

## THE GEOPOLITICS OF THE MIDDLE CORRIDOR: AN INDIAN PERSPECTIVE

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The ongoing conflict between Russia and Ukraine for over a year and a half has led to several global challenges, including global supply chain disruptions, which were already affected severely during the coronavirus pandemic. The conflict and the ensuing sanctions by Western countries on Russia have impacted different regions. Asian countries are now seeking alternative routes for trading with the European markets.

The Northern Corridor (via Russia), the Southern Corridor (through Iran), and the Middle Corridor (through Central Asia and the South Caucasus) are currently the three existing major inland transit routes connecting Asia and Europe. In the Northern Corridor, the safety of freight traffic is a concern due to the consequences of the ongoing conflict between Russia and Ukraine. Besides, the conflict has impacted the competitiveness of the Northern Corridor. Usage of the Southern Corridor is complex on account of sanctions against Iran. Due to the changing geopolitical landscape, the Middle Corridor—which runs through Central Asia, the Caspian Sea, the Caucasus, and further into Europe—is becoming more significant.

De-risking, diversifying trade and transportation routes and restructuring logistics flows have become more critical than ever. As cargo transportation between Europe and Asia via the South Caucasus and Central Asia is expanding, multinational shippers are striving to develop new transit routes to circumvent Russia. The Middle Corridor is increasingly recognised as a crucial East-West connection. In this regard, the paper discusses growing Western support for the further development of the Middle Corridor route and developing inter-regional cooperation. The Middle Corridor's importance and challenges are also extensively discussed in the paper. Besides, India's connectivity linkages with Eurasia have also been analysed briefly.

### **The Middle Corridor**

The Middle Corridor starts from Southeast Asia and runs to European countries through Central Asia, the Caspian Sea, and the South Caucasus. It combines rail, sea, and road transportation modes and provides an alternative to traditional routes through Russia. The Middle Corridor (**Map 1**) has Northern and Southern branches. The Northern branch goes through Kazakhstan, while the Southern branch passes through Turkmenistan and Uzbekistan. After taking a ferry across the Caspian Sea, it divides into two routes: one crosses the Black Sea from Batumi, Georgia, to harbours in Romania and Bulgaria and the other overland through Türkiye to the Balkan countries. <sup>[1]</sup> The Middle Corridor includes significant Caspian Sea ports such as the ports of Baku

International Sea Trade Port (Azerbaijan), Aktau/Kuryk Ports (Kazakhstan), and Turkmenbashi Port (Turkmenistan), which contribute to the effortless movement of goods along this corridor. [2]

**Map 1**



Source: <https://eurasianet.org/how-the-middle-corridor-is-shaping-georgias-relations-with-the-west>

### The Middle Corridor

The Middle Corridor initiative was launched in 2013 when Kazakhstan, Azerbaijan and Georgia signed a document titled "The Establishment of a Coordination Committee for the Development of the Trans-Caspian International Transportation Route (TITR)". [3] In 2015, the first trial shipment, called "the Nomad Express", travelled from Western China to Baku via Aktau and the Caspian Sea in six days. [4] However, the "Transport Consortium (single route operator)" was established in December 2016 by the members of the Coordinating Committee to develop the route. The Trans-Caspian International Transport Route has begun operating in February 2017. [5]

With the opening of the Baku-Tbilisi-Kars (BTK) Railway (**Map 2**) on 30 October 2017, a further vital component of the Middle Corridor was completed. [6] With an initial capacity of 1 million persons and 6.5 million tonnes of cargo, the BTK offers a fresh vision for an unhindered trade in both directions. [7] Despite pandemic-related delays, the Baku-Tbilisi-Kars railroad's transportation volumes have continuously increased since its inauguration. By 2034, this capacity is anticipated to have expanded to 3 million passengers and 17 million tonnes of cargo annually. [8]

**Map 2**



Source: <https://www.eurasian-research.org/publication/recent-developments-in-the-baku-tbilisi-kars-railway-project/>

### Baku-Tbilisi-Kars Railway

Another agreement, known to be an extension of the Middle Corridor, the Lapis Lazuli Corridor (**Map 3**), is from Afghanistan to Türkiye, passing via Turkmenistan, Azerbaijan and Georgia. This Lapis Lazuli agreement was signed in Ashgabat on 14-15 November 2017. The Corridor has been considered to be a tangible outcome of developing regional integration and connectivity between South Asia and Europe. [9] The project's construction started in 2018, with an initial investment of US\$2 billion. [10]

Map 3



Source: <https://www.silkroadbriefing.com/news/2022/08/21/turkmenistan-essential-for-lapis-lazuli-corridor-connectivity-international-road-transport-union/>

### **Lapis Lazuli Corridor**

The Lapis Lazuli route was linked to the Baku-Tbilisi-Kars railway in 2018, allowing for the delivery of products from Afghanistan to Europe. Subsequently, Afghanistan shipped its first test shipment to Europe in December 2018. [11] The Ministry of Industry and Commerce of Afghanistan said that based on their findings, the Lapis Lazuli Corridor is low in cost, safe and close compared to Karachi port for transit of Afghanistan's goods to Europe. In future, the Lapis Lazuli Corridor can become an alternative to Pakistani trade routes for Afghanistan. [12] A tripartite roadmap was signed in January 2021 by Turkmenistan, Azerbaijan and Afghanistan to advance their cooperation on the Lapis Lazuli Corridor. [13] However, the project is stalled due to the Taliban takeover of Kabul in August 2021.

### **Significance of the Middle Corridor**

For several years, the Middle Corridor was making only gradual progress until accelerating with the onset of the Russia-Ukraine conflict and the ensuing sanctions on Russia. First, compared to the Northern Corridor, the Middle Corridor offers a shorter route, resulting in a shorter travel time. Most notably, the Middle Corridor assists companies in reducing the problems with sanctions compliance related to transiting through Russia.

The Middle Corridor offers access to new markets, with an estimated population of over 80 million along the route. Before the Russia-Ukraine conflict, more than 90% of the rail traffic between Europe and the Far East was carried along the Russian route; however, as a result of the sanctions in 2022, shipments reduced over the Northern Corridor by 40% while the support for the Middle Corridor is increasing. [14] Kazakhstan also saw a more than twofold increase in cargo moving over the Middle Corridor, hitting 1.5 million tonnes in 2022 as compared to 2021. [15] The Middle Corridor experienced unprecedented growth in 2022, with cargo volume growing by 2.5 times to 1.5 million tonnes. [16] Railway freight also increased by more than 60% to 433,000 tonnes in the first quarter of 2023. [17]

Moreover, the Middle Corridor is more significant in ensuring food and energy security. Energy exports from Central Asia to Europe could be increased due to the Middle Corridor. Kazakhstan expects to ship 1.5 million tonnes of oil, around 2–3% of its total oil exports, to Europe via the Middle Corridor to diversify its transport routes. [18] As part of implementing the roadmap agreed in November 2022, the participating nations—Azerbaijan, Georgia, Kazakhstan, and Türkiye—have set a goal to increase the Middle Corridor's capacity to 10 million tonnes annually by 2025. [19]

The corridor also traverses the boundaries of several other countries. However, as demand has increased, countries have begun to make great efforts to improve the infrastructure along routes and expedite various customs procedures. Ongoing efforts to raise the standard and conditions of transit routes along the Middle Corridor favourably impacted the figures. In the first four months of 2023, 8,696 containers passed through Azerbaijan, a 130% rise from the corresponding period in 2022. [\[20\]](#)

The development and expansion of Trans-Caspian cooperation will be facilitated by creating logistical hubs and free trade zones in Azerbaijan, Kazakhstan, and Turkmenistan ports, stimulating local economies. The countries in the region can profit from increasing commerce and economic growth by utilising the advantages of the Middle Corridor. Given that Iran and Russia are sanctioned, the Middle Corridor has an opportunity to establish itself as an effective route for East-West trade.

The introduction of digital tools, digitalisation and simplification of border processes and procedures, and policy harmonisation on customs and transport documentation are some initial stages towards developing an international platform for cooperation and action. Jonathan Charles, former European Bank for Reconstruction and Development (EBRD) Managing Director and international advisor to Kazakhstan, highlighted that "close coordination between all stakeholders along the route is essential to achieving the Middle Corridor's full potential." [\[21\]](#)

### **Growing Inter-Regional Cooperation**

On 31 March 2022, four countries—Georgia, Azerbaijan, Türkiye, and Kazakhstan—signed a quadrilateral declaration on developing the Middle Corridor, intending to foster greater cooperation and enhance the transit potential of the countries bordering the corridor. [\[22\]](#) This joint venture aims to fully automate freight transport services along the route by offering high-quality intermodal transport and logistics services, harmonising cross-border prices, and establishing a unified IT platform. Effective public-private partnerships are also being established with European logistics firms, including Maersk of Denmark, Rail Cargo Group of Austria, Nurminen Logistics of Finland, and Rail Bridge Cargo of the Netherlands, and all are working to increase cargo turnover along the route. [\[23\]](#)

In April 2022, the Danish shipping corporation Maersk inaugurated a rail service via the "Middle Corridor." According to the statement, the route was started "in response to customers' ever-changing supply chain needs in the current extraordinary times." [\[24\]](#) On 13 April 2022, the first train to use the new service departed from Xi'an, China, travelling through Kazakhstan, the Caspian Sea, Azerbaijan and Georgia before crossing the Black Sea to Romania and finally going to Germany. [\[25\]](#)

On 10 May 2023, the Finnish company Nurminen Logistics started running a container train across the Caspian Sea from China to Central Europe using the Trans-Caspian route. [26] The route had been created "in two months from scratch." On 27 May 2023, the first train arrived in Baku. In June 2023, Kazakhstan, Azerbaijan and Georgia announced their intent to create a joint logistics company and converge rail tariffs. [27] It is a significant development for the Middle Corridor between Central Asia and Europe along the Middle Corridor.

Central Asian countries' regional integration efforts have also intensified recently, especially for resilient connectivity in the region and beyond. The Central Asian countries are actively developing their infrastructure, including railroads. In the last six years, Kazakhstan has constructed 2,500 km of railways for US\$35 billion. [28] Along with their connections to China, Uzbekistan and Kyrgyzstan are aggressively expanding their rail networks. Meanwhile, Azerbaijan and Kazakhstan are improving the capacity of their Caspian Sea ports and ferries. Despite remaining neutral in the Russia-Ukraine conflict, Central Asian countries through the Middle Corridor are seeking an alternative route to the Russian-dominated Northern Corridor and more robust infrastructure to facilitate inter-regional trade.

On 14 September 2023, at the Fifth Consultative Summit of Heads of the Central Asian countries held in Dushanbe, Tajikistan, where President of Azerbaijan Ilham Aliyev was invited as the guest of honour, President of Turkmenistan Serdar Berdimuhamedow proposed creating a shared Central Asian transport and logistics platform. Given the "favourable conditions" for freight and passenger transportation between Central Asian countries, he claimed that transport is an essential topic of discussion among the countries in the region and that it is an appropriate time to increase cooperation in this field. [29] Turkmenistan emphasised more advantageous transportation connections between South Caucasus and Central Asia. South Caucasus countries are also cooperating to play a significant role in the ongoing development of the Trans-Caucasus Transit Corridor (CTC).

Moreover, Central Asian countries look to the Caucasus to strengthen the Trans-Caspian Corridor through increased partnerships and collaborations for a competitive alternative to other regional routes for the transportation of products, primarily to benefit from trade between China and Europe. The value of trade between China and the EU in recent years reached about US\$600 billion annually, and the EU has become China's largest trading partner, surpassing the US and Japan. [30] Effective use of the Middle Corridor will provide regional countries with significant economic prospects from increasing trade between China and Europe.

### **Support of the Western Countries to the Corridor**

The Russia-Ukraine conflict and China's intensifying diplomatic and economic exchanges with Central Asian countries have propelled the West to rekindle cooperation with the region by increasing long-term investments. Therefore, the West's strategic focus has turned to the South

Caucasus, Caspian Sea, and Central Asia, and growing support for the Middle Corridor is one of the components of enhancing engagements.

On 29 September 2023, Germany's Chancellor Olaf Scholz hosted leaders from the five Central Asian states – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan – for their first-ever Summit in Berlin. [31] The European Union (EU) member states strive to build regional cooperation in the changing geopolitical landscape due to the Russia-Ukraine conflict and seek to counteract Russia's dominant regional position by investing in alternative routes. Therefore, to strengthen regional and economic cooperation, the leaders expressed interest in developing the Middle Corridor and securing funding for infrastructure projects under the Global Gateway Plan in a joint statement after the Summit. [32]

Earlier, in June 2023, the Federal President of Germany, Frank-Walter Steinmeier, during his two-day state visit to Kazakhstan, stated that for trade relations between Asia and Europe, the "Middle Corridor" should "become an alternative to the northern route through Russia and Belarus and the southern route through Iran." [33]

US President Joe Biden also discussed the development of the Trans-Caspian Trade Route (the Middle Corridor) at the first-ever Summit with the Heads of State of Central Asian countries, which took place on 19 September 2023, on the sideline of the 78th Session of the UN General Assembly. [34] Additionally, Biden pledged to use the G7's Partnership for Global Infrastructure and Investment (PGII) to promote US investment in the Middle Corridor and assist in its development. [35]

Even though trade through the Middle Corridor has increased, many administrative, infrastructure, and political obstacles must be cleared before it can compete effectively with Eurasia's other major commercial routes.

## Challenges

The Caspian Sea countries needed more financing, infrastructure, and technology. The Caspian Basin is one of the world's most challenging "oil prospecting territories". [36] Though trade along the corridor has increased significantly, the Middle Corridor continues to face many challenges, such as the lack of infrastructure and transfer services, the hot and dry climate in summer along the Caspian Sea potentially impacting the perishable goods, delays at border crossings, and sporadic political instability. These issues must be resolved before cargo shipments increase.

Bottlenecks, such as the constrained capacity of seaports and railroads, lack of a uniform tariff structure, and absence of a single operator, could cause delays in transit. The Middle Corridor accounts for nearly 3-5% of all goods moved along the Northern Route despite a significant spike. [37] The route is slower and more expensive than the Northern route because it requires



multimodal transfers to cross the sea and has more border crossings. The demand for better railways and highways has been going on for years and is one of the primary infrastructure issues that has to be resolved.

The Caspian Sea nodes also required infrastructure to ensure more accessible transportation from Central Asian ports to Azerbaijan. Moreover, the lack of a deep-sea port in the Black Sea is also one of the challenges in the growth of the Middle Corridor. Georgia intends to attract investment to eventually construct the country's first deep sea port in Anaklia by taking advantage of its geography, the only South Caucasus country with a Black Sea coast, and the renewed global interest in the Middle Corridor.

### **India's Interest Lies in Exploring Connectivity Alternatives**

The importance of regional and international connectivity has been underscored by India's emergence as one of the fastest-growing economies in the world. By 2030, India will be a major global manufacturing hub with the capacity to export goods worth US \$1 trillion, and Europe will continue to be a significant destination. [\[38\]](#)

India's significant participation in numerous global connectivity projects demonstrates its ambitions for secure and affordable supply corridors to access the EU market. Recently, EU-India trade has increased, and they are holding discussions regarding a free trade agreement. In the 2022–2023 fiscal year, India exported €70 billion worth goods and services to the EU. [\[39\]](#) The crucial connectivity initiatives implemented by India, such as the International North-South Transport Corridor (INSTC), signing a deal with Iran in 2016 for the development of the Chabahar port, and joining the Ashgabat Agreement in 2018, have potential to impact India's trade and commercial ties significantly with the EU and different regions of the world.

On 9 September 2023, while announcing the India-Middle East-Europe Economic Corridor (IMEC) on the sidelines of the G20 Summit, held under the Presidency of India, Prime Minister Narendra Modi said that for India, improving connectivity was not only a means to increase trade between different countries but also an opportunity to increase mutual trust by following certain fundamental principles such as compliance with international norms, rules and laws, respect for the sovereignty and territorial integrity of all nations, promoting financial viability in place of increasing the debt burden and following all environmental-related standards. [\[40\]](#)

With the Middle Corridor, India's trade may also take the shorter route to Europe via the Caucasus and the Caspian Sea. There are two ways; first, since India intends to use the INSTC to go to Europe and Russia, combining the INSTC and Lapis Lazuli corridors will have several advantages. The second one is linking the Lapis Lazuli Corridor to Chabahar Port, which will facilitate economy and security once this route is developed. In the contemporary world, where the Middle Corridor is gaining significance, co-opting India would enhance the corridor's potential through its vast market. In the recently concluded G-20 Summit, India played the role of 'consensus builder'



at the global level. India can also play an essential role in converging various connectivity alternatives, which is indispensable in the changing geopolitical landscape.

### **Conclusion: Alternatives Are the New Reality in Connectivity**

The changing geopolitical landscape of the Eurasian region presents an opportunity for the advancement of the Middle Corridor. Though each stakeholder of the Middle Corridor might have different objectives for the corridor's development, they all converge on improving connectivity in the region and beyond. It also provides an opportunity for the South Caucasus, which has faced numerous challenges in developing its infrastructure. Developing new transport routes is strategically vital for Central Asia in light of recent geopolitical events in and out of the region.

Due to the growing economic significance of the Middle Corridor, the EU and the US will become more interested in and supportive of the route. Enhancing the resilience of energy supplies and supply networks and strategic advantages in a more prosperous and stable region are crucial concerns for the US and the EU, primarily to mitigate the impact of the global competition with China, Iran, and Russia.

Although the Middle Corridor's multimodal design may hinder large volumes of traffic and limit efficiency, it offers an alternative, diversifies transportation routes, and gives access to exporters from the South Caucasus and Central Asia to global markets. Due to the ongoing conflict between Russia and Ukraine (Northern Route), the Middle Corridor has the potential to become a third Vector of Eurasian Connectivity and a new reality among the existing East-West connectivity alternatives. Moreover, given the recent geopolitical development, creating multiple alternative routes is an adaptable and resilient approach.

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