



## THE DOSSIER

# Trans-Caspian Corridor: Eurasian Connectivity and the United States

*By Kamran Bokhari & Eugene Chausovsky*



Azerbaijani Foreign Minister Jeyhun Bayramov (L), Kazakhstan Foreign Minister Mukhtar Tleuberdi (second L), Turkish Foreign Minister Mevlüt Çavuşoğlu (second R), and Georgian Deputy Foreign Minister Alexander Khvtisiashvili (R) attend a press conference on Trans-Caspian connectivity in Aktau, Kazakhstan, on Nov. 25, 2022. (Cem Ozdel / Anadolu Agency via Getty Images)

## Executive Summary

In the three decades since the implosion of the Soviet Union, there has been increasing international interest in connecting the landlocked nations of Central Asia to the rest of the world via the Caspian region. Russia has dominated Eurasia for the bulk of the post-Soviet era, but the war in Ukraine has spurred the West toward development of sustainable transport connections

between Europe and Asia<sup>1</sup> with the objective of reducing dependency on Russian energy resources and Moscow's domination of land-based Eurasian trade routes.

The key challenge is China, whose recent emergence as a major player with its Belt and Road Initiative has better positioned it to take advantage of the opening provided by a Russia weakened by war and sanctions. However, China's economic



downturn<sup>2</sup> signifies a key moment of opportunity for the United States. Washington and its partners will need to navigate several constraints and latitudes to play an effective role in ensuring the development of a robust Trans-Caspian Corridor that can facilitate east-west connectivity.<sup>3</sup>

### Key Takeaways

- The Trans-Caspian Corridor is a viable way to create sustainable trade connectivity between East Asia and Europe that circumvents Russian influence.
- The United States and its allies will need to navigate a tricky, fragile strategic landscape and understand the motivations of several Eurasian stakeholders.
- China's westward ambitions, exemplified by its Belt and Road Initiative, will stand in the way of the Trans-Caspian Corridor, but there currently is a window of opportunity to act while Beijing is preoccupied with internal economic woes.

### Policy Recommendations

- The United States must carefully coordinate its approach to the Caspian region to not only serve its own interests and those of its allies but also support the security and prosperity of the Central Asian and Caucasus states.
- Washington should leverage its position as a global economic and technology leader to pragmatically support the development of the Trans-Caspian Corridor in a sustainable fashion, rather than using China's heavy-handed approach.
- The U.S. also should reassess its engagement with the Caspian region from a strategic perspective, incorporating not only C5+1 countries but also the broader South Caucasus.
- The U.S. has shared interests with allies that are active in the region, particularly the EU but also states like Japan and South Korea. The U.S. should coordinate its strategy with its European and Asian allies to establish a division of labor and reduce redundancies.



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COVER PHOTO: A heavy-duty machine loads containers with materials produced in Turkey onto a transport ship as it prepares to sail from the Alat Port in Baku, Azerbaijan, across the Caspian Sea to Kazakhstan, Turkmenistan, and Uzbekistan on April 27, 2020. (Resul Rehimov / Anadolu Agency via Getty Images)

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## Eurasian Stakeholders

To successfully forge a Eurasian energy and trade corridor, the United States must understand the geopolitics that shape the connectivity between Europe and Asia, factoring in the interests of several key nations. Understanding the motivations of each country and navigating this strategic landscape will be crucial to any efforts to develop the corridor.<sup>4</sup>

### Russia

Since the 19th century, the Kremlin has dominated land routes for energy trade between Asia and Europe. The 1991 implosion of the Soviet Union did not change this reality; after a brief interregnum, the Russian Federation under the Putin regime reemerged as a major power buoyed by massive exports of energy, agricultural produce, metals, and other commodities. This geoeconomic prowess created a European and broader international dependency that the West did little to diversify away from.

That approach underwent a massive shift with Russia's February 2022 invasion of Ukraine, a process that began with the February 2014 collapse

of the pro-Kremlin government in Kyiv. The ongoing conflict has the West struggling to find ways to reduce dependency on Russian exports. Relatedly, Western sanctions have created serious difficulties for many countries that have long been tethered to Moscow's economic sphere of influence, particularly those in Central Asia. Thus, there is both regional and international interest in pathways for trade that bypass Russian territory via the Trans-Caspian region.

Russia's strategic position was severely weakened by the 2014 regime change in Ukraine, a process accelerated by the ongoing war. Despite its weakness, Russia retains the ability to undermine international efforts toward developing Caspian and Black Sea trade routes.<sup>5</sup> While militarily bogged down on its western flank, Moscow can still employ considerable intelligence, political, diplomatic, and economic resources to shape the behavior of states in its strategic backyard to prevent these countries from leaving its orbit.

### China

China is perhaps the single biggest beneficiary of the implosion of the Soviet Union and the emergence of sovereign states in Central Asia. Geography isn't the only advantage that Beijing has over the U.S. in the

Countries with an interest in the Trans-Caspian Corridor span Eurasia



Source: ESRI, USGS, NASA

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region; its rise as the world's second-largest economy coincides with these states' gaining independence from the Soviet Union. Early in the post-Soviet era, China began to enhance economic relations with newly independent Central Asian republics with the desire to establish a "New Silk Road." Since 2008, China has developed a multitrunk pipeline for the import of natural gas from Turkmenistan, which has played a key role in satisfying the growth in Chinese consumption.

Five years later, President Xi Jinping launched its international Belt and Road Initiative (BRI) in Kazakhstan. The BRI was designed to be a solution to declining growth rates in the wake of the 2008 financial crisis and a way to weave Central Asia more tightly into China's geoeconomic orbit by accessing significant energy and mineral resources to fuel its economic growth and reduce dependency on U.S.-dominated maritime routes. The initiative is also a means for China to develop a cross-Eurasian corridor and thus a critical supplement to shipping lanes through the Straits of Malacca, where the United States has the upper hand.

In recent years, however, the BRI has run into serious problems, as is evident from the situation in Pakistan, where BRI's signature project, known as the China-Pakistan Economic Corridor, has stalled despite some \$40 billion in investments.<sup>6</sup> Pakistan is not the only country where Chinese investments have not produced the desired results and instead have plunged the host nation into greater debt than before. The Chinese strategy has a built-in paradox: Beijing invests in countries that are weak enough to be malleable to its interests. That weakness undermines Beijing's efforts because those same states lack the capacity to utilize Chinese financial input and offer a return on investment. Sri Lanka<sup>7</sup> and other Asian and African nations are other examples of this dynamic. Despite the BRI's problems in South Asia, Beijing remains hopeful that the Central Asian component will fare better. In March 2021, China brought Iran into the BRI with the announcement of a 25-year, \$400 billion economic agreement.<sup>8</sup>

The strategic vacuum in post-American Afghanistan has created a conundrum for Beijing's Eurasian strategy. China was able to pursue its geoeconomic push toward Eurasia because the U.S. was making

sure that problems in Afghanistan were contained within the country. After the American withdrawal and the rise of the Taliban, the risk of the instability in Afghanistan spreading into Central Asia has substantially increased. China can no longer push ahead with its Eurasian strategy without first ensuring that Afghanistan remains contained, which is something it does not have the tools to accomplish – especially as Beijing's key ally, Pakistan, is itself destabilizing. While China is trying to find a way around these Southwest Asian challenges, the Ukraine war has created more room for it to expand its influence in Central Asia.

More recently, however, China's growing economic downturn<sup>9</sup> is challenging its ability to continue its westward expansion.<sup>10</sup> China's growth rate is declining because of falling exports, a deepening real estate market crisis, and growing unemployment to where Beijing has stopped publishing statistics. These problems are creating a political crisis for Xi's government, which will be forced to prioritize the problems at home, reducing its capacity to push ahead with its Central Asia strategy.

## Kazakhstan

As Central Asia's largest economy, Kazakhstan is a leader in the region.<sup>11</sup> It is a major exporter of crude oil, natural gas, metals, and other commodities, and its location on the northeast coast of the Caspian Sea makes it a key node of the Trans-Caspian Corridor. In addition to its long coastline, the country's major port of Aktau can serve as the gateway for commercial traffic destined for Europe and wider international markets.

While maintaining close ties with former liege Russia, Kazakhstan's multivector foreign policy approach has allowed it to also forge relations with the United States, the European Union, and China. The Ukraine conflict has created difficulties for trade and commerce due to sanctions on Russia, but it also has given Astana an opportunity to distance itself from Moscow. This climate has created conditions for Kazakhstan to accelerate its efforts to contribute to the development of the Trans-Caspian Corridor.



Cranes hoist containers at Port Kuryk in Aktau, Kazakhstan in August 2018.  
(Aliia Raimbekova / Anadolu Agency via Getty Images)

The bulk of Kazakhstan's oil exports have been piped through Russian territory via the Caspian Pipeline Commission, which ferries the crude from the country's western Tengiz field to the Black Sea port of Novorossiysk, where it then travels via tankers to European and other destinations. This supply chain has seen several disruptions since the beginning of the war, which Moscow has blamed on technical problems. However, these temporary disruptions are a way for Moscow to shape the behavior of Astana, which has publicly refused to support Russia's annexation of Ukrainian territory.

Russia is trying to ensure the war does not create the conditions for Kazakhstan to venture too far from its sphere of influence, but its actions appear to be having the opposite effect. A noticeable example of this is Kazakhstan's move to ship crude from its Caspian port of Aktau to Azerbaijan, where it goes to global markets via the Baku-Tbilisi-Ceyhan pipeline.<sup>12</sup> Though presently the quantities remain very small, President Kassym-Jomart Tokayev in August 2022 ordered his government to examine the potential for a pipeline to be built across the Caspian Sea. Tokayev has also moved his government toward improving port infrastructure on the Caspian, terming it as a "strategic task" for his country.<sup>13</sup> Astana also has been seeking cooperation from Western partners, particularly the United States, for its efforts to develop

the Trans-Caspian International Transport Route into a full trade corridor that could significantly decrease its dependence upon Russian commercial routes.

Astana remains a strategic security partner of Moscow through the Collective Security Treaty Organization, but the developments in Ukraine and the South Caucasus likely have Kazakhstan's leadership reevaluating Russian capabilities to provide for its security needs. As a result, and in addition to its efforts to diversify its security partnerships, Astana is now preparing for an era in which Central Asia will have to increasingly fend for itself. The weakening of Russia's ability to be a security guarantor provides the United States and its allies the time and space to forge strong political and commercial links with the Trans-Caspian region.

### Uzbekistan

As a double landlocked country with the largest population in Central Asia, Uzbekistan has an immense interest in the development of the Trans-Caspian Corridor.<sup>14</sup> Its border with Afghanistan offers it the shortest route through Pakistan to the Indian Ocean. However, the return of the Taliban to power in Afghanistan in the wake of the 2021 U.S. withdrawal and Pakistan's unprecedented political, economic, and social meltdown<sup>15</sup> have created a strategic vacuum on Tashkent's southeastern flank.



Its geography and political economy at the center of the Eurasian landmass have forced it to mostly trade with Russia and China.

The development of the Trans-Caspian Corridor could enhance the country's ability to ship its major products (gold, cotton, copper, natural gas, and textiles) to the broader international market. Tashkent is making significant progress on its domestic transportation infrastructure but will need to address the issue of autonomy in its northwestern region of Karakalpakstan, which has recently experienced violent unrest.<sup>16</sup> Karakalpakstan's location places it in the middle of the shortest route from the core regions of Uzbekistan to the Caspian Sea via Kazakhstan.

### Turkmenistan

Turkmenistan, which has the fourth-largest reserves of natural gas in the world, has enormous potential to diversify its exports, over three-fourths of which currently go to China.<sup>17</sup> One such option is via the Turkmenistan-Afghanistan-Pakistan-India (TAPI) pipeline, but chronic security problems in Afghanistan and the intensifying crises in Pakistan mean the project is unlikely to gain traction.

Turkmenistan's only other option is to export to the European Union, which in the wake of the Ukraine war is trying to reduce its dependence on Russia.<sup>18</sup> To this end, Ashgabat has been trying to mobilize international support for construction of a Trans-Caspian pipeline, at an estimated cost of \$2 billion, with a capacity of 30 billion cubic meters of natural gas per year. However, Russia and Iran pose security challenges to such a project, and the United States and Europe have expressed little interest in a major fossil fuel project. There are less-expensive options also in the works that could link Turkmenistan's facilities with those of Azerbaijan; those projects could commence exports much sooner and at a quarter of the cost.<sup>19</sup> Turkmenistan's port of Turkmenbashi is one of two ports (the other being Kazakhstan's Aktau) along the eastern coast of the Caspian that can serve as an entry and exit point to Central Asia. In fact, Turkmenbashi and Baku, Azerbaijan's capital and main port, are the two closest points between the east and west coasts of the Caspian.



In 2013, Turkmenistan's then-president Gurbanguly Berdimuhamedov (C, foreground) and visiting Turkey's then-Prime Minister Recep Tayyip Erdoğan (second L) view a model of planned construction at the port in Turkmenbashi on Turkmenistan's Caspian Coast. Construction was completed in 2018. (STR / AFP via Getty Images)

### Azerbaijan

Azerbaijan is a critical node in the Trans-Caspian Corridor, given its location at the mouth of the land bridge connecting Central Asia to Europe and as a littoral state with significant deposits of oil and natural gas. As with other Central Asian nations, Azerbaijan until recently was firmly part of Moscow's sphere of influence. The decades-old conflict between Azerbaijan and Armenia over the disputed territory of Nagorno-Karabakh further prevented movement toward Central Asian trade that did not traverse through Russia.

In the past few years, though, Russia's influence in the region has waned.<sup>20</sup> This was most evident in events since the 2020 Azerbaijan-Armenia conflict, during which the Azerbaijanis were able to regain territories that they had lost to the Armenians in the early 1990s after the fall of the Soviet Union. The Kremlin, which had been planning the invasion of Ukraine, did not want to see the status quo in the South Caucasus upended. However, with military and intelligence assistance





from Turkey, the Azerbaijanis succeeded in shifting the balance of power in their favor.<sup>21</sup> This situation, coupled with Russia's military struggles in Ukraine, have exposed Moscow's weakening power in the South Caucasus and Central Asia.

While Azerbaijan's strategic situation gives it the potential to serve as a medium for trade routes, the situation in Nagorno-Karabakh is far from stable. Azerbaijan has gained full control of Nagorno-Karabakh because of the collapse of the Republic of Artsakh, but this victory, while significant, does not mean the end of hostilities. Azerbaijani President Ilham Aliyev is now seeking to connect with the exclave of Nakhchivan through the Zangezur Corridor,<sup>22</sup> a move Armenia sees as a threat.

Azerbaijan's military consolidation of Nagorno-Karabakh presents both a challenge to its relationship with Armenia and a significant opportunity to enhance the Trans-Caspian Corridor. Armenia could significantly benefit from the project, given its landlocked position and decades-long isolation from both Azerbaijan and Turkey. The key for Baku will be to refocus on its diplomatic and economic engagement with Yerevan in order to foster greater east-west connectivity while ensuring that it does not pursue trade corridors through the territory of Armenia proper through forceful military means. Were Azerbaijan to do so, this could disrupt the potential for the Trans-Caspian Corridor and invite spoilers, not only from Armenia but also from Russia and Iran, while causing key Western players like the U.S. and France to reexamine their engagement with Azerbaijan.

## Turkey

Long before Russia's challenges in Ukraine, Turkey sought to reduce its own energy dependence on Moscow. Separately, for the past couple of decades under the regime of President Recep Tayyip Erdoğan, Ankara has been trying to expand its influence in Russia's southern flank. The 2009 establishment of the Organization of Turkic States has been a key initiative of Turkey, with a specific focus on reconnecting with the Turkic-majority Central Asian states of Kazakhstan, Uzbekistan, Kyrgyzstan, and Turkmenistan.

Turkey saw the fall of Ukraine's pro-Russian government in 2014 as an opening to exploit. At the time, Turkey was still focused on the post-Arab Spring Middle East and broader Eastern Mediterranean basin, but the reversals and arrestors there steered Ankara toward the South Caucasus, where it began helping its ally Azerbaijan to prepare to go on the offensive in Nagorno-Karabakh. Baku's victory in the 2020 war and the collapse of Artsakh in 2023 allowed Turkey to punch a hole in what had long been a Russian sphere of influence. The Russian invasion of Ukraine has created further opportunities for Ankara to position itself as an alternative regional power to align with, particularly in the Black Sea Basin, which historically has been a crucible for Russian-Turkish competition.<sup>23</sup>

In the short term, Ankara is encumbered by its domestic economic and financial problems,<sup>24</sup> but should present trends continue, Turkey will increasingly be able to fill some of the vacuum left behind by a weakening Russia. This could serve as an enabling environment for the development of the Trans-Caspian Corridor, as both the West and the regional states will need a strong partner to work with, and Turkey is a crucial transit state for the corridor.

## European Union

Russia's war in Ukraine has shattered the notion that Europe could rely on Russia as a long-term, reliable source of energy for Europe. It underscores a failure of the European strategy to mitigate geopolitical competition with the Kremlin through economic integration, even though there have been ample examples of aggressive Russian behavior on both the military and energy fronts since 2005. Europe's dependence upon Russian natural gas exports is a major arrestor in the path of the West's struggle to counter Moscow's invasion of Ukraine. As a result, since February 2022 the European Union has been rushing to diversify its sources of energy.<sup>25</sup>

Natural gas resources in the South Caucasus and Central Asia represent a major alternative. Getting these energy supplies from the Caspian basin to Europe while bypassing Russia is a long-term project, but in the short term, the EU is focusing on the development of the road, rail, and maritime routes of the Trans-Caspian Corridor for general trade purposes.



Containers from freight trains are loaded onto a ship in the ferry port of Kuryk to be transported across the Caspian Sea in June 2023. (Jens Büttner / picture alliance via Getty Images)

In fact, the EU has the most advanced vision for the project – evident from a June 2023 report produced by the European Bank for Reconstruction & Development (EBRD).<sup>26</sup> Led and funded by the European Commission, the EBRD’s detailed assessment identified the most suitable transport linkages between the five Central Asian nations and 27 member states of the bloc via the Trans-European Transport Network. After assessing the details of three different route options through the northern, central, and southern parts of Central Asia based on a multicriteria assessment framework, the research shows that the Central Trans-Caspian Network (CTCN) is the most suitable connectivity link between Europe and Asia.

While the war in Ukraine serves as a major impetus for the EU to accelerate development of the corridor, the conflict can also be an obstacle. Russia’s military campaign limits the extent to which the bloc can allocate resources toward both conflict mitigation and the transport corridor. In addition, the tensions in the Western Balkans could further constrain EU bandwidth. Similarly, tensions with Turkey over EU membership will have to be sorted out as Ankara tries to balance between its desire for EU membership and its assertive, unilateral foreign policy stance.<sup>27</sup>

A European-Turkish accommodation will be critical considering that Turkey is a key transit state linking the European Continent and the South Caucasus.

### Iran

As a large country in the southwestern part of the Eurasian landmass and sitting at the crossroads of Central Asia, the Caucasus, South Asia, and the Middle East, Iran has a unique set of imperatives and constraints. In the early 19th century, Iran lost control of its holdings in both the Caucasus and Central Asia to Russia, and throughout the Cold War, Iran’s entire northern flank was part of the Soviet Union. Even after the dissolution of the USSR in 1991, the U.S.-led sanctions regime and the Persian-Turkic ethnic divide hampered Iran’s ability to regain influence among the post-Soviet states. While Tehran was able to cultivate limited energy relations with Turkmenistan, its relationship with Azerbaijan has been marred by ethnic and sectarian hostility and further strained by Iran’s ties to Armenia.

Iran’s anti-Western disposition does allow for cooperation with Russia. Since the early 2000s, periodic meetings of the five Caspian Sea littoral



states at the various leadership levels have provided Tehran with a forum to strengthen cooperation with Moscow and enhance its influence in the Caspian basin. A noteworthy outcome of this process is the efforts to establish the North-South Transport Corridor (NSTC), which connects Russia with Iran through the South Caucasus and India via the Persian Gulf and the Arabian Sea.<sup>28</sup> While the thrust of the NSTC project is connectivity with Russia, Iran has also sought to position itself as a gateway for India to access Central Asia and broader Eurasia, though the trade/transit volumes remain small.

The way the Second Nagorno-Karabakh War between Azerbaijan and Armenia has territorially strengthened Baku at the expense of Yerevan undermined Iran's ability to develop a north-south transport nexus; in fact, the resulting increase in the length of the Azerbaijani-Iranian border has heightened tensions with Baku.<sup>29</sup> The decline of Russia and growth of Turkish influence in the South Caucasus further constrains Iran's position in the Caspian region, especially given that it revives centuries-old Turkish-Iranian competition for influence in the Caucasus.<sup>30</sup> Meanwhile, growing ties between Iran's arch foe Israel and Azerbaijan and Turkmenistan are a major security concern for the Iranians at a time when their republic is in the throes of an intensifying evolutionary regime-change process.

### **Afghanistan, Pakistan, and India**

While physically removed from the Trans-Caspian region, South Asia's extensive organic linkages with Central Asia have a bearing on efforts to develop the east-west corridor. In a reversal of the historical trend, over the past four decades South Asia-based actors are now increasingly influencing the evolution of Central Asia. This is evident in the form of Taliban-run Afghanistan, the political and economic meltdown underway in Pakistan, and the rise of India as a geoeconomic player. These dynamics will constrain China's efforts to fill the strategic vacuum emerging in Central Asia and will shape the development of commercial ties across Eurasia catalyzed by the Trans-Caspian Corridor.

Indeed, Central Asian states such as Uzbekistan, Turkmenistan, and even Kazakhstan have an interest in developing a corridor that could connect them

with the markets of South Asia and the Indian Ocean basin.<sup>31</sup> All things being equal, China's BRI network in the two contiguous regions could enable this strategic objective. However, the instability in Afghanistan and Pakistan is increasingly transforming into insecurity,<sup>32</sup> and China's growing domestic economic challenges will have political repercussions preventing the emergence of a secure southeast route, further emphasizing the importance of the Trans-Caspian Corridor.

### **Saudi Arabia, UAE, and Qatar**

Over the past decade, significant divergence in the interests of the United States and the Gulf Arab states led to the latter pursuing a more independent foreign policy. The need to diversify their economies away from overreliance on hydrocarbons, invest their surplus cash, ensure food security, and counter Iranian influence in the Middle East are some of the key reasons that steered the Gulf Arab states to forge closer relations with Central Asia and the Caucasus.

Consequently, Riyadh hosted the first ever meeting with officials from all Central Asian nations in 2014, and in July 2023 it held the first ever GCC-Central Asia summit meeting.<sup>33</sup> Separately, the United Arab Emirates in recent years has invested billions of dollars in Kazakhstan, Uzbekistan, and Turkmenistan, much of which has been in energy, including solar energy. Qatar is also in the mix; Emir Sheikh Tamim bin Hamad Al Thani took his first trip to Central Asia in June, touring Kazakhstan, Uzbekistan, Kyrgyzstan, and Tajikistan. These states can contribute to the Trans-Caspian project through both investments and decades of experience in energy exports and port management.

Though the Saudis and the Emiratis are generally seen as in alignment with one another on Middle Eastern foreign policy, on a more global level they pursue independent paths. Riyadh and Abu Dhabi are likely to have divergent strategies around the Trans-Caspian Corridor, considering that Saudi Arabia's priority is to reduce dependence on crude exports while the Emirati geoeconomic outlook is much more diversified, especially with a focus on supply chains. Qatar, as the world's largest exporter of LNG, is likely to have an interest in the development of Trans-Caspian natural gas trade involving Turkmenistan and Azerbaijan.



### Existing and Planned Routes

To determine the viability of the Trans-Caspian Corridor, it is necessary to not only factor in the objectives and constraints of various stakeholders but also examine other trade corridors and routes in Eurasia.

#### Eurasian Northern Corridor

The bulk of trade between Asia and Europe takes place along the Eurasian Northern Corridor, which consists of a network of routes that stretch from the Sea of Japan to the Baltic Sea. Running east to west, the corridor commences in the Korean Peninsula and traverses through China, Russia’s Far East region, Mongolia, Kazakhstan, Siberia, and Russia’s core territory west of the Ural Mountains.<sup>34</sup>

The Eurasian Northern Corridor is the most well-established transportation connectivity route across the two continents. The routes through this corridor consist of both road and rail options. Since the bulk of this corridor traverses through the Russian Federation, it is clearly dominated by Moscow, which has long

sought to preserve it as the mainstay of east-west trade across the Eurasian landmass. Uncertainty over Russia’s future stability will reduce Moscow’s ability to project power on its southern flank. Over time, shorter routes that run through the Central Asian and South Caucasus nations could seriously reduce the value of the Eurasian Northern Corridor and thus aid U.S./EU efforts to reduce trade/transit dependence on Russia.

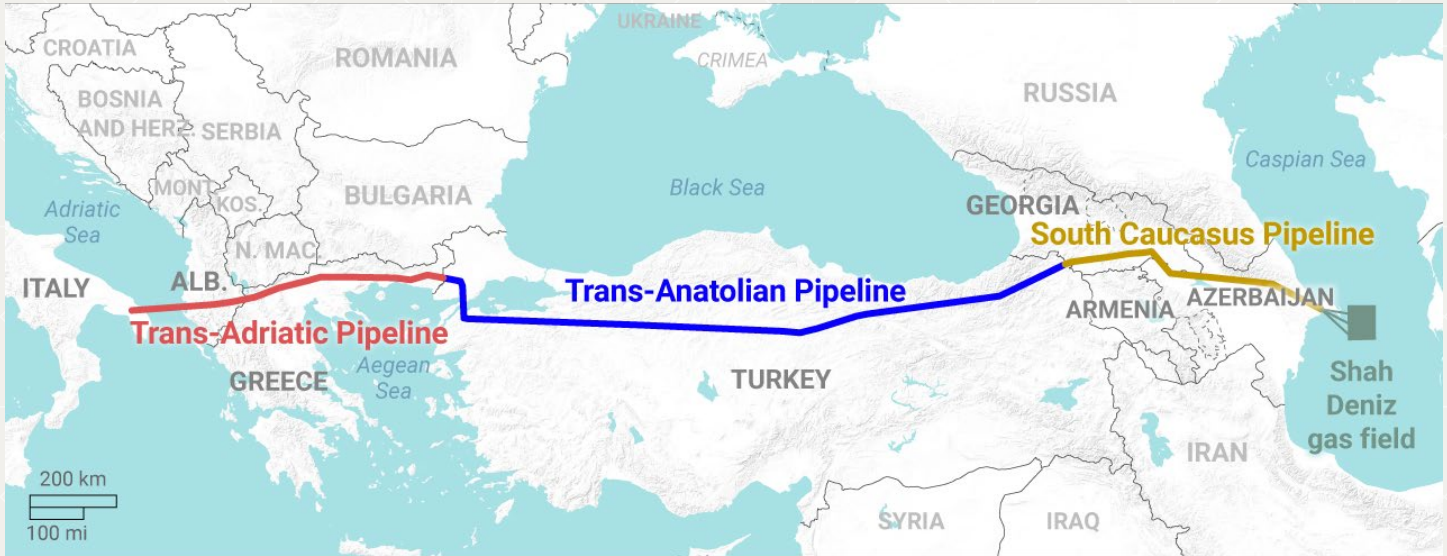
#### North-South Transport Corridor

The International North-South Transport Corridor is a joint Russian-Iranian project that would allow Russia to access the Persian Gulf. The envisioned corridor would go through the North Caucasus,<sup>35</sup> then would either follow a land route through Azerbaijan and into Iran or go through the Caspian Sea and then through Iran. From there, it would go to the Persian Gulf and beyond via the northwestern Indian Ocean to India.

Geopolitically, there are many hurdles blocking the development of this corridor. First, its two main partners are Russia and Iran, which are both under sanctions and facing internal challenges. Second, the route goes through several regions plagued



# Southern Gas Corridor



Sources: Southern Gas Corridor, TRT World, esri

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by chronic security problems, including the North Caucasus and Dagestan. If the route goes through Azerbaijan, tensions between Tehran and Baku will come into play, especially in the wake of Azerbaijan regaining control over Nagorno-Karabakh. Third, the transportation infrastructure connecting Iran's Caspian region to its Persian Gulf coast remains underdeveloped. While India needs Iran to access Central Asia and Afghanistan, trade with Russia could easily go through the Suez Canal and from there via the eastern Mediterranean and Black Seas. Therefore, the likelihood of this corridor seeing significant development is slim.

## Zangezur Corridor



and trade turnover between Kazakhstan and Pakistan hovers around \$57 million.<sup>38</sup>

The route is also at risk because of the political situations in Afghanistan, now once again being run by the Taliban, and Pakistan, which is on the verge of political and economic collapse. These factors make the development of this route highly unlikely in the foreseeable future.

## Kazakhstan-Uzbekistan-Afghanistan-Pakistan

Kazakhstan, Uzbekistan, Afghanistan, and Pakistan have been experimenting with a land route over the past couple of years.<sup>36</sup> In terms of sheer length, this is the shortest route for the landlocked nations of Central Asia to access the maritime space of the Indian Ocean: through the Pakistani port of Karachi and potentially Gwadar. Thus far, the route has seldom been used. Uzbekistan sent truck shipments through Afghanistan to Pakistan in May 2021, and Kazakhstan used the same route in August 2023. These are rare examples of limited-scope land transportation that represents just a fraction of trade; annual transit trade between Uzbekistan and Pakistan stands at \$150 million,<sup>37</sup>

## Southern Gas Corridor

Operational as of December 2020, the Southern Gas Corridor ferries natural gas from Azerbaijan's offshore Shah Deniz field in the Caspian Sea to Europe. Though solely for natural gas, the fact that it is running means



# Trans-Caspian Corridor

The Trans-Caspian transport route spans from China's coast to Europe and the Mediterranean.



Source: middlecorridor.com

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that future exports from Turkmenistan and Uzbekistan could feed into this existing infrastructure, which would augment supplies to those seeking to reduce dependency upon Russia, such as Turkey and the EU.<sup>39</sup>

## Trans-Caspian Corridor

In light of the strategic conditions across Eurasia, the Trans-Caspian Corridor is the only viable option for a robust link between Central Asia and Europe through the South Caucasus.<sup>40</sup> It is a more cost-effective and faster trade route than the Eurasian Northern Corridor, reducing travel distance by 1,250 miles. Compared to sea routes, the Caspian route can reduce travel time by 15 days.

However, as the June 2023 EBRD assessment<sup>41</sup> highlighted, there is a great deal of work that needs to be done to weave each of the five Central Asian nations into the corridor project. Transportation infrastructure for this land network already exists but will need upgrades.<sup>42</sup> It will require the necessary infrastructure to transfer cargo from trucks and trains to be placed on seafaring vessels. Moreover, even if the land network were running at optimal efficiency, it would

remain an intraregional transportation nexus, which is important but by itself insufficient. The maritime component of crossing the Caspian Sea is critical and will be the most significant political, financial, logistical, and technological undertaking of the project.

In the wake of the Ukraine war, Kazakhstan has begun exporting small quantities of oil through this route. Kazakhstan's state-owned oil pipeline operator, KazTransOil, has made oil shipments from the country's Tengiz and Kashagan oil fields through the Aktau port to Azerbaijan's Sangachal Terminal located 25 miles south of Baku. From there it fed into the Baku-Tbilisi-Ceyhan pipeline through to global markets. Azerbaijan's state-owned energy firm, SOCAR, and its counterpart in Kazakhstan, KazMunayGas, have inked an agreement to deliver 1.5 million tons of oil per year via the Caspian Sea route. Astana and Baku hope that by the end of the current year they will also increase tanker capacity for 12-14 trips per month.<sup>43</sup> Nonetheless, without required investments and technological assistance to upgrade port facilities and tanker fleets, the Trans-Caspian Corridor will not be a viable alternative to routes that cross through Russia.



## Policy Recommendations

The United States is in a unique position to shape the development of the Trans-Caspian Corridor. To do so, Washington must carefully coordinate its approach to the Caspian region to serve not only its own interests and those of its allies, but to support the security and prosperity of the Central Asian and Caucasus states.

The first-ever meeting between a U.S. president and the leaders of all five Central Asian states, which took place on the sidelines of the U.N. General Assembly meeting on Sept. 19, is a major milestone toward this end. President Joe Biden made several noteworthy policy announcements. Biden told his counterparts from the C5+1 nations (Kazakhstan, Uzbekistan, Kyrgyzstan, Tajikistan, and Turkmenistan) that the United States would increase security funding for the region, establish a new business platform to bolster private-sector engagement to help boost economic relations, and cooperate on critical minerals development<sup>44</sup> to ensure long-term energy and supply chain security. This elevation of the C5+1 framework has created the basis for greatly expanding cooperation between the United States and the nations in the region.

Biden also mentioned that another meeting between C5+1 heads of state would take place soon in one of the five Central Asian states, which would be the first visit to the region by a sitting American president. A trip to Central Asia during which the president visits each of the five nations would go a long way in demonstrating U.S. commitment to the security and prosperity of the region. This is critically important if regional states are going to be able to maintain a healthy distance from China, which is making deep inroads in Central Asia. An American president touring the region would restore some of the confidence that was shaken with the U.S. withdrawal from Afghanistan. It will also underscore U.S. commitment at a time of great geopolitical churn given the effects on the countries in the Trans-Caspian region of Russia's invasion.

Policymakers must understand that China's moves to build its own connectivity in Eurasia cannot simply be leveraged with an American version of the BRI called the Partnership for Global Infrastructure and

Investment (PGII).<sup>45</sup> China got a head start while Washington was mired in the post-9/11 conflicts in the Middle East and South Asia, and it has the advantage of both geographic proximity and an autocratic political economic system that allows for the mobilization of vast amounts of investments. PGII should focus on the Trans-Caspian Corridor to deny China the ability to dominate regional infrastructure and establish a counterweight to Chinese efforts to pull Central Asia into its geoeconomic orbit. China's current economic crisis means it will have less financial bandwidth to push ahead with the BRI, a window of opportunity for the United States to work with allied and partner nations to make progress on this connectivity project.

The following policy recommendations center on three key themes of engagement in the Caspian:

### Pragmatic Engagement

Unlike China, the U.S. does not have the ability or willingness to channel tens of billions of dollars in state-driven investment into the Caspian region, and unlike Russia, the U.S. does not have a significant military presence within the Caspian region. What the U.S. does have is the ability to leverage its position as a global economic and technology leader to support the development of the Trans-Caspian Corridor in a more sustainable and less heavy-handed fashion.

One key element of this is for the U.S. to focus on niche areas where it can support the development of the Caspian states and the trade flows between them and beyond the region. This includes providing technological assistance to help with the digitalization of the transportation corridor, including the further development of the Silk Road innovation hub in Silicon Valley. This also includes helping the Caspian states build institutional resilience in areas like governance and infrastructure development. States like Kazakhstan and Uzbekistan have been pursuing economic and political reforms, which can be facilitated by closer cooperation with the U.S.

The energy sector is another important sphere that can drive closer collaboration between the U.S. and the Caspian region. Global energy markets are in the process of being reshaped by the worldwide drive to reduce carbon emissions, and the Caspian region (and



A cargo ship waits next to train tracks to load and unload cargo containers at Port Kuryk in Aktau, Kazakhstan, on the Caspian Sea on June 21, 2023. (Jens Büttner / picture alliance via Getty Images)

Central Asia in particular) contains significant deposits of critical minerals and other resources, such as green hydrogen, that are key to the clean energy transition. The U.S. must tailor its engagement with the region to further develop its own clean energy supply chain and lessen its reliance on adversarial countries like China and Russia. This will also enable the U.S. to distinguish itself from the large-scale investments in fossil fuels pursued by Beijing and Moscow, though Washington can aim to support strategic projects in transitional fuels like natural gas, most notably the Trans-Caspian natural gas pipeline.

At the same time, the U.S. must move away from unnecessary punitive measures it has applied to the

Caspian region. Several states in the region have been subject to secondary sanctions because of Russia's invasion of Ukraine, which have proven to drive economic pressures in the Caspian, even though none of the countries have supported Russia's war and some have overtly spoken against it. Instead of sanctions or other restrictive measures, the U.S. should help the Caspian states sustainably diversify economically from Russia.

In the meantime, Congress should move to repeal the Jackson-Vanik amendment, a Soviet-era holdover law that has inhibited trade ties between the U.S. and Central Asian states like Kazakhstan, Uzbekistan, and Tajikistan. The Biden administration should work





with supportive members of Congress, where there is already bipartisan interest, to pass new legislation to repeal this amendment. This would go a long way in facilitating the progress that has been made with Biden's recent engagement with Central Asian heads of state.

## Strategic Engagement

As a natural counterpart to pragmatic engagement, the U.S. must also reassess its engagement with the Caspian region from a strategic perspective. The U.S. has already developed several mechanisms for cooperating with the Caspian region across the economic, security, and political spectrums, including C5+1 and the Build Back Better World and PGII global infrastructure development programs, with subprogram points of focus like the Economic Resilience in Central Asia Initiative. However, these should be revised and expanded to incorporate the connections between the South Caucasus and Central Asia. Whether formally or informally, there should be a cooperation mechanism of the C5+1 that incorporates the countries across the Caspian – particularly Azerbaijan, but also the South Caucasus more broadly.

Azerbaijan's consolidation of Nagorno-Karabakh presents a unique opportunity for the U.S. to enhance its engagement throughout the South Caucasus. Given Russia's diminishing role and growing tensions between Yerevan and Moscow, the U.S. can help to sustainably resolve the conflict between Azerbaijan and Armenia by fostering greater trade between the two countries through targeted investments and working to mitigate further security flare-ups. The U.S. can work with Azerbaijan and Turkey to ensure that they don't pursue their Trans-Caspian connectivity aims through military means while offering Armenia incentives to engage with both countries diplomatically in a way that Russia cannot.

Additionally, the U.S. needs to update its Strategy for Central Asia to include considerations of the Taliban takeover of Afghanistan and Russia's war in Ukraine and its implications for the region. While the current strategy points to the importance of regional connectivity efforts within Central Asia, it should also incorporate the interlinking elements that include the South Caucasus. As such, the U.S. should develop

and release a strategy for the Caspian region as a whole, with the Trans-Caspian Corridor as its focal point. Building upon a successful C5+1 summit, the Biden White House should convene an international conference on Eurasian Connectivity at which major powers, international financial institutions, relevant domain experts, and the private sector can explore ways to further this project.

## Collective Engagement

The U.S. should not act alone when it comes to engaging with the Caspian region. As discussed, the U.S. has shared interests with allies that are active in the region, particularly the EU but also states like Japan and South Korea. To the extent possible, the U.S. should coordinate its strategy with its European and Asian allies to establish a division of labor and reduce redundancies, especially in the Build Back Better World and PGII formats.

Beyond its allies, the U.S. should increase its coordination and cooperation with nonaligned countries that are active in the region, including Turkey, the Gulf states, and India. Whether on projects like green energy or security cooperation, there are untapped areas of collaboration that the U.S. could pursue with such states while acknowledging the multivectoral foreign policy of states like Azerbaijan, Kazakhstan, and Uzbekistan. The U.S. should work to mitigate regional tensions, including the aftermath of the Nagorno-Karabakh conflict and land/water disputes between Central Asian states.

There are even areas where the U.S. can cooperate with its primary competitors in the Caspian, despite the contentious nature of the relationship between Washington, Beijing, and Moscow. One such area is counterterrorism, with the U.S., China, and Russia all sharing an interest in countering transnational militant groups like the Islamic State group. Another such area is climate change, over which the U.S. and China have discussed collaboration in areas such as methane reduction and global climate finance.<sup>46</sup> While such areas will not diminish the disputes that the U.S. has with China and Russia, there should be room for certain areas of cooperation even amid disputes elsewhere.



Russia's 2022 war in Ukraine and Azerbaijan's 2023 victory in the Nagorno-Karabakh conflict have created an opportunity to advance the Trans-Caspian Corridor project. The United States can lead a global effort to establish much-needed connectivity across Eurasia, which does not have to remain geopolitically locked between Russia and China. Washington can

accomplish this by helping develop political economic resilience in Central Asia and the Caucasus, ensuring the sovereignty, territorial integrity, and independence of the nations in the two regions. Investing in the Trans-Caspian Corridor can prevent the region from strategic oscillation between Moscow and Beijing and its deleterious effects on future security and prosperity.



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