



Kazakhstan-EU Weekly Briefing

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Highlights

Middle Corridor

This week, the Middle Corridor advanced on three interconnected fronts. The EU moved further into the implementation phase of its Global Gateway strategy in Central Asia, reaffirming the Trans-Caspian Transport Corridor as a priority route for faster and more resilient Europe-Asia connectivity, with new investments targeting transport infrastructure and trade facilitation. At the same time, emerging prospects for normalization in the South Caucasus highlighted the possibility of reopening key land and rail routes, which could significantly reshape regional transit dynamics by reducing geopolitical risk and expanding east-west connectivity options. During Austrian business delegation's visit to Astana, Rail Cargo Austria and KTZ Express agreed to enhance intermodal transportation along the Trans-Caspian International Transport Route. Complementing these developments, Kazakhstan and France agreed in principle to establish a European-level civil aviation training center in Astana, strengthening the skills base and safety standards underpinning regional air connectivity.

Implications: Together, these developments suggest a shift from strategic intent toward practical consolidation of the Middle Corridor. EU investment is providing momentum, potential stabilization in the South Caucasus could unlock new transit configurations, and Kazakhstan's focus on aviation capacity-building reinforces the operational foundations of multimodal connectivity. If sustained, this combination would enhance the Corridor's resilience, flexibility, and long-term competitiveness

Critical Raw Materials

Kazakhstan adjusted its oil export routes after damage to the Caspian Pipeline Consortium (CPC) terminal in Russia through which around 80% of Kazakhstan's oil exports normally flow. Following a Ukrainian drone attack that disrupted infrastructure at the CPC Astana announced the redirection of limited volumes via the Atasu-Alashankou pipeline to China, alongside increased shipments through the Baku-Tbilisi-Ceyhan and Atyrau-Samara routes

Implications: The rerouting of Kashagan oil underscores the strategic importance of export diversification for Kazakhstan's energy sector and, more broadly, for regional supply security. In a context of heightened geopolitical risk, the ability to redirect volumes to alternative corridors strengthens resilience but also signals a gradual eastward flexibility in Kazakhstan's energy flows. For the EU, the incident reinforces



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the case for supporting diversified, secure transport routes and reduced reliance on vulnerable chokepoints in critical energy supply chains.

Digitalisation

Kazakhstan accelerated the digital transformation of its transport and transit systems as part of its strategy to consolidate its role as a key Eurasian logistics hub. The government advanced large-scale digital initiatives across customs, road, rail, and air transport, including the rollout of the Smart Cargo ecosystem and the near-completion of the unified Keden customs platform. These systems integrate dozens of public services, enable real-time cargo tracking, automate transit declarations, and apply AI tools to inspections and route planning, significantly reducing processing times at border crossings.

Implications: Kazakhstan's focus on digitalising transport and customs shifts connectivity from infrastructure alone toward efficiency, predictability, and speed. By cutting border and transit procedures from hours to minutes, these reforms directly strengthen Kazakhstan's competitiveness as a transit country and enhance the reliability of Eurasian corridors. For the EU and regional partners, Kazakhstan's digitalisation drive supports smoother cross-border trade, better data interoperability, and more resilient supply chains along key connectivity routes.

Trade

Kazakhstan advanced its trade and industrial strategy with a strong focus on value addition and export expansion. In Astana, the government presented a 2026-2028 roadmap aimed at raising exports of oilseed and oil-and-fat products above USD 1 billion annually, shifting from raw material exports toward processed goods.

Developed with technical support from the International Trade Centre and backed by the European Union, the roadmap prioritises higher processing rates, improved logistics, and infrastructure for storage and transport, reinforcing Kazakhstan's position in global agri-food markets, including the EU. In parallel, Astana intensified efforts to attract foreign investors for a fourth major oil refinery, positioning the project as central to expanding refining capacity, reducing fuel imports, and supporting export-oriented growth.

Implications: Together, these initiatives signal a clear move toward deeper

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integration into global value chains rather than reliance on raw exports. EU-supported agri-food development aligns trade growth with the Trans-Caspian corridor and regional connectivity, while expanded refining capacity would strengthen Kazakhstan's industrial base and export resilience in energy markets. For international partners, the combination of targeted sectoral roadmaps and large-scale investment opportunities points to a more structured and long-term approach to trade and industrial cooperation with Kazakhstan.



EU-Centric Trends: Brussels' Point of View

Kazakhstan–EU Gateway Launches with Focus on Critical Raw Materials Cooperation

Kazakhstan–EU Gateway was formally inaugurated this week in Brussels, bringing together policy experts, industry representatives, and stakeholders engaged in EU–Kazakhstan relations. The event focused in part on critical raw materials (CRM), with speakers discussing Kazakhstan's resource base, including rare earth elements and other strategic minerals, as well as existing extraction capacity. Kazakhstan's interest in developing downstream processing and working in line with European regulatory and sustainability standards was also highlighted.

Trend Analysis: Speakers from Kazakhstan emphasised the country's readiness to cooperate with European partners on CRM projects, pointing to regulatory stability, openness to foreign investment, and alignment with ESG requirements.

European participants acknowledged Kazakhstan's potential role in supply diversification but noted practical constraints on the EU side, including complex decision-making structures, financing challenges, and the early stage of implementation of the Critical Raw Materials Act. Several interventions pointed to a gap between political frameworks and project-level cooperation.

Why it Matters: Critical raw materials are relevant to the EU's industrial and energy transition objectives and to Kazakhstan's efforts to attract long-term investment and expand value-added production. The discussion at the Gateway's launch illustrates how CRM cooperation is being framed by both sides within existing policy and regulatory contexts.

What to Watch: Developments related to the implementation of the EU–Kazakhstan Memorandum of Understanding on raw materials, engagement by EU institutions involved in CRM policy, and interest from European industrial actors. Indications of feasibility studies, structured project discussions, or financing considerations will be relevant in assessing progress.



Source: Kazakhstan–EU Gateway

Kazakhstan-Centric Trends: Developments on the Ground

1. EU–Kazakhstan visa facilitation talks to continue with second round in Astana

Kazakhstan and the European Union have agreed to hold the second round of talks on visa facilitation in Astana in 2026. The launch of the negotiations was announced at the 22nd meeting of the EU-Kazakhstan Cooperation Council on 1 December in Brussels, chaired by EU High Representative for Foreign Affairs and Security Policy Kaja Kallas and Kazakhstan's Minister of Foreign Affairs Yermek Kosherbayev. The discussions focus on modernising the legal framework governing travel, with Kazakhstan advocating for a substantial reduction in required documentation and lower visa application fees.

Trend Analysis: The initiation of visa facilitation talks represents one of the most tangible steps taken by the EU towards enhanced mobility with Kazakhstan, reflecting growing political trust and alignment on migration management. For the EU, improved mobility underpins business links, educational exchange, and long-term regional engagement, while for Kazakhstan, visa easing supports closer European integration and its ambition to position itself as a regional hub for travel, education, and investment.

Why it Matters: Visa facilitation has practical implications for ordinary citizens, businesses, and cultural and academic exchanges by potentially lowering administrative and financial barriers to travel. It also serves as an indicator of the depth and maturity of EU–Kazakhstan relations, particularly in the sphere of regulatory cooperation. Progress in this area may reinforce broader diplomatic and economic ties without altering existing visa regimes.

What to Watch: Attention should be paid to the scope of any agreed reductions in documentation requirements and whether these apply uniformly across EU member states. The treatment of visa fees and eligibility criteria will also be important in assessing the practical impact of the talks. Additionally, the absence of a clear decision-making timeframe may affect expectations regarding implementation and follow-through.



Kazakhstan-Centric Trends: Developments on the Ground

2. Kazakhstan Advances Penitentiary Reform Through International Human Rights Dialogue

Scientific conference “Human Rights and the Development of the Penitentiary System: National Priorities and International Standards” was held in Astana on 10 December to mark International Human Rights Day and the 77th anniversary of the Universal Declaration of Human Rights. Organised by the Commissioner for Human Rights in cooperation with UNDP Kazakhstan, the Council of Europe, the OSCE Programme Office in Astana and the Ministry of Internal Affairs, the event brought together state institutions, the judiciary, law enforcement bodies, civil society and international partners. Discussions focused on protecting the rights of persons deprived of liberty, rehabilitation and resocialisation, and strengthening national and international oversight mechanisms.

Trend Analysis: The conference reflects Kazakhstan’s continued emphasis on aligning its penitentiary system with international human rights standards through gradual institutional reform. Repeated references to the National Preventive Mechanism (NPM), international monitoring, and cooperation with UN and European partners indicate a sustained shift towards preventive oversight and transparency. The presentation of the draft Consolidated Report based on 2025 NPM visits further illustrates the routinisation of monitoring and reporting practices within the penal system.

Why it Matters: Penitentiary reform remains a central test of Kazakhstan’s broader human rights commitments, particularly regarding the prevention of torture and the protection of vulnerable groups in closed institutions. The emphasis on rehabilitation-oriented detention and reduced prison populations highlights the social and legal implications of reform beyond incarceration itself. International recognition of progress, including under the UPR and ICCPR review processes, situates these reforms within Kazakhstan’s global human rights obligations.

What to Watch: Key issues to monitor include the implementation of recommendations arising from the NPM’s Consolidated Report and their uptake by relevant government agencies. The independence and operational capacity of monitoring mechanisms, particularly the NPM, will remain central to credibility and effectiveness. Continued engagement with international human rights bodies and the practical impact of reforms on conditions of detention warrant close attention.



News Sources

- 1) Global Gateway in Central Asia: Commissioners advance economic partnerships and cross-regional connectivity during mission to Uzbekistan ([European Commission](#))
- 2) Austria Strengthens Ties with Kazakhstan Following Visit of Business Delegation ([Astana Times](#))
- 3) How peace and connectivity could redesign the South Caucasus economy ([EUReporter](#))
- 4) Kazakhstan, France to Establish Regional Civil Aviation Training Center in Astana ([Astana Times](#))
- 5) Kazakhstan Advances Transport and Transit Digitalization ([Astana Times](#))
- 6) Kazakhstan to divert some Kashagan oil to China after Ukraine hit ([Reuters](#))
- 7) Kazakhstan Sets USD 1 Billion Oilseed Export Target for 2028 ([EEAS](#))
- 8) Kazakhstan Seeks Foreign Investors for Fourth Oil Refinery Project ([Times of Central Asia](#))
- 9) Kazakhstan Highlights Human Rights and Penitentiary Reform at International Conference ([Astana Times](#))
- 10) Conference on human rights and development of penitentiary system held in Astana ([El.kz](#))
- 11) Astana to host 2nd round of EU-Kazakhstan visa facilitation talks next year ([Qazinform](#))
- 12) EU and Kazakhstan Launch First Negotiation Round on Visa Facilitation and Readmission Agreements ([EEAS](#))
- 13) Kazakhstan–EU Gateway Opens a New Chapter for Strategic Critical Raw Materials Cooperation ([EUReflect](#))
- 14) Kazakhstan Is Ready. Europe Is Hesitating. And the Critical Minerals Clock Is Ticking ([Rare Earth Exchanges](#))

