

Transit Rivalry Or Partnership? INSTC Vs. Middle Corridor In Central Asia

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Abstract

The Middle Corridor and the International North-South Transport Corridor (INSTC) represent two significant transcontinental trade routes shaping Eurasian connectivity. Both corridors aim to diversify trade flows, reduce dependency on traditional maritime routes, and enhance economic integration. However, their overlapping geographic reach in Central Asia has raised questions about whether they are rivals competing for influence or potential partners fostering regional connectivity. This article examines the geopolitical, economic, and infrastructural dimensions of these corridors, analyzing their respective strengths, challenges, and strategic priorities. By assessing the interests of key stakeholders such as Russia, Iran, Turkey, and China, the study highlights areas of competition, including access to transit hubs and trade facilitation policies, as well as opportunities for collaboration, such as shared infrastructure and mutual reduction of logistical costs. The findings underscore the corridors' complementary potential in driving sustainable development and enhancing Eurasia's strategic role in global trade, provided regional and international actors prioritize cooperative frameworks over zero-sum competition.

Keywords: INSTC, OBOR, Middle Corridor

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I. Introduction

As the dynamics of international trade evolve, Eurasia has become a vital location for connectivity initiatives meant to connect the continents of Asia, Europe, and the Middle East. The Middle Corridor and the International North-South Transport Corridor (INSTC) are particularly significant routes that are changing transcontinental trade in the Eurasian region. The INSTC, led by Russia, Iran, and India, aims to provide a strategic substitute for conventional marine routes by connecting South Asia to Europe via the Middle East and Central Asia. Simultaneously, the Middle Corridor, sponsored by Turkey and backed by Central Asian nations, presents itself as an essential conduit between East Asia and Europe, avoiding Russia and offering a crucial link to the Belt and Road Initiative (BRI).

Although the goals of both corridors are to lower trade barriers and improve regional connectivity, discussions concerning their link have been triggered by their shared geographic focus in Central Asia. Can they serve as complementing routes that, taken together, deepen Eurasian integration, or are they doomed to battle for influence and trade volumes? The solution to this question has important ramifications for economic growth, regional stability, and the geopolitical power dynamics among key players including Russia, China, India, and Turkey. This article explores the economic potential, geopolitical foundations, and infrastructure synergies between the Middle Corridor and the INSTC. The study aims to provide light on these corridors' future role in influencing Eurasian connectivity by analysing areas of rivalry and potential for cooperation.

Overview of the INSTC

A major multimodal commercial network, the International North-South Transport Corridor (INSTC) links Europe with South Asia, the Middle East, and Eurasia. The corridor, which was conceived in 2000 as part of a trilateral agreement between Russia, Iran, and India, intends to cut down on transportation expenses and time by providing a substitute for conventional ocean routes like the Suez Canal. The INSTC aims to enable smooth communication between Indian ports, the Iranian port of Bandar Abbas, and important logistics hubs in Russia, Central Asia, and Europe by combining road, rail, and maritime connections (PAL, 2024)

With its routes crossing strategic areas of geopolitical and economic significance, the INSTC, which spans more than 7,200 kilometres, has developed into an essential part of Eurasian connectivity. It is especially important for India, which wants to increase commerce with Russia and Iran while avoiding Pakistan to gain access to Central Asia and Europe. While Russia sees the INSTC as a way to increase its influence in Central Asia and lessen reliance on trade routes controlled by the West, Iran sees it as a chance to grow its role as a regional transit centre despite international sanctions (Shujaat Naeem Azmi et al., 2024). Additionally, given recent global shocks like the Russia-Ukraine war and changing U.S.-China trade dynamics, the corridor supports the larger objectives of diversifying global supply chains and bolstering the robustness of Eurasian trade networks.

With the strategically important and hydrocarbon-rich regions of Central Asia and Eurasia, India seeks a positive and strategic outreach. The International North-South Transport Corridor (INSTC), which connects Mumbai, India, and Saint Petersburg, Russia, has been approved by 13 nations and has reduced freight costs by 30% and transit times by 40% when compared to the Suez Canal route (Chatterjee, 2018)

India, Iran, Russia, Azerbaijan, Armenia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkey, Ukraine, Belarus, Oman, and Syria are the 13 members of INSTC with Bulgaria now a member as an observer (MEA, 2023). From India to Northern and Western Europe, the INSTC offers a multimodal, economical, and efficient way to travel. Considering the geostrategic and economic significance of each participating nation, the corridor could improve India's connectivity with Central Asia and the Eurasian Region and vice versa.

INSTC has become essential for Russia as a result of Western sanctions that are interfering with trade along the Northern route. Russia and Iran expedited the building of a vital 164-kilometre railway line that connects Rasht and Astara via Anzali as part of the Western Route of the INSTC in May 2023 (Times, 2022).

With the Rasht-Astara railway coming closer to completion in 2027 with the help of a Russian US\$1.4 billion interstate loan, the corridor gained significant momentum in recent times. Furthermore, the completion of the vital 628-kilometre Chabahar-Zahedan railway, which will link the key Chabahar port with the Iranian railway network and INSTC will further boost the intensity of the corridor (Reuters, 2023)

India can use the Middle Corridor as part of INSTC to make it easier to access Central Asia, the Caspian Sea, the larger EU markets, and other regions. The existing 25–30 days transit time along the Western Route of INSTC will be shortened to just 10 days upon the completion of the Rasth–Astara railway line. Through the Baku-Tbilisi-Batumi or Baku-Tbilisi-Kars routes, New Delhi will be able to access European markets and the wider Black Sea region more quickly thanks to the Western Route of INSTC, which passes through the Middle Corridor in Azerbaijan. For India, the Middle Corridor and INSTC's convergence will lower the likelihood of interruptions and assist New Delhi in gaining more soft power clout in the area. Azerbaijan, Georgia, and the Central Asian Republics are among the nations that stand to gain greatly from the Middle Corridor proposal. Stronger diplomatic ties, regional integration, and economic diversification are all possible outcomes of it. Even in the face of persistent geopolitical difficulties, India can use its ties to the area to create new cultural and economic alliances in Eurasia.

For Central Asian nations hoping to increase trade with Europe and lessen their dependency on China and the geopolitical concerns that come with it, the Middle Corridor is a vital route. Trade along the Middle Corridor is predicted to triple by 2030 with the help of the United States and other like-minded countries. As a result, commerce between Azerbaijan, Georgia, and Kazakhstan will rise by 37%, while trade between these nations and the EU will rise by 28% (World Bank, 2023).

Overview of the Middle Corridor

The Trans-Caspian International Transport Route (TITR), now known as the Middle Corridor, is a multimodal trade network that spans Central Asia, the Caspian Sea, and the South Caucasus to connect East Asia to Europe. By providing a more varied and robust route for the transportation of products and energy, it acts as a strategic substitute for conventional Eurasian trade routes, especially those that run through Russia. The route runs through China, Central Asia (Kazakhstan, Uzbekistan, and Turkmenistan), the Caspian Sea, Azerbaijan, Georgia, and Turkey, connecting to European markets through the Black Sea and Eastern European rail systems (Kenderdine, 2021).

Originating in China as part of the Belt and Road Initiative (BRI), the Middle Corridor travels across Central Asia before crossing the Caspian Sea. It then travels across Turkey and the South Caucasus before arriving in Europe. With important infrastructure including the Baku-Tbilisi-Kars (BTK) railway, Caspian Sea ports like Aktau and Alat, and logistical centres in Turkey and Europe, the corridor depends on rail, road, and maritime transportation. With the disruption of conventional supply networks and the heightened sanctions on Russia following the Russia-Ukraine war, the Middle Corridor has become more well-known as a non-Russian route. (Eldem, 2022)

The Middle Corridor is quickly becoming a more popular alternative trade route with its shorter distance, unexplored market access, and growth potential, which offers a viable substitute for the well-established Northern Corridor, connecting Europe and Asia. Amid geopolitical unpredictability, Central Asian and Caucasus countries

worked together to create this autonomous multimodal transportation route linking China, the Caspian, the Black Sea, and Central Asia following Russia's incursion of Crimea in 2014 (Ozat & Nelson, 2023)

To expand and facilitate the infrastructure and trade along this route, Kazakhstan, Azerbaijan, and Georgia signed TITR and established a Middle Corridor coordination group. The route is 2,000 miles shorter than Russia's Northern Corridor and consists of more than 4,250 kilometres of rail lines and 500 km of the seaway (Huseynov et al., n.d.)

An important part of the Middle Corridor, which connects Azerbaijan, Georgia, and Turkey, was completed in 2017 with the opening of the 826-kilometer Baku-Tbilisi-Kars railway line (RFE/RL's Azerbaijan, 2017) The transit train from China arrived in Turkey in 12 days, and Prague in 18 days via Marmaray (DAILY, 2021)

The Middle Corridor saw 49,000 cargo trains pass through between 2014 and 2021, representing a 92.7 per cent yearly increase. 1.464 million equivalent Units (TEU) were transported by 15,183 container trains in 2021, representing a notable rise of 22.4 and 29 percent, respectively. Despite strong freight development, the Middle Corridor represented only 4% of EU-China trade volume and 5% of total value (World Bank, 2023).



Source: (Kumar, 2023)

For its own geostrategic and geoeconomic objectives, Europe is working hard to develop the Middle Corridor, including diversifying its energy sources for greater energy security. An agreement to buy gas from the Caspian Sea via the Southern Gas Corridor was reached by the EU¹ in July 2022 (Ziomecki, 2022) International financial organisations such as the US Agency for International Development (USAID), the World Bank, the Asian Development Bank (ADB), and the European Bank for Reconstruction and Development (EBRD) gave the route a lot of attention after the geopolitical uncertainty in the region followed by the Russia- Ukraine war. The US has also expressed support for "continued investment in and development" of the Middle Corridor and energy infrastructure, given the corridor's geostrategic and geoeconomic significance for Europe and Central Asia (The White House, 2023).

The Middle Corridor countries have enormous potential as markets and partners for the EU due to the modern global supply chain reconfiguration, the European energy crisis, and the EU's aim to find alternatives to the trans-Siberian railway freight routes (Tuba, 2022)

II. Importance Of Central Asia In Global Trade Dynamics

Known as the "Heart of Eurasia," Central Asia plays a crucial role in international trade because of its advantageous location at the intersection of the Middle East, Asia, and Europe. The region, comprising Tajikistan, Kyrgyzstan, Turkmenistan, Uzbekistan, and Kazakhstan, is an important transit centre for important international trade and transportation routes. Global supply chains are supported by trade facilitation, which lowers the time and expense of shipping goods internationally and encourages more inclusive commerce. Throughout the various stages of the COVID-19 epidemic, supply chains have benefited from trade facilitation measures at the border that have helped them deliver commodities where they were required. Nonetheless, COVID-19 and Russia's war of aggression in Ukraine are just two examples of the ongoing disruptions to global supply chains. These incidents have had a significant impact on regional and international trade patterns, upended global supply chains, and changed trade routes, further taxing logistics and raising concerns about trade prices in Central Asia. Through better infrastructure and more efficient logistics, nations like Kazakhstan, Uzbekistan, and Turkmenistan have the potential to connect their economy to global markets through the middle corridor and INSTC (Gaur, 2023).

¹ European Union

Important hubs in the corridor that connect Central Asian transportation networks to Azerbaijan, Georgia, and Turkey are ports like Aktau (Kazakhstan) and Turkmenbashi (Turkmenistan). By serving as the Middle Corridor's geographical link, Central Asia facilitates the multimodal transportation of products between China and Europe via roads, trains, and ships. The Middle Corridor enhances China's Belt and Road Initiative and further integrates Central Asia into global supply chains offering a different westward route (Colakoglu, 2018).

After international sanctions, traffic on the Northern Corridor has significantly decreased paving the way to transit from new corridors. Even while there have been difficulties, the rerouting of trade has also brought about new opportunities, especially for Central Asia and the Caucasus. Its multimodal and border-crossing characteristics place it at a structural disadvantage in comparison to other routes as traffic and focus migrate to the Middle Corridor, which passes across Central Asia as an alternate transit route. To improve regional integration and partially offset the time and expense increases that businesses and consumers face along this and other routes, trade facilitation measures continue to be crucial (OECD, 2023).

The economies of the region have remained resilient since the start of the conflict, and trade has increased in many nations, partly due to the development of alternate trade routes. Except for oil and gas, Armenia, Georgia, and the Kyrgyz Republic experienced a 60 percent increase in their share of trade with key partners like China, the European Union, Russia, and the United States in 2022 (Azour, 2024)

Through Central Asia, trade volumes between China and Europe have more than doubled. Despite making up a very minor portion of all trade between China and Europe, the Middle Corridor has great potential for the economic growth of the Caucasus and Central Asia as well as for its incorporation into international supply chains. Given that global value chains are becoming more integrated and dispersed throughout the globe, connectivity is crucial.

By fostering regional integration, lowering trade costs, and boosting trade volumes, transport connectivity can lessen these problems and boost Central Asia's competitiveness (ITF 2019). COVID-19 and the Russo-Ukrainian war are two examples of the ongoing disruptions to global value chains. International sanctions have raised the cost of shipping cargo along the Northern Corridor, resulting in major delays and an increase in freight tariffs worldwide, even though Central Asia has benefited greatly from recent large infrastructure investments made as part of the Belt and Road Initiative. Countries are searching for ways to meet their changing connectivity needs as shocks are putting additional strain on logistics and raising uncertainty about trade prices. The Trans-Caspian International Transport Route (TITR, also called the Middle Corridor), and INSTC may see a rapid change in regional trade and transit strategy towards Central Asia as a result of the disruptions to freight on the Northern Route (ITF-OCED, 2019)

III. Strategic Rivalries In Connectivity

Chinese and One Belt and One Road Initiative

The strategic importance for Beijing's Belt and Road Initiative (BRI), which offers an alternate and supplemental route to the main China-Europe transport corridors, China is interested in the Middle Corridor. This route offers a way to Europe over the Caspian Sea, avoiding Russia and connecting Central Asia, the South Caucasus, and Turkey. China has an interest in this corridor for several reasons (Donnellon-May, 2023) China may lessen its dependency on the Northern Corridor, which travels via Russia, and the Southern Corridor, which travels via Iran, by utilising the Middle Corridor. The Middle Corridor provides a more adaptable and durable economic route in light of geopolitical tensions, sanctions against Russia, and worries about possible chokepoints in the Southern Corridor.

By establishing a hybrid overland and marine network between Central Asian nations and Europe, it further enhances China's Belt and Road Initiative. China's investment in this corridor boosts trade volumes, improves regional connectivity, and fortifies its political and economic clout in the transit nations. The South Caucasus and Central Asian nations are significant suppliers of energy resources and markets for Chinese commodities. Enhancing infrastructure in these regions supports stability and economic integration, which is consistent with China's larger objectives of preserving a stable periphery. The vulnerabilities of global supply chains were brought to light by the COVID-19 pandemic.

Compared to the maritime Silk Road, the Middle Corridor provides a shorter and possibly faster path for trade between China and Europe, particularly for products that must be delivered quickly, such machinery and electronics. Azerbaijan, Kazakhstan, and other energy-rich areas are traversed by the Middle Corridor which is beneficial for China for its future market. China's energy imports may be more diversified if improved transport infrastructure made it easier for the country to acquire Caspian energy resources. China's desire to use Turkey as a conduit to European markets is in line with Turkey's active support of the Middle Corridor through initiatives like the Baku-Tbilisi-Kars railway. Beijing's interest in the route is further strengthened by the growing commercial connections between China and Turkey (Sharifli, 2024) China has increased its bilateral and international interaction with these countries.

During May 2023 China-Central Asia conference, China and Kazakhstan finalised bilateral agreements on the development of the Middle Corridor (Ministry of Foreign Affairs of the Republic of Kazakhstan, 2023) Later, the two nations strengthened their collaboration by signing a new agreement to improve the Trans-Caspian International Transport Route, with an emphasis on China-Europe container trains, during President Kassym-Jomart Tokayev's official visit to China in October 2024 (Kazakhstan, 2023) To improve road, rail, and marine transport and to create favourable conditions for the transit of commodities, Kazakhstan's parliament passed two agreements with China in May 2024. These agreements also encourage the growth of logistical hubs in the region (Aliyeva, 2024)

In addition to Kazakhstan, China and Georgia also inked a new deal to work together to develop the Middle Corridor, with an emphasis on increasing freight, streamlining routes, boosting transportation services, and strengthening infrastructure (Tabatadze, 2024). Furthermore, at the Shanghai Cooperation Organisation (SCO) Summit in July 2024, China created a strategic alliance with Azerbaijan and expressed its commitment to collaborate with Azerbaijan to improve cooperation and to actively participate in the establishment and utilisation of the Trans-Caspian Middle Corridor². Beijing has increased its involvement at the multilateral level in addition to fortifying bilateral ties. Notably, Beijing's determination to diversify its transport routes and reduce geopolitical risks is signalled by its official participation in the Middle Corridor Multimodal Joint Venture, which was formed by Kazakhstan, Azerbaijan, and Georgia through the China Railway Container Transport Corporation (CRTC) (The Times of Central Asia, 2024).

IV. INSTC And Middle Corridor Convergence

A rare chance to establish a fully integrated Eurasian connectivity network is presented by the intersection of the Middle Corridor and the International North-South Transport Corridor (INSTC). Despite having different geographic locations, goals, and supporters, the two corridors have a great deal of potential to work in tandem, especially in areas where their paths cross or coincide. The Caspian Sea serves as a connecting link for both pathways. While the INSTC uses routes that connect Iran, Turkmenistan, and Russia to the Caspian, the Middle Corridor depends on ferry connections between Kazakhstan and Azerbaijan.

Ports like Anzali (Iran), Alat (Azerbaijan), and Aktau (Kazakhstan) might act as joint hubs, promoting trade between the two pathways. (Wani, 2024)

Georgia and Azerbaijan, two vital transit nations for the Middle Corridor, are becoming more and more connected to the INSTC via road and rail systems. The Baku-Tbilisi-Kars (BTK) railway, for instance, supports the INSTC's aspirations to establish a connection with Europe.

As a logistics hub, Azerbaijan may be able to connect Middle Corridor routes with INSTC traffic.

A possible connection between the INSTC and the Middle Corridor is provided by Iran's road and rail networks with Turkey. To ease trade movements from north to south and east to west, existing rail lines between Tabriz, Iran, and Van, Turkey, could be extended and utilized for more benefits. By appealing to a wider coalition of stakeholders, such as China, India, Turkey, Iran, and the EU, a combined network may be able to lower geopolitical tensions in the region. (Gaur, 2023b)

By providing geopolitical diversification, convergence lessens reliance on any one path, such as the Suez Canal or Russian-controlled corridors. There may be several opportunities nevertheless, some challenges need to be overcome. Cooperation may be hampered by important stakeholders' divergent strategic objectives as India, Russia, and Iran support the INSTC, while China's Belt and Road Initiative (BRI) and Turkey's aspirations to serve as a transit centre are intimately linked to the Middle Corridor. Significant investments in ports, railroads, and intermodal facilities are necessary for seamless integration, particularly at sites of convergence like the Caspian Sea. It is still logistically difficult to harmonise standards and customs practices across several regions.

V. Future Prospects: Complementarity Or Conflict?

The Middle Corridor and INSTC have a lot of potential to work together as supplementary elements of a larger Eurasian connectivity network. The corridors run in different directions: Trade between India, Iran, Russia, and Central Asia is facilitated by INSTC. The Middle Corridor, which connects China and Central Asia to Europe via Turkey and the South Caucasus, is centred on east-west trade. The South Caucasus, the Caspian Sea, and the Turkey-Iran border are examples of overlapping territories that naturally form sites of convergence that facilitate integrated economic flows.

Connections to the Middle Corridor west of the Caspian could help INSTC's focus on trade between India Russia and Europe by providing access to Turkey and the EU.

² *Joint Declaration of the Republic of Azerbaijan and the People's Republic of China on the Establishment of a Strategic Partnership Was Adopted in Astana» Official Web-Site of President of Azerbaijan Republic, 2024*

On the other hand, the Indian Ocean region might be accessed by Middle Corridor traffic via INSTC infrastructure in Russia or Iran. The emphasis on containerised and time-sensitive items in the Middle Corridor is complemented by INSTC's strength in bulk commodities, such as energy and raw materials. By cooperating, the corridors could lessen the possibility of disruptive disputes over trade routes and promote stability and collaboration in areas like Central Asia and the South Caucasus. Both lanes benefit from the EU's desire to diversify supply chains, which encourages the growth of infrastructure. INSTC routes in places like Iran may potentially gain indirectly from China's BRI investments in the Middle Corridor.

The goal of both corridors is to increase trade between the Middle East, Europe, and Asia. They might undercut one another to draw customers because of their limited cargo volumes.

In comparison to INSTC's India-to-Europe route, the Middle Corridor promises a shorter transit time between China and Europe, despite its present higher cost. Trade may migrate to the Middle Corridor as a result of INSTC's reliance on sanctions-hit Russia and Iran, which may make it less attractive to some international shippers.

India supports the INSTC to obtain strategic autonomy in Eurasia and as a counterweight to China's Belt and Road Initiative (BRI). As part of the BRI, China supports the Middle Corridor, which might lead to competition in transit hubs such as Kazakhstan and Azerbaijan.

Russia may perceive the Middle Corridor's circumvention of Russian territory as a risk to its regional domination, even while it sees the INSTC as a priority for its trade with India and the Persian Gulf. There will probably be a combination of rivalry and complementarity between the Middle Corridor and the INSTC. Although their different trade interests and geographic orientations present chances for cooperation, tensions may arise from geopolitical rivalries and market competitiveness. The ability of regional powers and stakeholders to put collaboration above rivalry, invest in common infrastructure, and harmonise policies will determine their prospects for the future.

VI. Conclusion

While the INSTC and the Middle Corridor have the potential to operate as complementary routes in Eurasian connectivity, their interaction with Chinese and Indian ambitions highlights underlying tensions. Cooperation would require robust multilateral frameworks and confidence-building measures, but current geopolitical rivalries and divergent strategic goals may hinder such efforts. Whether these corridors evolve as allies or adversaries will significantly shape the future of Eurasian trade and stability. Both corridors benefit from developing shared rail and road links, particularly in Central Asia, where connectivity projects often overlap. The Middle Corridor and INSTC offer routes that can complement each other, with the former focusing on Westward connections to Europe and the latter targeting Southward links to the Middle East and beyond. Collaboration in infrastructure, customs facilitation, and digital trade could help foster stability and drive economic growth in Central Asia, benefiting both China and India indirectly. A cooperative approach to integrating the INSTC and Middle Corridor, while accommodating the ambitions of China and India, can transform Eurasia into a global trade hub. By fostering mutual trust, harmonizing infrastructure development, and leveraging multilateral institutions, stakeholders can turn potential rivalry into an opportunity for shared growth and stability.

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