



# Kazakhstan-EU Weekly Briefing

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**KAZAKHSTAN-EU**  
GATEWAY

# Highlights

## Middle Corridor

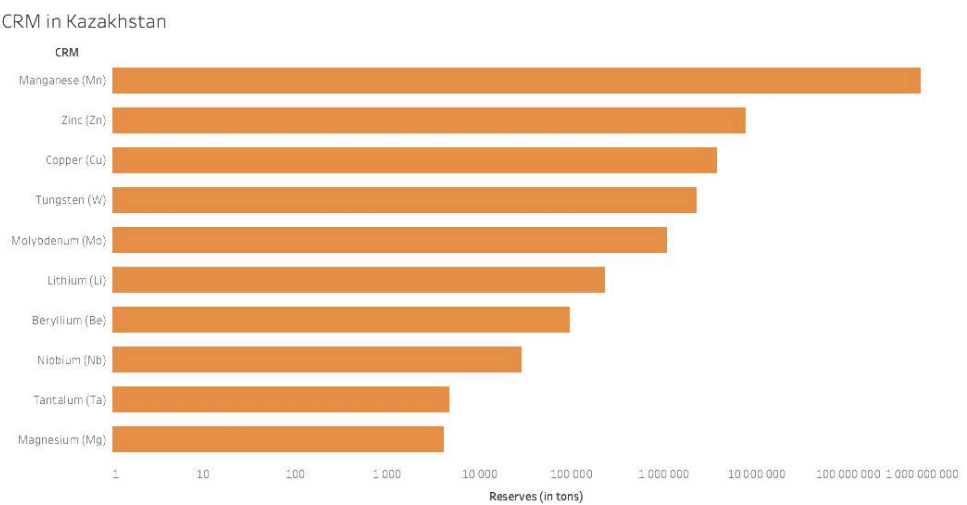
The Caspian Pipeline Consortium (CPC) terminal near Novorossiysk suffered its most serious incident to date after Ukrainian unmanned surface vessels struck one of the offshore mooring facilities (SPM-2). The attack destroyed the structure and halted loading operations, forcing tankers to leave the area. This marked the third attack on CPC infrastructure and directly affected the main export route for Kazakh crude to European markets. Kazakhstan’s MFA expressed concern, noting that CPC is a civilian facility essential for global energy supply stability, and the country began redirecting part of its oil flows through alternative channels.

**Implications:** The incident illustrates the vulnerability of maritime energy routes in the Black Sea region. In contrast, the Middle Corridor is consistently highlighted for its relative security and insulation from active conflict zones, which is one of the main reasons it continues to attract political and commercial attention as a stable overland alternative.

## Critical Raw Materials

Kazakhstan’s growing involvement in rare-earth extraction and processing continues to draw attention from major Western players. Recent reporting notes that both the United States and the European Union are intensifying their engagement as Kazakhstan accelerates its CRM projects, seeking to secure stable access to non-Chinese supply chains essential for green technologies, defence industries, and advanced electronics.

Xhoi Zajmi from Euractiv notes that Brussels is under pressure to move more quickly, as Washington steps up its own diplomatic and commercial outreach in



Sources: World Bank (2023); AIFC Mining Industry Report (2025); MINEX Kazakhstan Geological Overview (2024); Astana Times (2024); Ministry Of Industry & Construction Of Kazakhstan (2023–2025)



# Highlights

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Central Asia, signalling interest in deeper industrial partnerships and investment in processing capacity. This places Kazakhstan at the intersection of parallel Western strategies - similar in goals but increasingly competitive in execution.

**Implications:** This dynamic suggests that competition, not only cooperation, may shape Western involvement in Kazakhstan's CRM sector, with Astana positioned to benefit from multiple partnerships as global demand continues to rise.

# EU-Centric Trends: Brussel's Point of View

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## The 3rd EU-Central Asia Economic Forum was held in Tashkent on November 26th

The EU highlighted the Middle Corridor as its main priority in the region and confirmed that it wants deeper economic cooperation with Central Asia. The EU also presented new plans under the Global Gateway strategy and discussed investment, digital projects, and sustainable value chains. The European Investment Bank announced the opening of a regional office in Tashkent and support for more projects in Central Asia.

**Trend Analysis:** The EU is becoming more active in Central Asia, moving from general political dialogue to concrete projects and investments. Europe sees the region as important for diversifying trade routes away from Russia and for building more stable supply chains. The Middle Corridor is now a key part of the EU's economic strategy. The EU is also trying to improve regulations, digital trade systems, and cooperation in areas such as transport, energy, and critical raw materials.

**Why It Matters:** Kazakhstan is the main transit country of the Middle Corridor, so EU interest brings new investment opportunities. Better infrastructure, modernized transport routes, and new digital systems can increase Kazakhstan's role in European supply chains. The EU's priorities like green energy, clean transport, and digitalisation match Kazakhstan's own development plans. A stronger EU presence also gives Kazakhstan more geopolitical balance and more room to diversify its partnerships.

**What to Watch:** First, review the specific Global Gateway project lists announced after the Investors Forum, focusing on those impacting Kazakhstan's transport and logistics. Second, the 2026 establishment of the EIB's regional office will indicate the EU's commitment to long-term financing in Central Asia. Third, observe the implementation timeline of the new Letters of Intent, particularly regarding road modernisation along the Middle Corridor. Finally, the upcoming EU agreements on critical raw materials will be crucial, as they will set the tone for the next phase of economic cooperation.

# Kazakhstan-Centric Trends: Developments on the Ground

## **EPCA 10-Year Anniversary Sparks a Series of EU–Kazakhstan Visits.**

A series of high-level EU–Kazakhstan meetings is taking place around the 10th anniversary of the EPCA. **President Tokayev received the EU Special Representative Eduards Stiprais in Astana on November 24th**, where both sides reaffirmed plans to expand cooperation in green transition, transport, and regional security. **On December 1st, Foreign Minister Yermek Kosherbayev will chair the EU–Kazakhstan Cooperation Council in Brussels alongside High Representative Kaja Kallas** to review EPCA implementation, Global Gateway projects, and cooperation on critical raw materials. **European Council President António Costa will visit Astana on 3–4 December for anniversary events and talks with Tokayev.**

**Trend Analysis:** EU–Kazakhstan political dialogue is becoming more structured and active. Multiple high-level visits within days show that both sides are using the EPCA anniversary to push forward practical cooperation in connectivity, energy, reforms, and regional stability.

**Why It Matters:** This momentum strengthens Kazakhstan’s ties with one of its most important economic and political partners. It keeps EU attention focused on Kazakhstan’s reforms, green transition, and role in regional connectivity.

**What to Watch:** Outcomes from the Cooperation Council on Global Gateway projects, visa facilitation, CRM cooperation, and any new EU initiatives announced during António Costa’s visit.



Credit: akorda.kz



# News Sources

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- 1) Kazakhstan's Foreign Ministry expresses protest over attack on KTK in Novorossiysk ([Kazinform](#))
- 2) Kazakhstan & EU: Where next after 10 years of enhanced partnership? ([Eureporter](#))
- 3) Tashkent Hosts EU-Central Asia Economic Forum ([The Astana Times](#))
- 4) EU advances economic partnerships and the connectivity agenda with Central Asia and South Caucasus ([European Commission](#))
- 5) EIB strengthens engagement in Central Asia with new Tashkent office and fresh commitments to sustainable infrastructure ([EIB](#))
- 6) EU intends to more actively develop relations with Kazakhstan ([Kursiv Media](#))
- 7) Kazakhstan and the European Union strengthen economic and political ties ([Kazakhstan Today](#))
- 8) Kazakhstan, EU Mark Decade of Enhanced Partnership as High-Level EU Envoy Visits Astana ([The Astana Times](#))
- 9) EU-Kazakhstan Cooperation Council , 1 December 2025 ([EU Consilium](#))
- 10) EU's António Costa to Visit Kazakhstan for 10th EPCA Anniversary This Week ([The Astana Times](#))