



RSC POLICY REPORT

The Emergence of New Asia–Europe corridors.

Bypassing Russia and Diminishing Russia’s Regional Influence.

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Introduction

The Russian invasion of Ukraine in February 2022 has triggered a profound geopolitical reconfiguration across the Black Sea region and the wider Europe-Asia space. Once considered inescapable to Europe-Asia connectivity, Russia has increasingly become more of a liability for global supply chains due to its military aggression, the resulting imposition of Western sanctions and persistent unreliability. This has catalyzed the development of alternative transit routes, most notably the planned Trans-Caspian “Middle Corridor,” which links Central Asia, the South Caucasus, and the Black Sea to Europe. By bypassing Russian-controlled infrastructure, this Middle Corridor reduces exposure to Moscow’s coercive leverage while offering more resilient pathways for trade, energy, and digital flows.

The strategic relevance of this shift consists of two distinct elements. First, the Middle Corridor and related initiatives illustrate how Eurasian connectivity is being reshaped by new alliances and infrastructural investments. Meanwhile, Azerbaijan, Georgia, and Kazakhstan have positioned themselves as pivotal transit hubs, while the European Union (EU) has intensified engagement through connectivity strategies and energy diversification agendas.¹

¹ Pkhaladze, Tengiz, “Navigating Geopolitical Realities: The EU’s Strategic Positioning in the South Caucasus and Central Asia,” European Centre for International Political Economy (ECIPE), May 2025. <https://ecipe.org/publications/eu-strategic-positioning-in-the-south-caucasus-central-asia/>

A second element in the strategic significance of this geopolitical shift stems from the now demonstrable trend of the relative decline of Russian power and influence in the Black Sea region, which is a direct result of Russia's failed invasion of Ukraine and that also underscores the onset of a broader transformation in the regional balance of power. More specifically, although Russia continues to project power and exert pressure through hybrid means, its capacity to serve as the primary bridge between Asia and Europe has been seriously eroded by both the imposition of external sanctions and the emergence of viable alternatives to any reliance on Russian routes. And the growing positive momentum of the Middle Corridor is now evident in the expansion of trade, an increase in cargo flows, greater and more significant infrastructural investments, and through the strengthening of regional cooperation beyond a Russian-dominated network.²

These developments also reflect more pragmatic efforts by regional actors to enhance greater stability and economic opportunity. For example, the recent signing of a preliminary agreement between Azerbaijan and Armenia outlining a planned framework for a secure transit corridor through the South Caucasus connecting Azerbaijan to its exclave Nakhichevan stands out as a notable case of such new pragmatism. While still at an early stage, at August 2025 Trump Route for Internal Peace and Prosperity (TRIPP) agreement primarily aims to reduce long-standing tensions, provide economic benefits through transit and infrastructural development, and strengthen conditions for lasting peace and stability between the two countries.

This, reflecting these new dynamic factors, this paper offers an analytical assessment of the related trends in the balance of power in the region, with a focus on Russian power and presence in the Black Sea region in parallel with its war against Ukraine and the imposition of Western sanctions, while also redefining the role of the Middle Corridor and presenting an analysis of the outlook for regional security and economic stability.

² Ismayilova, Aybaniz, "Middle Corridor Momentum. The Future of East-West Trade," Institute for Development and Diplomacy (IDD) Analytical Policy Brief, 17 April 2025.
https://idd.az/media/2025/04/17/idd_policy_brief - aybeniz_ismayilova - 17_april_2025.pdf?v=1.1

The Ascending Strategic Significance of the Middle Corridor

The Middle Corridor - officially known as the Trans-Caspian International Transport Route (TITR) - is rapidly emerging as a vital trade pathway linking Western China and Europe. Although the route has been informally in operation since the 1990s and officially opened in the early 2000s, its development was constrained by poor infrastructure, political instability in the South Caucasus, and, most importantly, the attractiveness of the Russian route, which had long served as the main trade corridor between China and the EU.

As the total length of the middle corridor is approximately 2,000 kilometers shorter than Russia's Northern Corridor, it provides a faster, more cost-effective, and strategically safer alternative for Eurasian trade. The volume of goods transported through the corridor increased from 350,000 tons in 2021 to 4.1 million tons in 2024. In the same year, cargo traffic along the Middle Corridor saw notable growth across railway operators in Georgia, Türkiye, Kazakhstan, and Azerbaijan. For example, the Azerbaijani authorities reported moving over 18.5 million tons of goods that year, marking a 5.7 percent increase compared to 2023. Similarly, Kazakhstan's railways recorded a 63 percent rise in freight volumes, reaching 4.1 million tons via the corridor. Turkish and Georgian railway companies also experienced higher cargo throughput throughout the same period.³

According to World Bank projections, transit volumes through the Middle Corridor (MC) could increase by an additional 3.3 million tons by 2030, representing 43 percent of the total growth in trade along the corridor. Nearly half of this growth is expected to come from EU-China transit. While in 2021, EU-China transit volumes via the Northern Route were nearly 1,000 times greater than those via the Caspian Sea, by 2030 this disparity is expected to narrow significantly.

Moreover, the EU represents a major trading partner for China and serves as one of the primary destinations for Chinese exports, reflected in China's overall trade volume with the EU, reaching \$785.8 billion in 2024.⁴

³ Avdaliani, Emil, "The Middle Corridor Remains Supplementary to Major Trade Routes between the EU and China," Central Asia-Caucasus Analyst (CACI), 30 April 2025.

<https://www.cacianalyst.org/publications/analytical-articles/item/13864-the-middle-corridor-remains-supplementary-to-major-trade-routes-between-the-eu-and-china.html>

⁴ The Trans-Caspian International Transport Route and Other Promising Corridors in Central Asia, Eurasian Rail Alliance Index, January 2025.

China views the Middle Corridor as a strategic extension of its Belt and Road Initiative (BRI), reducing reliance on Russian transit routes while enhancing access to European markets. And while China increasingly favors East-West corridors (as evidenced by various agreements signed with Georgia, Azerbaijan, and Central Asian countries), Russia and Iran emphasize North-South connectivity. Iran is actively seeking new export routes to mitigate the damage caused by US sanctions. Key initiatives include the International North-South Transport Corridor (INSTC), which Tehran describes as a potential alternative to the Suez Canal, allowing Russian and European trade to reach the Persian Gulf by land. Although the debate is focused on the implementation of the western route of the INSTC, it should be noted that Tehran has recently taken significant steps to develop the eastern branch as well. The eastern branch runs along the eastern coast of the Caspian Sea through Russia, Kazakhstan, and Turkmenistan to Iran, via the ports of Olya (Russia), Aktau (Kazakhstan), Turkmenistan, and the Iranian border checkpoints of Sarakhs and Inche-Burun.

Overall, there has been a steady increase in cargo transportation along the INSTC, the total volume of cargo transported between 2021 and 2024 has increased significantly from 16.3 million tons in 2021 to 26.9 million tons in 2024.⁵ Furthermore, Iran continues to recognize Russia as an important balancing force in the region. Iranian officials have expressed their willingness to cooperate with Moscow, which is reflected in Iran's readiness to cooperate with the Eurasian Economic Union (EaEU).

Consequently, both China and the European Union are striving to diversify their freight transportation routes through the development of multiple transport and logistics corridors. By diversifying its trade pathways, China seeks to improve export efficiency and strengthen economic ties with Central Asia, the Caucasus, and the European Union. The establishment of smart logistics hubs, modern rail terminals, and digitalized customs systems along the corridor will further integrate China's western regions into global supply chains, promoting accelerated economic growth in these historically underdeveloped areas.

⁵ Eurasian Rail Index, Overcoming infrastructure barriers to the development of the International North-South Transport Corridor, April 2025. <https://index1520.com/en/analytics/preodolenie-infrastrukturnykh-barerov-na-puti-razvitiya-mtk-sever-yug/>

Furthermore, transit via the Caspian Sea is projected to reach 7,000 tons compared with approximately 6.9 million tons via Russia in 2021, and 2 million tons versus 12.5 million tons in 2030, indicating a substantial relative increase for the Caspian-based Middle Corridor.

Three major rail projects are expected to significantly strengthen connectivity along the Middle Corridor. The China-Kyrgyzstan-Uzbekistan railway will not only enhance access to China's markets and provide new maritime linkages for Central Asian goods but will also improve intra-regional connectivity across Central Asia. Once completed, the railway would provide Kyrgyzstan and Uzbekistan with a more direct link to China. At present, rail traffic to and from China must pass through Kazakhstan. In addition, Uzbekistan and Kazakhstan are advancing a rail project passing through Afghanistan and linking to Pakistan and international seaports, offering Central Asian countries direct access to global sea lanes and an important alternative route for exporting their products. The rehabilitation of the railway connecting Azerbaijan, Armenia, and Türkiye could more than double the Trans-Caspian rail capacity through Georgia to the Black Sea, opening new routes via Türkiye to the Mediterranean Sea and further integrating the Middle Corridor into global trade networks.⁶

Nevertheless, the ongoing processes in Georgia, the government's rhetoric against the US and the European Union will have a significant impact on its role in the new transit network. Although a significant part of the Trans-Caspian rail transit passes through Georgia, in the future Georgia's policy of self-isolation will significantly harm its transit potential. Director of the Center for Transport Corridors Research, Paata Tsagareishvili, noted that after the launch of new routes between Armenia, Azerbaijan and Türkiye, Georgia is at risk of losing up to 20 percent of transit cargo.⁷

⁶ How to Maximize the Middle Corridor. A Guide to Infrastructure Priorities, Barriers and Investments, Caspian Policy Center (CPC), May 2024.

https://api.caspianpolicy.org/media/ckeditor_media/2024/05/29/how-to-maximize-the-middle-corridor.pdf

⁷ Georgia Evaluates Competition with Armenia over the Middle Corridor, the Caspian Post, Nov, 2025.

<https://caspianpost.com/analytics/georgia-evaluates-competition-with-armenia-over-the-middle-corridor>

Türkiye seeks to redirect 30 percent of the cargo currently moving through the Northern Corridor toward the Middle Corridor. The country is advancing this goal through a range of bilateral, trilateral, and multilateral initiatives, leveraging its strategic location at the crossroads of Europe, Asia, and Africa.⁸ With this strategy, Türkiye seeks to consolidate its status as a strategic transit hub and leverages its deep trade and cultural ties with Central Asia.

In this context, it is worth considering the prospects for a reduced role of Russia in the event that the war in Ukraine does not end in the near future. In parallel with security challenges, the search for safe and sustainable transit routes will become increasingly important. In this direction, the Trans-Caspian Transport Corridor Coordination Platform was established in 2024, which aims to strengthen cross-border cooperation, simplify customs procedures and minimize delays for cargo carriers. The platform brings together donors, investors, stakeholders, and beneficiaries involved in the TITR. Among them are European Union (EU) member states, the European Bank for Reconstruction and Development (EBRD), the World Bank, Asian Development Bank, Türkiye, Armenia, Georgia, Azerbaijan.

At the same time, maintaining close global trade links and strengthening multilateral cooperation will be crucial for the future growth of the Middle Corridor's geopolitical importance. The EU actively supported Turkmenistan's potential accession to the World Trade Organization, helping to align the country's trade policy with international standards, improving market access and supporting changes in logistical efficiency to boost regional trade.⁹

⁸ Eldem, Tuba, "Russia's War on Ukraine and the Rise of the Middle Corridor as a Third Vector of Eurasian Connectivity. Connecting Europe and Asia via Central Asia, the Caucasus, and Türkiye," SWP Comment 2022. <https://www.swp-berlin.org/10.18449/2022C64/>

⁹ Peksa, Beata, "Strengthening EU-Central Asia Cooperation: A Shared Vision for the Future," News Central Asia (nCa), 25 March 2025.

<https://www.newscentralasia.net/2025/03/25/strengthening-eu-central-asia-cooperation-a-shared-vision-for-the-future-2/>

The Western Vision

When discussing the reduction of Russia's role in the Black Sea region, it is imperative to emphasize the West's growing interest in the Middle Corridor. By all indications, Europe's engagement with the Middle Corridor has intensified, reflecting its strategic value for diversifying trade routes and reducing dependence on Russian transit lines. The European Union is actively investing in transport infrastructure in the region and sees the corridor as a way to balance the influence of Russia and China. The investments are aimed at reducing dependence on Russian-controlled trade routes, especially in energy transit and cargo logistics.

Azerbaijan and the European Union have deepened bilateral cooperation in recent years. This helped the EU begin the process of diversifying transit routes and take future actions to reduce dependence on Russian gas. Azerbaijan and the European Union signed a memorandum of understanding in 2022, which envisages cooperation in the energy sector and includes a commitment to double the capacity of the Southern Gas Corridor to deliver at least 20 billion cubic meters to the EU annually by 2027.¹⁰

Since 2023, a series of international agreements, investment packages, and high-level commitments have significantly accelerated the institutional and financial development of the Middle Corridor, marking a clear shift away from reliance on Russian transit routes. The process began with the EU's Global Gateway Investors Forum in Brussels in early 2024, where European institutions and Central Asian partners identified key "building blocks" for upgrading the Trans-Caspian route. These discussions evolved into concrete EU-Central Asia investment pledges, totaling around €10 billion, to modernize ports, railways, and logistics centers across Kazakhstan, Azerbaijan, Georgia, and Türkiye.¹¹

¹⁰ "EU and Azerbaijan enhance bilateral relations, including energy cooperation," European Commission press release, 18 July 2022.

https://ec.europa.eu/commission/presscorner/detail/en/ip_22_4550

¹¹ Karimli, Ilham, "EU, Central Asia Investors Commit €10 Billion to Trans-Caspian Transport Corridor," Caspian News, 5 February 2024. <https://caspiannews.com/news-detail/eu-central-asia-investors-commit-10-billion-to-trans-caspian-transport-corridor-2024-2-1-36/>

In parallel, the EBRD committed up to €1.5 billion for Trans-Caspian infrastructure, while the European Investment Bank (EIB Global) signed a €200 million loan with Kazakhstan in 2025 to enhance sustainable transport connectivity. At the operational level, a wave of bilateral protocols between Azerbaijan, Georgia, Kazakhstan, and Türkiye in 2023–2025 streamlined customs procedures and improved rail-ferry coordination, directly reducing transit time and costs.

The Trans-Caspian International Transport Route (TITR) association also intensified coordination, publishing new agreements and working plans that institutionalized corridor governance. This momentum culminated in the first EU–Central Asia summit **in** April 2025, where Brussels announced an expanded €12 billion Global Gateway package, reaffirming Europe's long-term commitment to diversify east-west trade routes. Collectively, these initiatives show that the Middle Corridor has evolved from a secondary pathway into a strategically prioritized alternative connecting Asian markets to Europe while bypassing Russian territory.

Unlike Iran, for the current Armenian government, the decline of Russia's influence and the Nagorno-Karabakh issue have significantly changed the vision of the regional balance of power, in response to which Armenia suspended its membership in the Collective Security Treaty Organization (CSTO). After that, Armenia tried to diversify its foreign policy with India, France, the European Union, and the United States. India and France replaced Russia as Armenia's main arms suppliers. On January 9, 2025, the government approved a draft law on the start of Armenia's accession process to the European Union, and on January 14, 2025, it signed a Strategic Partnership Charter with the United States¹².

A key point in understanding the Western perspective will be the US view of the South Caucasus and its sanctions package to reduce dependence on Russian gas. The Trump Administration's vision, which is aimed at stabilizing and shifting the center of influence in the South Caucasus region, which has traditionally been less important to the US, was clearly reflected in a framework agreement signed on August 8 during a ceremonial "peace summit" held at the White House between the leaders of Azerbaijan and Armenia.

¹² Ministry Of Foreign Affairs of the Republic of Armenia, 14 January 2025.
<https://www.mfa.am/en/press-releases/2025/01/14/the/13032>

The proposed framework extends well beyond merely resolving a long-standing territorial dispute. It envisions the creation of a U.S.-supervised transport route passing through Armenia's Syunik province, connecting Azerbaijan's mainland with its Nakhchivan exclave. Despite the peace agreement initiated between Armenia and Azerbaijan, its implementation is fraught with difficulties, such as the need to amend the Armenian constitution.

The challenge is also related to the lack of security guarantees, with the United States assuming a role that will primarily be commercial and political, but not a security guarantee. The United States does not want to involve its own military or police forces. These issues could create a number of problems in the future and the lack of agreement, for example, would prevent the unblocking of transport channels in the region, which was one of the main points of dispute between the countries in the past.

Despite the diversification of foreign priorities on the part of official Yerevan, Armenia's membership in the Eurasian Economic Union does not allow the country to completely free itself from Russia's economic influence. Despite the growing tensions between Russia and Armenia, economic interdependence increased significantly in 2022-2024. By the end of 2022, the volume of trade between Russia and Armenia had doubled and reached \$5.3 billion. In 2023, it reached \$7.3 billion. The growth trend continued the following year, and for the first eleven months of 2024, trade turnover amounted to \$11.62 billion.¹³ Despite the challenges, the precedent of reaching the agreement points to geopolitical changes in the broader regional context.

The South Caucasus and Central Asia are no longer seen in isolation. These regions are increasingly seen as part of a single geostrategic space - and at the heart of this new Eurasian vision lies the Middle Corridor. This was largely due to the need to find more stable transit routes after the Russian invasion of Ukraine. The Trans-Caspian Middle Corridor, if the logistical difficulties of this development trend are overcome, could become a powerful transit pillar.

¹³ Italian Institute for International Political Studies, The Eurasian Economic Union: A View from Armenia, February 2025.

<https://www.ispionline.it/en/publication/the-eurasian-economic-union-a-view-from-armenia-199077>

Conclusion

The geopolitical landscape of the Black Sea region and the broader Eurasian space has undergone a profound transformation since Russia's full-scale invasion of Ukraine. The cumulative effects of Western sanctions, Moscow's declining reliability as a transit partner, and shifting regional alignments have significantly eroded Russia's long-standing role as the principal bridge between Europe and Asia. In its place, a new multipolar connectivity architecture is emerging, centered on the Trans-Caspian Middle Corridor.

This route has rapidly consolidated itself as a viable and increasingly attractive alternative for Europe-Asia transport, enabled by expanding trade flows, extensive infrastructural investments, and growing institutional coordination among the states of Central Asia, the South Caucasus, and Türkiye.

On the other hand, Russia has historically considered these territories to be integral components of its geopolitical sphere of influence, which makes its current strategic decline particularly acute. Moreover, the expansion of sanctions has put significant pressure on the Russian economy, which has increased the importance of providing alternative trade and transit routes. This explains its support for initiatives proposed by Iran, despite sometimes conflicting interests.

At the same time, the West's strategic engagement manifested through the EU's Global Gateway initiative, substantial financial commitments by European development institutions, and renewed U.S. diplomatic involvement in the South Caucasus illustrates a broader reorientation toward diversified, resilient supply chains that circumvent Russia. For the countries of the region, this environment has created both opportunities and challenges.

Armenia's recent foreign policy realignment, exemplified by its suspension of CSTO membership, outreach to Western partners, and participation in emerging transit initiatives, reflects these shifting dynamics. Yet its continued economic dependence on Russia underscores the complexity of pursuing strategic diversification in a period of geopolitical uncertainty.

Looking ahead, the sustainability and long-term geopolitical impact of the Middle Corridor will depend on the ability of regional actors to address logistical bottlenecks, maintain political stability, and uphold a commitment to multilateral cooperation. If successfully implemented, the corridor has the potential to reshape the contours of Eurasian connectivity, reducing the dominance of Russian-controlled routes and strengthening the autonomy and resilience of the states situated along this emerging axis. Ultimately, the current moment represents not only a reconfiguration of transit routes, but also a deeper recalibration of power, interests, and alignments across Eurasia one in which the Middle Corridor stands as both a driver and a symbol of the region's evolving geopolitical order.

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