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Türkiye's centrality in the Middle Corridor: reshaping connectivity architecture in South Caucasus

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TÜRKIYE'S CENTRALITY IN THE MIDDLE CORRIDOR: RESHAPING CONNECTIVITY ARCHITECTURE IN SOUTH CAUCASUS

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Executive Summary

This analysis aims to underline Türkiye's strategic centrality within the Middle Corridor project, as a geographic bridge linking East and West which allows to concretely implement the grid of trade and energy corridors between Asia and Europe. Türkiye's role as key logistic hub has been further emphasized following the effects of Russia-Ukraine and Middle East conflicts, which have imposed the urgent need to develop additional and alternative trade corridors to avoid the negative consequences of logistic disruptions.

Ankara has been able to capitalize its geographic centrality in the regional connectivity architecture for shaping and forging Turkish foreign policy, enhancing profitable cooperation with neighbouring countries (Azerbaijan and Georgia) as well as developing reliable relations with Turkic-speaking Central Asian countries: moreover, following the current geopolitical tensions, Armenia and Iraq have progressively emerged as partners to promote alternative trade routes which will bolster the Middle Corridor's strategic rationality through a geographic diversification of transport corridors but which remain focused on Türkiye, so preserving its role of logistic linchpin.

Introduction

The strategic need to diversify trade and energy routes along the east-west geographical axis, connecting Asia and Europe, has progressively become a key priority to mitigate the vulnerability linked to the instability and the disruptions' threats related to the Russia-Ukraine conflict and the closure of Hormuz Strait. The promotion of alternative transport routes to deliver goods as well as energy supply to the European markets – in order to escape from the negative implications of escalating regional conflicts – has progressively brought out the role of Türkiye as key logistic and energy hub, a reliable partner for developing and enhancing uninterrupted east-west transport corridors: consequently, the Türkiye-centered Middle Corridor (as well as potentially the Development Road Project)[1] has progressively emerged as a realistic and feasible geopolitical option to implement, while Turkish role as energy bridge has been further enhanced following the EU attempts to look for alternative energy routes bypassing Hormuz Strait.

In the Ankara perspective, the engagement to foster the Middle Corridor represents a centrepiece within Türkiye's foreign policy, which will pave the way for achieving different goals, namely to legitimize Ankara as a reliable partner for the EU, to deepen economic cooperation and political dialogue with Turkic-speaking Central Asian countries (and Azerbaijan), to reshape cooperation with neighbouring countries in the Caucasus: if Azerbaijan remains a strategic partner – also to implement the Trans Caspian International Trade Route, or Middle Corridor – Ankara aims to preserve cooperation with Georgia (key transit country within the Middle Corridor, connecting Türkiye with Azerbaijan) and to reshape a dialogue with Armenia on new basis in order to open a new transport corridor (TRIPP) which will allow to offer an alternative transport route within the Middle Corridor.

The aim of this paper is to analyse how Türkiye's geographic location has positively contributed to developing an east-west transport corridor, which was primarily conceived as an energy route then becoming an alternative trade route able to provide economic and strategic gains for all the involved actors. The implementation of the Middle Corridor is based on a wider framework of cooperation among transit countries: Ankara has promoted connectivity issues within its foreign policy towards Caucasus and Central Asia Turkic-speaking states, combining political dialogue with the opportunity to improve trade cooperation, involving them in trans-regional projects of infrastructural connectivity.

The Middle Corridor's rising relevance

As the natural entry point into Europe, Türkiye has always played a strategic role in the implementation of an east-west transport corridor, acting as a geographic and natural bridge connecting Asia and Europe. In this perspective, the Middle Corridor project based on developing the Trans-Caspian International Transport Route (TITR) as an alternative trade and transport corridor bypassing Russian territory has represented an intriguing opportunity for Ankara authorities to increase its geopolitical position as well as to expand the projection of the Turkish foreign policy in the wider region. The Middle Corridor was established in 2014 by Kazakhstan, Azerbaijan, and

1 "Türkiye-centered corridor gains edge as Mideast conflict strains sea routes", Daily Sabah, March 6, 2026, https://www.dailysabah.com/business/transportation/turkiye-centered-corridor-gains-edge-as-mideast-conflict-strains-sea-routes

Georgia to connect China and Europe via Central Asia, the Caspian Sea, and the South Caucasus, with onward links through Türkiye.

Before to emerge as a logistic linchpin within an east-west trade corridor, Türkiye's geographic centrality has appeared primarily relevant under an energy perspective: following the realisation of the Baku-Tbilisi-Ceyhan (BTC) oil pipeline and the parallel Baku-Tbilisi-Erzurum (BTE) gas pipeline – first segment of the EU-flagship energy project called the Southern Gas Corridor (SGC) - in the early 2000's, Türkiye has progressively become an energy hub for the EU, allowing a partial but concrete diversification of oil and gas supplies, delivering non-Russian hydrocarbons along an east-west energy corridor. The use of the Mediterranean oil terminals and the realisation of the Trans Anatolian Gas pipeline (TANAP) have contributed to better define Ankara's role in ensuring regular and alternative oil & gas supply to the EU, also before Russia's invasion of Ukraine in 2022. Furthermore, the geopolitical fragmentation triggered by the US-Iran recent conflict and the following disruption of the maritime traffic – linked to Hormuz closure as well as the security threats affecting Bab el Mandeb chokepoint (through which container ships, oil and LNG tankers cross the Red Sea to enter in the Mediterranean Sea) – has reinforced Türkiye's ambition to become a pivotal logistics hub, as a secure partner for trade and energy.[2]

Concerning connectivity, in spite of Türkiye's engagement to create domestic infrastructural segments to enhance the east-west trade, for the EU the Middle Corridor has progressively become a priority only after 2022 events, given the sudden urgency to reduce the reliance on trade and energy routes crossing Russian territory.

Before 2022, the Northern Corridor (the New Eurasian Land Bridge, a grid of railway and highways aimed at deliver goods from the Sino-Kazakh border crossing Kazakhstan, Russia, Belarus and Poland) carried more than 86 percent of transport between Europe and China, while the Middle Corridor covered less than 1 percent.[3] Following the outbreak of Russian-Ukraine conflict, the Northern Corridor has become less attractive, targeted by western sanctions affecting transit on the Russian territory: consequently, trade volumes delivered through the northern route dropped by half in 2023 compared to 2022, while the Middle Corridor increased its traffic of 89 percent and 70 percent in 2023 and 2024, respectively.[4] According to the World Bank, the Middle Corridor can reduce travel times, while freight volumes could triple to 11 million tonnes by 2030, with a 30 percent increase in trade between China and the EU.[5]

Among the potential different east-west overland routes, the EU has decided to focus its investments and political-diplomatic efforts on the creation of the Central Trans-Caspian Network, following an assessment that took into account key factors such as increased feasibility in terms of traffic volumes, infrastructure development, economic integration and regional development. Consequently, the

2 Hürcan Aslı Aksoy, Turkey Capitalises on Hormuz Disruption: Connectivity as a Foreign Policy Strategy, SWP Berlin Point of View, May 5, 2026, https://www.swp-berlin.org/publikation/turkey-capitalises-on-hormuz-disruption-connectivity-as-a-foreign-policy-strategy

3 The World Bank, Middle Trade and Transport Corridor, https://openknowledge.worldbank.org/server/api/core/bitstreams/7e6a216e-eb56-4783-ba1b-b7621abddcd9/content

4 Karel Valansi, Why the Middle Corridor matters amid a geopolitical resorting, The Atlantic Council Repoer, June 2, 2025, https://www.atlanticcouncil.org/content-series/ac-turkey-defense-journal/why-the-middle-corridor-matters-amid-a-geopolitical-resorting/

5 The World Bank, Middle Trade and Transport Corridor, https://openknowledge.worldbank.org/server/api/core/bitstreams/7e6a216e-eb56-4783-ba1b-b7621abddcd9/content

"main" Trans-Caspian International Transport Route is an intermodal corridor that runs from the Sino-Kazakh border - from the Khorgos "dry port" - through Kazakhstan to the ports of Aktau and Kuryk on the Kazakh shore of the Caspian. From there, goods are transferred by sea to the Azerbaijani port of Baku, where they are then conveyed onto the Baku-Tbilisi-Kars (BTK) railway to reach Türkiye and Europe.[6] To implement the construction of the Middle Corridor, in January 2024 the EU committed to allocate 10 billion euros under the Global Gateway initiative with the aim of developing an efficient alternative transport route based on multimodality, combining land and maritime transport.[7]

Middle Corridor concept and Türkiye's role

Connectivity has become one of the most relevant cornerstone within Türkiye's foreign policy strategy, taking advantage from its geographic position in the middle of the east-west corridor to promote global trade, economic development as well as to strengthen regional cooperation with transit states and to link with Eurasia, by leveraging the shared historical heritage.[8] Traditionally, Eurasian region has a significant relevance in the Türkiye's foreign policy: after the Soviet Union's dissolution, Ankara has undertaken an initiative aimed at bringing the Turkic-speaking former Soviet Republics from Caucasus and Central Asia under an organizational framework, formerly the Cooperation Council of Turkic Speaking States renamed the Organization of Turkic States (OTS), as a multilateral cooperation's umbrella to project its foreign policy vision in Eurasia.[9] Moreover, Turkish government launched the Asia Anew Initiative (*Yeniden Asya*) – aimed to bolster political dialogue and to strengthen trade and cooperation with Asian countries – while another plan is the "Century of Türkiye", started in 2023, which is based on improving east–west trade. The Middle Corridor clearly appears a key component of both initiatives.[10]

Ankara leading idea is not only based on deepening economic relations with Central Asia but leveraging its common linguistic roots with Turkic-speaking countries in the region and offering them a trade outlet which represents an attractive alternative to diversify their export routes lessening the traditional influence of Russia and Iran.[11]

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6 European Commission. "Sustainable transport connections between Europe and Central Asia." European Commission and European Bank for Reconstruction and Development, June 16, 2023. https://transport.ec.europa.eu/transport-themes/international-relations/study-sustainable-transport-connections-central-asia_en; European Commission, "Global Gateway." European Commission, March 1, 2023. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/stronger-europe-world/global-gateway_en.

7 European Commission. 2024. "Global Gateway: €10 billion commitment to invest in Trans Caspian Transport Corridor connecting Europe and Central Asia announced at Investors Forum." European Commission, January 29, 2024, https://ec.europa.eu/commission/presscorner/detail/mt/ip_24_501.

8 Umud Shokri, Serhat Süha Çubukçuoğlu, Sultan AlRubaei, Charting a Course: Türkiye's Ambitious Plan for Middle Corridor Trade Expansion, TRENDS Research, August 7, 2024, https://trendsresearch.org/insight/charting-a-course-turkiyes-ambitious-plan-for-middle-corridor-trade-expansion/?srsltid=AfmBOorlEGRo0KGR5bGYwN29K1drChvCTc-UPHKc6MNcEtXFdu9-Imlg

9 Barçın Yinanç, The Middle Corridor Calls for Turkish-European Cooperation, The Türkiye Analyst, January 17, 2022, https://www.turkeyanalyst.org/publications/turkey-analyst-articles/item/701-the-middle-corri-

10 Republic of Türkiye Ministry of Foreign Affairs, Asia Anew Initiative, (n.d.), https://www.mfa.gov.tr/asia-anew-initiative.en.mfa; Insight Turkey, The Century of Türkiye: A New Foreign Policy Vision for Building the Türkiye Axis, (n.d.), https://www.insightturkey.com/articles/the-century-of-turkiye-a-new-foreign-policy-vision-for-building-the-turkiye-axis

11 Felix K. Chang, The Middle Corridor through Central Asia: Trade and Influence Ambitions, FPRI, February 21, 2023, https://www.fpri.org/article/2023/02/the-middle-corridor-through-central-asia-trade-and-influence-ambitions/

From this perspective, the Middle Corridor would improve Türkiye's strategic position and strengthen its relations with Turkic-speaking countries involved in this connectivity project. Also, the Turkish Ministry of Foreign Affairs emphasizes that the geographical location as a bridge between East and West Asia and Europe further legitimises the role of Türkiye to support the development of regional transportation projects within a connectivity architecture.[12]

In addition to the progressive support to the Middle Corridor project, Turkish focus on connectivity along an east-west route has also pushed Ankara to join the Chinese-backed Belt and Road Initiative (BRI), based on the development of overland routes (highways and railways) to deliver goods from China to Europe reducing the overdependence on maritime routes, which accounted for more than 90 percent of Chinese exports to the West.[13] Apparently, the Middle Corridor overlaps with China-Central Asia-West Asia corridor of BRI - as an overland transport route crossing Central Asia (namely Kazakhstan) and bypassing Russian territory to ship goods to the European markets - but the Middle Corridor has been conceived to also avoid Iran using the Caspian maritime route to reach Azerbaijan, the Caucasus and finally Türkiye before ending in the EU. However, in strategic terms, we can identify a synergy between the Middle Corridor and the BRI because in the Beijing's vision the Trans-Caspian route represents a westward-alternative leg compared to the BRI-traditional western route which crosses Iran, so achieving a geographic diversification of transport routes which ensures China to reach European markets without transit disruptions, a benefit condition of trade security also for the EU countries.

Türkiye signed a Memorandum of Understanding with China in November 2015 with the aim of providing a link between its Middle Corridor and BRI, and President Erdogan visited China in July 2019 in order to make a progress in integrating the two initiatives.[14] Moving from this cooperation on connectivity within the BRI framework, the first freight train using the Trans-Caspian railway corridor arrived in Türkiye in 2019 completed its journey from Xi'an, China to Prague (Czech Republic) in 18 days, by using the Middle Corridor and Türkiye's transport infrastructure.[15]

Considering that the Middle Corridor and the BRI represent the main geopolitical initiatives to promote a Türkiye-centered regional interconnectivity, since 2013 Ankara has actively invested on planning and developing key infrastructural segments in the country which allow to enhance the viability of these above mentioned corridors: the Caravansarai Project for inter-customs cooperation in the context of the Middle Corridor connecting Türkiye to China via Central Asia, as well as the Marmaray railway, the Yavuz Sultan Selim Bridge, the Baku-Tbilisi-Kars (BTK) railway, the Eurasia Tunnel, the 1915 Çanakkale Strait Bridge are already operatives. In addition to these infrastructures, the planned expansion of the Filyos, Çandarlı, and Mersin ports, the "Edirne - Kars High Speed Train

12 Republic of Türkiye. Ministry of Foreign Affairs, Türkiye's Connectivity and Multilateral Transportation Policy, https://www.mfa.gov.tr/turkiye_s-multilateral-transportation-policy.en.mfa

13 Fabio Indeo, New Trends in Central Asia Connectivity, in C. Frappi, F. Indeo (eds.), "Monitoring Central Asia and Caspian area", Ca Foscari Edition, Venice, 2019

14 M. Sait Akman, Turkey's Middle Corridor and Belt and Road Initiative: Coherent or Conflicting?, ISPI Commentary, November 29, 2019, https://www.ispionline.it/en/publication/turkeys-middle-corridor-and-belt-and-road-initiative-coherent-or-conflicting-24526

15 Republic of Türkiye. Ministry of Foreign Affairs, Türkiye's Connectivity and Multilateral Transportation Policy, https://www.mfa.gov.tr/turkiye_s-multilateral-transportation-policy.en.mfa

and Connections Railway Project" will further improve Turkish role in the regional connectivity architecture.[16]

Image 1. The Baku-Tblisi-Kars railway (BTK).
Source: Giorgi Balakhadze, Baku-Tbilisi-Kars Railway Map, Wikimedia Commons, licensed under CC BY-SA 4.0

Among these, the Baku-Tbilisi-Kars railway (inaugurated in 2017) is a key backbone of the Middle Corridor, the strategic western branch connecting Baku port on the Azerbaijani Caspian shore to Türkiye crossing Georgia, so offering an uninterrupted transportation and trade between China and Europe. Originally designed to handle 6.5 million tons of freight annually, the BTK railway is set to increase its capacity to 17 million tons by 2034, further strengthening the Middle Corridor's logistics capacity.[17] In addition to Kars as overland hub, Turkish ports, such as Mersin and Izmir, offer multimodal capabilities, enabling the integration of rail and sea transport.

Moreover, Türkiye's completion of the Marmaray railway under the Bosporus Strait, enabling rail cargo from Central Asia to travel directly into the heart of Europe, enhances connectivity along an alternative trade route compared to the Northern corridor crossing Russia.[18]

During the Global Transportation Corridors Forum in Istanbul in 2025, President Recep Tayyip Erdogan stressed Türkiye's role to promote connectivity in the region "*we invested approximately $300 billion in transportation and communication infrastructure. Of these investments, $177 billion*

16 Ibidem; Karel Valansi, Why the Middle Corridor matters amid a geopolitical resorting, The Atlantic Council Report, June 2, 2025, https://www.atlanticcouncil.org/content-series/ac-turkey-defense-journal/why-the-middle-corridor-matters-amid-a-geopolitical-resorting/

17 Eurasian Research Institute, Recent Developments in the Baku-Tbilisi-Kars Railway Project https://www.eurasian-research.org/publication/recent-developments-in-the-baku-tbilisi-kars-railway-project/

18 Felix K. Chang, The Middle Corridor through Central Asia: Trade and Influence Ambitions, FPRI, February 21, 2023, https://www.fpri.org/article/2023/02/the-middle-corridor-through-central-asia-trade-and-influence-ambitions/

went to roads, $64 billion to railways, $25 billion to airways, $4 billion to maritime, and $25 billion to communication infrastructure".[19]

In its efforts to promote regional connectivity, Türkiye has undertaken a regular dialogue with Central Asian and Caucasus partners for paving the way to a successful realization of the Middle Corridor. Türkiye has strategic partnership agreements with Kazakhstan and Uzbekistan to implement the Middle Corridor project. Since 2022 these countries periodically attended trilateral meetings - which involved foreign, economic and transportation ministries - to improve coordination and cooperation among the three Turkic-speaking countries over Middle Corridor-related issues.[20] In 2025 trilateral meeting, Turkish Foreign Minister defined the Middle Corridor as "the most reliable and economic route", a strategic and efficient project to link Asia and Europe.[21] Furthermore, the heads of foreign ministries and ministries of transport from Türkiye Azerbaijan, Georgia and Kazakhstan signed in November 2022 a Roadmap 2022-2027 for the harmonized removal of bottlenecks, while In 2024 Turkish President signed an agreement to simplify customs procedures along the BTK railway, in order to speed freight rail traffic along a Middle Corridor trade route.[22]

Cooperation with Kazakhstan and Azerbaijan is a priority given their role of strategic backbones to ensure the Middle Corridor's concrete feasibility, because they ensure the only existing maritime connection between the two shores of the Caspian Sea: from the Azerbaijani ports of Baku and Alat goods can be delivered through the BTK railway segment of the Middle Corridor, while Kuryk and Aktau Kazakh ports on the Caspian Sea are the maritime terminals of the Asian railway trunk of the corridor. According to the World Bank, the combined capacity of these Caspian ports is 24 million tonnes of freights per year.[23]

Turkmenistan's involvement to create an alternative southern leg of the Middle Corridor - which will run parallel to the Kazakhstan east-west route but crossing Turkmenistan to Turkmenbashi Caspian port - appears perfectly coherent with a strategy of diversification, and Ankara is already committed in supporting the creation of a new multimodal transport route focused on this Central Asia country. In 2018 Turkish company Gap İnşaat concluded the renovation of the Turkmenbashi Sea Port, expanding its capacity to 17 million tonnes of freights per year, now considered the largest port in the Caspian Sea: Turkish investments and know-how (the project had a budget of $1.5 billion) have supported Ashgabat ambition to play a role in the "modern silk road".[24] Turkmenbashi port is planned

19 Türkiye Today, Middle Corridor's railway trade potential reaches $75B: President Erdogan, June 27, 2025, https://www.turkiyetoday.com/business/middle-corridor-railway-trade-potential-reaches-75b-president-erdogan-3203541?s=1

20 Republic of Turkiye, Ministry of Foreign Affairs, "No: 242, 1 August 2022, Press Release Regarding the Trilateral Meeting of the Ministers of Foreign Affairs, Trade and Transport of Türkiye, Uzbekistan and Azerbaijan," https://www.mfa.gov.tr/no_-242_-turkiye-ozbekistan-azerbaycan-uclu-disisleri–ticaret-ve-ulastirma-bakanlari-toplantisi-hk.en.mfa.

21 Can Efesoy, 'Middle Corridor emerges as most reliable trade route between Asia, Europe': Turkish foreign minister, Anadolu Ajansı, January 29, 2025, https://www.aa.com.tr/en/world/-middle-corridor-emerges-as-most-reliable-trade-route-between-asia-europe-turkish-foreign-minister/3465613

22 Foreign ministers of the four countries discussed the development of the Trans-Island Transit Route (TITR), Middle Corridor News, November 25, 2022, https://middlecorridor.com/ru/press-tsentr/novosti/ministry-inostrannykh-del-chetyrekh-gosudarstv-obsudili-razvitie-tmtm; "Turkey strives to cement position as key cog in East-West trade", Eurasianet, April 9, 2024, https://eurasianet.org/turkey-strives-to-cement-position-as-key-cog-in-east-west-trade

23 The World Bank, Middle Trade and Transport Corridor, https://openknowledge.worldbank.org/server/api/core/bitstreams/7e6a216e-eb56-4783-ba1b-b7621abddcd9/content

24 Gap İnşaat, International Turkmenbasi Seaport Project, https://www.gapinsaat.com/en/infrastructure-projects/international-turkmenbasi-seaport-project

to become the Caspian maritime terminal of the Lapis Lazuli corridor (a southern route which runs in parallel with the Middle Corridor but sharing the same rationale) delivering goods from Afghanistan to Turkmenistan then crossing the Caspian Sea and following the BTK route. Türkiye signed the Lapis Lazuli-Transport Corridor Agreement together with Georgia, Azerbaijan, Turkmenistan and Afghanistan in November 2017, providing support for the development of regional integration, connectivity, economic prosperity.[25]

The Middle Corridor's energy dimension

In addition to the possibility to open an alternative trade and transport route to the EU, the Middle Corridor concept can be easily declined under an energy dimension, because the implementation of a Trans-Caspian energy route will enhance EU energy security through a strategy of diversification based on increasing imports of non-Russian oil and gas. In this perspective, Türkiye is emerging as a reliable energy hub for the EU, even if Ankara since long-time already plays this role following the realisation of the BTC and BTE pipelines, and especially with the launch of TANAP gas pipeline as a key segment of the Southern Gas Corridor, the EU-flagship energy project.[26]

Undoubtedly, the energy crisis in 2022 and in 2026 have contributed to further and strongly legitimize Turkish role as energy bridge connecting Caspian suppliers to the EU markets: if Russia's invasion of Ukraine has pushed the EU to develop alternative energy routes to offset the effects of the decision to phase out gas imports from Russia, the recent disruptions on the energy transit crossing Hormuz Strait have imposed the issue of the energy diversification as a priority in the Western foreign policy agenda.

In a wider and enhanced framework of energy cooperation, Türkiye offers its infrastructures and its geographic position as the main gateway to the EU for hydrocarbons and critical raw materials coming from Azerbaijan and other Turkic-Central Asian countries. In terms of diversification, Türkiye offers to Caspian producers an opportunity to have access to western markets, reducing their reliance on Russian infrastructures: Kazakhstan for instance exports 80 percent of its oil through the Caspian Pipeline Consortium which crossed Russian territory then using the Russian Black Sea port of Novorossiysk as export terminal. On the other side, Türkiye also benefits of these oil and gas supply from the Caspian basin to enhance its domestic energy security, due to its unbalanced dependence on hydrocarbon imports, reducing Russia's role as the largest supplier.

The BTC (with a capacity of 1.2 million of barrel per day) has been conceived as a cornerstone to fully realize the Trans-Caspian oil corridor, even if only Azerbaijan (on the Caucasian shore of the Caspian Sea) is able to use this pipeline as its main export route. Astana nominally committed itself to export 500.000 barrels of oil per day exclusively using tankers - due to the persistent Russian and Iranian opposition to realize underwater energy infrastructures linking the two shores of the basin - without never achieving this target. A joint commitment to realize the Trans-Caspian Oil Transport System could be a way to boost the Middle Corridor's energy dimension allowing to export Kazakh

25 M. Sait Akman, Turkey's Middle Corridor and Belt and Road Initiative: Coherent or Conflicting?, ISPI Commentary, November 29, 2019, https://www.ispionline.it/en/publication/turkeys-middle-corridor-and-belt-and-road-initiative-coherent-or-conflicting-24526

26 Gökçe Nur Ataman, Türkiye's alternative routes: Transforming into an energy hub, Daily Sabah, May 21, 2026, https://www.dailysabah.com/opinion/op-ed/turkiyes-alternative-routes-transforming-into-an-energy-hub

oil not only by tankers (which have a limited capacity) but building an underwater oil pipeline in the Caspian Sea aimed at linking Kuryk oil terminal to Baku in Azerbaijan, and then shipping oil through the Baku-Tbilisi-Ceyhan pipeline to the European markets.27

In the gas sector, TANAP represents the key backbone of the Southern Gas Corridor promoted by the EU, which through the Trans Adriatic Pipeline (TAP) and BTE allow Azerbaijani gas to supply the European markets (Italy, Greece and Bulgaria are the main recipients, recently followed by Austria and Germany) crossing Georgia and Türkiye. At the same time, on the Turkish perspective TANAP supplies the country with Azerbaijani gas (16 percent of total imports) contributing to diversify suppliers because Moscow accounts for nearly 40 percent of total natural gas imports.[28]

However, given its world's fifth largest gas reserves, Turkmenistan's involvement in the SGC would expand the capacity of transport of this energy route (from the current 10 billion cubic metres per year, bcm/y - which could be doubled by 2027-2028 – to 40-60 bcm/y)[29], making this corridor a real game-changer for supplying the EU. According to the project, the SGC will be completed by realizing an underwater Trans Caspian pipeline linking Turkmenbashi port to Baku to deliver Turkmen gas to Türkiye and Europe.

After February 2022, Turkish authorities have been involved in several meetings with Turkmen, European and Azerbaijani representatives to discuss on implementing SGC with Ashgabat's inclusion. On December 2022 during a trilateral meeting at Awaza (Turkmenistan) with Azerbaijani President Aliyev and Turkmen head of state Serdar Berdymukhamedov, Turkish President Erdoğan declared its readiness to allow the transit of Turkmen gas to western markets using TANAP and BTE infrastructures.[30] Thanks to a swap deal involving Iran, Turkmenistan started to export gas to Türkiye at the end of 2025 but US sanctions quickly stopped this option (limited to 1.3 bcm of gas).[31]

Moreover, similarly to the transit of hydrocarbons and other goods, the Trans-Caspian International Transport Route represents the best strategic option for the EU in order to ensure regular supply of minerals from Central Asia avoiding the transit in the Russian territory. This route is already operational to deliver uranium supply from Kazakhstan to France (affected by Niger's unreliability as traditional supplier after the military coup), because the Russian-controlled route of export to France through St Petersburg port is currently under sanctions. Central Asia's huge critical mineral and rare earth reserves - which could be used for the production of clean energy technologies, defense and military industry - can have access to the Western markets, supporting EU goal to reduce the

27 Fabio Indeo, *Central Asia. Cooperation in hydrocarbons*, in J. Lemps, S. Mayer (eds.), "Central Asia in a multipolar world", Springer, 2024

28 US EIA, Turkiye, July 11, 2023, https://www.eia.gov/international/analysis/country/TUR

29 James Sharp, Trans-Caspian Gas: From Pipedream to Pipeline?, Caspian Policy Center, June 26, 2025, https://www.caspianpolicy.org/research/energy/trans-caspian-gas-from-pipedream-to-pipeline

30 "Erdoğan calls to start work on sending Turkmen gas to Western markets", Daily Sabah, December 14, 2022, https://www.dailysabah.com/business/energy/erdogan-calls-to-start-work-on-sending-turkmen-gas-to-western-markets

31 "Turkmen gas is back on Turkey's agenda", Eurasianet, April 29, 2026, https://eurasianet.org/turkmen-gas-is-back-on-turkeys-agenda

dependence on the Chinese-controlled supply chain[32]: Ankara's centrality position in the Middle Corridor contributes to support the EU to achieve this strategic priority.

Diversification of the Caucasus connectivity architecture

Türkiye carefully looks at the evolving geopolitical landscape in Southern Caucasus, because improved relations and shared need of enhanced cooperation could pave the way for opening new trade opportunities based on alternative transport routes.

The Zangezur corridor's expected realisation will offer a new option for diversifying transport routes in the region, opening an alternative east-west route as well as enhancing the Middle Corridor strategic impact on ensuring benefits for all countries involved. Following the US support to this initiative expressed after brokering the start of a peace process between Azerbaijan and Armenia in August 2025, US President sponsored and promoted this infrastructural project - named Trump Route for International Peace and Prosperity (TRIPP) - which defines the planned land and railway connection between Azerbaijan's mainland and the Nakhchivan Autonomous Republic, passing through Armenia's Zangezur region.[33]In January 2026 Armenia and US agreed on an implementation framework to develop TRIPP, within which a joint venture, the TRIPP Development Co., will benefit of exclusive development and operational rights for 49 years (potentially extended to additional 50 years): US holds 74 percent shares but Armenia will retain sovereignty and territorial integrity.[34]

Türkiye openly supports the implementation of the Zangezur corridor because Ankara glimpses the opportunity to benefit of an alternative trade and transport route which will increase the resilience of the Middle Corridor through a southern leg which could avoid potential disruptions in the case of political and economic tensions in Georgia. In terms of strategic diversification, the Zangezur corridor will open a direct link between Türkiye and Azerbaijan through Armenian territory, reducing the reliance on Georgia as transit country. Furthermore, this project will further enhance Türkiye's influence in the east-west connectivity architecture, as a key logistic pivot within the Middle Corridor because both of the main land corridors (BTK and Zangezur corridor) are Türkiye-centered.

Turkish Minister of Transport and Infrastructure Abdulkadir Uraloğlu stressed the positive impact of the Zangezur corridor on increasing Middle Corridor's efficiency and capacity, shortening distances and diversifying trade routes between Asia and Europe.[35] According to a recent study backed by the European Commission, the new transport route crossing Armenia cut travel time by up to 25 percent

32 Fabio Indeo, *EU-Central Asia Cooperation on Critical Minerals within a Global Geopolitical Race*, in "Trends Research & Advisory", October 19, 2025, https://trendsresearch.org/insight/eu-central-asia-cooperation-on-critical-minerals-within-a-global-geopolitical-race/

33 Stephen Blank, Trump Makes a Move in the Caucasus, Central Asia-Caucasus Analyst Institute, August 21, 2025, https://www.cacianalyst.org/publications/analytical-articles/item/13887-trump-makes-a-move-in-the-caucasus.html

34 U.S Department of State, The TRIPP Implementation Framework (TIF), January 16, 2026, https://www.state.gov/wp-content/uploads/2026/01/TRIPP-Implementation-Framework.pdf

35 Erkut Akktal, Türkiye's Regional and International Role as a Logistic Hub: a Multi-level Analysis of Opportunities, Challenges, and Future Prospects, CESPI, Approfondimento 44, Aprile 2026, https://www.cespi.it/sites/default/files/osservatori/allegati/approf._44_turkiye_as_logistic_hub_-_akktal.pdf

compared with BTK.[36]

Some weeks after the Washington meeting between Azerbaijani and Armenian presidents, Turkish President Erdoğan inaugurated the railroad connecting the eastern Turkish hub of Kars to Dilucu at the frontier with Azerbaijan's Nakhchivan exclave, which will represent a strategic segment to successfully implement the TRIPP corridor: Türkiye and Azerbaijan are concretely engaged to deepen cooperation on promoting regional connectivity, given their geographic location as natural bridges between Asia and Europe. The Kars-Iğdır-Aralık-Dilucu railway connecting the TRIPP with Türkiye's railway network will be a critical part of the Middle Corridor. Ankara and Baku envisage to realize a new 224 km double-track electrified railroad by 2030 at an estimated cost of €2.4 billion, that it will handle 15 million tons of freight and 5.5 million passengers each year.[37]

The TRIPP corridor will enhance and expand Turkish role in the South Caucasus, not only as transit country but advancing commercial interests and potentially restoring relations also with Armenia.[38]

The normalization of relations between Ankara and Yerevan can be achieved harnessing the current window of opportunity based on improved regional cooperation and dialogue, which could lead to restore diplomatic relations and to the potential opening of the common border closed since 1990s when the first war over Nagorno-Karabakh. On May 4, 2026, Ankara and Yerevan signed an agreement to restore the Ani Bridge, which lies on the border between Armenia and Türkiye, another step in their normalization process based on the comment engagement to expand regional connectivity including Armenia - for the first time - as transit country.[39]

Nevertheless, the strategic impact of the Zangezur/TRIPP corridor in the framework of the regional connectivity architecture should be considered and evaluated under the lens of a diversification strategy, aimed at creating transport options to reach the main economic markets and mitigating the negative implications of sudden disruptions.

Georgia has expressed its profound concern on the TRIPP project, fearing that Tbilisi's role in the Middle Corridor could become marginal, downplaying the importance of the BTK railway. Indeed, until now, Georgia has been the only partner involved to develop a transit corridor linking Azerbaijan and the Caspian Sea with Türkiye through pipelines, railways and roads so boosting bilateral political dialogue and cooperation between Ankara and Tbilisi governments.[40]

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36 EU Commission, Meta Study-Advancing a Cross-Regional Connectivity Agenda with Central Asia, Türkiye and the South Caucasus, February 6, 2026, https://enlargement.ec.europa.eu/meta-study-advancing-cross-regional-connectivity-agenda_en

37 Turkish Ministry for Transport and Infrastructure, Zengezur Corridor will generate 147.6 billion Turkish Lira, August 23, 2025, https://www.uab.gov.tr/haberler/zengezur-koridoru-147-6-milyar-lira-kazandiracak; Thomas de Waal, Areg Kochinyan, and Zaur Shiriyev, Rewiring the South Caucasus: TRIPP and the New Geopolitics of Connectivity, Carnegie Europe, April 1, 2026, https://carnegieendowment.org/europe/research/2026/03/rewiring-the-south-caucasus-tripp-and-the-new-geopolitics-of-connectivity

38 Emil Avdaliani, With the TRIPP Turkey is Set to Benefit Most in the South Caucasus, Turkey Analyst, October 20, 2025, https://www.turkeyanalyst.org/publications/turkey-analyst-articles/item/738-with-the-tripp-turkey-is-set-to-benefit-most-in-the-south-caucasus.html

39 Aysu Biçer,Türkiye, Armenia sign deal to restore historic Ani Bridge amid thaw in ties, Anadolu Agency, May 4, 2026, https://www.aa.com.tr/en/politics/turkiye-armenia-sign-deal-to-restore-historic-ani-bridge-amid-thaw-in-ties/3926724; Aybaniz Ismayilova, Türkiye Promotes Eurasian Transit Development, Eurasia Daily Monitor, May 21, 2026, https://jamestown.org/turkiye-promotes-eurasian-transit-development/

40 Irakli Machaidze, Armenian-Azerbaijani peace plan threatens to dash Georgia's Middle Corridor hopes, Eurasianet, August 22, 2025,https://eurasianet.org/armenian-azerbaijani-peace-plan-threatens-to-dash-georgias-middle-corridor-

Nevertheless, the reality appears different considering that TRIPP would be operative after years, requiring massive investments and political stability: moreover, even if TRIPP contributes to open an alternative and complementary route compared to BTK, these are not mutually exclusive but both represent two geographically different routes of the Middle Corridor. In this framework, Georgia will remain relevant as well as its infrastructural cooperation with Türkiye within the Middle Corridor: Ankara and Tbilisi are working to promote the Eastern Türkiye Railway Infrastructure Development Project (ETMIC) – which will modernize the Divrigi-Kars-Georgia line with electrification – the Samsun–Trabzon–Sarpi high-speed line linking central Türkiye with Georgia, the new Batumi–Türkiye highway, all projects which are conceived to strengthen the traditional Middle Corridor route, not to weaken Georgia position as transit country.[41]

The implementation of the Development Road Project (DRP)will be relevant to enhance the Turkish strategy to become a global hub within a regional connectivity architecture, also contributing to a geographic diversification of the transport routes. The DPR will follow a south-north direction connecting the Al-Fav Port, currently under construction in Basra (southern Iraq), to Türkiye with a two-way highway and railway of approximately 1,200 km in length, and transporting goods from the Gulf countries and Asia to Europe. DRP route would be completed by 2030 (the Turkish segment includes 615 km of railway and 320 km of highway), with an investment of approximately $17 billion.[42] In this way Ankara would open an additional trade route so expanding its connectivity vision, integrating DRP with the Middle Corridor within a logistic synergy based on Türkiye's role of trade hub.[43]

DRP has raised great expectations for its potential economic impact: President Erdoğan stated that the Development Road Project will create a production impact of over 50 billion dollars in a 10-year perspective, offering a secure infrastructural option for transports within a regional scenario characterized by uncertainty and instability.[44]

The development of rail corridors in Middle East aims at enhancing the resilience of transport connectivity between Asia and Europe, by providing land-based alternatives to cross the Red Sea and Suez Canal,[45] even if this ambitious vision appears heavily affected by the Hormuz strait's current vulnerability, which hampers Middle East littoral states to implement the viability of their multimodal facilities (combining maritime terminals and railway/highway hubs).

hopes; Emil Avdaliani, With the TRIPP Turkey is Set to Benefit Most in the South Caucasus, Turkey Analyst, October 20, 2025, https://www.turkeyanalyst.org/publications/turkey-analyst-articles/item/738-with-the-tripp-turkey-is-set-to-benefit-most-in-the-south-caucasus.html

41 Emil Avdaliani, Turkish Transport Projects Reshape South Caucasus Connectivity, Eurasia Daily Monitor Volume: 22 Issue: 143, October 27, 2025, https://jamestown.org/turkish-transport-projects-reshape-south-caucasus-connectivity/

42 The Development Road, Official Website, https://www.thedevelopmentroad.it/

43 Ulas Birkan Cakilci, Strategic integration: How the Development Road Project reinforces the middle corridor, TRT World, July 16, 2025, https://www.trtworld.com/article/e54138082545

44 Anadolu Agency, Türkiye to turn geopolitical edge into economic gain with Development Road Project: President, June 27, 2025, https://www.aa.com.tr/en/turkiye/turkiye-to-turn-geopolitical-edge-into-economic-gain-with-development-road-project-president/3615346

45 The Development Road, Official Website, https://www.thedevelopmentroad.it/

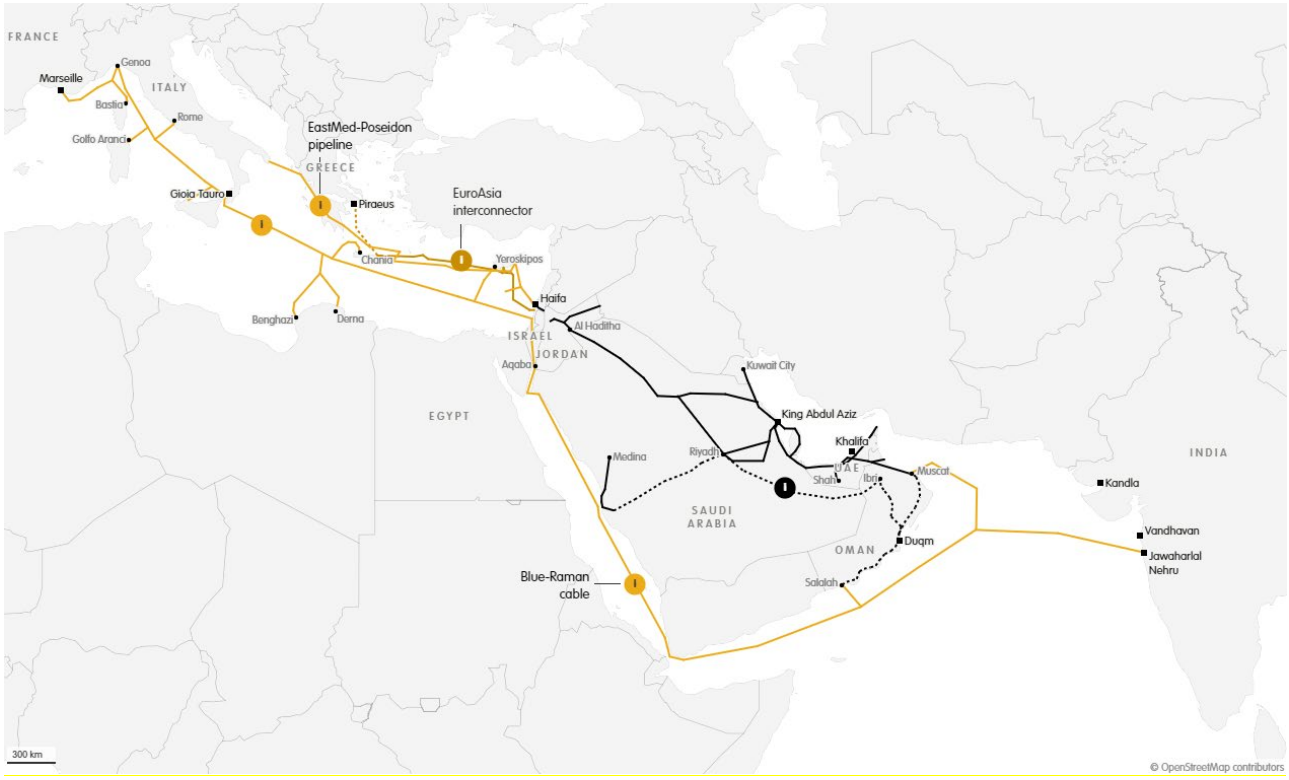

Image 2. India-Middle East-Europe Economic Corridor (IMEC)
Source: Rizzi (2024), ECFR, CC BY-SA 4.0. © OpenStreetMap contributors.

In this perspective, DRP appears a rival project compared to India-Middle East-Europe Economic Corridor (IMEC), which has to be recalibrated given the instability condition in Middle East: Türkiye's exclusion from the IMEC original version[46] has been strongly criticized by President Erdogan who declared "*there is no corridor without Türkiye*"[47] emphasizing the role of the country as potential hub, large and promising market and its geographic position in the Eastern Mediterranean Sea, so offering an alternative route and reliable ports for IMEC in spite of Haifa. As a kind of reaction to this exclusion, Türkiye has promoted the DRP together with Iraq, Qatar (both of them excluded by IMEC) and UAE (which instead supports both), conceived as an apparently less problematic corridor than IMEC.[48]

46 The initial IMEC project envisioned two sections: an eastern maritime link between India and the Gulf, and a northern section that would connect the Arabian Peninsula to Europe. This overland corridor will be based on a new railway network to link the Gulf with the Mediterranean via Jordan and Israel, while undersea cables and pipelines would facilitate the exchange of data, clean electricity and green hydrogen supply. The Israeli port of Haifa in the Mediterranean Sea as well as Gulf and Arabian Sea ports will play the role of shipping hubs in this connectivity blueprint.

47 Ragip Soylu, "Turkey's Erdogan opposes India-Middle East transport project", Middle East Eye, 11 September 2023, https://www.middleeasteye.net/news/turkey-erdogan-opposes-india-middle-east-corridor

48 Fabio Indeo, Reshaping the India-Middle East-Europe Economic Corridor: New Challenges, Old Vulnerabilities, TRENDS Research and Advisory, February 15, 2026, https://trendsresearch.org/insight/reshaping-the-india-middle-east-europe-economic-corridor-new-challenges-old-vulnerabilities/

Conclusion

Given the relevance of the Middle Corridor as alternative and additional trade transport route connecting Asia and Europe, Türkiye will benefit of its role as logistic hub obtaining significant gains in economic, geopolitical and strategic terms. The main international economic actors (China, EU and the US) consider Ankara as a reliable partner to provide stability and security along the route, while Central Asia and Caucasus countries involved in the TITR recognize Turkish role to provide them new trade outlets as well as attracting investments to upgrade or to realize infrastructures.

Even if the Middle Corridor is a safer and shorter corridor compared to the maritime route (35 days from China to the EU crossing the Indian Ocean, while Middle Corridor can currently deliver cargo in about 18 days, which could be reduced to 13–15 days following logistic improvements), the limited capacity of the Trans-Caspian route downplays its concrete strategic potential: indeed, if Northern Corridor's annual capacity is over 100 million tons, in 2024 the Middle Corridor delivered only 6 million tonnes.[49]

In spite of new corridor projects, the geographic centrality role of Türkiye remain unaltered as a key precondition to implement an uninterrupted trade route, also looking at multimodal infrastructural options focused on the Black Sea.

Relations between Ankara and Caucasus' neighbouring countries have to be forged under the new emerging scenario but we can observe interesting synergies and shared goals to achieve. If Türkiye-Azerbaijan cooperation represents the strategic cornerstone for improving regional connectivity – as a long-term high-level partnership covering energy, trade, infrastructures and based on a fair political dialogue – Armenia's involvement in connectivity projects and the future role of Georgia will be interesting dossiers for Türkiye's regional foreign policy. The inclusion of Armenia within the regional connectivity architecture will be positive in terms of diversification, reshaping the western segment of the Middle Corridor in two alternative routes, the BTK and TRIPP, which further legitimize Ankara as strategic linchpin and key logistic terminal for both. In spite of this relevant shift, cooperation and dialogue between Ankara and Tbilisi will be preserved (with the support of Baku) because BTK is at present the only operative route crossing Caucasus, while the potential realisation of TRIPP will contribute to better balance the distribution of goods along the routes not excluding transit in Georgia. Moreover, Georgia's centrality remains fundamental for the east-west energy routes – BTC, BTE – which compose the SGC aimed at meeting EU energy needs, but also as a terminal for renewable energy projects such as the Green Energy Corridor to deliver clean electricity from the Caspian region to the EU crossing the Black Sea.

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49 Karel Valansi, Why the Middle Corridor matters amid a geopolitical resorting, The Atlantic Council Report, June 2, 2025, https://www.atlanticcouncil.org/content-series/ac-turkey-defense-journal/why-the-middle-corridor-matters-amid-a-geopolitical-resorting/