THE MIDDLE CORRIDOR

GFSIS ESTONIA

THE NEW EURASIAN LOGISTICS ORDER AND THE STRATEGIC REINVENTION OF THE SOUTH CAUCASUS

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ISSUE
01

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1. Introduction

The organisation of the global economy has undergone significant transformation during the past three decades. Following the end of the Cold War, globalisation became increasingly characterised by the expansion of global value chains (GVCs), the fragmentation of production processes across multiple countries, and the growing integration of international markets. Firms organised production according to principles of comparative advantage, cost minimisation, and economies of scale, while advances in transportation, logistics, and communication technologies enabled increasingly complex cross-border supply chains (OECD 2013; World Bank 2020). Within this model, connectivity was primarily valued as a mechanism for reducing costs and improving efficiency.

The expansion of global value chains fundamentally altered patterns of international trade. Manufacturing activities became increasingly concentrated in East Asia, particularly in China, while maritime transportation emerged as the dominant mode of intercontinental commerce. Major maritime routes, especially those passing through the Suez Canal, became critical arteries of globalisation. Supply-chain management was largely guided by efficiency-oriented business models emphasising just-in-time production, lean inventories, and route optimisation. Consequently, international trade became increasingly dependent on a limited number of production centres, suppliers, and transport corridors (World Bank 2020; WTO 2019).

This model began to face significant challenges during the early 2020s. The COVID-19 pandemic exposed vulnerabilities associated with highly concentrated supply chains, and accelerated a shift towards resilience-oriented logistics strategies emphasising diversification, redundancy, and risk management (UNCTAD 2021; McKinsey Global Institute 2020). The restructuring of Eurasian connectivity accelerated further following Russia's full-scale invasion of Ukraine in February 2022, which increased uncertainty surrounding the Northern Corridor, and stimulated growing interest in alternative transport routes linking Europe and Asia (Figure 1. Major Eurasian Connectivity Initiatives: A Comparative Overview) (Eldem 2022; World Bank 2023).

At the same time, disruptions affecting maritime trade in the Red Sea and growing instability in the Middle East highlighted the vulnerability of key maritime chokepoints and reinforced concerns regarding the security of global supply chains. Together, these developments shifted the focus of governments and businesses beyond efficiency and resilience towards broader considerations of diversification, economic security, and route redundancy.

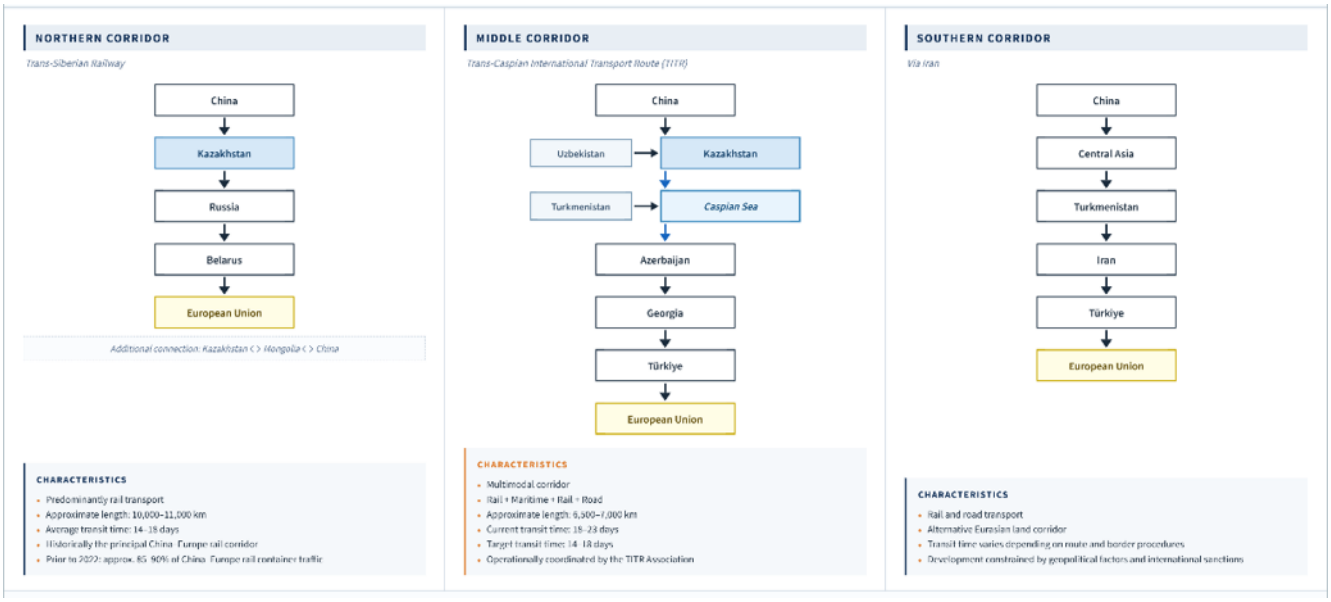


Figure 1. Major Eurasian Connectivity Routes: A Comparative Overview. Generated by AI

The cumulative effect of these disruptions has contributed to the emergence of a new Eurasian logistics order characterised by a growing emphasis on resilience, diversification, economic security, and strategic autonomy (OECD 2023; World Bank 2023). Connectivity is increasingly viewed as a strategic asset rather than simply a means of reducing transportation costs. This transformation is demonstrated in the growing prominence of initiatives such as China's Belt and Road Initiative (BRI), the European Union's Global Gateway strategy, the India–Middle East–Europe Economic Corridor (IMEC), and the Trans-Caspian Middle Corridor, which collectively illustrate the transition towards a more diversified and multi-corridor Eurasian connectivity architecture (European Commission 2021; OECD 2023).

Within this evolving environment, the South Caucasus has acquired renewed strategic significance. Historically situated at the intersection of Europe, Asia, and the Middle East, the region is increasingly emerging as a critical bridge connecting Central Asia, the Caspian Basin, Türkiye, and European markets. Importantly, its growing relevance cannot be explained solely by the development of the Middle Corridor; rather, it reflects the interaction of multiple connectivity initiatives and the broader restructuring of Eurasian trade and supply chains.

An important question emerging from these developments is whether the growing strategic importance of the South Caucasus represents a temporary response to recent geopolitical disruptions, or reflects a deeper structural transformation of Eurasian connectivity (World Bank 2023; OECD 2023). While the COVID-19 pandemic, the Russia–Ukraine war, and instability in the Middle East have undoubtedly accelerated interest in alternative transport routes, it remains unclear whether the region's rising significance will persist once current crises subside. This article argues that the growing importance of the South Caucasus is not merely crisis-driven; rather, it reflects a broader transition from a concentrated, efficiency-oriented model of globalisation towards a diversified, resilience-oriented, and security-conscious multi-corridor architecture that is likely to endure beyond current geopolitical conditions.

This article examines how competing and overlapping connectivity initiatives are reshaping the strategic position of the South Caucasus within the emerging Eurasian logistics order. It argues that the region is undergoing a process of geographic, economic, strategic, digital, and industrial reinvention driven by the growing importance of diversification, resilience, economic security, and value-chain development (World Bank 2023; OECD 2023; Eldem 2022). While geography creates opportunity, the long-term benefits of connectivity will depend on the ability of regional actors to transform transit advantages into sustainable economic value through logistics services, digital integration, industrial development, and deeper participation in regional and global value chains.

The article proceeds in four stages. First, it examines the major connectivity initiatives shaping contemporary Eurasian trade and logistics, including the Belt and Road Initiative, Global Gateway, IMEC, and the Middle Corridor. Second, it analyses the development, governance, and operational characteristics of the Middle Corridor as the principal east–west transport platform connecting Central Asia and the South Caucasus with European markets. Third, it reviews stakeholder perspectives regarding the future role of the South Caucasus within emerging Eurasian connectivity networks. Finally, it evaluates the broader process of geographic, economic, strategic, digital, and industrial reinvention taking place in the region, and discusses its implications for regional integration, supply-chain resilience, and the future Eurasian logistics order.

2.1 Belt and Road Initiative (BRI)

The Belt and Road Initiative (BRI) was formally launched by Chinese President Xi Jinping in September and October 2013, through speeches delivered in Kazakhstan and Indonesia, where he proposed the creation of the Silk Road Economic Belt and the 21st Century Maritime Silk Road. Together, these initiatives evolved into China's flagship international connectivity and infrastructure strategy, aimed at strengthening economic integration between Asia, Europe, Africa, and other regions through investments in transport infrastructure, logistics networks, energy systems, industrial cooperation, digital connectivity, and trade facilitation (Xi 2013a; Xi 2013b).

The Belt and Road Initiative emerged during a period of rapid Chinese economic expansion and growing demand for Eurasian connectivity. Although officially framed as a platform for international cooperation and shared development, it also supported broader Chinese objectives, including overseas investment, trade route diversification, supply chain resilience, and the strengthening of China's role in the global economy (Rolland 2017).

Unlike traditional development assistance programs, the BRI operates as a broad policy framework supported by Chinese policy banks, state-owned enterprises, sovereign funds, and multilateral financial institutions. Key financing actors include the China Development Bank (CDB), the Export-Import Bank of China, the Silk Road Fund, and the Asian Infrastructure Investment Bank (AIIB). Together, these institutions finance transport, energy, logistics, industrial, digital, and renewable energy projects across participating countries (World Bank 2019).

The Belt and Road Initiative consists of two principal components: The Silk Road Economic Belt, which promotes land-based connectivity across Eurasia, and the 21st Century Maritime Silk Road, which strengthens maritime links between Asia, Africa, and Europe. Together, these routes form an extensive network designed to facilitate trade and economic integration across multiple regions. Reflecting its global scale, by 2025, more than 150 countries and over 30 international organisations had signed cooperation agreements under the BRI framework. Cumulative engagement has exceeded US$1 trillion through infrastructure investments, construction contracts, and development financing, while Chinese overseas engagement under the initiative reached approximately US$121 billion in 2024 alone (Nedopil Wang 2025).

Since its launch in 2013, the Belt and Road Initiative has evolved from a predominantly infrastructure-focused program into a broader framework for international economic cooperation. Following a period of rapid expansion and institutionalisation, marked by the first Belt and Road Forum in 2017, the initiative expanded investments in transport, logistics, energy, and industrial infrastructure across Eurasia. Since 2023, China has promoted a "High-Quality Belt and Road Initiative," placing greater emphasis on financial sustainability, green development, digital connectivity, renewable energy, and technological cooperation (Nedopil Wang 2025).

2.2 Global Gateway: The European Union's Connectivity Strategy

The Global Gateway Strategy was launched by the European Commission on 1 December 2021, under the leadership of European Commission President Ursula von der Leyen, as the European Union's flagship connectivity and infrastructure initiative (European Commission 2021). Although officially presented as a partnership-driven development strategy, many analysts view Global Gateway as the European Union's strategic response to China's Belt and Road Initiative (BRI) and an effort to strengthen European influence through infrastructure, investment, and connectivity partnerships (European Commission 2021). Through a "Team Europe" approach, the initiative seeks to mobilise up to €300 billion between 2021 and 2027 for investments in transport, energy, digital infrastructure, health, and education (European Commission 2021).

The strategy targets Africa, the Indo-Pacific, Latin America and the Caribbean, Central Asia, the Western Balkans, the Southern Neighbourhood, and the Eastern Partnership countries, including Georgia, Moldova, Ukraine, Armenia, and Azerbaijan (European Commission 2021). Following Russia's invasion of Ukraine, Global Gateway gained additional importance as the European Union sought to strengthen supply chain resilience and diversify transport connections between Europe and Asia (European Commission 2024).

A major implementation milestone was the Global Gateway Forum held in Brussels in October 2023, which brought together governments, financial institutions, and private-sector representatives to advance flagship connectivity projects (European Commission 2023). This was followed by the Investors Forum for EU–Central Asia Transport Connectivity in January 2024, where Executive Vice-President Valdis Dombrovskis announced €10 billion in ongoing and planned investments to support sustainable transport connectivity and the development of the Trans-Caspian Transport Corridor (Middle Corridor) (European Commission 2024a). As a result, Global Gateway has become the principal European framework for supporting connectivity projects across the South Caucasus and wider Eurasian region.

2.3 India–Middle East–Europe Economic Corridor (IMEC)

The India–Middle East–Europe Economic Corridor (IMEC) was launched on 9 September 2023 during the G20 Summit in New Delhi through the signing of a Memorandum of Understanding by India, the United States, the European Union, Saudi Arabia, the United Arab Emirates (UAE), France, Germany, and Italy (Memorandum of Understanding 2023; Reuters 2023).

The initiative emerged alongside growing concerns regarding supply chain resilience, economic security, and the diversification of international trade routes following the COVID-19 pandemic and Russia's invasion of Ukraine. Its objective is to strengthen connectivity between India, the Middle East, and Europe through an integrated network of transport, energy, and digital infrastructure (Ghanem and Sánchez-Cacicedo 2024).

The proposed route connects India with Europe through the Arabian Peninsula, combining maritime and rail transportation within a single multimodal logistics network. Cargo originating in India is transported by sea to the United Arab Emirates, continues through Saudi Arabia and Jordan via rail infrastructure, reaches the Israeli port of Haifa on the Mediterranean Sea, and subsequently connects with European markets through maritime transport. In addition to transport infrastructure, the corridor incorporates plans for energy transmission networks, digital connectivity, and future hydrogen supply chains linking South Asia, the Middle East, and Europe (Memorandum of Understanding 2023; RIS 2025).

Unlike China's Belt and Road Initiative (BRI) and the European Union's Global Gateway strategy, IMEC does not yet possess a fully institutionalised financing architecture. Nevertheless, policy estimates suggest that the initiative may require approximately USD 100 billion in logistics and port investments and an additional USD 50 billion in energy infrastructure, including electricity

interconnections and renewable energy projects. Policy discussions further envision digital payment integration, blockchain-based trade finance systems, automated customs procedures, and artificial intelligence-driven logistics solutions designed to improve supply chain efficiency (RIS 2025, 13–15).

From a geopolitical perspective, participating countries do not necessarily share identical objectives. While India, Saudi Arabia, the UAE, and Israel primarily view IMEC as a mechanism for economic development, regional integration, and connectivity, the United States and the European Union increasingly regard the initiative as a means of strengthening supply chain resilience and expanding connectivity options across Eurasia. Consequently, IMEC has emerged as an important component of the evolving Eurasian connectivity landscape and a potential alternative to China's Belt and Road Initiative within a broader framework of competing connectivity strategies (Ghanem and Sánchez-Cacicedo 2024).

3. The Middle Corridor in the Emerging Eurasian Logistics Order

3.1 Definition, Terminology and Participants

The Middle Corridor represents the broader geopolitical and economic connectivity framework linking Asia and Europe through Central Asia, the Caspian Sea, and the South Caucasus (Figure 2). Its operational component is the Trans-Caspian International Transport Route (TITR), which facilitates cargo movement across the corridor. The route connects China, Kazakhstan, Azerbaijan, Georgia, and Türkiye, providing access to European markets through an integrated network of transport and logistics infrastructure. While these countries constitute the corridor's core participants, additional states, including Uzbekistan, Turkmenistan, Romania, Bulgaria, and other European partners, contribute through feeder connections, logistics services, and downstream transport networks.

The Middle Corridor is one of the principal Eurasian transport routes linking Asia and Europe. A defining characteristic of the corridor is its multimodal nature, integrating rail, maritime, road, port, and logistics operations across multiple countries. Cargo is transported by rail across Central Asia, transferred across the Caspian Sea through ferry and Ro-Ro services, and subsequently moved through the South Caucasus and Türkiye toward European markets.

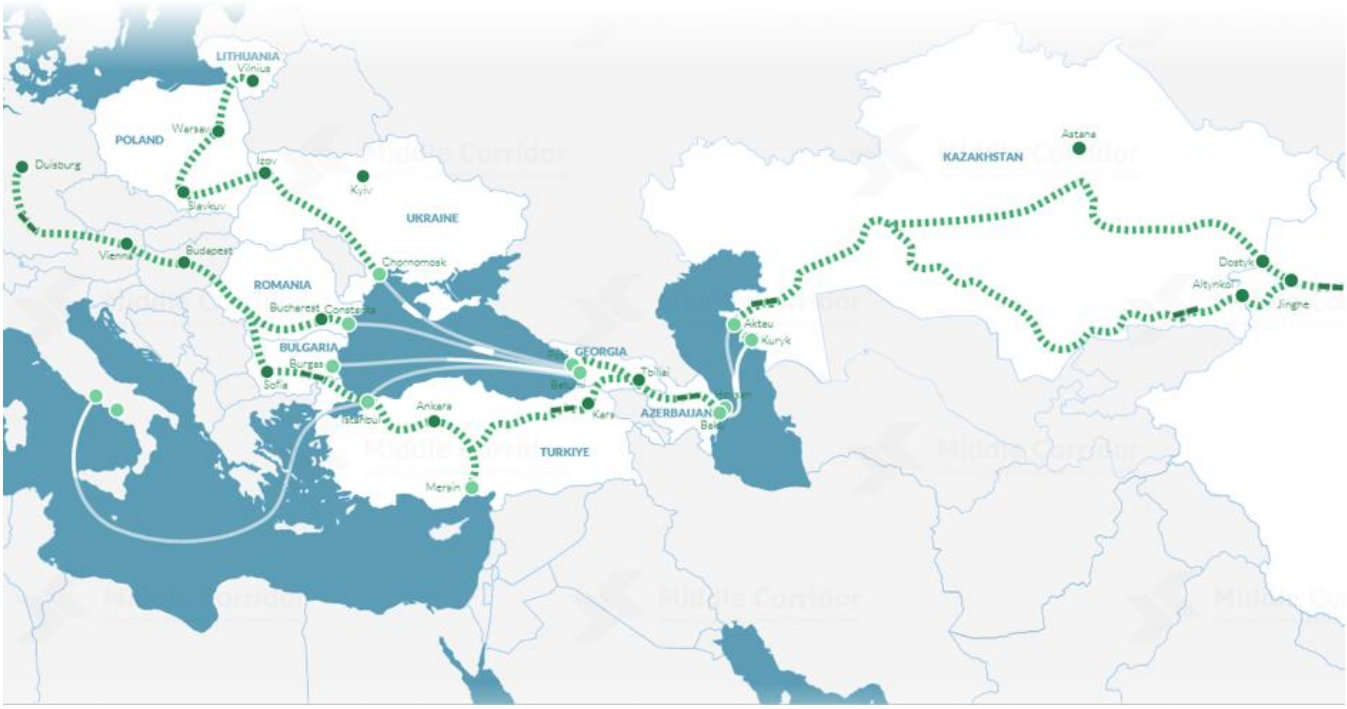


Figure 2. Trans-Caspian International Transport Route (Middle Corridor) network. Source: TITR Association (2026), official route map, accessed 21 June 2026, https://middlecorridor.com. Screenshot by author.

3.2 Historical Evolution of the Middle Corridor

The geography of the contemporary Middle Corridor overlaps with territories that historically facilitated trade between Asia and Europe. While the modern corridor differs fundamentally from historical trade routes in terms of infrastructure, governance, and transport technologies, its geographic configuration reflects the legacy of the Silk Roads, which connected Central Asia, the Caucasus, and European markets through a network of overland trade routes (UNESCO 2014).

The institutional foundations of the corridor emerged after the dissolution of the Soviet Union. In 1993, the European Union launched the Transport Corridor Europe–Caucasus–Asia (TRACECA) programme to strengthen transport links between Europe, the Black Sea region, the South Caucasus, the Caspian basin, and Central Asia. This process culminated in the signing of the Basic Multilateral Agreement (MLA) in Baku in 1998, which established the legal framework for transport cooperation, transit facilitation, customs procedures, and trade development among participating countries (TRACECA 2021; TRACECA 2024) (Figure 3).

The strategic importance of the South Caucasus was further reinforced through the development of east–west energy infrastructure. The commissioning of the Baku–Tbilisi–Ceyhan (BTC) oil pipeline in 2006 and the South Caucasus Pipeline (SCP) in 2007 demonstrated the feasibility of large-scale regional infrastructure cooperation and strengthened the region's role as a transit bridge between the Caspian basin and international markets (BP 2024; European Commission 2024; Komakhia 2022).

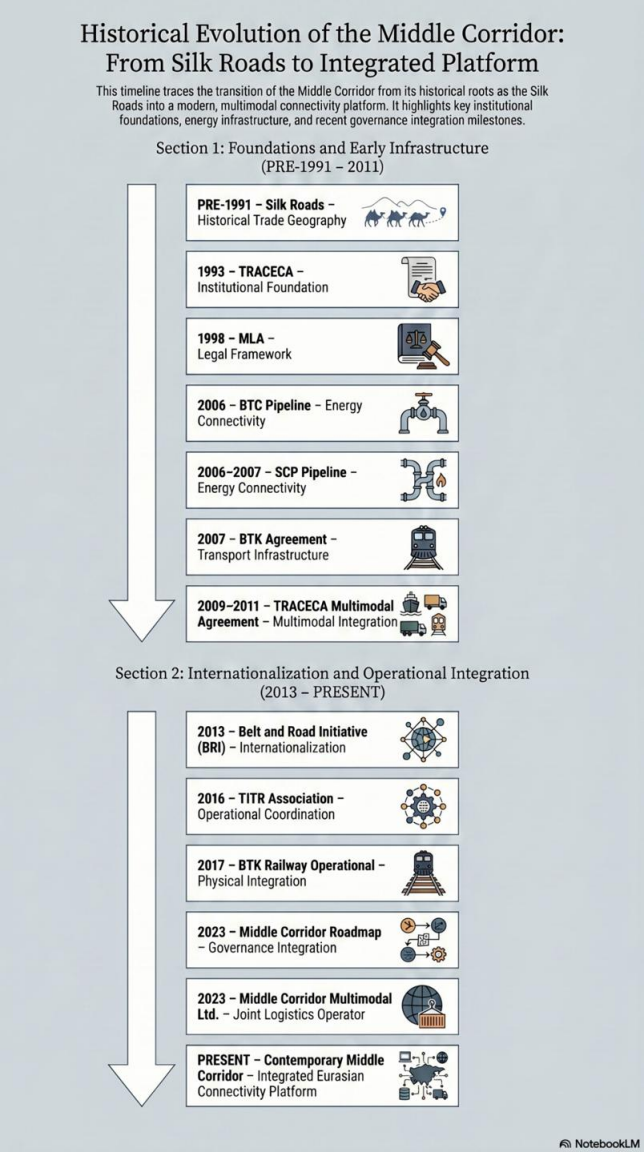


Figure 3. Historical development of the Middle Corridor. Source: Author's elaboration based on TRACECA (2024), TITR Association (2025), World Bank (2024), and EBRD (2024). Visualisation prepared using Google NotebookLM.

The physical foundations of the transport corridor were strengthened through the signing of the Baku–Tbilisi–Kars (BTK) railway agreement in 2007 and the adoption of the TRACECA Multimodal Transport Agreement, which entered into force in 2011. Together, these initiatives strengthened multimodal transport integration across the region and improved connectivity between the Caspian and Black Sea basins (TRACECA 2021; Azerbaijan Railways (ADY) 2024).

A new phase began with the launch of China's Belt and Road Initiative (BRI) in 2013. Although the Middle Corridor was not created by the BRI, the initiative increased international attention toward Eurasian connectivity and enhanced the corridor's geopolitical visibility (Republic of Türkiye Ministry of Foreign Affairs 2025).

The corridor's operational institutionalisation accelerated in 2016 with the establishment of the International Association "Trans-Caspian International Transport Route" (TITR) by Azerbaijan Railways, Kazakhstan Temir Zholy, and Georgian Railway. This was followed by the inauguration of the Baku–Tbilisi–Kars railway in 2017, creating a continuous rail connection between the Caspian region, the South Caucasus, and Türkiye (TITR Association 2024; TCDD 2017).

The most recent phase of development began in 2023 with the adoption of the Middle Corridor Roadmap and the establishment of Middle Corridor Multimodal Ltd. (MCM) as a joint venture by Azerbaijan, Georgia, and Kazakhstan, later joined by China's China Railway Container Transport Corporation (CRCT). These developments marked a shift from infrastructure construction toward coordinated corridor management, emphasising operational coordination, digitalisation, and corridor-wide integration (World Bank 2023; OECD 2023; TITR Association 2024).

Today, the Middle Corridor is evolving from a collection of national transport projects into an increasingly integrated Eurasian connectivity platform linking Asia and Europe through coordinated infrastructure, logistics, and institutional cooperation.

3.3 Economic Structure and Logistics Intensity of Core Corridor Economies

The core economies of the Middle Corridor occupy different positions within regional and global value chains. Kazakhstan and Azerbaijan remain largely resource-exporting economies, with mineral products accounting for approximately 84 percent and 90 percent of exports, respectively. In contrast, Türkiye functions as the principal manufacturing hub of the corridor, importing energy and intermediate goods while exporting higher-value industrial products. Georgia occupies a different position, deriving a significant share of its economic value from transit services, logistics, customs operations, and re-export activities rather than large-scale industrial production (OECD 2023).

These structural differences are reflected in the economic significance of the transportation and storage sector. In 2024–2025, transportation and storage accounted for approximately 8.2 percent of GDP in Türkiye, 7.1 percent in Azerbaijan, 6.1 percent in Georgia, and 5.6 percent in Kazakhstan, compared with approximately 5 percent in the European Union (Eurostat 2024; National Statistics Office of Georgia (Geostat) 2026; State Statistical Committee of the Republic of Azerbaijan 2026; TÜİK 2025; Bureau of National Statistics of the Republic of Kazakhstan 2025).

The corridor therefore connects economies performing complementary functions within Eurasian trade networks, linking resource exporters, manufacturing centres, logistics hubs, and consumer markets. Beyond facilitating transit, this diversity creates opportunities to expand value-added logistics services, including warehousing, distribution, customs brokerage, packaging, inventory management, and operations within logistics hubs, dry ports, and free economic zones (OECD 2023; World Bank 2023).

3.4 Infrastructure and Capacity of the Middle Corridor

3.4.1 Maritime Infrastructure and Capacity

The maritime segment forms the operational core of the Middle Corridor, linking the railway networks of Central Asia and the South Caucasus through the Caspian and Black Sea port systems. Consequently, the capacity and performance of a limited number of ports directly influence the functioning of the corridor.

On the eastern shore of the Caspian Sea, Kazakhstan's maritime gateway consists of the ports of Aktau and Kuryk. Together, they provide approximately 17.8 million tonnes of annual handling capacity and serve as the principal connection between Central Asian rail networks and trans-Caspian shipping services. According to Kazakhstan's Ministry of Transport, the country's Caspian ports handled approximately 7.4 million tonnes of cargo in 2024, corresponding to an estimated utilisation rate of 41.8 percent (Aktau International Sea Commercial Port 2024; Caspian Post 2024) (Figure 4).

On the western shore of the Caspian Sea, the Port of Baku at Alat serves as the central maritime hub of the Middle Corridor. The port currently possesses an annual handling capacity of 15 million tonnes and processed 7.3 million tonnes of cargo in 2023, corresponding to an estimated utilization rate of 48.7 percent (Port of Baku 2024).

Capacity and Utilization of Ports Critical to Middle Corridor Development

Latest Available Data (2023–2025)

Port System	Capacity	Cap. Year	Throughput	Throughput Year	Utilization
Poti (Georgia)	1.2 million TEU	2025	636,466 TEU	2025	53.0%
Alat (Azerbaijan)	15.0 Mt	2024	7.3 Mt	2023	48.7%
Aktau + Kuryk (Kazakhstan)	17.8 Mt	2024	7.44 Mt *	2024 (est.)	41.8%
Batumi (Georgia)	18.0 Mt	2025	7.3 Mt	2025	40.6%

"Despite differences in reporting periods, available data suggest that the principal ports of the Middle Corridor currently operate at approximately 40–55% of installed capacity, indicating substantial room for future traffic growth."

Figure 4. Capacity and utilisation of ports critical to Middle Corridor development. Generated by AI

Georgia's maritime infrastructure is centred on the ports of Poti and Batumi. Poti handled a record 636,466 TEU in 2025, representing approximately 53 percent utilisation of its annual container capacity of 1.2 million TEU. Batumi processed 7.3 million tonnes of cargo in 2025 against an annual capacity of 18 million tonnes, corresponding to a utilisation rate of 40.6 percent (APM Terminals 2025; Business Insider Georgia 2026; Batumi Sea Port 2026).

As illustrated in Table 4, the principal ports of the Middle Corridor currently operate at approximately 40–55 percent of installed capacity. Although the figures are not fully comparable due to differences in reporting years and methodologies, they indicate the existence of substantial spare capacity across the corridor's maritime infrastructure.

3.4.2 Railway Infrastructure and Capacity

Railway transport forms the land-based backbone of the Middle Corridor, linking Central Asia, the South Caucasus, Türkiye, and European markets through an integrated east–west railway network.

Kazakhstan possesses the largest railway network among the corridor countries, extending approximately 16,000 km, of which around 4,200 km (approximately 27 percent) are electrified. In 2025, Kazakhstan's railways transported 347.7 million tonnes of freight (Bureau of National Statistics of the Republic of Kazakhstan 2026). However, these figures represent the country's entire railway system rather than traffic moving along the Middle Corridor. Kazakhstan's rail network serves several Eurasian transport corridors, and the majority of its international rail freight has traditionally moved via the Northern Corridor through Russia (OECD 2023; World Bank 2023).

Azerbaijan occupies the central position within the corridor, where the Port of Baku at Alat, the country's East–West railway corridor, and the Baku–Tbilisi–Kars (BTK) railway integrate the Caspian maritime crossing with the South Caucasus railway system. The national railway network extends along 2,137 km of operational lines, approximately 60 percent of which are electrified. In 2025, Azerbaijan transported 14.3 million tonnes of freight by rail. The East–West railway provides the principal freight connection between the Port of Baku and Georgia's ports of Poti and Batumi, while the BTK railway extends this corridor through Türkiye to the European railway network (Azerbaijan Railways 2025; State Statistical Committee of the Republic of Azerbaijan 2026).

Georgia serves as the Black Sea gateway of the corridor. Its railway network extends 2,441 km, with 98.4 percent electrification, making it one of the most electrified railway systems in the region. Georgian Railways transported 13.26 million tonnes of freight in 2025, with transit cargo accounting for 57.5 percent of total railway freight (National Statistics Office of Georgia [Geostat] 2026). The country's East–West railway corridor links the Azerbaijani border with the Black Sea ports of Poti and Batumi, providing the principal rail connection between the Caspian and Black Sea basins. At Tbilisi, the Baku–Tbilisi–Kars railway branches southwest toward Türkiye, creating an uninterrupted rail connection between the Caspian region and European railway networks.

Türkiye provides the western continuation of the Middle Corridor through its railway network connecting Kars with Ankara, Istanbul, and European markets. The Baku–Tbilisi–Kars (BTK) railway constitutes the principal rail connection between the South

Caucasus and Türkiye. The 840 km railway extends through Azerbaijan (503 km), Georgia (259 km), and Türkiye (79 km), providing uninterrupted access to the European railway network via the Marmaray rail tunnel beneath the Bosporus. (Republic of Türkiye Ministry of Transport, Maritime Affairs and Communications 2018; [Daily Sabah 2026]).

3.4.3 Development of Physical Logistics Infrastructure

3.4.3.1 Railway Infrastructure Development

Following the rapid growth of traffic after 2022, investment priorities along the Middle Corridor have shifted from constructing missing transport links towards expanding capacity, eliminating bottlenecks, and improving multimodal connectivity. Supported by international financial institutions and national governments, ongoing railway projects seek to strengthen the corridor's operational reliability and competitiveness.

In Kazakhstan, investments focus on double-tracking, bypass lines, the modernisation of border crossings, and improved rail access to the Caspian ports of Aktau and Kuryk. These projects are supported by the World Bank, IFC, AIIB, MIGA, and other international financial institutions (IFC 2026; World Bank 2026).

In Azerbaijan, railway development centres on the modernisation of the Baku–Tbilisi–Kars (BTK) railway so as to strengthen integration between the Port of Baku and the national East–West railway network. Following modernisation completed in 2026, the BTK railway reached its full operational freight capacity of 5 million tonnes annually. Azerbaijan has also initiated construction of a railway connection toward Nakhchivan, which could add approximately 15 million tonnes of annual freight capacity if implemented (Azerbaijan Railways [ADY] and International Transport Forum [ITF] 2025b; [Daily Sabah 2026]).

In Georgia, investment priorities include modernisation of the East–West railway corridor, improving freight connectivity between Azerbaijan and the Black Sea ports of Poti and Batumi, and strengthening integration with the BTK railway.

In Türkiye, continued investment in the Marmaray rail tunnel, the Halkalı–Kapıkule railway, and related freight infrastructure further strengthens the uninterrupted railway connection between Asia and Europe (Republic of Türkiye Ministry of Transport, Maritime Affairs and Communications 2018).

3.4.3.2 Maritime Infrastructure Development

The maritime segment remains one of the most critical components of the Middle Corridor, making continued investment in Caspian and Black Sea port infrastructure essential for future corridor competitiveness.

In Kazakhstan, modernisation continues at the ports of Aktau and Kuryk, including berth reconstruction, dredging, expanded Ro-Ro capacity, and improved rail-port connectivity, with support from the European Bank for Reconstruction and Development (EBRD) and other development partners (EBRD 2024).

In Azerbaijan, investment focuses on expanding the Port of Baku at Alat, strengthening multimodal integration with Azerbaijan Railways, increasing ferry capacity, and developing the Alat Free Economic Zone, further reinforcing Azerbaijan's role as the principal Caspian gateway of the Middle Corridor (Port of Baku 2024).

Alongside port development, Kazakhstan and Azerbaijan continue to invest in expanding the Caspian maritime fleet through new ferries, Ro-Ro vessels, and cargo ships. These investments support the growing volume of trans-Caspian freight and enhance maritime connectivity along the Middle Corridor (OECD 2023; World Bank 2023).

In Georgia, investment priorities include construction of the Anaklia Deep Sea Port, expansion of the New Poti Sea Port, and modernisation of maritime infrastructure supporting the Black Sea gateway of the corridor. The U.S. International Development Finance Corporation (DFC) has committed up to USD 75 million to support the expansion of the New Poti Sea Port, including construction of a new terminal expected to increase annual handling capacity by approximately 1 million tonnes (Georgia Today 2026).

Although not currently part of the core operational route, Turkmenbashi International Seaport provides additional maritime capacity that could contribute to future diversification of Trans-Caspian freight flows.

3.4.3.3 Logistics Hubs and Intermodal Terminals

Alongside railway and port modernisation, participating countries are increasingly investing in logistics hubs, dry ports, and intermodal terminals that strengthen cargo consolidation, customs clearance, warehousing, and multimodal distribution across the corridor.

In Kazakhstan, the Khorgos Gateway Dry Port and the Sarzha Multipurpose Marine Terminal improve container trans-shipment and strengthen Kazakhstan's position as the eastern logistics gateway connecting China with the Middle Corridor (AD Ports Group 2025; Khorgos Gateway 2025).

In Azerbaijan, logistics development is centred in the Alat Logistics Centre within the Alat Free Economic Zone, integrating rail, road, port, warehousing, and value-added logistics services into a single multimodal platform that supports corridor operations (Alat Logistics Center 2025).

In Georgia, the Tbilisi Intermodal Hub (Tbilisi Dry Port), inaugurated in 2025, provides the country's first modern bonded inland logistics terminal. Directly connected to the ports of Poti and Batumi and the national railway network, the facility strengthens Georgia's role as a regional logistics platform for container handling, customs clearance, warehousing, and cargo distribution (AD Ports Group 2025).

Taken together, these investments demonstrate that the Middle Corridor is evolving beyond a transport route into an integrated logistics system, where competitiveness increasingly depends on multimodal connectivity, efficient logistics services, and operational integration.

3.5 Trade Facilitation, Digitalisation, Corridor Governance

While investments in physical infrastructure have expanded the capacity of the Middle Corridor, its long-term competitiveness increasingly depends on trade facilitation, digitalisation, and coordinated corridor governance. International organisations, including the World Bank, OECD, and UNECE, emphasise that efficient customs procedures, interoperability, information exchange, and institutional coordination have become as important as transport infrastructure itself (World Bank 2023; OECD 2025; UNECE 2023).

The OECD Trade Facilitation Indicators (TFIs) reveal notable differences across the corridor. The South Caucasus performs closer to OECD standards than Central Asia in several dimensions, particularly automation, customs procedures, governance, and border agency cooperation (Figure 5). By contrast, internal and external border agency cooperation remain comparatively weaker across much of Central Asia, highlighting the importance of continued institutional coordination and digital integration (OECD 2025).

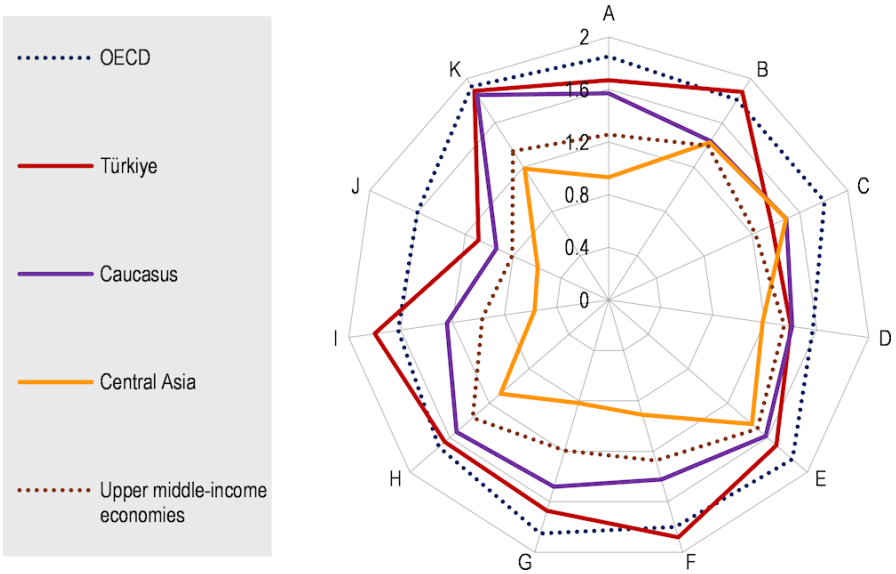


Figure 5. Performance of Central Asia, the South Caucasus, and Türkiye in the OECD Trade Facilitation Indicators, 2022

Note: A = Information Availability; B = Involvement of the Trade Community; C = Advance Rulings; D = Appeal Procedures; E = Fees and Charges; F = Documents; G = Automation; H = Procedures; I = Internal Border Agency Cooperation; J = External Border Agency Cooperation; K = Governance and Impartiality. "Caucasus" represents the average score of Armenia, Azerbaijan, and Georgia. "Central Asia" represents the average score of Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. "OECD" represents the average score of all OECD member countries. Scores range from 0 (lowest performance) to 2 (best practice performance).

Governments and international partners have responded by accelerating digital transformation. Azerbaijan has introduced the Digital Transport and Logistics Information System (DTLIS), Kazakhstan continues to expand digital customs, cargo monitoring, and transport management systems, while Georgia maintains one of the region's most advanced digital customs and Single Window environments. At the corridor level, the TITR Association promotes tariff harmonisation, coordinated transport services, and information exchange. In 2023, the national railway companies of Kazakhstan (KTZ), Azerbaijan (ADY), and Georgia (GR) established Middle Corridor Multimodal Ltd. (MCM) to coordinate multimodal transport operations and develop an integrated logistics service across the corridor. In 2025, China Railway Container Transport Corporation (CRCT) joined the joint venture, further strengthening operational integration between China and the Middle Corridor (Azerbaijan Railways [ADY] and International Transport Forum [ITF] 2025b; Astana Times 2024; Jamestown Foundation 2025).

3.6 Challenges and Bottlenecks

Alongside significant investments in infrastructure and logistics, the Middle Corridor continues to face several operational, institutional, and environmental challenges. One of the most significant concerns remains the Caspian Sea crossing, where ferry and Ro-Ro capacity, vessel availability, sailing schedules, and trans-shipment efficiency influence corridor performance (World Bank 2023; UZMIIT 2026).

On the Black Sea side, Georgia remains the corridor's principal maritime gateway to Europe. However, the absence of an operational deep-sea port limits the accommodation of larger vessels and direct maritime services, making completion of the Anaklia Deep Sea Port an important element of the corridor's future development (U.S. Commercial Service 2026; World Bank 2023).

Operational challenges also persist in railway interoperability, customs procedures, border crossings, regulatory harmonisation, and digital integration. The change of railway gauge at the Georgia–Türkiye border, together with differences in transport procedures and information systems, requires continued coordination among corridor participants. Further progress in electronic documentation, Single Window systems, cargo tracking, and cross-border information exchange is expected to improve transport efficiency and service reliability (OECD 2024; UZMIIT 2026; World Bank 2023).

Another emerging challenge is the declining water level of the Caspian Sea, which may affect navigability, increase dredging requirements, and place additional pressure on port operations and maritime transport infrastructure (UNEP-DHI 2024; Reuters 2025).

4. Stakeholder Perspectives on the Strategic Role of the South Caucasus

Recent discussions among international financial institutions, international organisations, governments, industry representatives, and policy experts indicate broad agreement that the South Caucasus is assuming a more prominent role within the emerging Eurasian logistics order. While this growing importance is closely associated with the development of the Middle Corridor, stakeholders increasingly view the region itself as a strategic interface connecting Europe, Central Asia, and the Caspian basin within a more diversified connectivity architecture (Eldem 2022; World Bank 2023).

A recurring theme across stakeholder discussions is that the future competitiveness of the South Caucasus will depend less on its geographic location than on the efficiency of its transport and logistics systems. Representatives of the World Bank, OECD, TRACECA, and the logistics sector consistently emphasise customs modernisation, digitalisation, interoperability, and institutional coordination as the principal factors determining corridor performance (World Bank 2023; OECD 2023; UZMIIT 2026).

Stakeholders also argue that the region's long-term development should extend beyond its transit function. The establishment of logistics hubs, warehousing facilities, industrial zones, and value-added services is increasingly regarded as essential for enabling the South Caucasus to capture greater economic benefits from growing connectivity and to strengthen its position within regional and global value chains (World Bank 2023; OECD 2023; Marti and Komilov 2025).

Another area of broad consensus concerns the growing convergence of external interests in the South Caucasus. The European Union increasingly views the region as part of its connectivity diversification and strategic autonomy agenda; China regards it as an important complementary route within the Belt and Road Initiative; Türkiye promotes deeper regional integration; while the United States places growing emphasis on resilient supply chains, digital infrastructure, logistics modernisation, and secure access to critical minerals (European Commission 2024; Hajiyev, Tafuro Ambrosetti, and Bağcı 2025; Motkin, Dobkin, and Benson 2025; U.S. Commercial Service 2026). Together, these perspectives suggest that the South Caucasus is becoming an increasingly important intersection of economic, logistical, and geopolitical interests.

Overall, stakeholders suggest that the future role of the South Caucasus will depend not only on continued infrastructure investment, but also on effective governance, digital integration, and regional cooperation capable of transforming improved connectivity into sustainable economic development (World Bank 2023; UZMIIT 2026).

5. Discussion and Conclusions

5.1 Structural Transformation Rather Than Crisis Response

A central question of this study is whether the growing strategic importance of the South Caucasus is primarily a consequence of recent geopolitical crises or the result of a deeper transformation of Eurasian connectivity. A useful way to address this question is through a counterfactual perspective: would the region have gained strategic importance had the COVID-19 pandemic, Russia's full-scale invasion of Ukraine, and instability in the Red Sea not occurred?

The findings suggest that the answer is affirmative. These crises accelerated the search for alternative transport routes but did not create the foundations of the region's growing importance. The development of TRACECA, the Baku–Tbilisi–Kars railway, the Port of Baku at Alat, railway modernisation across Central Asia, and the Belt and Road Initiative had already strengthened East–West connectivity before the disruptions of the 2020s (European Commission 2021; TRACECA 2024; World Bank 2023). At the same time, global value chains were gradually changing as firms sought greater resilience, supplier diversification, and more flexible logistics networks. Recent geopolitical shocks therefore accelerated the ongoing structural transition rather than initiating it.

5.2 The Emerging Eurasian Logistics Order

The evidence presented throughout this article demonstrates that Eurasian connectivity is evolving from a system centred on a limited number of transport corridors into a diversified and interconnected logistics architecture. Rather than viewing the Belt and Road Initiative, Global Gateway, IMEC, and the Middle Corridor as separate or competing projects, they should be understood as overlapping responses to the same structural challenge: creating resilient, secure, and efficient connectivity between Asia and Europe (European Commission 2021; Ghanem and Sánchez-Cacicedo 2024).

This transformation reflects broader changes in global trade and production. Increasing geopolitical uncertainty, the restructuring of global value chains, and growing emphasis on supply-chain resilience have shifted policy priorities from minimising transport costs towards balancing efficiency with resilience, redundancy, and economic security. Within this emerging logistics order, the South Caucasus has evolved from a transit region into a critical logistics node linking Central Asia, the Caspian basin, the Black Sea region, Türkiye, and Europe.

The findings further indicate that future competitiveness will depend less on constructing additional infrastructure than on improving institutional performance. While considerable investments have expanded the capacity of ports, railways, and multimodal transport facilities, the principal bottlenecks increasingly relate to customs harmonisation, digitalisation, interoperability, logistics services, and corridor governance (OECD 2025; UNECE 2023; World Bank 2023). Geography creates opportunity, but logistics performance determines whether that opportunity becomes sustainable economic value.

5.3 Implications for the South Caucasus

The benefits of the current transformation remain unevenly distributed. Georgia and Azerbaijan occupy the core operational positions within the Middle Corridor, and therefore derive the greatest immediate advantages. Armenia is not currently part of the corridor's operational framework. Nevertheless, ongoing negotiations concerning the reopening of regional transport and logistics links, together with the engagement of international actors, including the United States, demonstrate that the future configuration of South Caucasus connectivity remains dynamic. Although the outcome of these discussions remains uncertain, they illustrate that Armenia could become a more significant participant within a future, more integrated, regional connectivity architecture.

Ultimately, the findings of this study demonstrate that the strategic reinvention of the South Caucasus is best understood not as the consequence of successive geopolitical crises, but as the manifestation of a broader restructuring of Eurasian trade, logistics, and global value chains. The COVID-19 pandemic, Russia's invasion of Ukraine, and disruptions in the Red Sea accelerated an ongoing transformation rather than creating it. Even if current geopolitical tensions gradually diminish, the broader movement towards diversified supply chains and multi-corridor connectivity is unlikely to reverse. The long-term challenge for the South Caucasus is

therefore no longer whether it occupies a strategic position within Eurasian connectivity, but whether it can transform that position into sustainable economic competitiveness, industrial development, and lasting regional integration.

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