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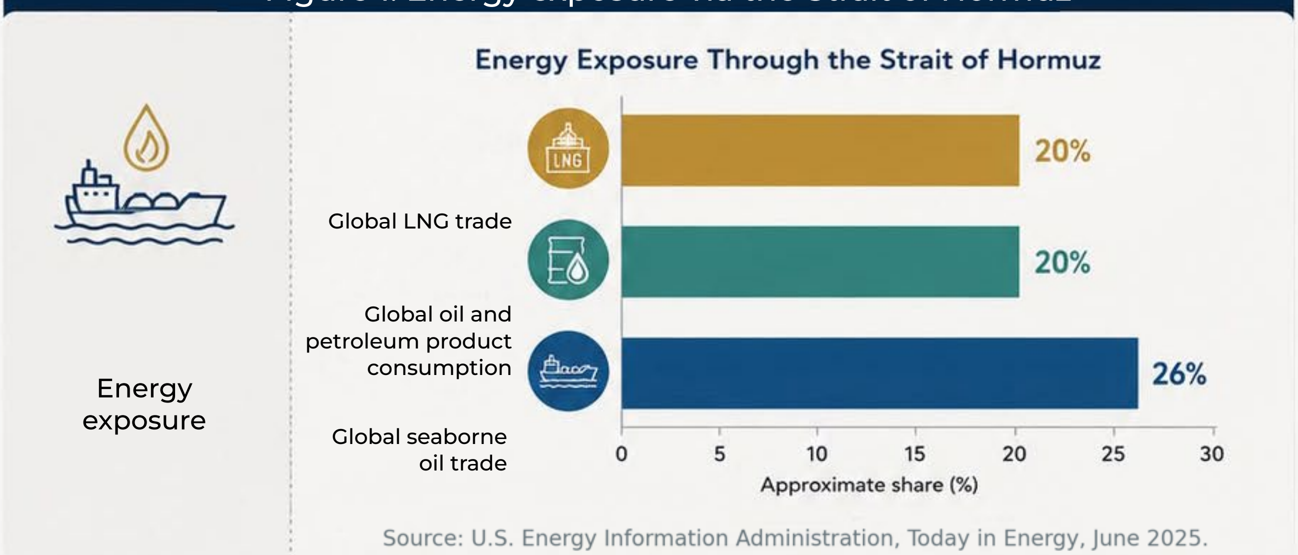
STRATEGIC CONTEXT

Türkiye, the Middle Corridor, and Post-War Eurasian Transit Politics

Strategic context

The aftermath of the Iran war has sharpened a core question in Eurasian geopolitics: Which states and corridors can still offer reliable connectivity when traditional routes are exposed to war, sanctions, and maritime disruption? Türkiye has moved quickly to argue that part of the answer lies in the Middle Corridor or Trans-Caspian International Transport Route (TITR) as it is formally known. Stretching from China through Central Asia, across the Caspian, through the South Caucasus and into Türkiye before reaching Europe, the route is not necessarily an invention; rather, it has recently returned to the apex of discussions on global trade. What has now shifted is its strategic context. Russia's attack on Ukraine had already reduced the political attractiveness of the Northern Corridor for many European and international firms. The Iran war has added a second layer of uncertainty by weakening confidence in routes prone to Iranian influence and by intensifying concern that Gulf instability could spill into maritime arteries central to both Asian trade and European energy security. In this context, Ankara's long-standing effort to convert geography into geopolitical leverage has acquired new urgency.

Figure 1: Energy exposure via the Strait of Hormuz



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The importance of this shift is inseparable from the Strait of Hormuz. Even before the current crisis, Hormuz was one of the world's most important energy chokepoints,[1] carrying roughly one quarter of seaborne oil trade and close to one fifth of global LNG trade. The deterioration in security after the Iran war has therefore had effects far beyond the Gulf. It has raised freight insurance costs, increased the premium on politically more secure transit routes, and revived questions about whether supply chains organized around maritime chokepoints remain fit for an era of recurring geopolitical instability. For Europe, the issue is particularly acute in gas markets. Although Europe's direct oil exposure to Hormuz is lower than Asia's, a meaningful share of its LNG balance remains vulnerable to disruption in Gulf exports, especially from Qatar. Various estimates suggest that a prolonged disruption could place approximately 10% of Europe's LNG imports at risk, particularly through exposure to Qatari LNG cargoes. This does not imply an immediate energy crisis, but it does tighten the link between transport geography and energy resilience.

Table 1. European LNG Exposure to Hormuz-Linked Supply

INDICATOR	EXPOSURE	INTERPRETATION
Qatari share of EU LNG imports	About 10%	Vulnerable to Hormuz disruption
EU LNG through Hormuz	About 8.7%	Estimates vary by the method used
Global LNG trade through Hormuz	About 20%	Mainly Qatar and the UAE

The European exposure is meaningful but materially lower than Asia's direct exposure to Gulf energy flows.

Source: IEEFA, 2025; ifo Institute, 2026; EIA, 2025. Gathered by the author.

Europe's energy concerns are therefore not confined to replacing Russian pipeline gas with LNG. They now involve a broader assessment of corridor resilience: whether suppliers can reach European markets through routes insulated from conflict, sanctions, and coercive interdiction. The European Union's (EU) growing interest in Central Asia and the Trans-Caspian route reflects that shift. The Middle Corridor is attractive not because it can replace maritime trade in volume terms,[2] but because it offers redundancy, selective speed, and geopolitical optionality. It also aligns with Europe's search for new energy and critical mineral linkages in Central Asia and the South Caucasus. For Ankara, this creates an opening to present Türkiye not merely as a transit state, but as part of a wider European answer to route insecurity.

Türkiye's transit ambition is rooted in structural geography but has always required a proactive strategy.[3] Since the end of the Cold War, successive governments have sought to turn the country's geographic position between Europe, the

1 Mannat Jaspal, "Asia's Energy Stress: Regional Impact of Hormuz Crisis," Observer Research Foundation Middle East, June 1, 2026, https://orfme.org/expert-speak/asias-energy-stress-regional-impact-of-hormuz-crisis/.

2 Andrii Buzarov, "How Middle Corridor Is Strengthening Türkiye-Armenia-Azerbaijan Cooperation," *Türkiye Today*, May 28, 2026, https://www.turkiyetoday.com/opinion/how-the-middle-corridor-strengthened-turkiye-armenia-azerbaijan-cooperation-3220820.

3 Anadolu Staff, "Türkiye's President Erdoğan Highlights Importance of Caspian-Transit East-West Middle Corridor," *Anadolu Agency*, May 14, 2026, https://www.aa.com.tr/en/world/turkiyes-president-erdogan-highlights-importance-of-caspian-transit-east-west-middle-corridor/3937288.

Black Sea, the Caucasus, Central Asia, and the Middle East into strategic capital. Energy projects such as the Baku-Tbilisi-Ceyhan (BTC) Pipeline and the Southern Gas Corridor established Türkiye as a connective platform, while the Marmaray rail link, port upgrades, and the Baku-Tbilisi-Kars (BTK) railway extended that logic to intermodal trade. The result is a layered connectivity doctrine: First energy transit, then logistics integration, and now an explicit attempt to shape the wider map of Eurasian trade routes.

The Middle Corridor should not, however, be overstated. It is best understood as a strategic alternative rather than a mature substitute for established trade routes.[4] Compared with the Northern Corridor, it avoids Russian territory and the sanctions, compliance, and reputational risks attached to it. Compared with routes crossing Iran, it is less exposed to sanctions and, after the war, to direct war-risk calculations. Compared with maritime shipping, it can offer faster transit for selected goods and reduced exposure to some chokepoints. But the corridor remains multimodal, politically fragmented, and infrastructure-constrained. It depends on coordination among states along the route with uneven capacities and divergent interests, and it still faces serious bottlenecks at Caspian ports, customs interfaces, rail links, and terminals.

The Iran war does create a strategic opening for Türkiye by increasing demand for alternatives to both Iran-linked and chokepoint-dependent routes. But this opening does not amount to guaranteed success. Türkiye's emergence as a primary Eurasian transit hub will depend less on rhetoric than on whether the Middle Corridor becomes commercially reliable, politically coordinated, and scalable enough to compete with maritime routes on cost and predictability as well as on geopolitics.

Assessing the viability of the Middle Corridor

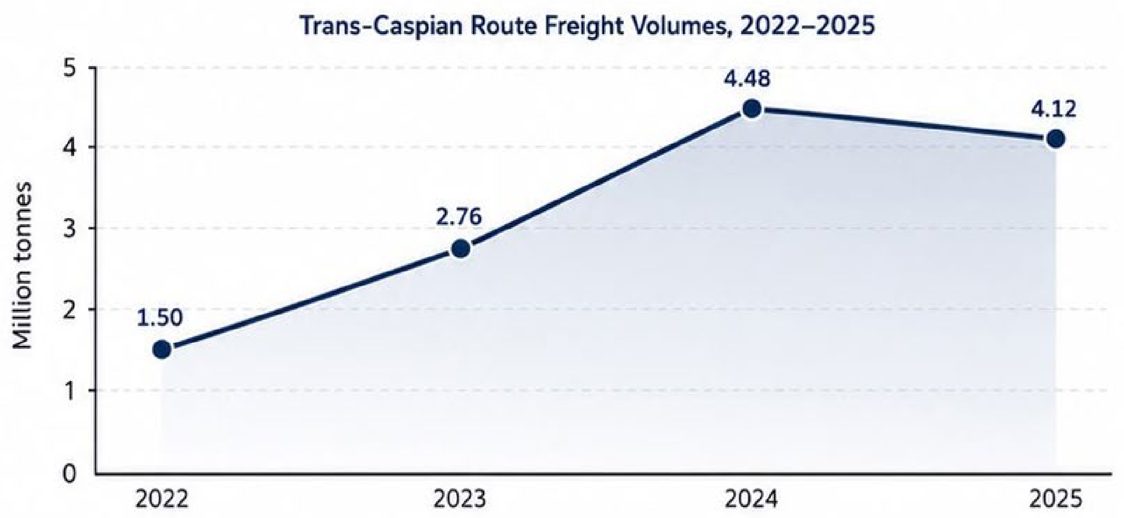
Strategically, the corridor is more viable today than at any point in the past decade because the geopolitical costs attached to alternative routes have risen. Commercially, however, viability remains conditional. The core route links Chinese and Central Asian production zones to Europe through Kazakhstan, the Caspian ports of Aktau and Kuryk, Azerbaijan's Alat/Baku complex, Georgia, and Türkiye before feeding into European rail and port networks. Türkiye's role within this chain is important but not singular. It is the western gateway and one of the few states on the route with meaningful domestic market depth, diversified port access, and an advanced intermodal base. The BTK railway and expanding logistics facilities have improved its ability to absorb and onward-route cargo. Ankara has also framed connectivity as a systems question rather than a collection of flagship projects, which is analytically sound because corridor competitiveness depends on end-to-end performance.

Türkiye enters this period with several infrastructural advantages. It has a relatively dense transport network linking the Black Sea, Mediterranean, and Aegean ports to inland rail and road systems. The BTK railway provides the clearest articulation of the South Caucasus segment into Anatolia, while the Marmaray tunnel enables uninterrupted rail passage between Asia and Europe through Istanbul. Investments in logistics terminals and intermodal hubs are intended to reduce transfer friction at the Turkish end of the route. Yet capacity on paper is not the same as throughput under operating conditions. Rail bottlenecks, last-mile constraints, rolling stock availability, and differences in scheduling and tariff regimes across borders still affect reliability. Türkiye may be the strongest individual node in the corridor's western half, but it cannot compensate on its own for weaknesses in the Caspian and Caucasus segments. The route will continue to be judged by end-to-end reliability rather than by Turkish infrastructure alone.

The institutional backbone of this route lies in reaching uniformity across Middle Corridor states, which essentially seeks to coordinate tariffs, logistics, digitalization, and operating standards across the participating countries. This matters because the corridor's core problem is not simply moving freight over land but reducing the transaction costs created by multimodality and multiple sovereignties. Freight volumes have risen quickly from a low base, and international assessments suggest that with operational reforms and targeted investment, trade volumes could expand substantially while transit times fall. Even so, these projections should be treated as contingent. The central question is whether political momentum can be converted into routinized, commercially disciplined coordination rather than episodic gains driven by crisis and official promotion.

Freight carried along the TITR increased from roughly 1.5 million tons in 2022 to about 4.48 million tons in 2024, before easing to around 4.12 million tons in 2025. This underscores both the corridor's growing relevance and the relatively modest scale from which it is developing.

Figure 2: Freight volumes on the Trans-Caspian route, 2022–2025



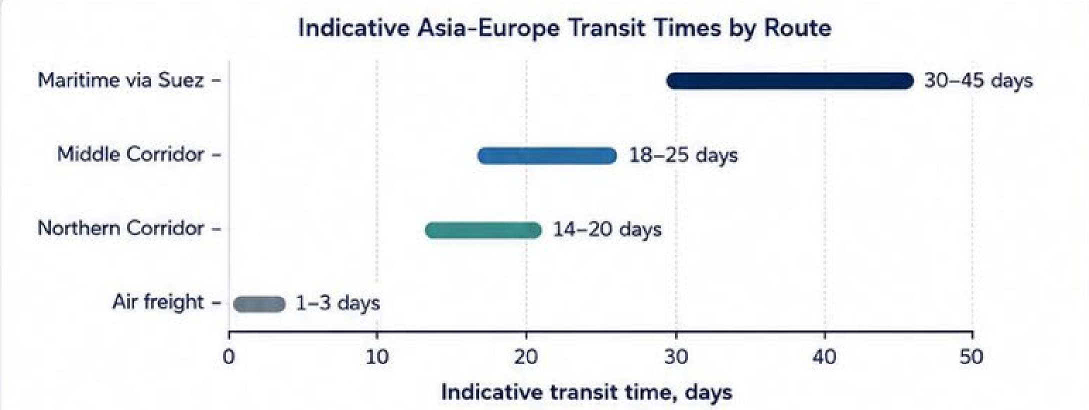
Source: Interfax; Astana Times; OECD. 2025 figure reported as annual cargo volume.

Author generated figure.

Compared with maritime routes, the Middle Corridor offers a selective rather than general advantage. Sea freight remains cheaper for most bulk cargo and containerized trade at scale, and no realistic ten-year scenario places the corridor in a position to displace maritime shipping between Asia and Europe. Its value lies instead in time sensitivity, diversification, and resilience. For selected cargoes, especially higher-value goods where speed matters, optimized operating conditions and transit times of approximately eighteen to twenty days can compare favorably with maritime journeys of thirty to forty-five days, particularly when insurance costs, rerouting, and delays rise.

Recent crises affecting the Red Sea and the Strait of Hormuz have reinforced that point. But chokepoint risk does not automatically make overland routes economical. Maritime trade still benefits from scale efficiencies, mature service ecosystems, and integrated financing that the Middle Corridor does not yet match. The route is better understood as a hedge and supplement than as an alternative to maritime trade writ large. Indeed, even under optimistic assumptions, maritime transport is likely to remain the dominant conduit for Asia-Europe trade because of its unmatched scale and lower unit costs. The Middle Corridor's comparative value lies

Figure 3: Indicative route-specific Asia-Europe transit times



Source: World Bank; OECD; regional logistics assessments. Ranges are indicative and route-specific.

Author generated figure.

not in replacing maritime routes, but in providing diversification and resilience for selected cargoes and politically exposed supply chains.

Against the Northern Corridor through Russia, the Middle Corridor's political advantages are clearer. Since 2022, firms using Russian transit have had to contend with sanctions exposure, payment frictions, reputational risk, and uncertainty about the regulatory environment. Even where transit remains legally possible, many European firms regard the route as strategically compromised.[5] The Middle Corridor's advantage over passage through Iran has become more pronounced after the Iran war. Before the war, Iranian territory could still be framed as a viable southern alternative linking the Gulf and Eurasia. That case is now weaker. Sanctions risks remain high, physical security perceptions have deteriorated, and the political premium on avoiding Iran-linked corridors has increased among credible commercial actors. Even so, the comparison is not entirely one-sided. Routes through Russia and Iran often offer greater territorial continuity and avoid some of the transshipment frictions built into the Caspian crossing. The Middle Corridor's political attractiveness has therefore improved faster than its operational simplicity.

5 Anne Kerriou, "China-EU Rail Freight Volumes Fell Again in 2025," *Upply Market Insights*, January 30, 2026, https://market-insights.upply.com/en/china-eu-rail-freight-volumes-fell-again-in-2025.

The main constraint remains the Caspian crossing itself. Cargo can still lose strategic time at borders despite physical infrastructure improvements. Port upgrades at Aktau, Kuryk, and Alat have improved capacity, but vessel availability, weather conditions, and turnaround times continue to affect reliability. Transit times are improving, yet average commercial performance remains less impressive than politically motivated headline figures often imply.

Overall, the Middle Corridor is commercially viable in the sense that it can attract greater freight volumes, deepen regional integration, and occupy a more important place in Eurasian risk calculations. It is not yet viable as a fully scalable substitute for the most established trade arteries. Türkiye's opportunity lies in helping narrow that gap. If Ankara can combine domestic logistics upgrades with serious work on corridor governance, it will strengthen its claim to hub status. If it relies mainly on geopolitical rhetoric, the corridor's momentum may remain episodic and crisis-driven. The current environment favors the Middle Corridor because alternatives have become less attractive. The next phase will test whether it can become attractive on its own commercial merits.

TABLE 2: KEY BOTTLENECKS ALONG THE MIDDLE CORRIDOR

SEGMENT	MAIN CONSTRAINT	SEVERITY
Caspian crossing	Vessel availability, weather, turnaround times	High
Border and customs interfaces	Fragmented procedures and paperwork	High
Rail networks	Uneven capacity and rolling-stock constraints	Medium
Ports and terminals	Transshipment and last-mile friction	Medium
Digital systems	Limited interoperability	Medium

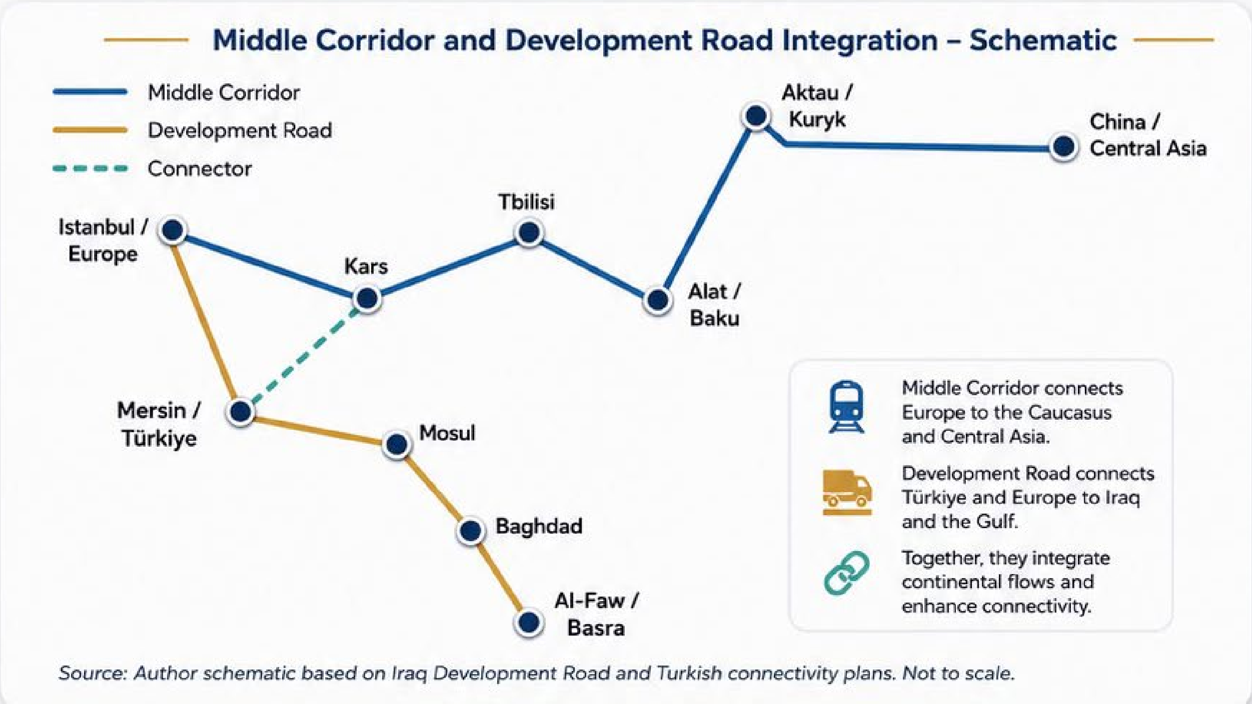
The corridor's main constraints are institutional and operational.

Source: World Bank, 2023; OECD, 2023; ADB, 2024. Gathered by the author.

Linkages with the Development Road Project

For Türkiye, the Middle Corridor becomes more valuable if it is not treated as a standalone east-west route. This is where the Iraq Development Road matters. The strategic logic is straightforward. If cargo from the Gulf can move north through Iraq into Türkiye and then onward to European and wider Eurasian networks, and vice versa, Türkiye becomes more than the western terminus of a trans-Caspian route. It becomes the hinge between multiple corridors. In Ankara's preferred formulation, the Middle Corridor and the Development Road are mutually reinforcing, two-way routes. One links Europe to the Caucasus and Central Asia; the other links Europe and Türkiye to Iraq and, indirectly, to the Gulf. Together, they could reposition Türkiye from a transit state serving discrete routes into a logistics center located at the intersection of several continental flows.

Figure 4: Integration of the Middle Corridor and Development Road schematic



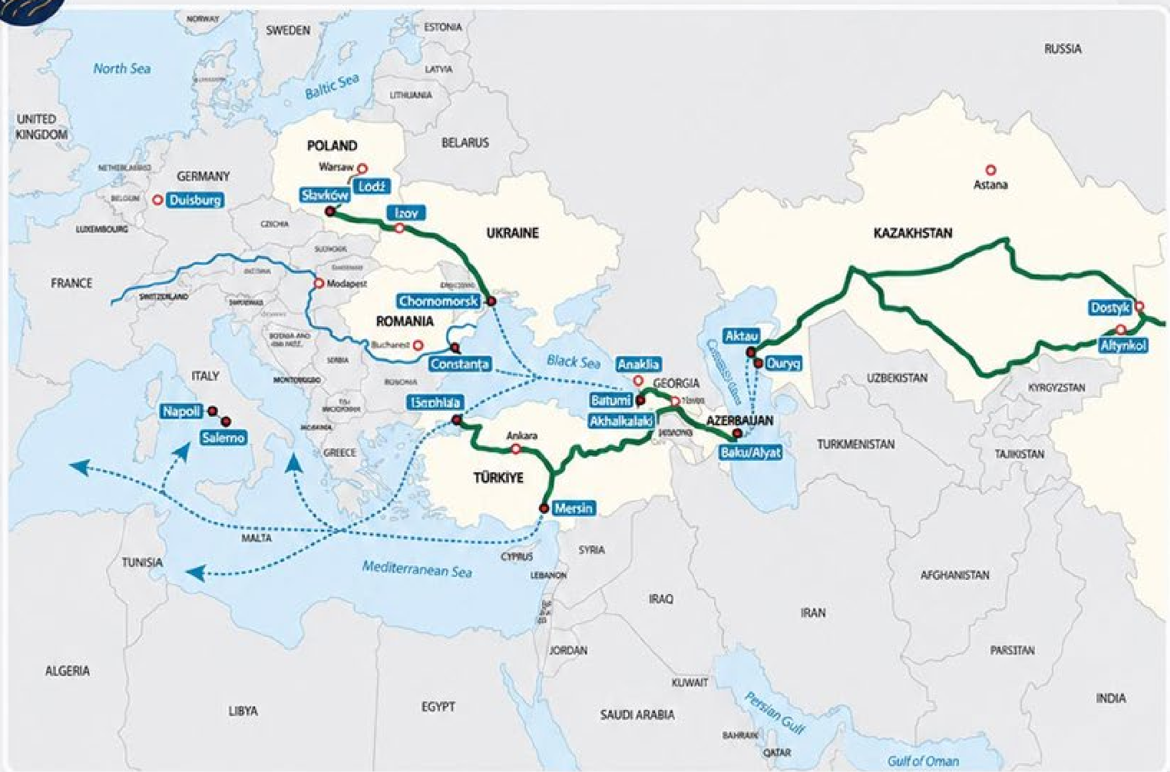
Source: Author schematic based on Iraq Development Road and Turkish connectivity plans. Not to scale.

Author generated figure.

That logic has strengthened in the aftermath of the Iran war and rising pressure on Hormuz. If Gulf exporters and investors conclude that maritime concentration risk has become more acute, they will look more seriously at overland and hybrid alternatives. The Development Road cannot replace Gulf shipping volumes, but it could become a politically significant supplementary channel for time-sensitive goods and diversified trade flows. For Türkiye, a functioning north-south axis through Iraq would widen its strategic catchment area and make its transit role less narrowly east-west.

Iraq and the Gulf states could play an important role in reshaping regional trade flows through this project. Baghdad presents the Development Road as both an infrastructure and an economic diversification strategy.[6]

6 Ayşe Bucuoğlu Bodur, "Development Road Project to Bring in $55B Boost to Turkish Economy," *Anadolu Agency*, January 16, 2025, https://www.aa.com.tr/en/economy/development-road-project-to-bring-in-55b-boost-to-turkish-economy/3863203.



For Gulf actors such as Qatar and the United Arab Emirates, participation offers commercial access, political influence in Baghdad, and a stake in Iraqi stabilization. For Türkiye, Gulf participation is essential because it brings capital, political weight, and cargo-generating potential. It also furthers the economic integration between Türkiye and the Gulf Cooperation Council (GCC). Without it, the Development Road risks remaining a limited bilateral project; with it, the route begins to look like a broader geoeconomic corridor connecting the Gulf to Europe.

The opportunity for linking Gulf exports to Europe through Türkiye is therefore real, but it should not be exaggerated. In the near to medium term, the strongest prospects lie in containerized trade, manufactured goods, construction materials, and supply-chain diversification rather than large-scale hydrocarbon redirection. Oil and LNG will still move most efficiently by sea or through existing pipeline systems. But if Europe seeks not only new suppliers but also more resilient trade routes around energy-intensive commerce, Gulf-Türkiye-Europe linkages gain wider strategic relevance.

The Development Road nevertheless faces more serious implementation risks than current narratives acknowledge. The most consequential is the Iraqi governance environment. Corruption, weak state capacity, and the risk of renewed insecurity all raise project exposure. Commercial credibility depends not simply on building rail and road infrastructure, but on ensuring predictable customs procedures, contract enforcement, and physical protection. As the project runs through an Iraq still shaped by internal political competition, sectarian rivalries, and uneven center-periphery relations, implementation could easily become hostage to disputes unrelated to logistics. In that sense, the Development Road is both a geopolitical multiplier for Türkiye's ambitions and a conduit for Iraqi political risk. The more Ankara ties its hub strategy to Iraqi transit, the more exposed it becomes to Iraq's institutional volatility. In the future, this could necessitate further Turkish military action in Iraq, likely at the cost of straining relations with Baghdad.

Even with these caveats, the Development Road remains strategically significant because it broadens the logic of the Middle Corridor from an east-west bypass into a wider connectivity matrix. If successful, it would strengthen Türkiye's claim to be the principal interface between Europe, the Gulf, the Caucasus, and Central Asia. If it stalls, Ankara will still retain the Middle Corridor, but without the north-south reinforcement that could make its logistics hub role more generic.

Geopolitical developments supporting Türkiye's vision

Türkiye's connectivity agenda has gained support not only from shifts in trade economics but also from changes in regional geopolitics. The main enabling condition is that several neighboring actors now have stronger incentives to diversify away from routes dominated by Russia or exposed to Iran-related instability. Yet that support is uneven and often tactical rather than durable. Many states favor a stronger Middle Corridor because they want optionality, not because they accept Türkiye as the uncontested center of Eurasian connectivity. Ankara's success will therefore depend on managing partnerships in an environment where most participants want the corridor to exist, but few want excessive dependence on any single hegemon over the route.

One potentially important development is the gradual, uneven movement toward Armenia-Türkiye normalization.[7] Full normalization remains uncertain, and transport reopening is still tied to the more sensitive Armenia-Azerbaijan track. Even limited progress, however, could reduce regional fragmentation and add route flexibility across the South Caucasus. The obstacle however is that transport normalization remains inseparable from unresolved sovereignty, security, and domestic political conflict happening at both micro and regional scales.

Azerbaijan remains indispensable to Türkiye's corridor strategy. Baku is both a strategic partner and a co-architect of the South Caucasus segment, and its infrastructure investments have strengthened the corridor's material foundations. But Azerbaijan's centrality also introduces geopolitical complexity. Debates over the Zangezur Corridor, Armenian sovereignty, Russian influence, and Iranian sensitivities show that connectivity in the South Caucasus is not purely technical. For Ankara, the advantage is a reliable partnership with Baku; the risk is continued exposure to a conflict legacy that produces deadlock.

7 Emre Basaran, "Turkey Removes a Restriction on Direct Trade with Armenia to Improve Ties," *Euronews*, May 13, 2026, https://www.euronews.com/business/2026/05/13/turkey-removes-a-restriction-on-direct-trade-with-armenia-to-improve-ties.

Türkiye's engagement with Central Asia has also become more strategically coherent. For Kazakhstan and other Central Asian states, the Middle Corridor offers a way to diversify beyond Russia and, to a lesser extent, China-dominated logistics frameworks.[8] Their support, however, is transactional rather than ideological. These states back routes that improve strategic autonomy and move goods efficiently; they will not absorb commercial losses for political symbolism or Turkish aspirations. Ankara's challenge is therefore to convert diplomatic alignment into logistical reality.

External actors increasingly view connectivity initiatives through a competitive geopolitical lens. The EU has become more supportive of the Trans-Caspian route because it aligns with diversification away from Russia and complements broader engagement with Central Asia. Gulf states involved in the Development Road discussions see an opportunity to connect the region to European markets. China's position is more ambivalent. Beijing can benefit from greater route redundancy, but it generally prioritizes cost efficiency over commitment to any single transport corridor. It is therefore unlikely to privilege the Middle Corridor if other Belt and Road routes remain cheaper or easier to manage. The United States has been less consistent than the EU, but it has clear reasons to support routes that reduce Russian and Iranian leverage across Eurasia. None of these actors is backing Türkiye's vision out of deference to Ankara. They support elements of it insofar as those elements serve their own interests and priorities. That gives Turkish diplomacy room to maneuver, but little room to monopolize the corridor.

8 Göktuğ Çalışkan, "From Astana to Turkistan: Decoding Erdoğan's Middle Corridor Vision," *Politics Today*, May 27, 2026, https://politicstoday.org/from-astana-to-turkistan-decoding-erdogans-middle-corridor-vision/.

TABLE 3.
Comparative Assessment of Eurasian Transit Corridors

VARIABLE	MIDDLE CORRIDOR	NORTHERN CORRIDOR	IRAN ROUTE
Sanctions exposure	Low	High	High
Political risk	Medium	Medium	High
Commercial maturity	Medium	High	Medium
Scalability	Medium	High	High
Strategic appeal for Europe	High	Low	Low
Transit speed	Medium	Medium	Medium

The Middle Corridor's strongest advantage is political and geoeconomic diversification rather than commercial superiority.

Source: Assessment based on World Bank, OECD, EBRD and regional transport reporting. Gathered by the author.

The Iran war may also shift regional alignments in ways that strengthen Türkiye's position. If Iran emerges more isolated and less trusted as a transit environment, neighboring states will search harder for alternatives. If Gulf producers view Hormuz as structurally riskier, they may become more receptive to hybrid land-sea strategies involving Iraq and Türkiye. If Europe interprets the war as further evidence that energy security depends on route diversity as much as supplier diversity, Ankara's value proposition gains force.

Türkiye's current position should therefore be read as an enabling moment rather than a settled victory. The country has many of the ingredients needed for hub status: location, infrastructure, diplomatic reach, and a persuasive narrative of strategic relevance. What it lacks is decisive corridor lock-in. The Middle Corridor is more plausible than before, the Development Road is strategically promising, and post-war realignment may reinforce both. But each remains contingent on cooperation among states whose interests overlap without fully converging.

Conclusion

Current geopolitical conditions do improve the prospects of the Middle Corridor, and they do so in ways that favor Türkiye. The combined effects of the Iran war, pressure on the Strait of Hormuz, sanctions risk around Russia, and Europe's search for more resilient connectivity have increased demand for alternative routes across Eurasia. Türkiye is well placed to benefit because it sits at the intersection of the South Caucasus, European, Mediterranean, and potentially Gulf-facing networks. In policy terms, Ankara's claim that it can serve as a critical transit hub now carries more weight than it did when maritime routes appeared secure and Russian or Iranian corridors remained politically usable. But this improvement is relative rather than absolute. The Middle Corridor has become more attractive as competing routes have become riskier, but it is not yet fully competitive because it has yet to resolve its own structural deficiencies.

The main unresolved obstacles remain infrastructural, institutional, and geopolitical. On infrastructure, the corridor still depends on improved rail capacity, more efficient port operations, greater vessel availability on the Caspian, and better integration across its several nodes. On institutions, customs harmonization, tariff coordination, digitalization, and end-to-end logistics management remain incomplete. Geopolitically, the route still crosses politically sensitive terrain in the South Caucasus and depends on a level of regional cooperation that cannot be taken for granted. The same applies to the Development Road, whose strategic logic is compelling, but whose execution depends on financing, Iraqi state capacity, and sustained political alignment among multiple external actors. These are not secondary issues. They are the difference between a corridor that attracts policy attention and one that wins durable commercial trust.

Over the next decade, Türkiye can realistically emerge as one of the principal Eurasian transit hubs, but probably not as the singular dominant one. Eurasian connectivity is becoming more plural, and hence multiple corridors are likely to coexist, compete, and periodically substitute for one another as political conditions shift. Türkiye's best-case outcome is therefore not monopoly but indispensability in further regional connection. Achieving that will require continued investment in domestic transport infrastructure and stronger corridor-governance reforms with partner states. The long-term success of the Middle Corridor will depend on the route's ability to compete economically with established maritime channels, not simply on the fact that war and chokepoint pressure have made alternatives more desirable. The Iran conflict has opened a strategic window for Türkiye. Whether that window produces a durable shift in Eurasian trade geography will depend on execution more than opportunity.