakh officials is expected to continue through alternative channels.



Credit: Friends of Europe

Kazakhstan-Centric Trends: Developments on the Ground

Regional Integration: Central Asia Takes Steps Toward Institutional Unity

During the 7th Consultative Meeting of Central Asian Heads of State in Tashkent (Nov 15-16), Uzbek President Shavkat Mirziyoyev proposed transforming the current consultative format into a "Community of Central Asia" to formalise regional integration. Kazakhstan's President Kassym-Jomart Tokayev supported deeper strategic alignment, proposing a "Central Asian Framework Convention on Water Use" and emphasizing the need to eliminate trade barriers. Notably, the leaders agreed to admit Azerbaijan as a full participant in future meetings, effectively expanding the "C5" format to "C6".

Trend Analysis: The proposal to transform the consultative meetings into a "Community" indicates a shift towards institutionalising regional cooperation. Combined with the inclusion of Azerbaijan, this development suggests a move to formalise political and economic ties beyond bilateral



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agreements. If implemented, this framework would establish a more structured mechanism for internal coordination among the Central Asian states.

Why it Matters: For the EU, a unified "Central Asian Community" with Azerbaijan offers a more streamlined partner for energy and logistics projects, particularly for the Middle Corridor. A formalised bloc with harmonised standards would reduce the complexity of negotiating with six separate jurisdictions, potentially accelerating the implementation of Global Gateway initiatives.

What to Watch: Observers should monitor how Azerbaijan's full membership influences the region's stance on Caspian logistics and energy transit in upcoming ministerial meetings.

News Sources

- 1) China Railway subsidiary officially joins Middle Corridor Multimodal ([RailFreight.com](#))
- 2) Kazakhstan will enter the European Union market through Estonia's seaports ([Jibek Joly](#))
- 3) What is the Armenian Prime Minister's visit to Astana about ([KazInform](#))
- 4) Kazakhstan advances Green Corridor ([Astana Times](#))
- 5) European Parliament hosted a landmark roundtable ([Eureporter](#))
- 6) Kazakhstan proposes cooperation with UZ on rare earth metals ([Tengrinews](#))
- 7) Kazakhstan has adopted the first law in Central Asia on artificial intelligence ([Astana Times](#))
- 8) Kazakhstan, Estonia Secure \$517 Million in Deals at Business Forum ([Astana Times](#))
- 9) EU Sanctions Envoy Delays Kazakhstan Trip Due to Illness ([Caspian Post](#))
- 10) Mirziyoyev proposed a strategic partnership format called the 'Central Asia Community' ([Fergana Agency](#))
- 11) Tokayev Calls for Deeper Integration and Strategic Breakthroughs at Central Asian Leaders Meeting ([Astana Times](#))