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Eurasia's East-West Corridor: A Booster for Economic Development and Western Investment

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Cover Image: Photo from August 2025 shows a cargo ship docked at Aktau port, Kazakhstan. Aktau is Kazakhstan's main port on the Caspian Sea. (Li Renzi/Xinhua via Getty Images)

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EXECUTIVE SUMMARY

Central Asia (Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, and Turkmenistan – the "C5") is reemerging as a critical Eurasian transit hub, reviving its historic role as a Silk Road connector between Asia, Europe, and global markets. With Azerbaijan's recent alignment with the group – effectively creating a C6 – Central Asia's access to the Caspian Sea has been strengthened, enabling the development of a viable east-west trade and transport corridor that mitigates the region's landlocked constraints.

Led by Kazakhstan, this corridor is more politically viable than alternative north-south routes and offers a realistic complement to maritime and Russia-dependent land corridors. Its momentum reflects converging policy initiatives, including new South Caucasus connectivity arrangements, Kazakhstan's expanded engagement with Western and Middle Eastern partners, and sustained state-led investments in infrastructure, logistics digitalization, and port-and-rail capacity since the 2010s. Other Central Asian states are increasingly investing to enhance regional integration.

With coordinated investment, regulatory harmonization, and diplomatic support, the corridor can become a profitable, strategic alternative – boosting regional growth while supplying Western markets with critical minerals, energy, and goods and balancing both China's BRI and Russia-centric routes.

Central Asia and the South Caucasus

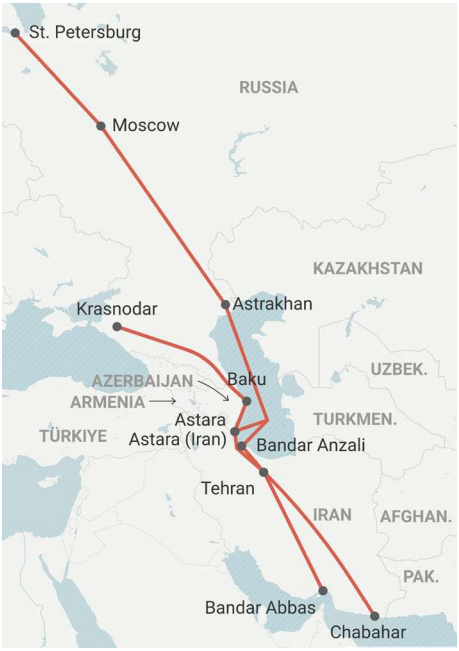
I. Introduction

Central Asia has served as a global pivot point of Eurasian great-power politics since time immemorial, from Alexander the Great's conquests and the ancient Silk Road through Pax Mongolica to the Great Game between the Russian and British Empires. Contemporary competition in West Asia among China, the United States, Russia, and, to a lesser extent, Europe and India, highlights Central Asia's need for agency, geopolitical independence, and diverse trade route options.

For most of its history, Central Asia was influenced and contested primarily through its eastern and southern approaches. Actors from the Arab world, Persia, Turkic regions, China, and India projected power into – and sometimes out of – the region along these routes. Movements along the western axis across the Caspian Sea or its northern shore were comparatively ephemeral or migratory. It was only the first 19th-century Great Game, followed by the political realities of the Cold War and events in Afghanistan and Iran, that closed off southern and eastern connectivity and substituted it with connectivity to the north, enforced first by Russian and then by Soviet administrations.

The collapse of the Soviet Union, instability in Afghanistan and Iran, an increasingly assertive China, and a tentatively integrating Europe now all interact in Central Asia with opportunities for fluid engagement and diplomatic realign-

International North–South Transport Corridor (INSTC)



ment that have not been seen in roughly two centuries. Central Asia is an area where every great power, or near-great power, intersects, with competing geopolitical ambitions and the means and motives to compete with one another.

Central Asia's southward connections to Pakistan, India, and beyond via the Indian Ocean offer opportunities for its political and economic diversification, even if currently such a route is difficult to implement due to significant security and political risks. Improving Central Asia's links with South Asia would bring new political and economic options that are presently unavailable and strengthen and diversify the trade routes connecting the region to global markets via the Sea of Arabia and the Indian Ocean. Developing this connection, even though it may not align with China's or Russia's interests, would benefit the countries in the region as well as the United States and European Union.

That said, South Asia presents a highly constrained option for Central Asia to overcome its landlocked status due to multiple sources of instability and geopolitical friction. Iran is in turmoil and heavily encumbered by sanctions, and it lacks internal resources to develop a modern transportation infrastructure without heavy Chinese involvement. Afghanistan's ongoing security challenges due to the Taliban regime and presence of ISIS-K and other radical organizations limit its ability to serve as a reliable transit corridor, while tensions between Kabul and Islamabad, as well as persistent political and economic instability in Pakistan, further complicate overland connectivity. Additionally, longstanding antagonism between Pakistan and India introduces structural barriers to cross-border trade, making coordinated regional logistics through South Asia highly uncertain.

In contrast, the East-West corridor via the Trans-Caspian International Transport Route (TITR) and the Trump Route for International Peace and Prosperity (TRIPP) offers a more rational, predictable, strategically diversified path that bypasses these volatile dynamics.

II. Recent Background and Foundational Geoeconomics

Since they emerged from the debris of the Soviet Union 34 years ago, Central Asian states have been focused on shedding the USSR's political, administrative, and economic architecture. Despite the extreme political and economic turbulence and mass deprivation that accompanied their independence, these former Soviet republics have made considerable progress in moving away from the old, highly centralized, hierarchical decision-making structures typical of the Marxist-Leninist political model. It has not been an easy process, considering the legacy of 70 years of command economy, which provided little autonomy to republic-level governments. The Kremlin's GOSPLAN central planning agency and its finance, transportation, energy, and industry ministries exerted extensive control over how the Soviet republics and even local, district, and town-level authorities operated.

Moving away from this economic statecraft model has been a key challenge over the past 30 years, as the republics' leaders transitioned from serving as Moscow's enforcers to policy drivers. Since each republic was tied into the integrated Soviet supply chains, they had to not only transform their operating systems but also find mechanisms to achieve economic independence. On the economic front, Kazakhstan emerged as the clear leader, with a 2024 GDP of $291 billion and per capita income of $14,444.[1]

Further complicating the transition of the former Soviet republics was Moscow's efforts to continue its economic and political influence over its former periphery in the aftermath of the USSR's implosion through the Commonwealth of Independent States, Collective Security Treaty Organization, and Eur-

1 Focus Economics, Kazakhstan Economic Data and Projections, https://www.focus-economics.com/countries/kazakhstan/

asian Economic Union.[2] The result was that after 1991, the newly independent Central Asian states inherited a landlocked geography and transportation infrastructure that all pointed north toward Russia. Their immediate challenge was to boost regional interconnectivity and reorient these inherited Soviet networks toward broader global markets. Transport connectivity and economic diversification have become key national priorities. China recognized this necessity and used it to its advantage by announcing the Belt and Road Initiative (BRI) in Kazakhstan's capital of Astana in 2013 (and relaunching it there in 2023), clearly recognizing the geopolitical centrality of the largest of the Central Asian states to the viability of its sprawling geoeconomic effort.

China initiated the China-Kyrgyzstan-Uzbekistan railroad in 2024 to compete with the China-Kazakhstan route, while Kazakhstan has pursued the TITR, more popularly known as the Middle Corridor, connecting China to Europe via the Caspian Sea and the South Caucasus, to lessen reliance on Russian pipelines and railways. Likewise, Uzbekistan has come out of the Karimov-era autarky under President Shavkat Mirziyoyev, focusing since 2016 on becoming a regional hub, improving rail and road links to China (via Kyrgyzstan), Turkmenistan (for Caspian access), Kazakhstan, and Afghanistan.

Turkmenistan built pipelines to China, exported gas to Iran, and sought to expand routes to Iran and the Caspian, aiming to bypass the Russian-controlled gas network. Meanwhile, Kyrgyzstan and Tajikistan, while landlocked, sought regional integration through projects such as CASA-1000 (an electricity transmission project to South Asia) and engagement with the BRI. In short, transport connectivity stemmed from their new sovereignty and diversification strategy – an attempt by newly sovereign and self-directed state actors to rewire geography to serve national interests.[3]

"As China's economic rise accelerated in the late 1990s, the People's Republic began to translate its expanding material power into regional influence. It took nearly a decade for China to acquire the economic and institutional means to expand its growing economic heft westward across Eurasia."

The rise of China as a major global economy a few years after the collapse of the USSR and the ensuing vacuum enabled Beijing to benefit from the geostrategic opening. As China's economic rise accelerated in the late 1990s, the People's Republic began to translate its expanding material power into regional influence. It took nearly a decade for China to acquire the economic and institutional means to expand its growing economic heft westward across Eurasia.[4]

Through energy diplomacy, infrastructure development, and the creation of multilateral mechanisms such as the Shanghai Cooperation Organization (SCO), Beijing gradually transformed from a cautious observer into a central player in Central Asia's economic and security landscape. By the time of the 2013 launch of the BRI in Kazakhstan's capital, China had already been building an infrastructure network across Central Asia as part of its "going out" policy. These pipelines, highways, and rail links were not yet part of a grand strategy but merely sought to make it easier for Chinese exports to arrive in the region. Still, they collectively reoriented Central Asia's infrastructure from a north-south Soviet axis toward an east-west Sino-centric one. When Xi Jinping announced the BRI in Astana in 2013, he was effectively putting a name and a vision to a network that had been two decades in the making but had long historical antecedents.[5]

Over 30 years as independent states, the Central Asian countries have con-

2 P. Terrence Hopmann, Stephen D. Shenfield, and Dominique Arel, *Integration and Disintegration in the Former Soviet Union: Implications for Regional and Global Security*, Occasional Paper #30 (Providence, RI: Thomas J. Watson Jr. Institute for International Studies, Brown University, 1997), https://ciaotest.cc.columbia.edu/wps/wibu/0015209/f_0015209_12839.pdf

3 Ali Dayar. "A New Link in Global Trade: The China-Kyrgyzstan-Uzbekistan Railway and its Role in the Middle Corridor." Caspian Policy Center, October 6, 2025. https://caspianpolicy.org/research/middle-corridor/a-new-link-in-global-trade-the-china-kyrgyzstan-uzbekistan-railway-and-its-role-in-the-middle-corridor; Zaheer Abbas, Inayat Kalim, Muhammad ShoaibMalik. "CASA 10000, Its Potential for Regional Trade and Development." *Global Political Review IV(III)*. September 2019. https://www.gprjournal.com/article/casa1000-its-potential-for-regional-trade-and-development.

4 Daniel S. Markey, *China's Western Horizon: Beijing and the New Geopolitics of Eurasia* (New York: Oxford University Press, 2020).

5 Sébastien Peyrouse, *Central Asia's Growing Partnership with China* (working paper, Swiss Federal Institute of Technology/ETH Zurich, 2009), https://www.files.ethz.ch/isn/111372/WP4-EN.pdf.

solidated sovereignty and established national institutions, all while largely complying with international norms and sanctions regimes. This adherence enabled their gradual integration into the global economic and diplomatic system, exemplified by Kazakhstan's 2015 World Trade Organization accession and the region's broader participation in the United Nations, the Organization for Security & Co-operation in Europe, and other multilateral organizations. These accomplishments reflect a long-term strategy: maintain legitimacy with external powers, attract investment, and signal reliability as partners in a volatile space, especially in light of Russia's ongoing war in Ukraine.[6] Central Asia's leadership has skillfully balanced relations among Russia, China, and the West, avoiding overdependence on any single external power while safeguarding sovereignty, territorial integrity, and domestic stability.

Yet the region's economic and infrastructure trajectory reveals persistent structural weaknesses. Central Asia remains heavily reliant on primary products and raw materials exports, with limited industrial diversification or value-added production. Infrastructure has been overwhelmingly oriented along East-West axes, connecting China's industrial and energy corridors with European markets.

To mitigate their dependence on Russia, the Central Asian states have pursued three main strategies. First, they have sought economic and trade diversification through investments from China, the development of the Trans-Caspian corridor, and the cultivation of alternative partnerships with the United States, the EU, Türkiye, Iran, and India, while engaging regional organizations such as the SCO and BRICS, and developing non-Russian-led transport corridors. Second, they are developing new pipelines and energy grids including the Turkmenistan-China gas pipeline, Kazakhstan's portion of the TITR from Aktau to Baku aimed at supplementing Caspian Pipeline Consortium (CPC) access to the Novorossiysk oil terminal, and Uzbekistan's energy interconnections with southern partners, while expanding domestic refining and processing capacity to retain more value from their resources. Third, following the multivector approach pioneered by Kazakhstan,[7] these countries have pursued strategic balancing by seeking regional agency, engaging China, Russia, the Gulf states, the EU, the United States, and regional neighbors while strengthening national institutions and borders.

III. The Middle Corridor

The Trans-Caspian International Transport Route runs from China and Central Asia through Kazakhstan, across the Caspian Sea, and onward via Azerbaijan, Georgia, and Türkiye to Europe, connecting to the Greater Middle East and West Asia.[8] Its logic is straightforward: to create a shorter, politically diversified route that bypasses Russia's Northern Corridor and avoids the geopolitical and security risks of southern maritime routes linked to insecurity in Iran, Afghanistan, and Pakistan. For China, the TITR offers a potential commercial superhighway to Europe bypassing the maritime routes that can be interdicted by the U.S. Navy. For the Central Asian and South Caucasus states, it represents an independent path linking East and West while reducing dependence on Moscow's infrastructure.

Momentum behind the corridor has accelerated. Freight volumes reached 4.1 million metric tons in the first 11 months of 2024, a 63% year-on-year increase.

6 Ricardo Barrios, Maria A. Blackwood, Rebecca M. Nelson, and Michael D. Sutherland, *Central Asia: Implications of Russia's War in Ukraine*, CRS Report R47591 (Washington, D.C.: Library of Congress, June 9, 2023), https://crsreports.congress.gov/product/pdf/R/R47591

7 Rachel Vanderhill, Sandra F. Joireman, and Roza Tulepbayeva, "Between the Bear and the Dragon: Multivectorism in Kazakhstan as a Model Strategy for Secondary Powers," *International Affairs* 96, no. 4 (July 2020): 975–993, https://doi.org/10.1093/ia/iiaa061

8 Kamran Bokhari and Eugene Chausovsky, "Trans-Caspian Corridor: Eurasian Connectivity and the United States," *New Lines Institute*, October 31, 2023, https://newlinesinstitute.org/geo-economics/trans-caspian-corridor-eurasian-connectivity-and-the-united-states/

Trans-Caspian International Transportation Corridor (TITR or Middle Corridor)

Zangezur Corridor with TRIPP

Highlighting the 43-mile Trump Route for International Peace and Prosperity corridor (TRIPP) through Armenia's southern border region.

— Trans-Caspian Transportation Route (Middle Corridor)

— Zangezur Corridor

Kazakhstan alone moved 2.3 million metric tons in the first half of 2025, up 7% from 2024. Governments have created one-window transit systems, joint logistics ventures, and upgraded terminals.[9] Kazakhstan's Aktau port has doubled its container capacity and been reclassified as an international hub. These steps show that the TITR is no longer aspirational; it is an increasingly viable artery drawing investment from Europe, Central Asia, and China alike.

The corridor gained new strategic weight after the August 2025 U.S.-brokered agreement between Armenia and Azerbaijan included the development of the TRIPP. This is a transit corridor through Armenia's southern Syunik province, linking Azerbaijan's mainland to its Nakhchivan exclave along Türkiye's doorstep and Iran's northern flank. Under a 99-year U.S. development lease, TRIPP will host rail, road, fiber-optic, and potentially energy lines.

For the Middle Corridor, the TRIPP acts as an accelerator, adding a complementary route through the South Caucasus that reduces chokepoints and brings U.S. and Turkish geopolitical sponsorship.[10] Together, the TITR-TRIPP alignment is now the most developed non-Russian East-West transit option.

IV. Viability of the East-West Corridor and Kazakhstan's Geographic and Structural Advantage

Kazakhstan's geographic position places it squarely between the major Asian manufacturing centers (notably China) and European industrial and consumption markets. Over the past decade, this positional advantage has been activated via multiple transport corridors, rail, road, and maritime, transforming the country from a periphery to a hub.

The country lies on the route of the TITR, which links China via Central Asia through the Caspian region to the South Caucasus, Türkiye, broader West Asia, and Europe. Kazakhstan also hosts a segment of the Western Europe-Western China Highway, a major road corridor linking Europe with China via Russia and Kazakhstan, offering a fast overland alternative to traditional maritime routes.[11] More broadly, as of 2025 Kazakhstan reportedly lies on some 13 international transport corridors connecting Europe, Asia, the Caspian region, the Gulf, and South Asia. The multiplicity of corridors (rail, road, maritime) across different geographies underscores the structural viability of an east-west axis running substantially, if not primarily, through Kazakhstan.

9 Organisation for Economic Co-operation and Development (OECD), *Realising the Potential of the Middle Corridor* (Paris: OECD Publishing, 2023), 118-19, https://www.oecd.org/content/dam/oecd/en/publications/reports/2023/12/realising-the-potential-of-the-middle-corridor_c458041c/635ad854-en.pdf

10 Bokhari, Kamran "The US in the South Caucasus and Implications for Eurasia," *Geopolitical Futures*, June 20 2025, https://geopoliticalfutures.com/the-us-in-the-south-caucasus-and-implications-for-eurasia/

11 Trend News Agency. "Kazakhstan unveils renovated Almaty-Shymkent highway along Europe-China route." *Trend.Az*, November 14, 2025. https://www.trend.az/casia/kazakhstan/4117478.html

Central Asia–Indian Ocean Route

V. Infrastructure, Regulatory, and Logistical Upgrades: Building the Backbone

Kazakhstan is undertaking major infrastructure, regulatory, and logistical upgrades to build the backbone of its transit-hub ambitions. For the east-west corridor to function not just as a concept but as a dependable supply route, robust infrastructure and efficient logistics with a streamlined regulatory base are critical. Astana has recently embarked on a wide-ranging modernization and expansion program, across rail, roads, ports, and digital systems, which significantly strengthens its transit viability.

Railway Modernization and Capacity Expansion

Kazakhstan's national railway network spans some 16,000 kilometers (9,942 miles), which is the backbone of its transit potential. Recognizing that more than half of the system's tracks were worn out, the government has prioritized modernization and by 2030 plans to modernize 5,000 kilometers and repair a further 11,000 kilometers.[12]

As of 2025, five major rail infrastructure projects are underway, including the second track of the Dostyk-Moiynty segment (connecting to China), the Almaty bypass, Darbaza-Maktaral, Moiynty-Kyzylzhar, and Bakhty-Ayagoz. The second track on the 837-kilometer Dostyk-Moiynty section alone, financed via infrastructure bonds from the national fund, is expected to increase China-Europe rail traffic capacity fivefold and boost the daily transit capacity to 1,500 kilometers/day (from the previous 800 kilometers/day).[13] Projects such as Darbaza-Maktaral (connecting central Kazakhstan with routes to Turkmenistan and Iran) and the Bakhty-Ayagoz line (which could open a third border crossing with China: Bakhty-Chuguchak) underscore diversification and redundancy efforts in rail connectivity.[14]

According to government statements from 2025, these projects will together expand Kazakhstan's throughput capacity by up to 10 million metric tons, a substantial boost.[15] These measures (second tracks, bypasses, and new lines) strengthen the rail backbone, reduce bottlenecks, and provide the capacity and redundancy needed for a high-volume east-west corridor.

Port and Maritime Infrastructure and Logistics Hubs

Recognizing the maritime dimension, Kazakhstan in June 2025 launched a container hub at Aktau Port, which is a cornerstone for the TITR – significantly increasing container-handling capacity. Kazakhstan is establishing cross-border transport and logistics hubs at strategic border points (China, Kyrgyzstan, Uzbekistan, and the Russian border) and on the Caspian coast, per the national "Transport and Logistics Potential until 2030" concept.[16] The system of hubs is aimed at forming a unified multimodal transport, trade, and manufacturing logistics network – increasing transit and non-resource exports by up to 30%. Additionally, a "Centre-West Corridor" project (Astana-Zhanteke-Egindykol-Arkalyk-Torgai-Yrgyz) is being built (2025-2029), which will address the lack of roads in parts of central/western Kazakhstan and open direct access to

12 Omirgazy, Dana. "Kazakhstan Overhauls Railway Infrastructure to Cement Role as Global Transit Hub." *The Astana Times*, August 19, 2025. https://astanatimes.com/2025/08/kazakhstan-overhauls-railway-infrastructure-to-cement-role-as-global-transit-hub/

13 12 Satubaldina, Assel. "Kazakhstan Capitalizes on Geopolitical Shifts to Emerge as Eurasia's Transport and Logistics Hub." *The Astana Times*, November 17, 2023. https://astanatimes.com/2023/11/kazakhstan-capitalizes-on-geopolitical-shifts-to-emerge-as-eurasias-transport-and-logistics-hub/

14 13 Moldakhmetov, Dauren. "Kazakhstan: The Key Link Connecting China and Europe." *Timesca.com,* June 10, 2025. https://timesca.com/kazakhstan-the-key-link-connecting-china-and-europe/

15 14 Prime Minister's Office of the Republic of Kazakhstan. "Kazakhstan Strengthens Its Position on the Transit Map of Eurasia: Major Infrastructure and Capacity Expansion Projects Underway." *primeminister.kz*, July 15, 2025. https://primeminister.kz/en/news/kazakhstan-strengthens-its-position-on-the-transit-map-of-eurasia-major-infrastructure-and-capacity-expansion-projects-underway-30273

16 15 Prime Minister's Office of the Republic of Kazakhstan. "Establishment of Cross-Border Transport and Logistics Hubs to Increase Exports of Non-Resource Goods by 30%." primeminister.kz, December 10, 2024. https://primeminister.kz/en/news/establishment-of-cross-border-transport-and-logistics-hubs-to-increase-exports-of-non-resource-goods-by-30-29451

Central Asia–Persian Gulf Route

western regions and Caspian ports.

These investments facilitate not only transit but also the construction of the physical infrastructure to handle high-capacity, multimodal flows – from rail and road to sea – while also creating logistics platforms that can serve as regional hubs.

Digitalization, Customs, and Logistics Process Optimization

Kazakhstan has introduced a "Digital Trade Corridor" based on the Tez Customs platform.[17] This system significantly speeds up customs procedures, reducing transit declaration processing time from about 3 hours to about 30 minutes. In parallel, a "transit information system" was launched within the framework of the Eurasian Economic Union offering real-time cargo monitoring, cybersecurity compliance, and integration with the logistics systems of member states. Additional digital innovations include automating wagon management, improving planning, reducing empty runs (thus improving efficiency), and increasing wagon turnover by about15%. This combination of infrastructure and digital logistics positions Kazakhstan as not just a transit corridor but a modern supply chain services hub capable of offering predictable, efficient, and transparent transport services.

Transit Growth and Throughput Metrics

As of 2024, total transit volume through Kazakhstan reportedly reached 27.4 million metric tons.[18] With ongoing upgrades, government forecasts target 33 million metric tons in 2025 and more than 54 million by 2026, with a longer-term outlook of 67 million by 2029 – and optimistic projections (assuming global corridor expansion) of up to 100 million metric tons by 2035. Already, in 2024 the total cargo transit (rail and road) reportedly reached 34.6 million metric tons (27.5 by rail, remainder by road).[19] These numbers illustrate not only rapid growth but also the materialization of a volume threshold where a Kazakhstan-based East–West corridor becomes realistically competitive with traditional maritime or Russian-centric land routes.

VI. Growing Demand for Alternative Corridors

In recent years, geopolitical shifts – including a desire among European and Western actors, and to a lesser extent China, to reduce dependence on single, politically hazardous routes (e.g., through Russia, or via the Middle East) – have increased demand for alternative transit corridors. New formats and cooperation frameworks reflect this trend.

Growing Global Interest in the Middle Corridor and TITR

The TITR is being increasingly viewed as a viable, politically resilient alternative to the "Northern Corridor" (through Russia) or maritime routes via Suez or around Africa. By 2030, cargo flows via TITR could triple or more.[20] In 2024 alone, container traffic on the Kazakh section of TITR increased by 62%, reaching 4.5 million metric tons; officials aim to double that volume within three

17 Container Management. "New Digital Platform Launched to Improve Customs Processing at China-Kazakhstan Border" *Container Management*, January 25, 2024. http://container-mag.com/2024/01/25/new-digital-platform-launched-to-improve-customs-processing-at-china-kazakhstan-border/

18 KazTAG. (2025, August 20). Kazakhstan plans to repeat 10-year growth in transit to 27.4 million tons in two years. KazTAG. Retrieved from https://new.kaztag.kz/en/news/kazakhstan-plans-to-repeat-10-year-growth-in-transit-to-27-4-million-tons-in-two-years

19 TopPress.kz. "The Middle Corridor Powerhouse: Kazakhstan's Ascent in Global Logistics." *TopPress.kz*, June 19, 2025. https://toppress.kz/article/the-middle-corridor-powerhouse-kazakhstans-ascent-in-global-logistics

20 Whitmore, Charles. "The Middle Corridor Powerhouse: Kazakhstan's Ascent in Global Logistics." *Logistics Middle East*, May 15, 2025. https://www.logisticsmiddleeast.com/logistics/the-middle-corridor-powerhouse-kazakhstans-ascent-in-global-logistics

years.[21] The July 2025 renewal of the cooperation agreement between Astana's state railway firm KTZ and China State Railway Group underscores a strategic commitment to strengthen the Middle Corridor and increase freight volumes between China and Europe via Kazakhstan.[22] The increased throughput and high-level political backing indicate that demand is not only rising, but structural – supporting the idea that the East-West corridor via Kazakhstan is becoming a staple trade artery.

Regional Cooperation, Multilateral Integration, and Corridor Governance

Multilateral cooperation is deepening: In 2022, Kazakhstan, Azerbaijan, and Türkiye signed a trilateral agreement in Aktau aimed at simplifying multimodal transport via Caspian Sea ports and the corridor.[23] The logic is to create a stable, predictable corridor network – with clear rules, aligned administrative procedures, and joint development of ports, terminals, and services.

In addition, the activation of TRIPP offers a new transit link through southern Armenia to connect Azerbaijan to its Nakhchivan exclave – effectively creating a more seamless South Caucasus section of the Middle Corridor.[24] This is a major "force multiplier" for TITR. According to recent statements, TRIPP will function as part of the Middle Corridor axis, offering additional capacity and flexibility for freight movement beyond traditional Caspian Sea transshipment nodes. This added infrastructure could relieve bottlenecks, diversify the corridor's route options, and increase resilience against regional instability or delays.

Azerbaijan's formal integration into a "Central Asia +" configuration (sometimes referred to as "C6/C5 + Azerbaijan") significantly enlarges the Middle Corridor's economic and demographic base – making the corridor a more geopolitically weighty linkage. With Azerbaijan's economy (and its Caspian coastal access) added to the Central Asia countries, the group gains enhanced connectivity to both maritime routes and European/Turkish markets without relying on Russia or Iran. By extension, Kazakhstan, which is already central in the overland leg between China and the Caspian, becomes even more critical: Goods can flow overland from China into Kazakhstan and then onward via Azerbaijan's ports and southern corridors to the Mediterranean, Europe, and beyond.

For Kazakhstan, this dynamic reinforces its role as a transit hub anchor of Eurasian trade. As cargo volumes through the Middle Corridor increase (already growing rapidly in recent years) Kazakhstan's rail networks and Caspian-facing ports like Aktau and Kuryk will see additional demand.[25] Meanwhile, the TRIPP adds redundancy and a new southern axis that helps bypass regional chokepoints and mitigate political risk, thus bolstering the reliability of routes that pass through Kazakhstan. This gives Astana not just a geographic transit advantage but also strategic leverage in shaping Eurasian logistics flows.

21 Soysal, Derya. "Kazakhstan at the Crossroads: Driving the Future of Eurasian Trade Through the Trans-Caspian Corridor." *EU Reporter*, July 1, 2025. https://www.eureporter.co/kazakhstan-2/2025/07/01/kazakhstan-at-the-crossroads-driving-the-future-of-eurasian-trade-through-the-trans-caspian-corridor/

22 Kwan, Sergey. "Kazakhstan and China Boost Rail Trade via Middle Corridor Agreement." *The Times of Central Asia*, July 10, 2025. https://timesca.com/kazakhstan-and-china-boost-rail-trade-via-middle-corridor-agreement/

23 Soysal, Derya. "Kazakhstan at the Crossroads: Driving the Future of Eurasian Trade Through the Trans-Caspian Corridor." *Eurasia Review*, July 2, 2025. https://www.eurasiareview.com/02072025-kazakhstan-at-the-crossroads-driving-the-future-of-eurasian-trade-through-trans-caspian-corridor-oped/

24 Bokhari, Kamran. "Why Azerbaijan Is the Next Front of US-China Competition." The National Interest, October 8, 2025. https://nationalinterest.org/blog/silk-road-rivalries/why-azerbaijan-is-the-next-front-of-us-china-competition

25 Report.az. "Review: Middle Corridor's Strategic Importance Grows in Current Geopolitical Context." *Report.az*, June 18, 2025. https://report.az/en/infrastructure/review-middle-corridor-s-strategic-importance-grows-in-current-geopolitical-context

VII. The TRIPP as an Independent Corridor and Strategic Force Multiplier

The combined effect of the 99-year leased TRIPP announced in August 2025 and Azerbaijan's entry into the Central-Asian grouping deepens institutional and diplomatic support for the Middle Corridor.[26] The expansion of the corridor's geopolitical footprint – now spanning Central Asia, the South Caucasus, and linking to European and Turkish markets – increases the incentive for coordinated infrastructure and regulatory upgrades, border crossing harmonization, and multimodal logistics planning. For Kazakhstan, this means its investments in rail, logistics, and port infrastructure are not just nationally beneficial – they become essential to a larger, more integrated Eurasian trade network.

While many analysts and observers have treated TRIPP primarily as a South Caucasus confidence-building mechanism between Armenia and Azerbaijan, such a framing significantly understates its broader geoeconomic and geopolitical relevance. TRIPP should be understood not merely as a regional transit passage, or even as a geopolitical breakthrough solidifying the U.S. presence in the region and enabling project development in a heretofore underutilized area. It is more important geoeconomically as an independent corridor with outsized strategic effects, particularly when integrated with the Middle Corridor and Central Asia's evolving connectivity architecture. Its physical length and footprint may be modest relative to Eurasia-wide transport systems, but its strategic leverage is disproportionately large.

"TRIPP should be understood not merely as a regional transit passage, or even as a geopolitical breakthrough solidifying the U.S. presence in the region and enabling project development in a heretofore underutilized area. It is more important geoeconomically as an independent corridor with outsized strategic effects, particularly when integrated with the Middle Corridor and Central Asia's evolving connectivity architecture."

At its core, TRIPP is a new east-west land bridge through Armenia's southern Syunik province linking mainland Azerbaijan to Nakhchivan, Türkiye, and onward to European markets. Yet its true value emerges when it is treated not as a standalone Caucasus project but as a western branch of the Middle Corridor, extending Kazakhstan-anchored connectivity on the eastern end of the Caspian Sea at Atyrau and Aktau directly into Anatolia and the Mediterranean Basin while bypassing both Russia and increasingly politically unreliable Georgia. TRIPP is all the more critical as an alternative to the current Trans-Caspian route that goes through Georgia and the Black Sea, which is vulnerable to Russian interdiction, especially as the Ukraine war winds down and Moscow attempts to regain its posture in the South Caucasus. U.S. and Turkish alignment with both Armenia and Azerbaijan underscores how the Kremlin's influence in these two nations is not what it used to be. TRIPP is not a competitor to existing corridors; it is a force multiplier that enhances their efficiency, resilience, and utility.

Although TRIPP operates geographically outside Central Asia, its long-term viability is inseparable from Kazakhstan's role as the backbone of the Middle Corridor. Over the past 15 years, Kazakhstan has invested approximately $35 billion of its own capital into rail, port, road, and digital logistics infrastructure,[27] an investment scale unmatched elsewhere along the corridor. This sustained capital commitment transformed Kazakhstan into the principal structural anchor of Eurasian overland trade, enabling the rapid growth in cargo volumes that has recently seen Middle Corridor traffic increase by more than 60% year-on-year.[28]

The operationalization of TRIPP is already intersecting with tangible investment and industrial initiatives linked to Kazakhstan. The Wabtec locomotive agreement, for example, provides rolling stock that can be deployed not only along the Middle Corridor but also across TRIPP-connected routes, ensuring

26 Durso, James. "Azerbaijan's Entry Turns Central Asia's C5 Into a Geopolitical Heavyweight." *OilPrice.com*, November 25, 2025. https://www.yahoo.com/news/articles/azerbaijan-entry-turns-central-asia-210000070.html

27 Tsang Alice. "Capitalizing On Central Asia. Logistics and Connectivity in Kazakhstan." *Research HKTDC*, July 18, 2024. https://research.hktdc.com/en/article/MTc0NDY3MjgwOA

28 Aguiar, Pablo. "The Middle Corridor: A Route Borne of the New Eurasian Geopolitics." *Geopolitical Monitor*, January 25, 2025. https://www.geopoliticalmonitor.com/the-middle-corridor-a-route-born-of-the-new-eurasian-geopolitics/

interoperability and efficiency across systems. Such seemingly technical decisions carry strategic implications: Standardized, Western-compliant rolling stock reduces friction, enhances safety, and embeds shared operational norms across corridors.

Similarly, the reported joint infrastructure investment vehicle between Cerberus Capital Management and the National Bank of Kazakhstan, announced in November 2025 as a 50-50 partnership focused on Middle Corridor infrastructure,[29] underscores growing U.S.-Kazakh financial alignment. While formally oriented toward Central Asian logistics, assets such as capital pools indirectly strengthen TRIPP by reinforcing the upstream systems upon which its success depends. Corridor economics are cumulative: Investment in one node raises returns across the network.

Beyond transport infrastructure, U.S. interest in Kazakhstan's strategic minerals, particularly tungsten, highlights how TRIPP and the Middle Corridor jointly enable secure, diversified supply chains for critical inputs. These corridors are not simply moving containers; they are enabling industrial ecosystems linking extraction, processing, transport, and end markets under increasingly predictable governance conditions.

Another underappreciated dimension of TRIPP is its potential role as a conduit for high-tech infrastructure. Alongside rail and road, the corridor is designed to accommodate fiber-optic cables, digital switching equipment, and next-generation logistics management systems. This creates an avenue for the diffusion of U.S. and allied standards in areas such as digital infrastructure, cybersecurity, AI-enabled logistics, and data governance. This is more important than ever in an era where Sino-American competition is increasingly in cyberspace.

For the United States, this represents a strategic opportunity to shape not only physical supply chains but the digital nervous system that underpins them. For Kazakhstan and other Central Asian states, alignment with high-standard digital infrastructure enhances competitiveness, transparency, and integration into advanced manufacturing and services markets. In this sense, TRIPP supports not just trade volume but value addition and technological upgrading across the corridor.

TRIPP draws its relevance from this broad preexisting capacity, unfolding investment, and longstanding pan-Eurasian logistics aspirations. Without Kazakhstan's rail density or recent investments in additional railway infrastructure,[30] Caspian port expansion at Aktau and Kuryk, digital customs modernization, and logistics hubs linking China, Central Asia, and the Caspian, TRIPP would remain a localized transit solution. With Kazakhstan fully integrated, TRIPP becomes a southern extension of a continent-scale system – one capable of supporting high-value, time-sensitive, and strategically critical cargo flows in both directions.

This structural relationship explains why Kazakhstan, despite TRIPP being developed under a U.S. strategic umbrella, must be regarded not as a passive beneficiary but as an active stakeholder. Corridor governance, standards alignment, rolling stock compatibility, and logistics integration all require Central Asian participation to succeed. In this respect, TRIPP represents an opportunity for Kazakhstan and its Central Asian partners to shape a new generation of multilateral corridor governance. Ideally, this will be one that reflects their interests rather than reproducing dependency on legacy transit powers.

Access to Türkiye via TRIPP is also significant. Türkiye functions not only as a bridge to Europe but as an industrial, logistics, and manufacturing hub in its

29 Cerberus Capital. "National Bank of Kazakhstan enters into strategic cooperation agreements with Cerberus, Brookfeld." *Cerberus Capital*, November 7, 2025 https://www.cerberus.com/media/national-bank-of-kazakhstan-enters-into-strategic-cooperation-agreements-with-cerberus-brookfield/

30 Wabtec Corporation. "Kazakhstan Awards Wabtec $4.2 Billion Locomotive Order." *Wabtec Corporation*, September 22, 2025. https://www.wabteccorp.com/newsroom/press-releases/kazakhstan-awards-wabtec-a-42-billion-locomotive-order

U.S. President Donald Trump (C), joined by lawmakers and members of his administration, delivers remarks during a dinner with leaders of Central Asian countries in the East Room of the White House on Nov. 6, 2025, in Washington, D.C. Trump hosted President Kassym-Jomart Tokayev of Kazakhstan, President Serdar Berdimuhamedow of Turkmenistan, President Sadyr Japarov of Kyrgyzstan, President Shavkat Mirziyoyev of Uzbekistan, and President Emomali Rahmon of Tajikistan. (Andrew Harnik/Getty Images)

own right. Türkiye also has many shared political and economic connections with Central Asia, as shared multilateral institutions such as the Organization of Turkic States grow more important. For Central Asian exporters, this enables faster access to Mediterranean ports and European supply chains while simultaneously opening alternative import routes for machinery, technology, and intermediate goods. Importantly, this diversification prevents overreliance on both Chinese and Russian corridors without excluding either, preserving multivector flexibility.

Although TRIPP is a relatively compact corridor in physical terms, its geopolitical signaling effect is substantial. It embeds U.S. strategic presence into the connective tissue of the South Caucasus while extending that presence indirectly into the Caspian and Central Asia. It is important to note that within three months of the TRIPP move, U.S. President Donald Trump held an unprecedented summit meeting at the White House with all five of his Central Asian counterparts. This was followed up quickly with the December 2025 phone call from Trump to Kazakh President Kassym-Jomart Tokayev and Mirziyoyev, reinforcing post-summit momentum on connectivity, trade, and geopolitical balancing beyond Russia and China. But this is not a zero-sum outcome. China benefits from additional westward capacity insulated from maritime interdiction risk, while in the future under different political conditions, Iran could also integrate into a broader Eurasian connectivity framework. The corridor's design does not exclude; it disciplines and diversifies.

For the United States, engagement through TRIPP offers durable access not only to the South Caucasus but to the broader Caspian Basin and Central Asia's vast resource base. For Central Asian states, it strengthens sovereignty by multiplying options rather than constraining them. And for global markets, it delivers a more resilient, diversified, and efficient Eurasian connectivity architecture.

In sum, TRIPP must be understood as a small artery with big consequences inseparable from the geopolitical contentions surrounding Central Asian corridors. Integrated with the Middle Corridor and anchored by Kazakhstan's infrastructure and investment leadership, it materially reshapes the geography of Eurasian trade. Its value lies not only in connecting Azerbaijan, Armenia, and Türkiye but also in linking Central Asia to global markets through a faster, safer, and strategically diversified pathway, one that reflects the realities of a fragmented, competitive, and increasingly mutually exclusive world economy.

VIII. Beijing's Calculus

Beijing also sees overland connectivity through Central Asia to Europe as being advantageous. While China understands that reinforcing transit capacities to the West and the Middle Corridor does provide a vector for American and European influence in the region, it provides Beijing with strategic utility, too. Building up the Middle Corridor would be complementary to Beijing's initiatives in Pakistan with the China-Pakistan Economic Corridor, the flagship project of the BRI; its tentative involvement in Taliban-run Afghanistan; and its partnership with Iran. It is also likely that the expansion of the Middle Corridor would bolster the impact of some existing BRI projects in Central Asia and the Caucasus, even as others face new Western competition.

Geopolitically, a robust Middle Corridor that marginalizes Russia would help China reinforce Russia's growing dependency on it. The Middle Corridor would remove Russia's overland transit utility to Western Europe, and similarly the development of the Middle Corridor would unlock energy resources for export to not just the West, but to China as well from Azerbaijan. The Kremlin, while retaining significant hydrocarbon reserves in Siberia, would find it difficult to leverage against alternative suppliers to China. This can all be used to rein in Russia in the event that Moscow becomes strategically unpredictable or uncontrollable for China.

Russia is not alone. Strategic dependency would be reinforced via similar dynamics, albeit to a lesser extent, with other Chinese strategic partners such as Pakistan or Iran.

More importantly, an overland route to Europe provides China with a direct trade route that cannot be interdicted by the U.S. Navy in the event of armed confrontation. In such a scenario, the ability to directly trade with Europe in significant volume without dependency on Russia or Iran could represent a strategic lifeline. A direct route of trade less open to interdiction could also enable China to inflame the currently nascent Euro-American split.

The Middle Corridor on the whole represents an opportunity for the United States to compete with China in its backyard, in the area where it launched the Belt and Road Initiative in the first place. However, it also provides China new frontiers and strategic vectors that must be carefully considered and anticipated.

IX. Why the East–West "Axis" Is Materializing

It is one thing to talk about corridors on paper, it is another for an "axis" to become operational, reliable, and predictable.

Critical Mass of Connectivity: Rail, Road, Sea, and Digital

Kazakhstan offers all necessary modalities (rail, road, and seaports) combined with modern logistics management systems. This is essential for an "axis": redundancy, flexibility, and resilience. These include:

- Multiple rail lines (new builds and upgrades) provide redundancy and capacity.
- Port infrastructure (Aktau and planned hubs) closes the gap between land and sea transit, thereby enabling seamless multimodal flows.
- Road networks (via the Western Europe-Western China Highway and other corridors) add flexibility and alternative routing, especially for noncontainerized or time-sensitive cargo.
- Digital customs and logistics platforms streamline cross-border procedures and reduce risks of delays, bottlenecks, and opacity.

Together, these layers create a corridor that is not just theoretically possible but commercially competitive.

Government Commitment and Strategic Vision

What differentiates Kazakhstan from many transit-potential countries is sustained high-level strategic vision and political commitment. The government has:

- Adopted a formal "Transport and Logistics Potential until 2030" concept that guides corridor-level planning and investment.
- Mobilized public funding (e.g., via the national fund and sovereign wealth vehicles like Samruk-Kazyna) to finance large-scale railway and logistics infrastructure projects.
- Prioritized digitalization, customs reform, and administrative streamlining – acknowledging that infrastructure alone is insufficient without efficient and transparent governance.

This level of state-led coordination and resource allocation gives the corridor stability and predictability, a key condition for foreign partners, investors, and carriers.

Transit Demand, Geopolitical Shifts, and Diversification Logic

Global geopolitical shifts – the war in Ukraine, sanctions on Russia, rising tensions between major powers – have increased the appeal of alternative routes that bypass potentially unstable or concentrated transit chokepoints. For Europe and the United States, this makes the east-west corridor potentially essential for securing supply routes.

The growth in cargo volumes via Kazakhstan reflects rising demand: The 2024-2025 surge in container traffic and rail freight indicates shippers are already reacting to shifting global dynamics. For shippers and importers, the combination of stable transit times, predictable tariffs, and diversified routes reduces risks associated with political instability, sanctions, or disruption along traditional routes. This strong demand helps ensure commercial viability of the corridor as a long-term axis.

In sum, it is not a speculative bet: the convergence of capacity, demand, state backing, and geopolitical incentives makes the east-west axis via Kazakhstan increasingly likely to crystallize – and to remain operational and important for decades.

Kazakhstan GDP Growth and GDP Per Capita Growth

Year	Nominal GDP (billion USD)	GDP per Capita (USD)
2000	18.3	~1,229 Worldometer
2005	57.1	~3,771
2010	148	~9,071
2015	184.4	~10,511
2020	171.1	~9,122
2021	197.1	~10,374
2022	225.5	~11,484
2023	261.8	~13,158
2024	288.4	~11,850 (TradingEconomics forecast)
2025	300.1	~14,723 (IMF)
2026 (proj)	~315–330*	~13,239 (TE 2026 forecast)
2027 (proj)	~335–350*	~13,954 (TE 2027 forecast)
2028 (proj)	~350–370*	—
2029 (proj)	~365–390*	—
2030 (proj)	~380–410*	—

*Projected GDP figures 2026–2030 are approximate extrapolations based on recent IMF growth and macro trend expectations (e.g., ~5–6% growth). Exact IMF forecasts for 2028–2030 are not yet publicly available in detail.

A conveyer for stone crushing at a mining quarry in Kazakhstan. (Pavel Shelkovenko / Getty Images)

X. Critical Minerals, Raw Materials, and Strategic Value: Why Western Markets Should Care – and Engage

Beyond transit logistics, Central Asia's value as a partner for Western markets goes deeper: It is a significant producer and exporter of critical minerals – a factor that amplifies the strategic importance of securing stable transport routes through the country.

Overview of Kazakhstan's Mineral Endowment

Kazakhstan produces and processes 19 of the 34 raw elements that the European Union designates as "critical raw materials."[31] According to recent geological assessments, Kazakhstan's reserves of rare-earth metals (REEs) are estimated at 2.6 million metric tons – with identified projects for industrial development, e.g., at the Kuirektykol site in Karaganda region.[32] The country is among the world's top producers of several strategic minerals:

- **Uranium:** Kazakhstan remains the world's largest uranium producer – producing around 23,270 metric tons in 2024, accounting for roughly 40% of global output.[33]
- **Titanium:** Kazakhstan is a major global source of titanium (titanium sponge), including for aerospace and high-tech applications.[34]
- **Critical metals and rare earths:** The country has significant reserves of lithium, cobalt, nickel, manganese, beryllium, tantalum, niobium, and others.[35]
- **Non-ferrous metals:** Copper, zinc, lead, and chromium, among others, are useful for industries including electronics and renewable energy applications and construction.[36]

Thus, Kazakhstan represents a broad and diversified mineral base – not limited to hydrocarbons and traditional metals but also extending into rare and critical materials essential for modern technologies, green energy, defense, and sensitive industries.

Strategic Implications for Western Markets

- **Supply Diversification and Security of Critical Materials:** With growing demand for REEs, battery metals (cobalt, nickel, lithium), and strategic materials (titanium, uranium) – especially as the green transition accelerates – Western economies face a pressing need to reduce reliance on dominant suppliers (notably China). Kazakhstan offers a geographically stable, politically independent, and strategically located alternative supply base.
- **Integration of Mineral Supply with Secure Transport Corridors:** The value of Kazakhstan's mineral output is multiplied by its role as a transit hub. Western buyers (for example, in the EU or United States) both receive raw materials and benefit from a logistics chain that is increasingly multimodal, transparent, and underpinned by modern infrastructure.

31 24 Nakispekova, Aimen. "Kazakhstan Produces Over Half of Raw Materials Critical for EU Economy." The Astana Times, February 7, 2024. https://astanatimes.com/2024/02/kazakhstan-produces-over-half-of-raw-materials-critical-for-eu-economy/

32 25 Satubaldina, Assel. "Kazakhstan's Rare Earth Reserves Estimated at 2.6 Million Tons." The Astana Times, September 2, 2025. https://astanatimes.com/2025/09/kazakhstans-rare-earth-reserves-estimated-at-2-6-million-tons/

33 26 World Nuclear Association. "Kazakhstan." World-Nuclear.org. Updated June 19, 2025. https://www.world-nuclear.org/information-library/country-profiles/countries-g-n/kazakhstan

34 27 U.S. Commercial Service. "Kazakhstan – Mining Equipment and Services." Country Commercial Guide, U.S. Department of Commerce (trade.gov), last updated September 2, 2022. https://www.trade.gov/country-commercial-guides/kazakhstan-mining-equipment-and-services

35 28 Stevens, Colin. "Kazakhstan Is an Important Element in the Diversification of Supplies of Rare Earth Metals." EU Reporter, January 25, 2025. https://www.eureporter.co/kazakhstan-2/2025/01/25/kazakhstan-is-an-important-element-in-the-diversification-of-supplies-of-rare-earth-metals/

36 29 Soysal, Derya. "Between Critical Raw Materials and Oil: Kazakhstan Is Becoming a Regional Partner Highly Valued by Other Powers." EU Reporter, March 14, 2025. https://www.eureporter.co/kazakhstan-2/2025/03/14/between-critical-raw-materials-and-oil-kazakhstan-is-becoming-a-regional-partner-highly-valued-by-other-powers/

- **Support for Energy and Nuclear Security:** As the world reconsiders nuclear energy amidst the green energy transition and supply-chain vulnerabilities, Kazakhstan's uranium becomes especially valuable. With about 40% of global uranium production, Kazakhstan is central to long-term global energy security.
- **Industrial and Strategic Autonomy:** For industries such as aerospace, defense, electronics, green energy, and renewables, Western partners benefit from a stable, diversified supply base outside of geopolitically problematic areas.

Thus, Kazakhstan's dual role as transit hub and mineral supplier makes a useful and strategically important partner for any Western policy aiming at resilience, diversification, and supply chain security.

XI. The Significance of a "Like-Minded" Eurasian Partners: Geopolitical and Strategic Context

Kazakhstan joining the Abraham Accords underscores its broader strategic value as a dependable actor in the broader West Asian/Eurasian geopolitical context. This is an example of a Eurasian country with a stable, pragmatic, multivector foreign policy, open to cooperation with the West, Middle East, and Asia simultaneously. The logic is illustrative: The global order is fragmenting, alliances are shifting, and new cooperative frameworks – not limited to traditional bilateral relationships – are emerging.

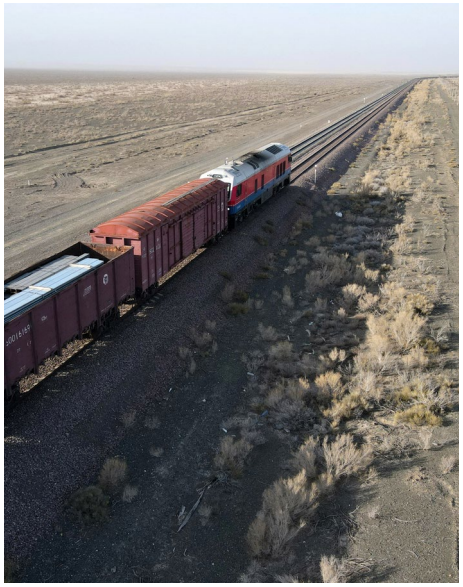
From a Western strategic vantage point, deepening Central Asia's cooperation with the EU, the United States, and the countries linked to the Abraham Accords (Middle East, including the Persian Gulf, the Levant, and North Africa, as well as the Caucasus and the Caspian) offers value beyond trade.[37] This is particularly true given the broader trend: a multipolar world in which pragmatic, interest-based cooperation across culture and region is gaining traction. Kazakhstan, by virtue of its transit role, resource base, and foreign policy approach, is well-positioned to be among the leading bridge countries in this evolving landscape.

XII. Looking Beyond Transit at the Strategic Raw Materials and Supply Chain Perspective

Western investors, policymakers, and industrial actors should view Central Asia favorably and beyond the transit logic, and for a variety of reasons:

1. **Critical Materials Security and Supply Chain Diversification:** Given the region's large reserves and diverse mineral base – including uranium, REEs, battery metals, titanium, copper, and zinc – working with Kazakhstan and other mineral-rich countries in the region can help reduce Western dependence on concentrated supply zones, particularly China. This is vital for industrial sovereignty, supply chain resilience, and national security sectors.
2. **Integrated Transport and Resource Corridor:** Kazakhstan is already building a robust transit infrastructure, and supply of resources can piggyback on the same corridors, ensuring predictable, fast, and relatively low-risk delivery to Europe or global markets. This reduces transportation risk, cost, and uncertainty.
3. **Regulatory Transparency and Investment-Friendly Policies:** The Kazakh government has signaled openness to foreign investment since the early

37 Bokhari, Kamran. "Kazakhstan's Strategic Breakout: The Abraham Accords as a Route to the High Seas." Geopolitical Futures, December 5, 2025. http://geopoliticalfutures.com/kazakhstans-strategic-breakout-the-abraham-accords-as-a-route-to-the-high-seas/



A freight train crosses the steppe near the Dostyk railway station at the Kazakh-Chinese border, a key hub for trade between China and Europe through Central Asia, on Nov. 19, 2025. (Ruslan Pryanikov / AFP via Getty Images)

1990s massive U.S. oil supermajor projects, including Exxon and Chevron. Today, its government is open to projects, especially in mining and downstream processing, and has begun to digitalize subsoil-use licensing (e.g., via a unified subsoil use platform operational since June 2023) – reducing bureaucratic friction and enhancing transparency for investors.

4. **Support for Value-Added Production and Industrialization:** Kazakhstan is not just exporting raw ore. It has processing capacity, smelting, refining, and downstream production. With a vast supply of coal, natural gas, and eventually nuclear energy, rare earths and strategic metals processing in Kazakhstan is likely to be competitive worldwide. That enhances value retention and creates opportunities for Western companies to invest in joint ventures for processing, refining, and value-added manufacturing (e.g., battery components, alloys, advanced materials).
5. **Energy Security and Nuclear Supply:** With about 40% of global uranium production, plans for at least two nuclear reactors, and ambitions for nuclear fuel pellet and fuel fabrication plants, Kazakhstan offers a stable and indigenous supply line for nuclear energy, which is a strategically important segment as Europe and the United States expand or maintain nuclear power as part of energy transition and energy security policies.
6. **Geopolitical Stability and Multivector Diplomacy:** Unlike some resource-exporting countries in volatile regions, since gaining independence from the Soviet Union in 1991, Kazakhstan has maintained relatively stable politics, a tradition of nonalignment and a multivector foreign policy enabling it to act as a reliable supplier and transit partner with minimal political risk.

Partnering with Kazakhstan offers the West not only a transit corridor but also a strategic resource hub, a value proposition that aligns strongly with long-term needs for resilience, diversification, and security. Moreover, working with the most advanced economy in the region can do much to set examples of mutually beneficial cooperation and open the door to expanding markets throughout the Central Asian region and Eurasia.

XIII. Challenges and Risks

While the east-west corridor offers immense potential, there is a need to acknowledge existing challenges and risk factors. Recognizing and addressing them is key for both the C6 and prospective international partners.

1. **Infrastructure Bottlenecks and Implementation Risk:** Despite major investments, not all projects are complete. There are rail segments, port hubs, and road upgrades that remain works in progress. Delays, cost overruns, or geopolitical complications (e.g., in neighboring transit states) could hamper throughput. Indeed, some recent reporting indicates that the TITR's throughput capacity historically stood at only 6 million metric tons (80,000 20-foot equivalent units) – far below its potential.
2. **Dependence on External Actors and Regional Stability:** The corridor's full viability depends on neighboring countries (Caspian, Caucasus, Türkiye, port states) aligning their infrastructure, regulations, and politics. Disruptions – whether political, environmental, or economic – can degrade the corridor's reliability.
3. **Regulatory and Governance Uncertainties:** Despite progress in digitalization and customs reform, further coordinated policy measures may be needed to ensure investor clarity and confidence, and transparency – especially in mining, subsoil licensing, and environmental governance. While a unified subsoil-use platform exists in Kazakhstan, long-term implementation and rule-of-law consistency will be key, and other states seeking to

become players in developing critical minerals need to follow suit. High level corruption and red tape are notorious project killers.

4. **Market Demand and Competitive Pressure:** For Kazakhstan to realize its ambitious projections for the Middle Corridor (e.g., 100 million metric tons of transit by 2030-2035), global demand must remain robust. Competition from other corridors, e.g., alternate Caspian or maritime routes, or renewed Russian overland routes in case Ukraine war ends and sanctions are lifted, could reduce market share.
5. **Environmental, Social, and Governance Concerns:** As mining and transport volumes grow, environmental and social impacts – including land use, pollution, labor standards, and governance – may attract scrutiny. For Western, and especially European institutional investors, environment, social, and governance compliance will be essential, which may require further reforms and capacity building in institutional frameworks in participating Central Asian states.

Realizing the corridor's full potential will require high-level leadership, sustained effort, cooperation, transparency, and investment.

XIV. Practice-Oriented Recommendations: What Should the United States, the European Union, and the C6 Do

Below are actionable recommendations designed to produce mutually beneficial outcomes for Central Asia, the Caspian, Western partners, and the broader region.

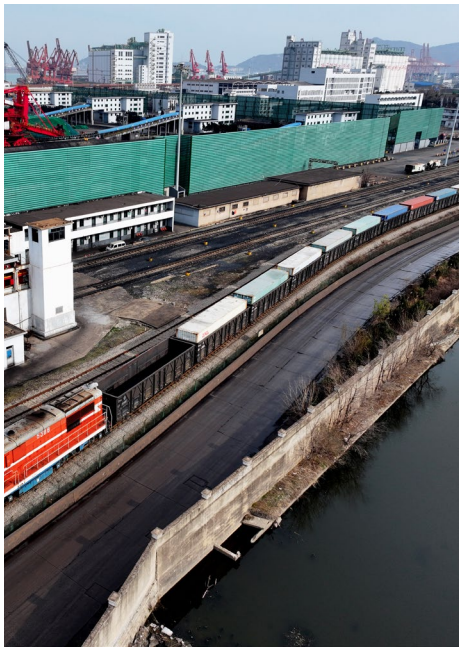
The United States Should Eliminate Outdated Restrictions to Give Central Asian States Permanent Normal Trade Relations Status

As has been noted elsewhere, the United States needs to retire legislation that continues to require annual waiver of its provisions to facilitate trade with this increasingly important region. This includes the Jackson-Vanik Amendment, a Cold War-era relic originally legislated to punish nonmarket economies for limiting the emigration of Jews and other religious minorities. Still on the books, the amendment denies states like Kazakhstan and Uzbekistan from Permanent Normal Trade Relations status. While waivers are granted annually to these countries, the lack of political will from U.S. leadership to grant PNTR breeds distrust.

Joint Infrastructure and Logistics Investments

In the aftermath of the successful C5 summit the U.S. government should emphasize the participation of American firms in infrastructure investment projects in Kazakhstan and elsewhere in Central Asia. This is important both because these states already have ongoing projects and a proven ability to facilitate foreign investment and because success in one country can serve as a model for the region. Moreover, a functioning enterprise along the intercontinental trade route naturally attracts further regional development.

- **Establish a Logistics Infrastructure Partnership Fund:** The U.S. government investment arms, the EU), and Kazakhstan should create a partnership to cofinance critical rail and port infrastructure, including extending/completing second-track railway sections (Dostyk-Moyinty, Bakhty-Ayagoz), expanding Caspian ports (Aktau, Kuryk), and developing additional dry ports and container hubs. This fund could reduce the risk of major capital expenditures and accelerate completion.
- **Support Multimodal Terminal and Hub Development:** Prioritize building multimodal terminals that integrate rail, road, and maritime links (e.g., at Aktau, Kuryk, Port of Baku), as planned under Kazakhstan's and Azerbaijan's logistics strategy. Encourage Western logistics firms and operators



A China-Europe freight train is preparing to depart from the China-Kazakhstan (Lianyungang) Logistics Cooperation Base in Lianyungang City, Jiangsu Province, China on Jan. 1, 2026. (CFOTO/Future Publishing via Getty Images)

to participate by bringing management best practices, transparency, and standards.

- **Co-invest in Road Corridors and Intermodal Connectivity:** Support modernizing Kazakhstan's road infrastructure (e.g., Western Europe-Western China Highway segments, Centre-West corridor) to ensure redundancy and resilience.

Joint Projects in Critical Minerals and Downstream Processing

- **Facilitate Western investment in Kazakh mining and processing enterprises:** Encourage through the U.S. International Development Finance Corporation and ExIm Bank joint ventures, or minority stake investments by EU and U.S. firms, in mining, refining, processing, and downstream manufacturing (e.g., battery materials, rare earth processing, titanium alloys). Focus on high-value, value-added processing rather than only raw ore extraction.
- **Support the creation of Strategic Mineral Supply Corridors:** Combine resource extraction with reliable, safe, and economically efficient transport via the east-west corridor. This would link mineral-rich regions in Kazakhstan directly to European or global markets via modern rail and port infrastructure, ensuring supply chain integrity, predictability, and transparency.
- **Promote Environmental, Social, and Governance reforms:** Encourage and support the establishment of ESG-compliant mining, processing, and environmental standards in mining operations; invest in institutional capacity building (regulatory bodies, transparency mechanisms, environmental monitoring) to align the Kazakh mining sector with Western expectations.

Regulatory and Digital Cooperation

- **Deepen digital customs and transit management systems:** Expand and integrate the TEZ Customs and Eurasian Economic Union transit information systems, with support for interoperable data standards, cargo tracking, cybersecurity safeguards, and transparency. Promote shared platforms among countries along the corridor, with technical assistance from EU and U.S. digital governance agencies or private firms.
- **Facilitate policy dialogue and legal harmonization:** Through bilateral or multilateral frameworks, the United States and EU should encourage harmonization of transport, customs, labor, environmental, and investment regulations across corridor countries. This reduces friction, legal uncertainty, and enhances attractiveness for private sector participation.

Institutionalizing Kazakhstan's Role as Corridor Backbone

- **Establish a Kazakhstan-Western Corridor Council:** A formal body including Kazakh authorities, U.S./EU representatives, and major logistics/commodity stakeholders could coordinate long-term corridor development, monitor progress, set standards, resolve bottlenecks, and align and streamline infrastructure, regulation, and investment. These measures cut days of container transport between countries, making the route more economically competitive.
- **Support multilateral corridor governance, including Caspian and Caucasus partners:** Use leverage and incentives (investment, trade, technology) to bring other corridor states in the Trans-Caspian and the Caucasus region, as well as port operators on the Caspian and Black seas, into stable, transparent governance frameworks, thereby increasing corridor reliability, reducing risk of unilateral disruption. Specifically, encourage and facilitate the establishment and functioning of a C6 Secretariat that can begin to carry on the needed follow-up by and between the C6 states needed

for regulatory harmonization, smooth border transits, and other regional joint commercial ventures. Having such a coordinating body would also allow the countries involved to interact more successfully with potential Western investors by putting together consortiums capable of furthering projects that involve multiple countries – as project scale attracts investment and yields ROI.

Market and Trade Integration: Downstream Industry, Energy, Decarbonization

- **Encourage Western firms to build processing or manufacturing sites in Central Asia or near-corridor hubs (e.g., EU border):** For example, battery cell manufacturers (using nickel, cobalt, manganese, lithium), rare earth processing plants, and titanium alloy companies could integrate resource supply with manufacturing to reduce supply chain complexity.
- **Leverage uranium supply for U.S. and European nuclear fuel diversification:** Given global concerns over energy security, Western energy companies should negotiate long-term supply and processing agreements for Kazakh uranium, potentially pairing uranium supply contracts with infrastructure and logistics investments. Western companies should increasingly construct nuclear fuel enrichment and nuclear fuel assembly manufacturing in the region.
- **Promote green technology and energy-transition linkages:** Use Kazakhstan as a node in a broader low-carbon supply chain, from raw materials, to processing, to manufacturing, to transport, to end markets in Europe and North America. This supports Western decarbonization and energy-transition goals while providing demand security for Kazakh production and can encourage other Central Asian countries capable of becoming involved to follow through on the precedent.

Strategic Messaging and Diplomatic Support

- **Frame Kazakhstan as a like-minded Eurasian partner in Western strategic and industrial policy documents:** Given its stability, multivector foreign policy, resource base, and transit infrastructure, Kazakhstan should be highlighted in U.S. and EU strategic roadmaps (e.g., critical minerals strategy, supply chain resilience policy, infrastructure strategy).
- **Encourage cooperation between Western countries and Kazakhstan (possibly with Middle East partners) under the broader geopolitical logic exemplified by the Abraham Accords:** Fostering pragmatic, interest-based cooperation across civilizations and regions and encouraging the involvement of other C6 countries in the Abraham Accords and/or other appropriate frameworks would bring the entire region forward for mutual benefit.

These recommendations – infrastructure investment, resource cooperation, regulatory alignment, joint governance, and market integration – are concrete, mutually beneficial, and actionable. They reflect a win-win logic: Kazakhstan and other Central Asian countries obtain investment, jobs, industrialization, modernization, and integration; Western partners gain supply chain diversification, resource security, and stable logistics; and the broader Eurasian region benefits from connectivity, trade, and economic integration.

Conclusion: A New Eurasian East-West "Axis"

In a rapidly shifting global landscape – marked by geopolitical uncertainty, supply chain fragility, and growing demand for critical minerals and diversified trade routes – the rise of a vigorous, viable east-west corridor stands out as a

rare opportunity for sustainable, systemic economic development. An east–west axis via Kazakhstan is no longer theoretical. It is taking shape in physical infrastructure, legal frameworks, economic flows, and geopolitical realignments. For the United States, the European Union, and other Western actors, this represents a strategic opportunity to build robust, diversified, transparent supply chains; to secure access to critical minerals and energy resources; to support industrial and green energy ambitions; and to anchor Western engagement in a part of Eurasia that is stable, cooperative, and forward-looking.

If acted upon thoughtfully with investment, partnership, regulatory cooperation, and long-term vision, this axis could become a pillar of 21st-century global trade and strategic supply networks.

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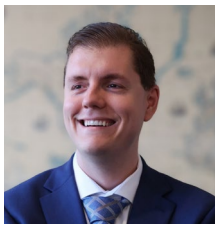

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