# Sustainable Middle Corridor:

# From Strategic Coordination to Bankable Implementation

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## Event Report

Organised by Kazakhstan-EU Gateway in collaboration with FERRMED, the **High-Level Roundtable on the Sustainable Middle Corridor** was held on Wednesday, 29 April 2026 at the European Institute for Asian Studies in Brussels. The event brought together representatives from EU institutions, financial actors, logistics and transport companies, and Central Asian stakeholders to discuss how the Trans-Caspian Transport Corridor (TCTC) can transition from a politically supported initiative to a technically efficient and financially viable logistics system.

The roundtable opened with remarks by **H.E. Roman Vasilenko, Ambassador of Kazakhstan to the EU**, who framed the strategic context of EU-Kazakhstan cooperation on connectivity. Ambassador Vasilenko recalled that cargo volumes shipped across the Middle Corridor have grown from 850,000 tonnes in 2021 to 5.2 million tonnes in 2025, reflecting both Kazakhstan's sustained infrastructure investment and Europe's growing engagement, with 35 billion USD invested in transport infrastructure. Kazakhstan has committed a further 15 billion USD to infrastructure development in the coming years, including two major bypass projects near Almaty and towards Uzbekistan, and is pursuing a carbon neutrality strategy for 2060 that incorporates railway electrification, energy efficiency improvements, and a new climate-resilient railway line of over 300 kilometres, supported by the Asian Infrastructure Investment Bank and the World Bank Group. Ambassador Vasilenko also highlighted emerging digital connectivity initiatives, including a planned fibre optic cable on the floor of the Caspian Sea linking Kazakhstan and Azerbaijan, and underlined the need for strong coordination and continued investment to consolidate the corridor's role as a green and sustainable route connecting Europe and Asia.

The European perspective was presented by **Ms. Charlotte Adriaen, Head of Unit for Central Asia and Afghanistan at the European Commission's DG INTPA**, who situated the strategic significance of the Middle Corridor within the broader geopolitical shift triggered by Russia's invasion of Ukraine, which has accelerated EU efforts to develop faster, more reliable, and more sustainable alternative routes. Ms. Adriaen recalled that the EU has pledged 10 billion EUR in transport investment through the TCTC framework, of which 2.5 billion have already been committed to specific projects, alongside financial tools for feasibility studies and technical cooperation. Beyond hard infrastructure, EU technical assistance programmes implemented through GIZ, Expertise France, and the International Trade Centre (ITC) are working on trade facilitation, customs harmonisation, and digital integration. She stressed that the Middle Corridor should be understood not as an end in itself, but as a tool for broader regional development in Central Asia, with potential to link landlocked countries to global markets and support reindustrialisation through energy connectivity. On the question of China's digital integration in the region, Ms. Adrien acknowledged that EU work proceeds on a separate track, with no current solution for harmonisation.

**Mr. Cristian Terheș, Member of the European Parliament**, reinforced the geopolitical case for the corridor by outlining five dimensions of its strategic value: the promotion of peace through connectivity, the generation of prosperity along the route, the reduction of transit times by avoiding difficult areas such as the northern corridor and the Strait of Hormuz, the strengthening of supply chain resilience through route diversification, and the creation of opportunities for broader regional and global engagement between Europe and Central Asia.

The **first session** of the roundtable delved into green logistics, infrastructure, and operations, bringing together a diverse set of industry and institutional voices. **Mr. Joan Amorós of FERRMED** presented the lessons drawn from the EU's TEN-T framework and the +FIRRST initiative for fast, flexible, and integrated rail systems. He identified the concentration of European rail traffic on a limited network, the prevalence of dead-end rather than pass-through terminals, and insufficient terminal capacity as the principal structural bottlenecks, and recommended the construction of 425 additional pass-through terminals, the introduction of longer freight wagons, and the development of longer trains as priority measures. FERRMED is conducting two pilot tests on the Rotterdam-Paris and Duisburg-Almeria corridors, and Mr. Amoros recommended that Kazakhstan adopt the same pass-through terminal model to improve corridor efficiency.

**Mr. Gotfried Smit of the European Shippers Council** noted that the Middle Corridor is attracting growing attention due to the need for diversification and the disruptions affecting other routes. He identified the corridor's main competitive advantages as its ability to bypass Russia and its increasingly competitive transit times, supported by large infrastructure investments and market momentum. However, he highlighted several challenges that must be addressed: the multimodal complexity arising from multiple shifts between rail and ferry; the Caspian Sea as the most critical bottleneck due to limited ferry capacity and congestion risk; lack of predictability as a result of customs fragmentation across borders; limited cost competitiveness relative to the northern corridor and maritime alternatives; and the need for digital integration including real-time tracking, electronic documentation, and user-friendly booking systems. Mr. Smit also referenced the World Customs Organisation's capacity-building programmes as a relevant tool for addressing customs harmonisation. **Mr. Dair Amirov of Kedentransservice JSC**, the key logistics operator of Kazakhstan, described the company's network of 18 terminals across Kazakhstan as well as facilities in Xi'an and Chengdu, and outlined plans for developing additional logistics hubs. He identified insufficient infrastructure, limited digital integration, and the need for stronger demand coordination with international partners as critical challenges, and welcomed cooperation with international stakeholders to develop sustainable and efficient infrastructure.

The **second session** on financing and investment opened with a contribution from **Mr. Erik Van De Sande of Transport Management Consultants & Surveyors (TMCS)**, who stressed the need for an integrated corridor approach and called for more structured platforms for dialogue between private stakeholders and governments, observing that private sector representation at such events remains insufficient. **Mr. Marc Billiet of the IRU** proceeded by outlining the contribution of the TIR system, which offers customs facilitation measures across 30 countries in the region, and the Green Lane concept, which provides priority passage for compliant trucks and creates incentives for transparency. He presented the eTIR digitalisation initiative, currently being piloted in Kazakhstan, as a tool for advanced data exchange between customs authorities that reduces manual checks and paper-based delays, especially noting that trade volumes are expected to triple by 2030. He drew particular attention to border waiting times of up to 15 days in some locations, insufficient border capacity for goods processing, and poor conditions for drivers, calling for enhanced trust, internationally harmonised procedures, and

mutual recognition of vehicle standards. **Mr. Heinrich Kerstgens of Rhenus** noted that while most of his company's cargo currently moves through Russia and China, the Middle Corridor offers several viable routes, all transiting the Caspian Sea. He stressed that reliability is more important than speed for freight operators and called for modernisation of the Caspian Sea fleet and ports, improved service schedules, and measures to address current underutilisation of capacity. **Mr. Bauyrzhan Mukayev of Kazakh Invest** underlined the corridor's potential to promote economic growth across Central Asia and presented the key companies operating in the port of Aktau. He identified the construction of new vessels, the modernisation of terminals, and the development of quick fleet ships as investment priorities, and invited European stakeholders to collaborate on attracting EU investment to Kazakhstan.

Several additional contributions enriched the discussion. Vantieghem Henri, the former Belgian Ambassador to Kazakhstan, called for stronger bridges between private sector actors and institutions to improve project visibility and transparency, noting that Belgian companies are already present in Kazakhstan, and drew an analogy with the Benelux model of regional cooperation and cross-border integration as an inspiration for Central Asian collaboration. A representative of Pakistan underlined the importance of the Middle Corridor for regional connectivity and as a link between China, Pakistan, and European markets. The Deputy Ambassador of Mongolia expressed strong interest in the corridor as a driver of prosperity for the region. A representative of the European Energy Committee advocated for developing partnerships based on strategic interdependence rather than sovereignty, citing critical raw materials, energy products, and the Caucasus corridor as essential elements linking Europe with Kazakhstan.

The roundtable as a whole pointed to a corridor at an inflection point. The political will is present on both sides, investment commitments are substantial, and the geopolitical case for diversification is stronger than ever. Yet the gap between strategic ambition and operational reality remains significant, and closing it will require simultaneous progress on several fronts: harmonising customs and digital systems across multiple jurisdictions, modernising the Caspian Sea fleet, increasing terminal capacity and interoperability, and creating structured platforms for private sector engagement. Three overarching priorities emerged from the day's discussions. First, operational reliability must be prioritised over speed, as predictability is the decisive factor for freight operators choosing between competing routes. Second, digital integration, from eTIR and eCMR systems to real-time tracking and electronic documentation, is both a practical necessity and a catalyst for the trust-building that underpins investor confidence. Third, the corridor's long-term viability depends on moving beyond bilateral project logic toward a genuinely integrated, multi-stakeholder governance framework that connects EU institutions, national authorities, international financial institutions, and private operators around a shared implementation agenda.