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KAZAKHSTAN EU
GATEWAY

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Transport, logistics and connectivity

World Bank: Trans-Caspian corridor investment could more than triple trade by 2040 *(28 September 2026, World Bank)*

A World Bank flagship report finds that investment in the **Trans-Caspian Transport Corridor**, also known as the Middle Corridor, could more than triple trade volumes, halve travel times, raise gross domestic product by 3.3% and create 2 million jobs by 2040 across nine countries, including Kazakhstan.

Combined with reforms, volumes could quadruple. These gains would require more than **$25 billion** in infrastructure and about $30 billion in enabling investments.

Relevance:

The corridor is a flagship of the EU's Global Gateway strategy, and the report estimates what it would cost to make it competitive. Kazakhstan's Caspian ports of Aktau and Kuryk are central to any such investment plan. The report was already on the agenda of a corridor conference co-chaired by the European Commission in Tashkent on 30 September. Watch whether the EU and international financial institutions build its estimates into their project pipelines.

Rhenus and Aktau port agree to develop a container terminal *(30 September 2026, The Astana Times)*

German logistics group **Rhenus** and Aktau International Sea Trade Port signed an agreement on 30 September, during President Kassym-Jomart Tokayev's visit to Germany, to develop a trimodal container terminal linking sea, rail and road. The site will cover at least 30 hectares, with a capacity of at least **150,000 twenty-foot equivalent units (TEU)** a year. The investment value was not disclosed; a cargo-flow analysis and feasibility study come next.

Relevance:

The agreement brings a European operator into port handling on the Caspian, one of the Middle Corridor's main bottlenecks, and supports Tokayev's aim, stated in Berlin, of raising volumes on the corridor to 20 million tonnes. The feasibility study and its financing will show whether the terminal goes ahead.

Trade and investment

German–Kazakh Business Forum lines up 37 projects worth €1.8 billion *(28 September 2026, German Chamber of Commerce and Industry)*

About 300 representatives, among them Tokayev, Federal President Frank-Walter Steinmeier and five ministers, attended the German–Kazakh Business Forum in Berlin on 29 September, where declarations of intent were signed. The German

Chamber of Commerce and Industry had announced 37 projects worth **€1.8 billion**. By its count, trade reached about **€8 billion** in 2025 and grew more than 25% in the first half of 2026, solely due to imports from Kazakhstan.

Relevance:

Kazakhstan accounts for about 80% of Germany's trade with Central Asia, much of it oil and gas imports. German companies are eyeing industry, energy and logistics, and industrial gases group Linde alone is weighing projects worth up to $500 million. Declarations of intent are not committed investment, however, and the two sides' statistics differ widely: Kazakhstan puts 2025 trade at $4.5 billion. What matters next is whether projects reach financing, for example through the investment and finance platform Tokayev proposed with Baiterek Holding.

Carlsberg opens $344 million plant in Almaty Region *(2 October 2026, The Astana Times)*

Carlsberg Group opened a **$344 million** beverage plant in Boraldai, Almaty Region, on 1 October. At full capacity it will produce about 1 billion litres a year, and it is expected to create more than 230 direct jobs. The plant makes PepsiCo drinks under licence for Kazakhstan and Kyrgyzstan, and local content accounts for 71.5% of Carlsberg Kazakhstan's procurement. Danish Foreign Minister Lars Løkke Rasmussen attended the opening.

Relevance:

Kazakhstan's foreign ministry counts the plant among the most significant Danish investment projects in the country. Its high local content fits Kazakhstan's push for localised production, a point Deputy Foreign Minister Ardak Zebeshev stressed at the Kazakhstan–Denmark Business Forum. Further Danish projects could follow through the new bilateral commission (see Policy and diplomacy), particularly in the sectors Zebeshev highlighted: logistics, water management, agriculture, pharmaceuticals and energy.

KAZAKHSTAN-EU GATEWAY

Human capital and people-to-people connections

Kazakhstan and Germany expand university and research links *(1 October 2026, Embassy of Kazakhstan in Germany)*

Meeting German university rectors and research leaders during his visit, Tokayev said **45 Kazakh universities** cooperate with about 100 German partners, and about 2,000 Kazakh students study in Germany. He proposed a dedicated Kazakh–German educational exchange programme. The presidents' joint declaration backs a possible new campus for the Kazakh-German University in Almaty, a Kazakh–German school in Astana and a first Kazakh–German Future Forum in Saarland in summer 2027.

Relevance:

Tokayev also said Kazakhstan has begun negotiations to join **Horizon Europe** as an associated country, although in June the European Commission had not yet stated its position on this. The presidents welcomed the conclusion of negotiations on an **EU–Kazakhstan visa facilitation agreement**. The next milestones are the design of the exchange programme, progress on Horizon Europe association and the signature of the visa agreement, which should ease academic and business travel.

EU-funded project issues guidance on investigating ill-treatment *(2 October 2026, EU Delegation to Kazakhstan)*

At a round table in Astana, the EU-funded project **Breaking the Cycle** presented recommendations to help investigators handle offences under Part 1 of Article 146 of Kazakhstan's Criminal Code, which covers cruel, inhuman or degrading treatment. Participants included the Ministry of Internal Affairs, the Prosecutor General's Office, the Supreme Court and the UN human rights office for Central Asia. The guidance covers securing evidence, timely medical examinations and victims' participation.

Relevance:

Human rights and the rule of law are part of the EU–Kazakhstan Enhanced Partnership and Cooperation Agreement, and projects like this give the EU direct access to the institutions that handle complaints of ill-treatment. The test is implementation: the ministry's Management Academy says it is ready to build the recommendations into staff training, and the next step is training for territorial units.

Critical Raw Materials (CRM)

Kazakhstan offers Germany long-term supplies of critical raw materials *(30 September 2026, Akorda)*

In Munich, Tokayev offered German industry long-term supplies of copper, titanium, aluminium, beryllium, tantalum and niobium. Ahead of the visit, he said Kazakhstan produces 21 of the 34 raw materials on the EU's critical list. He also discussed a possible joint action plan between German copper group Aurubis and national mining company Tau-Ken Samruk on processing copper scrap and mining waste. The German–Kazakh **2026–2028 roadmap** covers extraction and processing.

Relevance:

Germany's interest mirrors the EU's drive to diversify supplies under the Critical Raw Materials Act and the 2022 EU–Kazakhstan strategic partnership on raw materials, batteries and renewable hydrogen. The emphasis on processing in Kazakhstan, also seen in the €7.5 million Horizon Europe project TiBeRIUM on titanium and beryllium, suits Astana's aim of moving up the value chain. Watch whether the Aurubis action plan materialises and what follows the partnership's 2025–2026 roadmap, which ends in 2026.

Digitalisation and innovation

Kazakhstan and Bavaria deepen ties and explore a semiconductor partnership *(30 September 2026, Akorda)*

Tokayev met Bavarian Minister-President **Markus Söder** in Munich, called Bavaria a key partner in implementing the Berlin agreements and invited him to Kazakhstan. At the Kazakhstan–Bavaria Technology Forum, he proposed a partnership programme with the **Bavarian Chips Alliance** and a representative office of Bavarian business in Almaty. Promotion agencies Kazakh Invest and Bayern International signed a memorandum of understanding covering energy, raw materials and environmental, agricultural and industrial technology.

Relevance:

Bavaria is one of Kazakhstan's main trading partners among the German states: Bavaria's economy ministry puts trade at about **€4.7 billion** in 2024, with up to half of the state's oil deliveries coming from Kazakhstan. The chip proposal is modest in scope, targeting power electronics, sensors and control systems rather than large-scale chip manufacturing, which could give European suppliers a realistic entry point. The next markers are the official Bavarian delegation visit planned for May 2027 and Bavaria's review of a business office in Kazakhstan.

Policy and diplomacy

Tokayev's visit to Germany yields joint declaration and 2026–2028 roadmap *(29 September 2026, Federal Government of Germany)*

During his official visit on 29–30 September, Tokayev adopted a joint declaration with Federal President Frank-Walter Steinmeier and agreed a **2026–2028 roadmap** on industrial, technological and raw materials cooperation with Chancellor Friedrich Merz. The declaration calls the Middle Corridor strategically important and welcomes plans for a third Central Asia–Germany summit. Merz said Kazakhstan already contributes to Europe's oil supply security and thanked it for helping prevent sanctions circumvention.

Relevance:

The roadmap and declaration link much of the bilateral agenda to EU priorities, from the Middle Corridor to raw materials. Tokayev said Kazakhstan intends to supply more oil, which Merz framed as replacing Russian supplies, but Kazakhstan's readout tied any increase to transport capacity, and in May Russia stopped Kazakh oil transit to the Schwedt refinery via the Druzhba pipeline. Political gaps remain: Tokayev favoured freezing hostilities in Ukraine and called Putin for Europe and the world, while Merz said Russia must negotiate seriously. Watch for the Central Asia–Germany summit, which Merz wants to hold in the second quarter of 2027.

Denmark and Kazakhstan set up a commission on trade and investment *(2 October 2026, Ministry of Foreign Affairs of Kazakhstan)*

Danish Foreign Minister Lars Løkke Rasmussen visited Kazakhstan on 1–2 October, holding talks with Kazakh Foreign Minister Mukhtar Tileuberdi and meeting Tokayev. The foreign ministries signed a memorandum establishing a **bilateral commission** on trade, economic and investment cooperation. Trade was $163 million in 2025. Talks covered cooperation with Maersk on the Middle Corridor, and Denmark named Lars Thuesen ambassador to Kazakhstan and special representative for Central Asia.

Relevance:

Denmark has been a modest economic partner for Kazakhstan, so a dedicated commission and a special representative for the region mark a step up. Rasmussen pointed to Central Asia's growing importance for Danish foreign and economic policy. Closer cooperation with Maersk would matter, because commitments by global carriers help make the Middle Corridor commercially viable. Watch for the commission's first meeting and any expansion of Maersk services on the route.