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Rafi, Dilara

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Dilara Rafi
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Azerbaijan's Strategic Role in the Middle Corridor: Taking the spotlight in the globalized world and boosting Non-Oil Sectors via transit operations

Abstract

The Middle Corridor, a critical trade route connecting Europe and Asia, has gained importance after geopolitical challenges on the alternative routes, the Northern and Southern Corridors. Azerbaijan plays a strategic role in the Middle Corridor, investing in transport infrastructure and fostering regional cooperation. This paper examines Azerbaijan's efforts to enhance its position as a key global transit hub to strengthen its logistical capabilities, contributing to non-oil sector growth and economic diversification. Through regional partnerships, infrastructure projects, and improved multimodal transport systems, the country aims for capitalizing on its strategic location, further integrating into global trade networks. The paper concludes with recommendations for enhancing Azerbaijan's transit potential, emphasizing the need for digital innovations, regulatory reforms, and increased collaboration with corridor countries and global partners.

Keywords: Middle Corridor, multimodal transport, non-oil sector, economic diversification

Introduction

Since the Middle Ages, transport has been closely tied with trade, being especially active along the major trading routes. Known as the Silk Road for centuries, the trade route along Eurasia played a vital role in connecting China with the Roman Empire, fostering the exchange on the route (Aghayev, 2023). Building upon this historical legacy, modern international transport corridors have evolved to play an even more critical mission in global trade and economic development, strengthening the regional and global relations among countries, enabling efficient and complex transport infrastructure and operations, and boosting their economic development (Vinokurov et al., 2021).

The main three routes connecting Europe to Asia by land are the Southern Corridor, the Northern Corridor, and the Middle Corridor. In addition to land routes, the Ocean route exists, which is longer and recently politically unstable (Urciuolo, 2024). Considering the sanctions against Iran, the Southern Corridor does not pose as a desirable route. Furthermore, the Russian-Ukrainian war has sparked the issues of safety along the Northern Corridor, inducing increased attention towards the Middle Corridor and creating new global demands in transportation (Valiyev, 2023). Also known as the TransCaspian International Transport Route (TITR), The Middle Corridor passes through Central Asia connecting to the Caspian Sea, the Caucasus, and proceeding towards Europe, with 4256 km by rail and 508 km by sea (Sattarov, 2022). Considering the multimodality of the route, cargo enters Kazakhstan via either Dostyk or Khorgos stations by rail until reaching the port of Aktau, where it travels until the Port of Baku, and through Azerbaijan-Georgia railways traversing to Europe.

Being situated on the Middle Corridor, Azerbaijan largely contributes to ensuring the seamlessness of operations and the timely transfer of cargo from China to Europe. A series of projects involving all modes of transport has been implemented to improve the infrastructure and operations along the route. In the railways, the Baku-Tbilisi-Kars railway launched in 2017, which offers a vital part of the transport link between East and West, reducing cargo delivery time from China to Europe by more than fifty percent compared to shipping by sea (President.az, 2024). Moreover, positioning itself as a global transit hub, Azerbaijan commenced operations in the Baku International Trade Seaport in 2018 to foster the sustainable development of the country's transit and logistical capabilities (President.az, 2024). In addition, located at an attractive geographical point, the Alat Free Economic Zone provides opportunities for investors, while enhancing the economic development of the country.

In 2015, the Coordinating Council on Transit Freights was established by the Decree of the President which identifies common conditions of transportation and improvement of transit procedures (E-qanun, 2015). On 23 November 2023, an Action Plan on increasing the transit potential of international transport corridors passing through the territory of the Republic of Azerbaijan and promoting transit cargo transportation for the years 2024-2026 was signed, creating more opportunities to strengthen the infrastructure and procedures along the Middle Corridor (AzerNews, 2023).

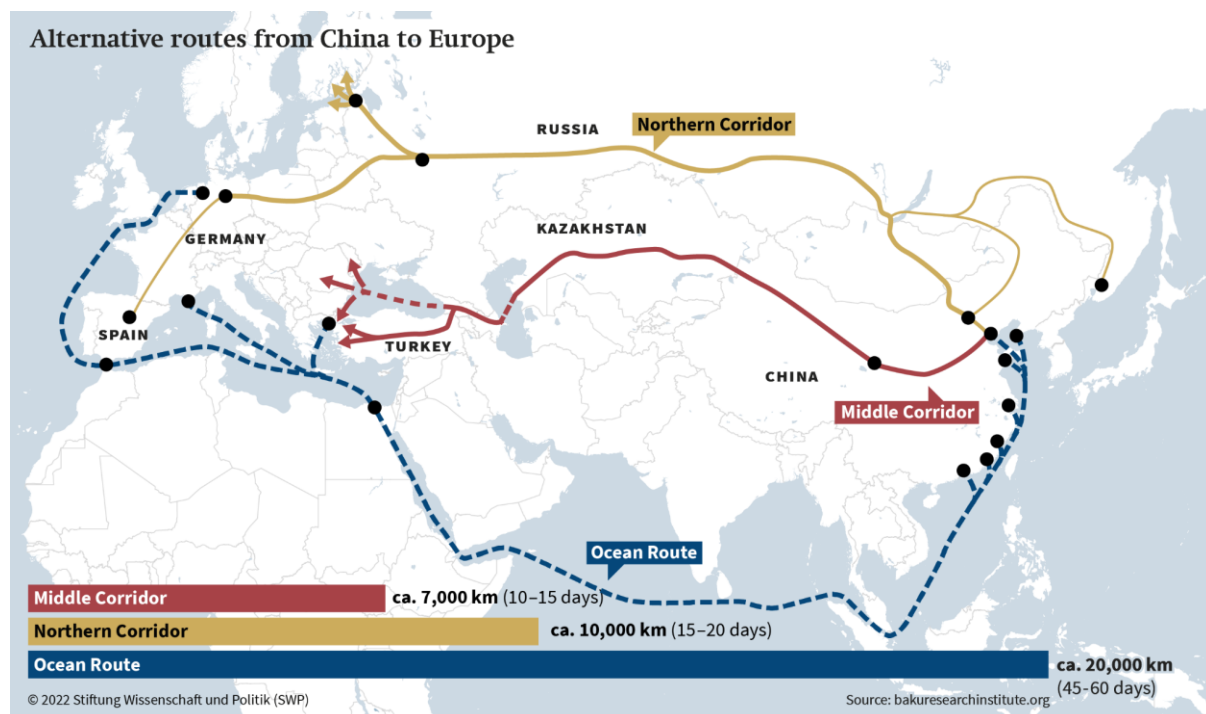
Azerbaijan's pivotal role in the Middle Corridor is crucial for driving growth in its non-oil sectors by enhancing regional and global connectivity. This paper explores how Azerbaijan's

location along the Middle Corridor not only positions Azerbaijan as a key player in the globalized trade networks but also supports economic diversification and development within the country. The paper starts by analyzing existing literature on the Middle Corridor in terms of globalization and the effectiveness of multimodal transportation, followed by the room for economic growth in the non-oil sector and the diversification of the economy by facilitating trade, providing recommendations on the measures for improvement.

Literature review

Performance and capacity of the Middle Corridor

According to statistics, the cargo passing through the Middle Corridor surpassed 120 percent in only the first three months of 2022 in comparison with the same period of 2021 (Eldem, 2022). As freight carriers are in search of safe and fast alternatives with an undisrupted supply chain, the Middle Corridor proves to be a suitable route, not prone to geopolitical conflicts. Noticing the growing importance of the route, European companies including Nurminen Logistics of Finland, Maersk of Denmark, CEVA Logistics of Germany, and Rail Bridge Cargo of the Netherlands have started using the Middle Corridor (Poplawski et al., 2024). As of 2023, the volume of transportation along the Middle Corridor totaled 4.3 million tons, an increase of 65% compared to the previous year (Trend.az, 2024).



Alternative routes from China to Europe. Eldem, 2022.

Although there exist great expectations from the Middle Corridor, the volume of transit equaled 33,000 TEUs in 2022, which is significantly smaller than the volume passing through the Northern Corridor - 410,500 TEUs for the same period (Urciuolo, 2024). Considering the multimodal transportation, which incurs costs in changing modes of transport along the route, the logistical challenges on the Middle Corridor are bound to

occur. Currently, the block trains travelling along the route from China reach Europe in 16-18 days, which provides a competitive alternative duration-wise (Apa.az, 2024). Nevertheless, according to the reports by the European Bank for Reconstruction and Development (EBRD), the Middle Corridor could achieve a transit capacity of 1.4 million TEUs, with an additional 470,000 TEUs of traffic between the region's countries if existing bottlenecks are removed until 2030 (European Bank for Reconstruction and Development, 2023).

The Middle Corridor and Globalization

The contribution of international transportation corridors is both significant and multifaceted to globalization as it facilitates the seamless movement of goods and services across borders, fostering international trade and economic integration. As Vasa and Barkanyi (2023) claim, regional cooperation according to corridors enhances connectivity and promotes accessible trade among countries from Europe to Asia. By removing natural borders, international transport corridors reduce geographical inequalities between countries, providing opportunities for easier market access, stimulating cross-border investments, and offering development benefits. Additionally, the construction of new railways and roads permits the neighboring countries to benefit from the connection, nurturing economic and social development (Rakauskienė et al., 2022).

The increased attention of recent years has encouraged countries along the Middle Corridor to put mutual efforts into finding solutions to operational and infrastructural challenges that hinder the efficient use of the route (Eldem, 2022). Thus, the countries have reviewed their bilateral and multilateral agreements to ensure the uninterrupted flow of goods from Asia to Europe, specifically considering increasing the physical capacity of the corridor and upgrading soft connectivity points for uniform procedures (Valiyev, 2023). On a more macro level, there exists regional cooperation in attempts to improve the operations and infrastructure along the Middle Corridor, such as the roadmap signed between Azerbaijan, Georgia, Kazakhstan, and Turkey in November 2022 (Jafarova, 2024). One of the contributions of the Middle Corridor to globalization is its promoting multilateral cooperation among Turkic states via direct railway networks (AIR Center, 2022). In the 10th OTS summit in Astana in 2023, Astana Declaration was adopted which encouraged the Turkic States to develop physical and digital transport infrastructure projects on the Middle Corridor and remove obstacles to trade (Urciuolo, 2024).

Taking into account the Middle Corridor being China's path to Europe, the country has invested in the projects to develop infrastructure along the route. China's initiatives are essential for promoting cross-border collaboration and facilitating common development in a globalized world (Wang and Miao, 2024). As Pannier states (2024), in January 2024, the train from China that arrived in Azerbaijan carried various goods, including construction materials and electric cars, emphasizing the suitability of the Middle Corridor as a reliable route for trade. Moreover, China's interest in the Middle Corridor can be attributed to develop its western provinces, providing the means to tap into regional markets (Kenderdine & Bucksy, 2021).

For the eastern part of the Caspian Sea, China has promoted the interconnection of routes. While China's investments focus on enhancing the eastern segment of the Middle Corridor,

Azerbaijan has equally prioritized the western section, ensuring the seamless integration of routes across the Caspian Sea (Lianlei, 2016). The alignment of interests of the countries along the Middle Corridor implies their mutual interests in development and globalization efforts. In addition to Azerbaijan's initiatives in the Caspian Sea, the country has invested in railways, passing through Türkiye and Georgia. Azerbaijan's strategic investments in rail infrastructure, particularly the Baku-Tbilisi-Kars railway, not only enhance regional connectivity but also integrate the country more deeply into global supply chains. Moreover, since the 1990s, Azerbaijani transport infrastructure projects have been primarily directed toward Europe, completing the Asia to Europe chain of development along the Middle Corridor (Lianlei, 2016).

Since the Russia-Ukraine war, the direction of the supply-chain network of the EU has shifted to Central Asia and the South Caucasus. New energy agreements between EU and Azerbaijan would strengthen the cooperation in trade, investment, and economic diversification, resulting in a win-win situation for both parties (Eldem, 2022). Among the initiatives by the EU, the Global Gateway project has targeted to bolster global economic relationships by coordinating transport systems and investments. According to Urciuolo (2024), the allocation of 10 billion EUR to Central Asian transport infrastructure in the 2024 Investors Forum would support the creation of direct transport links through the Black Sea and the Caucasus region. In parallel to the EU's strategic initiatives, Azerbaijan's actions in fostering connectivity on the European side underscore its commitment to becoming a key transit hub in the region. An example would be ADY Container's launch of a ferry in the Black Sea, linking Constanta port of Romania to Batumi port of Georgia (AIR Center, 2022). Azerbaijani feeder vessel Rasul Rza transported cargo from Central Asia to Romania in 2022, indicating the attempts by Middle Corridor countries to enhance connectivity on the route (Azvision.az, 2022).

Through strategic investments and regional cooperation, the Middle Corridor has emerged as a vital component of the global trade network, fostering economic integration and positioning the countries along its path as key players in the globalized economy. With a clear understanding of the Middle Corridor's role in globalization, the next section will explore Azerbaijan's role in developing and enhancing multimodal transport systems, which are crucial for facilitating seamless cargo movement across different modes of transport.

Multimodal Transport Development in Azerbaijan

Having advanced transport infrastructure is an essential factor for countries to achieve economic and regional development (Aghayev, 2023). Research suggests that there is a positive relationship between the growth of transport networks and economic development (Rodrigue, 2020). As effective transport corridors diminish distance on the route and time spent along supply chains, increase trade volume and income, the contribution of transport infrastructure is undeniable in economic advancements. In addition, Vasa and Barkanyi (2023) claim that the success of transport corridors depends on proper corridor management mechanisms and innovative initiatives.

Taking into account economic reforms and investments in transport infrastructure impacting international transport corridors passing through Azerbaijan, there are opportunities to increase the potential of transit cargo transportation in the country (Hasanli & Mansimov,

2021). Measures like the introduction of new procedures, the construction of new transport infrastructure and vessels, and the electrification of railroads have tremendously helped the multimodal transport system of Azerbaijan to become progressive and sustainable (Dadashli & Valiyev, 2024).

Cargo transportation in transport sector (thsd. tons)

2005	2010	2015	2019	2020	2021	
128328	196452	222373	235288	188629	193903	Total
26522	22349	17090	15222	14631	15058	railway
13680	11714	6626	5969	5982	5468	sea
74	40	129	183	458	557	air
18534	62458	60923	58596	56040	60298	pipelines
6842	12476	15251	19809	21320	25280	gas pipes
11692	49982	45672	38787	34720	35018	oil pipes
69518	99891	137605	155318	111518	112522	road

Cargo transportation in transport sector (Valiyev, 2023)

In the railways, 100 million dollars was invested in enhancing the Georgian side of the infrastructure of the Baku-Tbilisi-Kars railway line to ensure the operativeness of the route (Aghayev, 2023). Furthermore, the opening of the Zangezur Corridor will enable transport corridors to increase cargo volume and consequently trade, facilitating economic development (Dadashli & Valiyev, 2024). Currently, the electrified railway from Azerbaijan to Georgia carries a variety of products, with the goods carried via containers becoming more popular in the recent period (Kenderdine & Bucksy, 2021). Although there are issues like the Baku-Tbilisi-Kars (BTK) railway due to differing track gauges, the countries are trying to resolve the issue, such as by applying SMGS measures (Urciuolo, 2024).

In addition to rail advancements, Azerbaijan's maritime sector has also seen significant progress. The Baku International Sea Trade Port complex is one of the important regional projects with a capacity to handle up to 15 million tons of cargo per year and plans to turn into one of the largest ports of the Caspian Sea (Hasanli & Mansimov, 2021). As the volume of cargo is steadily increasing from Central Asia, the Baku International Sea Trade Port will be renovated to handle cargo handling capacity from 15 to 25 million tons (Wang & Miao, 2024).

Azerbaijan's strategic investments in transport infrastructure, including rail and maritime sectors, have positioned the country as a key player in the region. These efforts not only enhance the efficiency of the Middle Corridor but also contribute to the broader goal of economic diversification and integration.

Economic Impact on Azerbaijan's Non-Oil Sector

Azerbaijan's economic growth was heavily shaped by the development of the oil and gas sector since the 1990s which allowed the country to achieve political and financial stability (Babayev & Ismailzade, 2020). The country is aiming for economic diversification, and thus investing in transportation infrastructure to benefit from its suitable position in the crossroads of trade route corridors (Baghirov, 2020). According to statistics, Azerbaijan's non-oil exports totaled \$2.7 billion in 2021, 47.2% higher than that of 2020 (Sattarov, 2022).

Capital investment to transport sector, million manats

2019	2020	2021	2022	2023	
2 189,2	2 091,6	2 857,3	4 613,4	5 417,2	Total
377,5	389,8	166,9	208,5	192,8	<i>Activity of the overground transport and pipeline</i>
1,2	1,2	0,4	0,1	0,1	<i>Railway transport</i>
235,8	266,8	109,2	108,6	73,6	<i>Other land transport</i>
140,5	121,8	57,3	99,8	119,1	<i>Pipeline</i>
98,4	53,3	40,3	31,5	49,6	<i>Water transport</i>
33,7	109,7	147,1	89,3	1 004,7	<i>Air transport</i>
1 679,6	1 538,8	2 503,0	4 284,1	4 170,1	<i>Storehouses and activity of the support transport</i>

Capital investment to transport sector (State Statistical Committee, 2023)

There are several steps in transforming the Middle Corridor into a source of economic diversification for Azerbaijan. The main step involves treating the corridor as an economic corridor instead of a transport corridor (Jafarova, 2024). Since there is a great economic demand from the countries along the corridor, it is feasible to use the Middle Corridor as a trade route and economic zone with proper reforms and digital innovations. By resolving the issues regarding the corridor, such as shortening the transit time, implementing digitalized procedures, and reforming regulations, Azerbaijan has a huge potential to increase the efficiency of its operations on the Middle Corridor and thus focus on reaping its economic benefits.

*Income from transportation of goods in transport sector, 1000 manats**

2019	2020	2021	2022	2023	
5 125 582	6 093 602	7 390 633	8 633 943	7 292 103	Total
283 172	270 579	282 914	394 140	430 317	<i>Railway</i>
178 200	167 859	175 601	242 634	248 998	<i>Sea</i>
1 378 157	2 691 846	3 240 291	3 642 938	2 152 229	<i>Air</i>
2 292 011	2 323 741	3 049 506	3 567 157	3 617 825	<i>Pipelines</i>
1 313 258	1 127 013	1 197 650	1 238 914	1 101 742	<i>oil pipes</i>
978 753	1 196 728	1 851 856	2 328 243	2 516 083	<i>gas pipes</i>
994 042	639 577	642 321	787 074	842 734	<i>Road</i>

Income from transportation of goods in transport sector (State Statistical Committee, 2023)

Global collaboration on realizing the economic benefits of the Middle Corridor is necessary for Azerbaijan, and the country has signed various documents on the initiatives. In 2019, the first High-Level Transport Dialogue between the Republic of Azerbaijan and the European Union took place, which addressed partnerships in the fields of maritime, railway, road connectivity, and aviation (Urciuolo, 2024). In addition, the EU planned to invest 12.8 billion EUR to rehabilitate transport infrastructure building until 2030 (EU Neighbours East, 2019). On the Chinese side, there are opportunities to improve trade relations, with similar development patterns observed in both countries. As both countries highly value interconnectedness and focus on land-sea seamless operations, parallel evolving strategies give room for bilateral collaboration (Lianlei, 2016).

These initiatives would greatly assist Azerbaijan to diversify its economy and develop its non-oil sector. Azerbaijan's strategic investments in transportation infrastructure in addition to its favorable position at the crossroads of major trade routes, provides hope for the country to poised itself as a key connectivity hub between East and West.

Recommendations

The Middle Corridor has great opportunities lying before it which can be strengthened by hard and soft measures. Due to its attractive location, competitive transit times, and opportunities, the route poses a preferred means of transport for countries and investors (Jafarova, 2024). One of the factors for straightening the globalization along the Middle Corridor would be the involvement of governments of the corridor countries and various forms of collaboration among them to foster integration. As Eldem states (2022), the cooperation of Middle Corridor countries with China and the EU is critical for attracting investment and the volume of goods carried via the route. As President Aliyev mentioned in the 2022 SCO Summit in Samarkand, there are numerous opportunities for cooperation within the Middle Corridor and Belt and Road projects with both China and Europe (Wang and Miao, 2024).

The infrastructure investments approximated by the EBRD amount to 18.5 billion euros, presenting an opportunity for Azerbaijan to further strengthen its role as a major transit hub in the region (European Bank for Reconstruction and Development, 2023). An essential step would be investment to upgrade multimodal logistics hubs to ensure seamless coordination between rail, road, and maritime transport. The ongoing efforts to develop Azerbaijan's multimodal transport also cover expanding port capacity and addressing the technical issues, such as the differing track gauges on the Baku-Tbilisi-Kars railway through modernized corridor management and innovative initiatives (Vasa & Barkanyi, 2023). Furthermore, infrastructure development is not only limited by physical infrastructure, as digitalization measures are necessary for the seamlessness of transportation networks. By implementing proper measures, Azerbaijan would not only enhance the efficiency of its transport network but also contribute to its goal of economic diversification and growth.

In order to capitalize on the Middle Corridor's potential for economic diversification, Azerbaijan's view should be focused on transforming the corridor from a transport route to a fully integrated economic zone. This shift would highlight prioritizing trade facilitation through the corridor and implementing digital innovations on customs and border processes to increase the corridor's attractiveness to international investors. Additionally, cross-border collaboration is essential for fostering trade and economic exchange. The optimization of industrial capacity structure would be innovative in providing new opportunities for industrial cooperation among countries. The government should consider the formation of public-private partnerships to attract foreign direct investment (FDI), particularly to the non-oil sectors. Thus, a focus on corridor development that surpasses transport is needed to promote economic diversification, trade, and regional integration.

Conclusion

Azerbaijan's strategic positioning along the Middle Corridor makes it possible for significant opportunities to enhance its role in global trade networks and foster economic diversification. The development of multimodal transport systems and infrastructure would facilitate seamlessness of operations, further integrating the country into international supply chains. As the Middle Corridor continues to gain importance amidst geopolitical tensions, Azerbaijan stands a chance to benefit from increased transit operations along the corridor and thus attract investments in its non-oil sectors. To fully realize this potential, continued collaboration with regional partners, investment in infrastructure, and modernization of operational procedures are essential. By capitalizing on these opportunities, Azerbaijan will not only enforce its role as a transit hub between East and West, but also achieve sustainable economic growth and development.

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