



Kazakhstan-EU Weekly Briefing

**Issue 5 | December
1-7, 2025**

Highlights

Middle Corridor

Kazakhstan's Foreign Minister Yermek Kosherbayev came to Brussels on 1 December to underline the role of the Middle Corridor as a strategic route for Eurasian connectivity. The EU announced major investments in Kazakhstan's logistics: €45 million to modernize Aktau port, €150 million for key Caspian road links, and €3 million to create a regional platform for standardization and digital procedures across Central Asia. Swiss logistics companies, among which are MSC and EuroAirport, also declared an interest in ports, aviation, and rail connections along the Trans-Caspian route. Transit volumes have increased from 1.5 million tons in 2022 to 4.5 million tons in 2024.

Implications: EU funding and private-sector interest are signals of a strategic shift towards a secure and efficient Middle Corridor as an alternative to traditional Eurasian routes. Infrastructure upgrade and digital coordination make Kazakhstan the leading transit hub and bolster investment and supply chain reliability between Europe and Asia.

Digitalisation

Kazakhstan continued to develop its digital ecosystem through international cooperation and national development. During the 45th Berlin Eurasian Club meeting, German journalists and politicians reviewed political reforms in Kazakhstan, digital trends, and the role of the country in the region, with an emphasis on deeper media connections and cooperation with the newsrooms of English-speaking countries. E-commerce has expanded sevenfold since 2020, already accounting for 14.1% of total retail turnover, expected to reach 15% by 2025 and 18.5% by 2029, while AI personalization and local marketplaces continue to drive it.

Implications: Kazakhstan is moving forward towards an integrated digital environment. Closer EU media links can provide better visibility for reforms, and fast-growing electronic commerce is indicative of changing consumption habits along with the maturing digital market that already places the country as an attractive partner for the EU in cooperation on technologies and digital governance.

EU-Centric Trends: Brussels' Point of View

1. EU–Kazakhstan Cooperation Council

On 1 December, the 22nd EU–Kazakhstan Cooperation Council convened in Brussels. Chaired by Foreign Minister Yermek Kosherbayev and EU High Representative Kaja Kallas, the Council reviewed EPCA implementation, discussed political and economic reforms, and advanced cooperation in trade, digitalisation, green transition, and connectivity. A major outcome was the formal launch of negotiations on a visa-facilitation agreement for Kazakh citizens, alongside readmission discussions.

Trend Analysis: The initiation of visa-facilitation talks is one of the most concrete steps the EU has taken toward greater mobility with Kazakhstan. It reflects rising political trust and alignment on migration management. For the EU, improved mobility supports business links, educational exchange, and long-term regional engagement. For Kazakhstan, visa easing strengthens European integration and supports its ambition to become a regional hub for travel, education, and investment.

Why it Matters: Visa facilitation would significantly lower administrative barriers for Kazakh students, researchers, and business travellers, and would deepen people-to-people ties — a dimension often missing in EU–Central Asia relations. The Council also reaffirmed support for Kazakhstan's reform agenda and cooperation on connectivity, critical raw materials, and Global Gateway projects, showing that the EU wants more structured progress across multiple sectors.

What to Watch: Follow the pace of visa-facilitation negotiations — key points will include documentation requirements, processing times, and fees. Look for concrete project announcements under Global Gateway, especially in transport and energy, and signals about EU support for CRM processing and Middle Corridor development.

EU-Centric Trends: Brussels' Point of View

2. Astana Calls for Acceleration of EU Global Gateway Funding

During recent meetings, Kazakhstan encouraged the EU to accelerate implementation of the €10 billion in Global Gateway commitments allocated for Central Asia. These funds are planned for transport corridors, renewable energy, and digital infrastructure, but project execution has been slower than expected. Astana stressed that timely progress is essential, especially in logistics and energy cooperation.

Trend Analysis: Kazakhstan's request reflects practical concerns about project timelines and the need for predictable financing. While the EU has announced significant financial commitments for the region, many projects remain in preparatory phases. Kazakhstan is seeking clearer schedules, more rapid decision-making, and faster movement from planning to implementation. The appeal also highlights increasing competition for infrastructure investment in the region.

Why it Matters: Accelerating EU investment would support Kazakhstan's efforts to diversify export routes, strengthen energy security, and modernise infrastructure. For the EU, demonstrating progress on Global Gateway commitments would reinforce its credibility as a long-term regional partner and provide a counterweight to faster-moving competitors in the infrastructure space.

What to Watch: Look for detailed project timelines, financing decisions, and tender announcements, particularly in Middle Corridor upgrades, renewable-energy development, and digital connectivity. Any EU statements responding to Kazakhstan's call for faster delivery will also be important signals.

Kazakhstan-Centric Trends: Developments on the Ground

António Costa's Visit to Kazakhstan

European Council President António Costa visited Astana on 3–4 December for the 10th anniversary of the EU–Kazakhstan Enhanced Partnership and Cooperation Agreement (EPCA). Following talks with President Tokayev, the two leaders issued a joint statement outlining priority areas: expanding trade and investment, strengthening cooperation on critical raw materials, supporting renewable and low-carbon energy projects, modernising transport corridors (including the Middle Corridor), advancing digital governance, and increasing academic and cultural exchanges. Both sides also reaffirmed their commitment to regional stability and multilateral dialogue.

Trend Analysis: The joint statement confirms that current EU–Kazakhstan cooperation is broadening in scope rather than shifting direction. Themes like energy, transport, economic reform were already present in the EPCA, but the statement places stronger focus on implementation, particularly in green transition, logistics, and critical minerals. Costa's visit also shows that the EU is maintaining high-level engagement with Kazakhstan at a time when both sides want to keep momentum behind connectivity and green-energy projects. The visit does not introduce new policy directions but reinforces existing ones and sets clearer expectations for follow-up work.

Why it Matters: The visit provides political backing for several ongoing initiatives, from energy cooperation to CRM supply-chain development. It also signals that Kazakhstan remains a priority partner for the EU in Central Asia at a senior political level, which can help sustain investor confidence and support Kazakhstan's broader reform and diversification agenda.

What to Watch: Monitor whether the joint priorities translate into specific project announcements — especially in green energy, CRM processing, and Middle Corridor modernisation. Follow-up steps linked to mobility, education, and business exchanges will also show how far the commitments from the visit develop in practice.

News Sources

- 1) Kazakh FM Explores New Swiss Investment Opportunities ([The Astana Times](#))
- 2) The Trans-Caspian Route. How Kazakhstan and the EU create a new transport corridor ([Vesti KG](#))
- 3) Kazakhstan's E-Commerce Market Expands Sevenfold ([The Astana Times](#))
- 4) Kazakhstan, Germany to Forward Media and Expert Engagement ([The Astana Times](#))
- 5) How the European Union can benefit from friendship with Kazakhstan without geopolitical risks ([KazTag](#))
- 6) Kazakhstan, EU Launch Formal Negotiations on Visa Facilitation Agreement ([The Astana Times](#))
- 7) The head of state held talks with the President of the European Council, António Costa ([Akorda](#))
- 8) Kassym-Jomart Tokayev and António Costa issued a joint statement ([Akorda](#))
- 9) Ten years of the EU–Kazakhstan Enhanced Partnership ([EU Reporter](#))
- 10) Kazakhstan and the EU: Prospects for Cooperation ([24KZ](#))
- 11) Kazakhstan calls on EU to speed up €10 billion Central Asia investments ([Euronews](#))

