

THE STRATEGIC ROLE OF THE ORGANIZATION OF TURKIC STATES IN THE MIDDLE CORRIDOR: OPPORTUNITIES AND GEOPOLITICAL IMPLICATIONS

September 2026 No: 82

Deniz Koray ATTAR



THE STRATEGIC ROLE OF THE ORGANIZATION OF TURKIC STATES IN THE MIDDLE CORRIDOR: OPPORTUNITIES AND GEOPOLITICAL IMPLICATIONS

Central Asia holds significant strategic importance as a natural bridge between the Far East and Europe. Following the dissolution of the Soviet Union in 1991, the balance of power in the region was reshaped. In this context, Turkic communities in Central Asia established independent states, and new actors emerged in the region. In order to enhance cultural cooperation among themselves and to position as a strong strategic actor in the region, Turkic states established the Cooperation Council of Turkic-Speaking States, also known as the Turkic Council, with the Nakhchivan Agreement in 2009. Since then, member states have strengthened their institutional and economic relations, holding various summits at the level of ministers and heads of state and signing numerous agreements. As a continuation of this process, during the Council of Heads of State held in Istanbul in 2021, the organization was renamed the Organization of Turkic States (OTS), elevating institutional relations among member countries to a higher level.

The member states of the Organization of Turkic States have deepened their relations by cooperating across numerous sectors, including politics, migration, environment, economy, education, health, and energy. In this context, the coordination developed particularly in the field of transportation carries strategic importance. The cooperation among OTS member states in transportation has largely focused on the Middle Corridor project. The Middle Corridor, officially known as the Trans-Caspian International Transport Route, is a multimodal land and maritime transportation route that starts in China, passes through Kazakhstan, crosses the Caspian Sea to the South Caucasus and Türkiye, and then extends to Europe. In this framework, the Middle Corridor aims to enhance connectivity between East and West by envisioning the revival of the historic Silk Road.

Overall, the Middle Corridor is considered a more advantageous route in terms of distance and time compared to other corridors (the Northern and Southern Corridors) within the scope of China's Belt and Road Initiative, announced in 2013.

In particular, due to the effects of the Russia–Ukraine war, security challenges in the Red Sea, and the impact of the Israel/US–Iran tensions in the Middle East on the political conjuncture, the Middle Corridor has begun to gain importance as an alternative route to existing maritime routes, as well as to the Northern and Southern Corridors. In this context, international stakeholders such as China and the European Union have

strengthened their relations with Central Asian and Caucasus countries and invested in infrastructure projects linked to the Middle Corridor. Accordingly, the Middle Corridor project has begun to evolve beyond its economic dimension into a political phenomenon in the eyes of Central Asian countries and global actors.

Within this framework, the study will analyze the strategic dimensions of the Middle Corridor, assess the cooperation undertaken by the OTS in this context, and examine the strategic opportunities and geopolitical risks that the Middle Corridor presents for OTS member states. Finally, in light of this information, it will discuss whether the Middle Corridor project

constitutes an integration effort within the OTS or serves as a strategic balancing element.

The Geopolitical Dimension of the Middle Corridor

This section will aim to explain the geopolitical dimension of the Middle Corridor project. In this context, comparing the Middle Corridor with existing routes (the Northern Corridor, the Southern Corridor, and the Maritime Route) is critical for understanding the vital significance of the project for regional actors. Additionally, it will become apparent why cooperation among OTS member states within the Middle Corridor project is not merely a choice but a strategic necessity.

Over time, the Middle Corridor project has emerged not only as an economic initiative but also as a key geopolitical instrument in the transformation of Eurasia. The Trans-Caspian East-West Middle Corridor Initiative, which extends from Türkiye through Georgia and Azerbaijan to the Caucasus, the Caspian Sea, and Turkestan, holds critical importance for the revival of the historic Silk Road. The Middle Corridor represents a significant component of China's Belt and Road Initiative, announced by Chinese President Xi Jinping as part of the "Chinese Dream," alongside the Northern and Southern Corridors. The rising geopolitical significance of the Middle Corridor can be explained by the changing political conjuncture affecting alternative routes.

With the outbreak of the Russia–Ukraine war in 2022, the European Union (EU) imposed various sanctions on the Russian Federation. Within the framework of these sanctions, the EU aimed not only to reduce

its energy dependence on Russia but also to decrease its geographical dependence on Russia in trade with China. In this context, the political instabilities in the region, combined with the sanctions, reduced transit activity along the Northern Route by 40%. Moreover, the Middle Corridor is considered a more efficient transportation route, as it is 3,000 km shorter than the Northern Corridor.

The Southern Corridor, considered another alternative route for trade between China and Europe, passes through Kyrgyzstan, Uzbekistan, Turkmenistan, and Iran before reaching Türkiye. Due to the sanctions imposed on Iran for many years, this route has never been regarded by the European Union and China as a primary route for the Belt and Road Initiative. In particular, considering the war between Israel/US and Iran that began on February 28, 2026, the Middle Corridor stands out as a safer and more stable alternative compared to the Southern Corridor.

Due to the long transit time of the maritime route, it is less preferred compared to the other corridors. In this context, the Northern Route offers an average transit time of 14–18 days, the Middle Corridor 16–20 days, while the maritime route has a transit time ranging from 28 to 40 days. Moreover, as a result of security challenges in the Red Sea, it is estimated that maritime transport capacity through the Red Sea decreased by 20% by the end of 2023. From this perspective, the Middle Corridor emerges as a more attractive alternative to the maritime route in terms of both transit time and security.

Overall, the Russia–Ukraine war, security challenges in the Red Sea, and recent conflicts in the Middle East have made it

necessary for trade between China and the EU to pass through a more stable route. In this context, the Middle Corridor project, which bypasses both Russia and Iran and passes through Azerbaijan via the Baku–Tbilisi–Kars (BTK) Railway, including Georgia and Türkiye, has emerged as an alternative to other Belt and Road Initiative routes (the Northern and Southern Corridors) and the maritime route in terms of both security and transit time, gaining greater geopolitical significance compared to these routes.

Existing Mechanisms of the Organization of Turkic States on the Middle Corridor and the Middle Corridor's Energy and Digital Connectivity

This section will explain the existing cooperation mechanisms developed by the Organization of Turkic States on the Middle Corridor and examine the energy and digital dimensions of the Middle Corridor project. Understanding the historical development of the Organization of Turkic States is extremely important for assessing the cooperation undertaken by OTS member states within the framework of the Middle Corridor project.

Although Turkic states began establishing institutional relations in 1992, the formation of a formal union among them was only possible in 2009. In this context, the Cooperation Council of Turkic-Speaking States was established with the 2009 Nakhchivan Agreement. Later, at the 2021 Istanbul Summit, this council was renamed the Organization of Turkic States. The founding members of the organization are Azerbaijan, Kyrgyzstan, Kazakhstan, and Türkiye. Over time, Uzbekistan became a permanent member, while Turkmenistan, Hungary, and the Turkish Republic of Northern Cyprus have joined as observer

members. In line with these developments, the OTS has positioned itself as the overarching body for cooperation mechanisms among Turkic-speaking countries. Within this framework, institutions such as TURKSOY, TURKPA, the Turkic Business Council, the Turkic Academy, and the Turkic Culture and Heritage Foundation have become key components of the institutional coordination network of the Turkic world.

Over time, the increasing geopolitical and geostrategic significance of the Central Asia region has become an important issue for the integration of OTS member states. In this context, the advantages and geographical scope of the Middle Corridor enable the Organization of Turkic States to serve as a main transportation artery within Eurasia.

Throughout the process, the Organization of Turkic States member countries have maintained a determined stance toward the development of transport corridors and have carried out joint efforts to implement necessary projects and remove obstacles to ensure uninterrupted transportation along the Trans-Caspian International East-West Middle Corridor. In this context, one concrete example of the cooperation within the OTS in the Middle Corridor project is the Türk Dünyası Vizyonu–2040 declaration. The declaration emphasizes various measures aimed at making the Trans-Caspian International East-West Middle Corridor the shortest and safest transportation link between East and West, while seeking to deepen economic cooperation among member states. In this regard, measures include harmonizing national economic policies, increasing trade complementarity, removing trade barriers to expand trade volumes, and enhancing multimodal

connectivity along the Trans-Caspian International East-West Middle Corridor (TITR).

It should be noted that the Middle Corridor, unlike the Northern Corridor, does not consist of a single railway line. The project includes not only railways but also maritime and road routes. OTS member states have contributed to the development of the project by engaging in comprehensive cooperation across all of these areas.

Overall, the primary goal of OTS member states in the Middle Corridor project has been to utilize Azerbaijan's Baku, Turkmenistan's Türkmenbaşı, and Kazakhstan's Aktau ports for maritime transport. At the same time, the development of Azerbaijan's Alat port and Kazakhstan's Kuryk port has also been among the main objectives. In this context, the Sister Ports Relationship and Cooperation Memorandum of Understanding was signed by the member states in 2013. With this agreement, cooperation between maritime and dry ports within OTS member states was strengthened. In particular, the Baku and Aktau ports, which are crucial for the Middle Corridor project, were included in this agreement. Additionally, OTS member states have developed joint projects with Georgia, allowing the Middle Corridor to connect to the Black Sea via the ports of Poti and Batumi, thereby linking Asia with Europe. In this regard, due to the diversity offered by the Middle Corridor's land and railway transit network, the corridor has achieved an advantageous position compared to alternative routes.

OTS member states have also undertaken significant efforts to develop railways. In

this context, since 2022, the members have started organizing meetings of Railway Administration Heads. In particular, various initiatives have been launched to develop and enhance the potential of railways within the Middle Corridor project. Additionally, the forum titled "Railway Connectivity of Turkic States: Fergana Valley–Anatolia" held in Fergana, and the International Multimodal Transport Forum held in Istanbul in 2023, brought together numerous logistics companies, operators, and partners from the Turkic geography along with key figures from the public sector, enabling the development of joint projects in the transportation field. Within this framework, the most important joint railway project developed under the OTS has been the Baku–Tbilisi–Kars (BTK) railway project. The BTK railway line was realized through the combined efforts of Türkiye and Azerbaijan, both OTS members, and Georgia, which is not an OTS member. Due to political issues with Armenia, these three countries sought an alternative route to the Georgian maritime passage within the Middle Corridor project. Following diplomatic negotiations, the construction of the BTK was approved in 2007, and the approximately 838 km long BTK line was inaugurated in 2017, providing uninterrupted connectivity between Asia and Europe. Together with the Marmaray Railway Project crossing the Bosphorus, the final segment of the Middle Corridor project was completed. In light of these developments, the construction of the BTK has made the Middle Corridor a more attractive and competitive route for Eurasian trade compared to alternative routes. Another noteworthy railway project is the Türkiye–Georgia–Azerbaijan–Turkmenistan–Afghanistan transit transportation corridor, also known as the Lapis Lazuli route, which constitutes one of

the key passages of the Middle Corridor. With this transportation corridor, the routes of the Middle Corridor project have been diversified, and by including Turkmenistan—a OTS observer member—the connectivity of OTS member states within the Middle Corridor has been strengthened. At the same time, the inclusion of Afghanistan in the project holds significant importance for regional stability among OTS countries.

The Middle Corridor project, beyond being merely a logistical trade route, holds critical importance in terms of energy supply security. Within the OTS, Azerbaijan, Kazakhstan, and Turkmenistan stand out as major producers and exporters of these raw materials, while Türkiye and Hungary play a key role as transit countries, transporting these resources to European markets. In this context, through the initiatives of OTS member states, projects such as the Trans-Anatolian Natural Gas Pipeline (TANAP), the Baku–Tbilisi–Ceyhan (BTC) Oil Pipeline, the South Caucasus Pipeline (SCP), and the planned Trans-Caspian Natural Gas Pipeline have been integrated into the Middle Corridor, giving the corridor a strategic dimension beyond a mere trade route. In particular, during periods when the EU is seeking to diversify its energy sources, the Middle Corridor, with its pipeline infrastructure, emerges as an alternative energy supply route for the European Union and assumes a critical role in ensuring energy security.

OTS member states have carried out various projects to facilitate the transportation network around the Middle Corridor. A significant part of these initiatives involves the digitalization of the Middle Corridor. In this context, the e-Permit and e-CMR applications within the

OTS stand out. Türkiye and Uzbekistan launched the e-Permit project at the 6th OTS Transport Ministers' Meeting held in Tashkent on October 28, 2022. The project aims to simplify transportation operations between the two countries, reduce costs associated with physical permits, and eliminate issues such as lost or misused permits. Efforts to implement this project in other member states are still ongoing. Another digitalization initiative is the e-CMR project. The e-CMR is the digital version of the paper consignment note. Through e-CMR, countries can monitor and manage the information of all parties involved (sender, driver, customs officer, and receiver) in real time via a cloud system. OTS member states have supported the e-CMR project and have decided to establish a Sub-Working Group on this matter. Work is ongoing to ensure the project's applicability within the OTS framework.

In light of all these developments, the Middle Corridor should be seen not merely as a transportation project within the OTS but also as an important initiative that strengthens economic and political integration among the Organization of Turkic States member countries.

Strategic Opportunities, Geopolitical Risks, and Structural Limitations of the Middle Corridor Project for OTS Member States

In light of the information presented so far, this section will analyze the opportunities and risks that the Middle Corridor project creates for OTS member states and, at the same time, examine the structural limitations of the project. Understanding the opportunities and risks offered by the project to the countries is critically important for analyzing whether the

Middle Corridor project serves as an integration initiative within the OTS or as a regional balancing instrument.

a) Türkiye

Türkiye can be seen as one of the most valuable members of the Middle Corridor project within the OTS. Rather than separating the Middle Corridor project from China's Belt and Road Initiative, Türkiye has aimed to integrate the two, interpreting the project as a revival of the historic Silk Road. In this context, Türkiye has provided significant support to the project by establishing a win-win relationship with the People's Republic of China. Accordingly, the Middle Corridor project can be understood as part of Türkiye's goal to create the shortest, safest, and most efficient trade route between Asia and Europe.

Within the scope of the project, Türkiye can be said to have four main objectives: to serve as a bridge between East and West, to strengthen its cultural and commercial ties with the Central Asian Turkic States, to attract foreign investment, and to develop its own transportation infrastructure capacity. Overall, Türkiye has largely achieved these objectives. To reinforce its role as a bridge between East and West, Türkiye has made multi-billion-dollar investments in its transportation infrastructure within the framework of the Middle Corridor project. These include projects such as the Baku–Tbilisi–Kars Railway, Marmaray, Yavuz Sultan Selim Bridge, Eurasia Tunnel, Çanakkale Bridge, and Istanbul Airport. Together, these projects have significantly increased Türkiye's logistics capacity. In particular, the BTK railway project has positioned Türkiye as an important actor not only in

regional but also in global trade. The line's length and multimodal integration have made Türkiye a critical player in East-West transportation and have substantially enhanced trade relations with Central Asian countries. With the completion of these projects, Türkiye has attracted billions of dollars in foreign investment. For example, between 2005 and 2018, China invested approximately 15 billion USD in Türkiye in the fields of transportation, energy, and infrastructure. With these investments, Türkiye has strengthened its strategic position within the Middle Corridor and increased the country's credibility among global investors. In light of all these developments, while Türkiye has sought to reinforce its role as a bridge between East and West, it has gone beyond this bridging function and has become a critical hub in Asia-Europe trade.

Türkiye has been involved in numerous pipeline projects both to strengthen its relations with Central Asian states and to reinforce its strategic position. These include projects such as TANAP, BTC, and SCP. By considering these pipeline projects within the framework of the Middle Corridor, Türkiye has become a critical transit country that transports the energy exports of Central Asian states to European markets, thereby not only enhancing its strategic influence but also deepening its economic and diplomatic relations with Central Asian countries.

Moreover, within the framework of the Middle Corridor project, Türkiye has made significant investments in OTS member states. In recent years, the investment volume and share of Turkish companies have increased notably, particularly in Azerbaijan and Kazakhstan. At the same time, Türkiye has strengthened its strategic

position within the organization by taking a leading role in harmonizing customs procedures and setting logistics standards under the OTS framework. This has significantly enhanced Türkiye's influence in decision-making processes in regional politics.

While the Middle Corridor project provides strategic advantages to Türkiye, it also entails various risks. For example, although the project has strengthened trade relations between Türkiye and OTS member states, an examination of Türkiye's export figures to Central Asian countries over the past decade shows that the desired targets have not been fully achieved. At the same time, although Türkiye is considered a stable country, the recently concluded Syrian Civil War, ongoing regional unrest in Iraq, and the active presence of terrorist organizations in the region have made Türkiye's surrounding area insecure. Considering that China generally shapes its Middle Eastern connections through Iran and the Gulf countries, Türkiye's role on the Middle Corridor faces significant geopolitical risks. The situation becomes even more complex when taking into account the Israel/US–Iran war that began on February 28. Although Iran's and the Gulf countries' positions as transit states are somewhat affected in China's view, this does not necessarily create a favorable scenario for Türkiye. Given the conditions created by the regional crisis, it is more likely that the intensity of traffic will increase along the line and maritime route passing through Georgia's Poti and Batumi ports rather than Türkiye. Moreover, the capacity of the BTK railway and the fact that Marmaray operations are limited to nighttime create serious logistical constraints for Türkiye within the project. Although the capacity of the BTK railway has been attempted to be

increased in recent years through multi-billion-dollar investments, the line still lags significantly behind the alternative Northern Corridor in terms of transport capacity. Additionally, since the Middle Corridor project requires close coordination between China and Türkiye, any diplomatic issue between the two countries could negatively affect the functionality of the entire corridor.

b) Azerbaijan

Another key component of the Middle Corridor project within the OTS is Azerbaijan. With its strategic location at the intersection of Europe and Asia, significant energy resources, and extensive infrastructure development, Azerbaijan is positioned as a crucial actor linking the regional interests of the European Union and China. By supporting China's Belt and Road Initiative, Azerbaijan has placed significant importance on the Middle Corridor project both within the OTS framework and through other platforms. Azerbaijan's northern border with Russia and southern border with Iran makes it an essential transit point on the overland route between Europe and China. For this reason, China has regarded Azerbaijan as a critical logistics hub and has provided substantial support for the modernization of the Baku and Alat ports in particular. A concrete example of this support can be seen in the "Framework Agreement Between the Ministry of Economy of the Republic of Azerbaijan and the National Development and Reform Commission of China," signed during Azerbaijani Minister of Economy Mikayil Jabbarov's visit to China on September 4, 2023. This agreement strengthened investment cooperation between the two countries and established a shared goal of increasing production capacities. Thus, Azerbaijan's

partnership with China has reinforced its role as a key transit actor in the Middle Corridor project and has significantly boosted the country's commercial revenues.

Relations between Azerbaijan and the European Union have gained momentum, especially following the Russia-Ukraine war. Within the framework of the EU's sanctions on Russia, the European Union sought to diversify its energy supply and turned its attention to Central Asian and Caucasus countries. In this context, Azerbaijan has emerged as one of the most important countries for the EU's energy diversification strategy. Since July 2022, a Memorandum of Understanding has been signed between Azerbaijan and the EU, envisioning the increase of Azerbaijani gas exports to 20 billion cubic meters by 2027 and the expansion of the Southern Gas Corridor with the support of the European Bank for Reconstruction and Development (EBRD). Upon reaching the agreement, European Commission President Ursula von der Leyen emphasized the EU's enduring partnership with Azerbaijan and described the country as a "reliable partner." Additionally, the EU has made substantial investments in the Middle Corridor project to optimize its gas exports and trade flows. Within this framework, efforts have been made to modernize and expand Azerbaijan's infrastructure, and joint initiatives have been carried out to increase the transport capacity of ports such as Alat and Baku. As a result, Azerbaijan has attracted significant EU attention due to its abundant natural resources and strategic geographical location. Through these investments, Azerbaijan has considerably developed its infrastructure network and enhanced its geopolitical influence over the Middle

Corridor, thereby strengthening its strategic position in the Caucasus.

For Azerbaijan, the Zangezur Corridor holds great significance in the context of the Middle Corridor project. Through this corridor, Azerbaijan will establish a land connection with the Nakhchivan region, enabling direct overland access from Azerbaijan to Türkiye. Particularly after the Second Karabakh War, Azerbaijan has placed high importance on the construction of this corridor. Both Azerbaijan and Türkiye have interpreted it as an integral part of the Middle Corridor project. Upon successful completion of the project, the strategic integrity of the Middle Corridor within the OTS framework will be further strengthened. In this way, Azerbaijan not only elevates its institutional relations with Türkiye to a higher level but also diversifies the routes of the Middle Corridor project, enhancing its global significance.

Another initiative Azerbaijan has undertaken for the Middle Corridor project is the trilateral agreement signed between Azerbaijan, Kazakhstan, and Georgia. Within this framework, the agreement aims to establish a joint logistics company among the countries. This initiative seeks to standardize tariffs, facilitate cargo arrangements, and simplify customs procedures along the Middle Corridor. As a result, many operational barriers that hinder the flow of goods along this route can be removed. This not only strengthens Azerbaijan's position as a transit country within the Middle Corridor project but also reinforces its role as a logistics hub along the corridor.

While the Middle Corridor project provides numerous strategic benefits for Azerbaijan,

it also entails certain disadvantages. The drawbacks and limitations of the project can be categorized into three main areas: the risk of remaining within the sphere of great power competition, political vulnerabilities in the South Caucasus, and constraints related to infrastructure and transport capacity.

Although the European Union and China view the Middle Corridor as an alternative to other routes within the Belt and Road Initiative, providing various benefits to Azerbaijan, this situation has also turned the corridor into a zone of geopolitical competition. In this context, political pressures from Russia and Iran on Azerbaijan pose significant obstacles to the project. Additionally, although China and the European Union generally demonstrate a cooperative stance in this project, their underlying systemic competition could reduce attention and investment in the corridor.

Geopolitical disruptions in the South Caucasus region also pose various risks for Azerbaijan. In this context, although the Zangezur Corridor is supported by Türkiye and OTS member states, countries such as Armenia, Russia, and Iran do not view the project favorably. While Azerbaijan seeks for the Zangezur Corridor to operate as a duty-free and uninterrupted passage, Armenia demands that its sovereignty rights along the route be respected. In this regard, Russia, as a close partner of Armenia, provides political support to Armenia. Additionally, because the opening of the Zangezur Corridor would strengthen the Türkiye-Azerbaijan axis and weaken the Southern Corridor, Iran has occasionally issued strong statements regarding the project. All these developments negatively affect

Azerbaijan's maneuvering capacity on the international stage.

Finally, the current transport capacities of Alat Port and Baku Port, which are part of the Azerbaijan segment of the Middle Corridor, also create various logistical constraints for Azerbaijan. Although efforts have been made to increase the capacities of Alat and Baku ports through investments from the European Union, China, and OTS member states, the desired targets have not yet been achieved. This situation restricts the speed and efficiency of cargo flow along the corridor, negatively affecting Azerbaijan's role as a transit country. In this context, the Northern Corridor, an alternative route to the Middle Corridor, has a far more developed infrastructure in terms of transport capacity.

c) Kazakhstan

Kazakhstan, with its strategic location, abundant natural gas reserves, and critical mineral resources, constitutes one of the most important pillars of China's Belt and Road Initiative. In this context, Kazakhstan serves as the main overland transit country for cargo transported from China to Europe via the Northern, Southern, and Middle Corridors within the Belt and Road Initiative. This position has strengthened Kazakhstan's geopolitical influence not only at the regional level but also on a global scale.

It should be noted that Kazakhstan has not relied on a single route within China's Belt and Road Initiative. In this context, the country has emphasized alternative routes such as the Middle Corridor, thereby strengthening its position as a transit hub. Within this framework, various actors—including the United States, the European

Union, China, and OTS member states—have made substantial investments in Kazakhstan to enhance its infrastructure along the Middle Corridor. Additionally, Kazakhstan has prioritized the development of its railways using domestic resources, investing approximately USD 30 billion in the transport and logistics sector over the past decade. In this context, more than 2,500 km of new railway lines have been constructed. Through these efforts, Kazakhstan has aimed to establish itself as a key logistics hub within the Middle Corridor project and has achieved significant economic gains from the project due to its strategic geographical location.

Within the framework of the Middle Corridor project, Kazakhstan has established strong partnerships with the European Union. To support the Middle Corridor, the EU has provided substantial assistance to Kazakhstan. In this context, the European Bank for Reconstruction and Development invested approximately USD 100 million in the local bond issuance of Kazakhstan's national railway company, Kazakhstan Temir Zholy, in 2022. In addition to these investments, various European leaders have visited Kazakhstan to strengthen bilateral relations. Within this framework, on November 1, 2023, Emmanuel Macron visited Kazakhstan, highlighting the country's critical importance in Asia-Europe trade. Furthermore, under the "Ready4Trade Central Asia" project aimed at enhancing regional connectivity in Central Asia, Kazakhstan and other Central Asian countries received approximately EUR 16 million in investment from the EU. In light of these developments, the EU's investments and initiatives in Kazakhstan have strengthened the connectivity of the Middle Corridor project and reinforced

Kazakhstan's strategic position in the region. Moreover, Kazakhstan has leveraged its strong partnership with the EU as a balancing factor in its relations with actors such as Russia and China, thereby enhancing its strategic autonomy on a global scale.

Another key partner of Kazakhstan in the Middle Corridor project is the People's Republic of China. The coordination between the two countries has developed within the framework of China's Belt and Road Initiative. To strengthen the Belt and Road Initiative, China has made substantial infrastructure investments in Kazakhstan, the main land transit country. According to information announced by the 12th Kazakhstan-China Coordination Committee held in Astana in 2024, 100 joint investment projects are being implemented between the two countries, with a total value of approximately USD 14.5 billion. Furthermore, Kazakhstan and China aim to increase the cargo transported via the Middle Corridor to 1,000 container trains by 2027 and to 2,000 container trains by the end of 2029. In addition, within the scope of the Middle Corridor project, the construction of a third railway line, the Ayagöz–Tacheng line, was launched on December 21, 2023. This line is designed to overcome bottlenecks on the main transit routes of the Middle Corridor, enhancing both its flexibility and capacity. As a result, thanks to China's investments in Kazakhstan, the country has not only developed its domestic transportation network but also strengthened its role as a central actor within the Belt and Road Initiative.

Within the Middle Corridor project, Kazakhstan has engaged in intensive cooperation not only with global actors

such as China and the EU but also with South Caucasus countries. A concrete example of this collaboration can be seen at the Trans-Caspian Connectivity event held in 2022. In this context, officials from Georgia, Türkiye, and Azerbaijan gathered in Kazakhstan to jointly target the elimination of bottlenecks in the Middle Corridor for the 2022–2027 period and signed a “Roadmap” for the development of the Middle Corridor among the participating countries. In addition, Kazakhstan and Azerbaijan established a joint investment fund of USD 300 million within the scope of the Middle Corridor project. The primary objective of this fund is to increase the capacities of the Aktau and Kuryk ports in Kazakhstan and the Baku and Alat ports in Azerbaijan. Consequently, the fund has not only strengthened bilateral relations but also secured long-term economic benefits for Kazakhstan and its partners, contributing significantly to the development of trade networks in Central Asia.

Although the Middle Corridor project provides strategic advantages for Kazakhstan, it also entails significant risks and limitations. These risks and constraints can be examined under three main categories: geopolitical threats, economic and financial uncertainties, and logistical and structural constraints.

One of the foremost geopolitical risks posed by the Middle Corridor project is Kazakhstan’s strong economic and political ties with Russia. Both countries are members of organizations such as the Collective Security Treaty Organization, the Shanghai Cooperation Organization, the Commonwealth of Independent States, and the Eurasian Economic Union. Within this framework, considering Russia’s primary transit role in the Northern

Corridor and its general stance toward the Middle Corridor project, Kazakhstan faces several challenges under the project. The country’s deep ties with Russia in the security and defense sectors, combined with its high dependency on Russia for access to global markets for its oil exports, mean that Russian political pressure on Kazakhstan limits the development of the Middle Corridor project and constrains Kazakhstan’s maneuvering capacity within it.

Another significant challenge for Kazakhstan is the financial burden imposed by the high costs of the Middle Corridor project. In particular, the large-scale planned infrastructure projects place substantial strain on Kazakhstan. Although the country has received millions of dollars in investments from China, the EU, and OTS member states within the framework of the project, it still faces certain financial and economic risks. For example, Kazakhstan’s Bakhty–Ayagöz railway line project, aimed at increasing the capacity of the Middle Corridor, is estimated to require an investment of approximately USD 1.2 billion. Such high-cost infrastructure projects negatively impact Kazakhstan’s economic and strategic influence within the scope of the Middle Corridor.

Finally, Kazakhstan faces logistical challenges in the course of the Middle Corridor project. Adverse weather and sea conditions in the Caspian Sea negatively affect the speed of ferry and Ro-Ro transportation between the Aktau and Kuryk ports and the Baku/Alat ports. At the same time, despite the investments made, the ports’ handling capacities have not yet reached the desired levels. As a result, various problems arise in meeting the demand along the route. This situation

undermines Kazakhstan's goal of becoming a logistics hub in Central Asia and also limits the overall functionality of the Middle Corridor project.

In summary, Türkiye, Azerbaijan, and Kazakhstan have strengthened their positions as strategic actors in both regional and global trade through the Middle Corridor project. However, each country has faced certain risks and limitations due to geopolitical uncertainties in the region, infrastructure and capacity constraints, and the economic costs of the project. In this context, while the Middle Corridor project offers significant advantages to these countries, its success ultimately depends on the political stability of the region, cooperation with international actors, and intensive coordination among the countries involved.

The Middle Corridor Project: A Regional Integration Tool for the OTS or a Geopolitical Balancing Factor?

This section analyzes, in light of the information presented in the previous sections, whether the Middle Corridor project functions as a regional integration initiative for the OTS member states or serves as a geopolitical balancing factor.

In order to fully answer this question, it is necessary to evaluate both the positive and negative effects of the Middle Corridor project on integration within the OTS. In this context, it is evident that the Middle Corridor project clearly supports the integration of OTS member states both politically and economically. Within this framework, the joint projects discussed in detail in the previous sections serve as concrete examples of integration among

OTS countries. For instance, the E-CMR and E-Permit applications developed within the OTS to enhance the digitalization of the Middle Corridor, as well as projects integrated into the corridor such as TANAP, the Baku-Tbilisi-Ceyhan Oil Pipeline, the South Caucasus Pipeline, and the planned Trans-Caspian Gas Pipeline, have significantly increased economic and political cooperation among OTS countries, thereby strengthening their integration.

The decisions made at the Transport Ministers' Meetings within the OTS, together with the signed Memorandum of Understanding on Sister Ports Relations and Cooperation, railway projects such as BTK and Lapis Lazuli, the forum titled "Railway Connectivity of Turkic States: Fergana Valley – Anatolia," and the International Multimodal Transport Forum held in Istanbul, have significantly enhanced connectivity and political dialogue among OTS countries. Within this framework, while the Middle Corridor project can be seen as supporting integration within the OTS, the member states have nonetheless faced certain limitations throughout this process.

First of all, the fact that the Middle Corridor project does not encompass all OTS members poses a challenge for the full integration of the organization. The project is largely shaped around Kazakhstan, Azerbaijan, and Türkiye, while the roles of other actors such as Kyrgyzstan, Turkmenistan, Uzbekistan, and Hungary remain quite limited. Although the China-Kyrgyzstan-Uzbekistan railway under the Belt and Road Initiative is still under construction, progress has been slow due to financing and infrastructure issues. Moreover, the idea of extending this railway to Turkmenistan and the Caspian

Sea has generated serious political tensions between Kazakhstan and the other OTS member states involved in the project. In this context, while the project aims to bring Turkmenistan, Kyrgyzstan, and Uzbekistan into close coordination with Türkiye and Azerbaijan in Asia-Europe trade, the exclusion of Kazakhstan negatively affects the integration process within the OTS.

In this context, despite certain issues and structural limitations among OTS countries, the Middle Corridor project has facilitated comprehensive integration across multiple sectors and significantly enhanced coordination among member states. However, interpreting the project solely as an integration process within the OTS risks overlooking the fact that the corridor is also used by OTS countries as a geopolitical balancing tool. In this regard, the Middle Corridor not only supports integration within the OTS but also provides member states with strategic maneuverability on the international stage as a mechanism for geopolitical balance.

Understanding how the Middle Corridor project is used by countries as a geopolitical balancing tool requires examining the purposes for which the project was initiated. In this context, considering the developments from the project's concrete launch in 2017 to the present, it becomes clear that the corridor was initiated and developed in response to the prevailing political conjuncture.

One of the primary motivations behind the Middle Corridor is its role as an alternative route to the Southern Corridor, the Northern Corridor, and maritime routes. At the heart of this motivation lie the political instabilities affecting these corridors. The Russia-Ukraine war impacting the Northern Corridor, the U.S./Israel-Iran conflict

influencing the Southern Corridor, and other political crises, combined with security issues in the Red Sea, clearly illustrate the rationale behind the project. In this context, the OTS countries effectively assessed the political conjuncture, took the necessary steps to develop the project, and ensured that it became a strategic balancing tool for them. For example, although Kazakhstan has deepened its economic and security ties with Russia, through the Middle Corridor project it has received significant support from both the European Union and China, positioning itself as a logistics hub in Central Asia. This, in turn, has strengthened Kazakhstan's strategic autonomy and granted the country substantial maneuverability on the international stage.

A similar situation can be observed for Azerbaijan. For years, Azerbaijan has maintained a deep dependence on Russia in terms of access to external markets; however, with the development of the Middle Corridor project, the country has significantly reduced its reliance on Russia, gaining easier access to global markets through Türkiye and Georgia.

Alongside Azerbaijan and Kazakhstan, Türkiye has not interpreted the project merely as a process of integration within the OTS but has also leveraged its strategic dimension as a balancing tool in foreign policy. In this context, Türkiye, which relies heavily on Russia for its energy supply, has diversified its energy sources through the pipeline networks integrated into the Middle Corridor project, thereby strengthening its strategic autonomy. At the same time, with investments from the European Union and China, Türkiye's infrastructure has been significantly enhanced, positioning the country as a central hub in Asia-Europe trade. In light of

these developments, the Middle Corridor project has been used by OTS countries both as an economic and strategic instrument, becoming a balancing factor in international politics. OTS member states have effectively assessed the regional and global political context, improving their infrastructure while assuming a central role in Asia-Europe trade.

In conclusion, considering that the Middle Corridor project was initiated and developed by OTS countries and global actors in response to global political conjunctures, and taking into account the roles of OTS members in international politics, the project holds greater significance as a political balancing tool rather than as a mechanism for integration. In this context, the Middle Corridor has been perceived by OTS countries as an alternative route to other Belt and Road Initiative corridors, positioning the project as a balancing factor against global actors such as China, Russia, and Europe. Nevertheless, the fact that the Middle Corridor project has substantially strengthened integration and connectivity within the OTS should not be overlooked.

REFERENCES

- Wang, W. (2019). "The Potential of the New Silk Road for Europe". *Executive Intelligence Review*. 46 (46), 24-26.
- Yılmaz, S. (2020). Bir Kuşak Bir Yol Projesinin Azerbaycan, Kazakistan ve Türkiye'ye Etkisi. *International Journal of Society Studies*, Vol 16, No 32, 5274-5301.
- Sternberg, T., Ariell Ahearn, & McConnell, F. (2017). Central Asian 'Characteristics' on China's New Silk Road: The Role of Landscape and the Politics of Infrastructure. *Land*, 6 (3), ss.1-16.
- Senol, C., & Ucisik Erbilien, S. (2022). Analysis of the impact of the middle corridor on Türkiye in terms of geopolitics and economy in the OBOR initiative. *Cografya Dergisi*, 45, 161-180. <https://doi.org/10.26650/JGEOG2022-1159338>
- ĞPEK, Selma (2025), "Türkiye'nin Orta Asya'da Türk İşbirliğinin Sağlanması Stratejisi ve Orta Koridor Girişimi", *Uluslararası Yönetim Akademisi Dergisi*, S.8(3), ss.833-845, Doi: <https://doi.org/10.33712/mana.1749075>
- Tatlı, M. (2025). From the silk road to the energy corridor: The union of Turkish states and Türkiye's geostrategic role in the middle corridor. *İnönü Üniversitesi Uluslararası Sosyal Bilimler Dergisi*, (İNİJOSS), 14(2), 519-537.
- Kaya, E., (2024). Orta Koridor'un Dünya Politikasında ve Avrasya'da Artan Önemi. *Düşünce Dünyasında Türkiz*, 15(1): 9-35.
- Urciuolo, L. (2024, March 29). *The Middle Corridor initiative: Where Europe and Asia meet*. European Institute for Asian Studies. <https://eias.org/publications/briefing-paper/the-middle-corridor-initiative-where-europe-and-asia-meet>
- Kenderdine, Tristan; Bucsky, Péter (2021) : Middle corridor - policy development and trade potential of the Trans-Caspian International Transport Route, ADBI Working Paper Series, No. 1268, Asian Development Bank Institute (ADBI), Tokyo
- Tokgöz, A. F. (2025, March 29). *Türkiye ve Türk Devletleri Teşkilatı: Bölgesel iş birliği ile küresel ortaklık mümkün mü?* Dış Politika Araştırmaları Merkezi (DİPAM).
- Kılınç, O. (2025). Türkiye's Central Corridor policy in the context of the Belt and Road Initiative and the Organization of Turkic States. *Metin & Analiz*, 1(1), 33-49.
- Assylkhanov, A. (2025, August). *The Middle Corridor's impact on Kazakhstan: Foreign policy, economic development, and regional cooperation* (Research Paper No. 15). OSCE Academy in Bishkek.
- Cengiz, Ö. (2023). Rusya-Ukrayna Savaşının Türkiye'den Geçen Orta Lojistik Koridora Etkileri. *Kafkas Üniversitesi İktisadi ve İdari Bilimler Fakültesi Dergisi*, 14(27): 485-505.



DİPLOMATİK İLİŞKİLER ve POLİTİK ARAŞTIRMALAR MERKEZİ
CENTER for DIPLOMATIC AFFAIRS and POLITICAL STUDIES



+90 216 310 30 40



info@dipam.org



+90 216 310 30 50



www.dipam.org



Merdivenköy Mah. Nur Sok. Business İstanbul
A Blok Kat:12 No:115, Kadıköy/İstanbul

ABOUT THE AUTHOR

Deniz Koray ATTAR began his studies in the Department of Political Science and International Relations (English) at Bahçeşehir University in 2022. Currently the top student in his department, Attar is continuing his undergraduate studies and is focusing on Central Asia, the Turkic World, and international law as part of an internship program at DİPAM.