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The Middle Corridor perspective: opportunities and challenges

After 2022, political momentum behind the development of the Middle Corridor gained pace. While it is a project with considerable potential in transport, economic and energy terms, its actual expansion and competitiveness are dependent on a multitude of challenges and risks. In the energy sphere, the corridor's importance lies primarily in diversifying supply routes for resources from Central Asia and the South Caucasus, rather than in rapidly replacing existing transmission routes.

The essence of the Middle Corridor. The escalation of the war in Ukraine following Russia's invasion in February 2022 changed the outlook for the development and future operation of the Middle Corridor (Trans-Caspian International Transport Route). A previously marginal political initiative began to emerge as a genuine alternative to the so-called Northern Corridor[1] in the wake of Western Europe's changing approach to Russia and its sanctions policy. According to the European Commission data, trade volumes along this route have quadrupled since 2022 and, with appropriate investment, could increase a further threefold by 2030.[2] Nevertheless, its current annual transit volume is approximately 6 million tonnes, representing only a small fraction of the Northern Corridor's estimated transit potential of 100 million tonnes. The TRIPP corridor, planned following the Washington agreements of 2025 and running through Azerbaijan and Armenia, has further consolidated the Middle Corridor's position as a widely discussed alternative transit through Russia. The crisis surrounding the blockade of the Strait of Hormuz, triggered by the US-Israeli attack on Iran, has fuelled discussion about the need to seek parallel transit options for both goods and energy resources.[3]

The political dimension of the project – namely, the development of infrastructure links bypassing Russia – has a significant bearing on any realistic assessment of its potential. The Middle Corridor is understood differently depending on the perspective and degree of involvement of the actor defining it. In the broadest, yet at the same time most precise, sense, the Middle Corridor is a multimodal trade and transit network.

The multimodality of the route is both its advantage and a potential major threat to its efficient operation. At the same time, its maritime-land character, its passage through numerous countries that regard the development of the corridor as a major opportunity for civilisational and economic development, and its geographical scale create risks associated with infrastructure deficits, environmental factors, geopolitical risks and the instability of decision-making by the individual governments involved. Equally important to the long-term viability of the network may be regional instability stemming from ethno-political conflicts and the unpredictability of decision-making, largely related to the lack of transparency characteristic of authoritarian political systems.

The political and economic perspective. Two countries separated by the Caspian Sea – Kazakhstan and Azerbaijan – are taking the idea of developing the Middle Corridor more seriously. For Kazakhstan, investment in

[1] The Northern Corridor is a trade and transport route running from China through Russia and Belarus.

[2] *EU4Digital Meta Study: Advancing a Cross-Regional Connectivity Agenda with Central Asia, Türkiye and the South Caucasus*, 6 February 2026, European Commission, accessed 26 August 2026.

[3] In the context of the risk of a blockade of the Strait of Hormuz, countries in the Gulf and the Middle East are developing or reactivating alternative oil export routes. The most important include existing pipelines bypassing the strait: the East-West Pipeline to the port of Yanbu on the Red Sea (Saudi Arabia) and the Habshan-Fujairah pipeline leading to an export terminal outside the strait (UAE). At the same time, new or upgraded Iraqi corridors based on the Basra-Haditha trunk line are being considered. These could supply the Kirkuk-Ceyhan route to Türkiye, the Kirkuk-Banias route to Syria and the Haditha-Aqaba route to Jordan. The first two would primarily involve the reactivation or modernisation of former routes, while the Aqaba route would require the construction of new infrastructure.

the Middle Corridor offers and opportunity to reduce its dependence on exports through China while simultaneously opening up access to the EU and the US. It is also a tool for strengthening policies aimed at reducing Russian political influence. The Middle Corridor could potentially enable Kazakhstan to expand exports to the EU of uranium, tungsten, and titanium, as well as rare earth metals. The resulting expansion of infrastructure, including the railway network and ports – President Kassym-Jomart Tokayev has announced plans to build 5,000 kilometres of new railway lines and expand the ports of Akatu and Kuryk – is intended to strengthen Kazakhstan's position as a strategically and politically important regional state. At the same time, the other countries of the region are also interested in further investment in the development of the Middle Corridor, both resource-rich states such as Uzbekistan and Turkmenistan and those that would primarily benefit from expanded trade networks, such as Kyrgyzstan and Tajikistan.

In Azerbaijan's case, the Middle Corridor is intended, in political terms, to strengthen the country's role as the hegemon of the South Caucasus. The status Azerbaijan acquired following its victory in the Second Nagorno-Karabakh War and has gradually consolidated since then stems not only from its overwhelming military and economic advantage, but also from the country's strategic location. Azerbaijan's multi-vector foreign policy, based to a significant extent on positioning the country through the continued expansion of the Middle Corridor. Its steady development is also expected to deepen the strategic alliance with Türkiye in economic terms and strengthen Azerbaijan's position as a stable partner for Europe.

However, there are several significant obstacles to Azerbaijan's long-term plans in the Caucasus. The first is the capacity of the Georgian ports of Batumi and Poti, which are already operating under heavy strain. The deep-water port planned for Anaklia was intended to become an important point on the Middle Corridor, but the Georgian Dream government has significantly scaled back the project. This may be due to pressure from Russia, which wants to preserve the Middle Corridor's marginal role, as well as reduced Chinese interest (following a renewed tender, the construction of Anaklia was to be completed by a Chinese-Singaporean consortium).

The second obstacle is the very limited capacity of the Baku-Tbilisi-Kars railway line. There are also insufficient land connections in the Caucasus itself. A breakthrough solution in this situation would be the construction of the TRIPP corridor[4] through southern Armenia and the implementation of the Armenian *Crossroads for Peace* project, which aims to restore and construct infrastructure linking Armenia with Türkiye and Azerbaijan (*IEŚ Commentaries*, No. 1549). However, in this context, the political dimension remains a constraint: there is no peace agreement between Armenia and Azerbaijan, while the normalisation of Armenian-Turkish relations remains stalled.

The energy perspective. The Middle Corridor is therefore not an energy project as such, but a transport and logistics initiative with a significant commodities component. Its importance for Europe's energy security lies not in creating entirely new transport infrastructure from scratch, but in increasing the flexibility of existing and future export routes for energy resources from Central Asia and the South Caucasus. Following Russia's aggression against Ukraine in 2022, this aspect took on particular importance, as the European Union began to view Trans-Caspian connections as part of efforts to reduce dependence on Russian routes, infrastructure and, ultimately, political pressure.

Kazakhstan remains the most important country in the energy dimension of the corridor. It is one of the world's major oil producers and exports a significant share of its domestic output. From Astana's perspective, developing connections via the Caspian Sea, Azerbaijan, Georgia and Türkiye creates an opportunity to gradually expand oil exports while bypassing Russian territory. The port of Aktau and the potential of the port of Kuryk are particularly important in this context, as they can handle the transport of crude oil across the Caspian Sea to Azerbaijan and subsequently towards the Baku-Tbilisi-Ceyhan (BTC) pipeline. This does not, however, mean that Kazakhstan will rapidly become independent of Russian infrastructure. Routes running through Russian territory remain crucial for Kazakh exports, particularly the Caspian Pipeline Consortium (CPC) pipeline leading to the Black Sea terminal,

[4] TRIPP (Trump Route for International Peace and Prosperity) is an approximately 40-kilometre transport corridor intended to connect Azerbaijan with the Nakhchivan exclave.

as well as connections to the Russian pipeline system. From the perspective of refineries in Central Europe, Kazakh crude oil may play a complementary role, but it is difficult to regard it as a full substitute for Russian crude, partly because of differences in physical and chemical properties and the logistical and political constraints associated with transit (*IEŚ Commentaries*, No. 753).

Azerbaijan is the second pillar of the corridor's energy significance. It already functions as a regional energy hub and, since 2022, has also gained importance from the perspective of the energy security of Central Europe. Its position is underpinned by existing export connections: the BTC and Baku-Supsa oil pipelines and the gas infrastructure of the Southern Gas Corridor. With regard to oil, Azerbaijan's role remains significant but limited, partly because its crude has characteristics different from Russian Urals crude and because of the configuration of some Central European refineries. Greater diversification potential lies in natural gas. The Southern Gas Corridor, based on the Shah Deniz field and the TANAP and TAP pipelines, has enabled commercial supplies of natural gas to Europe since the end of 2020 and, through interconnectors – most notably the IGB – also to Central European countries (*IEŚ Commentaries*, No. 937). The development of the Middle Corridor therefore strengthens Azerbaijan's importance as a country linking Central Asia, the Caucasus, Türkiye and European markets, even though the corridor itself does not create new energy infrastructure in the pipeline sense.

In geopolitical terms, the energy function of the Middle Corridor overlaps with Türkiye's interests, as Ankara has long supported projects linking the Caspian basin with Western markets. Its involvement in the BTC and TANAP pipelines forms part of its strategy to establish itself as a regional energy hub. For Türkiye, the development of the Trans-Caspian route means not only potential transit and logistics revenues, but also deeper strategic ties with Azerbaijan and the Central Asian states.

The greatest constraint on the Middle Corridor's energy potential remains the scale of its infrastructure. Transporting oil across the Caspian Sea requires the expansion of ports, terminals, tanker fleets and transhipment infrastructure, while container and bulk freight compete for the same capacity. Other problems include costs, the number of transhipment operations, shipping conditions on the Caspian Sea, and the state of railway and port infrastructure in Georgia. In the case of natural gas, an additional barrier is the need to increase production in Azerbaijan and expand the capacity of the TANAP and TAP pipelines if supplies to the EU are to increase significantly.

Conclusions. A strategic priority for Kazakhstan and Azerbaijan is to weaken Russia's role as a transit state, as well as its hegemonic influence in the Caucasus – which has already occurred – and in Central Asia, where this process is currently under way. The plans of both countries are compatible with the EU's flagship Global Gateway strategic initiative[5], which focuses on sustainable investment in infrastructure worldwide. It is no secret that, within this strategy and the EU's adopted political approach, weakening the influence of the Russian Federation is also an important objective.

Supporting the development of a complex multimodal network such as the Middle Corridor is in the interests of the EU, including Poland, as it has the potential to significantly diversify the Union's dependence on the other trade and energy routes. Politically, investment in the corridor strengthens the independence of weaker state actors in the Caucasus and Central Asia.

In energy terms, the importance of the Middle Corridor lies primarily in increasing the flexibility of supplies of oil, natural gas, and strategic resources, rather than in rapidly replacing existing routes. For Central Europe, the growing role of Azerbaijan in natural gas supplies and the complementary role of Kazakh oil may be of particular importance.

Environmental changes are also significant. The Caspian Sea, which is the central transport area of the corridor, is under serious threat. Due to dams built by Russia on the Volga, which accounts for 80% of the water flowing into

[5] Global Gateway is the EU's strategic plan for 2021–2027, which "aims to support smart, clean and secure connections in digital, energy and transport sectors and to strengthen health, education and research systems around the world". Source: Council of the European Union, accessed 26 August 2026.

the sea, the water level is gradually falling. Climate change is also contributing to increased evaporation and the progressive desertification of coastal areas. Preventing these changes requires significant investment.

The Middle Corridor also faces infrastructure constraints. Its maritime-land character requires transhipment operations that depend on the capacity and accessibility of ports. As a result, transit times are also longer, placing the Middle Corridor at a disadvantage compared with the land-based Northern Corridor and the maritime route.