

**BUILDING GEOECONOMIC BRIDGES:  
EUROPEAN UNION – SOUTH CAUCASUS – CENTRAL ASIA.  
OPPORTUNITIES FOR ROMANIA**



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**Building geoeconomic bridges:  
European Union - South Caucasus - Central Asia.  
Opportunities for Romania**

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## Table of Contents

<b>FOREWORD.....</b>	<b>6</b>
<b>EXECUTIVE SUMMARY .....</b>	<b>7</b>
<b>VIEWS FROM EUROPE .....</b>	<b>9</b>
<b>Building Geoeconomic Bridges: Austria's Role in Connecting the EU with South Caucasus and Central Asia .....</b>	<b>10</b>
Velina TCHAKAROVA	10
<b>Danube, the next European <i>Blue Banana</i> - potential backbone of the regional logistics of South-Central Europe .....</b>	<b>12</b>
Prof. Valentin CÂRLAN, PhD	12
Joost HINTJENS, PhD	12
Prof. Thierry VANELSLANDER, PhD	12
<b>The cooperation between the EU and the South Caucasus and Central Asia: competition between EU members is to give way to complementarity ...</b>	<b>16</b>
Yasen GEORGIEV	16
<b>Why are the Black Sea and Caspian Sea strategic for Europe? .....</b>	<b>18</b>
Emmanuel DUPUY	18
<b>France and South-Caucasus/Central Asia: From a patchwork of initiatives to a strategic approach? .....</b>	<b>23</b>
Romain LE QUINIOU	23
<b>Diversification of supply chains: EU cooperation in South Caucasus and Central Asia and the significance of the Black Sea region.....</b>	<b>25</b>
Georgios MITRAKOS	25
<b>The South Caucasus' Road to Net Zero goes via Romania .....</b>	<b>28</b>
Ilya Roubanis	28
<b>Building geo-economic bridges: European Union - South Caucasus - Central Asia. The role/position of Hungary.....</b>	<b>30</b>
Erzsébet N. RÓZSA	30
<b>EU and Central Eurasia - the imperative of pragmatism .....</b>	<b>32</b>
Laszlo VASA	32
<b>The Republic of Moldova's Perspective on Romania's Engagement with the South Caucasus and Central Asia .....</b>	<b>34</b>
Bogdan COZMA	34
Laurențiu PLEȘCA	34
<b>Learning from China: Middle Corridor as a tool to reinvigorate EU relations with South Caucasus and Central Asia .....</b>	<b>36</b>
Konrad POPLAWSKI	36
<b>Poland-Central Asia Relations: Untapped Potential .....</b>	<b>38</b>
Małgorzata SAMOJEDNY	38
<b>Increasing resilience through connectivity: the EU, Türkiye and the South Caucasus .....</b>	<b>40</b>
Çiğdem ÜSTÜN	40
<b>The Black Sea routes and Eurasian corridors: Romania's Strategic Role and Ukrainian Contribution to Strengthening EU Ties with South Caucasus and Central Asia.....</b>	<b>42</b>
Sergiy GERASYMCHUK	42

<b>VIEWS FROM SOUTH CAUCASUS AND CENTRAL ASIA .....</b>	<b>45</b>
Deeper cooperation with the EU sought amidst geopolitical turmoil .....	46
Armen GRIGORYAN	46
Azerbaijan as a pivotal hub for the European Union .....	48
Fariz ISMAILZADE	48
Geopolitics versus Democracy: Georgia's Transactional Calculus and the EU's Dilemma .....	50
Irakli SIRBILADZE	50
Kazakhstan and Romania: Partnership amid a Changing Geopolitical Landscape .....	52
Bauyrzhan AUKEN	52
Amirbek ALIBI	52
Building geoeconomic bridges: European Union - South Caucasus - Central Asia. Views from Kazakhstan.....	54
Assel SARSENBAYEVA	54
Alibek RAIPOV	54
Central Asia and the European Union: Discovering New Economic Frontiers	57
Shoirakhon NURDINOVA	57
Potential for Cooperation between Uzbekistan and Romania in Developing Trans-Caspian and Black Sea Transport to Europe .....	59
Nargiza UMAROVA	59
The EU and Central Asia: towards pragmatic engagement .....	62
Zilola YUNUSOVA	62
<b>VIEWS FROM OTHER ASIAN STATES .....</b>	<b>64</b>
Geopolitics of Trade Corridors in Eurasia.....	65
Major General BK SHARMA, AVSM, SM** (Retired)	65
Opportunities and challenges for the EU in Central Asia and the Caucasus	68
Ayjaz WANI	68
Iran and EU in Central Asia and Caucasus: Alignment without Cooperation	71
Vali KALEJI	71
South Korea's Strategic Perception on Romania and South Caucasus-Central Asia Nexus .....	73
Wooyeal Palik	73
EU Climate Engagement in the South Caucasus and Central Asia: A Pakistani Perspective .....	75
Neelum NIGAR	75
<b>VIEWS FROM ROMANIA .....</b>	<b>78</b>
Green Diplomacy - The European Union's Environmental Cooperation with South Caucasus and Central Asia .....	79
Iohana-Georgia BURCEA	79
Geo-economics Connections between the EU - South Caucasus - Central Asia .....	82
Flavius CABA-MARIA	82
Romania Looking East: From the Black Sea to Central Asia .....	85
Angela GRĂMADĂ	85
Mihai ISAC	85

<b>European competitiveness on the final frontier .....</b>	<b>87</b>
Radu MAGDIN .....	87
<b>Romania: Anchoring the European Bridge to the South Caucasus and Central Asia via Constanța .....</b>	<b>90</b>
Cristian NEGRUȚIU .....	90
<b>Clean energy as an indicator of commitment to shared values - the case of the International Solar Alliance .....</b>	<b>92</b>
Mihaela-Adriana PĂDUREANU .....	92
<b>The importance of the Middle Corridor for Romania .....</b>	<b>94</b>
Tănase STAMULE .....	94
<b>AFTERWORD .....</b>	<b>96</b>
<b>Romania - South Caucasus - Central Asia. New opportunities in the global context .....</b>	<b>96</b>
Mihai SEBE .....	96

## FOREWORD

This *collective report* on the relationship between the European Union, Central Asia, and the South Caucasus reflects the growing interest in the dynamic changes taking place in the region. Our goal is to present to our readers not only insightful contributions, but also an authentic and legitimate perspective on various topics, by involving experts from the region. This approach is reflected in the title of the paper: *Building geo-economic bridges: European Union - South Caucasus - Central Asia. Opportunities for Romania*.

The report follows another recent initiative of the European Institute of Romania - a collective report on the Black Sea - which described the evolution of the Black Sea region from an economic and security point of view. This new report brings us closer to developments taking place in Asia and focuses on the [latest EU approach](#) towards this region.

As the world changes and new challenges arise, we are constantly working to bring relevant topics to the public agenda for the European citizens. That is why we asked our collaborators - academics, think tank experts, and public officials - to choose one or two questions from the following list and provide their perspective/short analysis.

1. *How do you evaluate your country's contribution to a stronger EU engagement in the region? Which are the main opportunities and challenges you foresee in the short and medium-term and how can they be addressed?*
2. *How can Romania leverage its position as an EU and NATO member for strengthening the economic ties between the EU and South Caucasus and Central Asia and in particular with your country? Which are the strategic projects in which Romania could engage?*
3. *What are the main opportunities and challenges for the EU in terms of deepening its cooperation with the two regions? How can your country contribute to addressing them?*
4. *How can Romania balance its economic ambitions with the need for regional stability and security, particularly in light of evolving geopolitical dynamics in the South Caucasus and Central Asia?*

Previously, the European Institute of Romania published four other reports on topics such as *the Black Sea*, *the Three Seas Initiative*, *the European Union and African Union*, and *the European Union and Western Balkans*, all available free on our [website](#).

Oana-Mihaela Mocanu, PhD

Director General of the European Institute of Romania

## EXECUTIVE SUMMARY

As one of the most important actors on the world stage, the European Union (EU) has many topics of interest on its agenda. In economic terms, according to Eurostat, the [EU](#) has the second-highest share of trade in the world (13.7%), after China (18.2%, excluding Hong Kong). Many issues at the EU level are, thus, considered important for the future of the Union. The challenges and transformations we have witnessed in Europe, especially in the last five years, have had a powerful impact on the EU's relation with Central Asia. These contacts are being revised and reshaped to reflect new realities and economic contexts - for example, the pandemic has increased the region's visibility especially from a commercial perspective. Policies are becoming increasingly visible. But not only the economic domain has had a relevant impact - meaning that it led to policy changes, but also the Russian Federation war of aggression against Ukraine has been a significant factor influencing the management of external relations with other geographical regions.

The overlap of different needs highlighted the necessity of transforming the EU's relationship with Central Asia, leading to new policy measures. Because of these developments, we can reflect on what Winston Churchill once said: *"I never 'worry' about action, but only about inaction"*. Thus, more actions by EU, its member states, and the states in Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan) can be considered favourable for the future relation of the EU and Central Asia. One such action was the EU-Central Asia Summit, held on 4 April 2025 in Samarkand, Uzbekistan. The meeting followed the adoption of a [Joint Roadmap for Deepening Ties between the EU and Central Asia](#) in October 2023 and the visit of [EU Commissioner for International Partnerships Jozef Sikela](#) to Central Asia in March 2025. During the visit, agreements were signed on digital connectivity, transport, critical raw materials, and also on the water, energy and climate sector to be funded through the Global Gateway strategy.

The April 2025 Summit was attended by European Commission President Ursula von der Leyen and European Council President António Costa, indicating strong political commitment on the part of the EU and, also, as mentioned by President von der Leyen of *"openness and [engagement](#)"* towards the region. In her opening speech, President von der Leyen outlined the guidelines for future relationship: building **transport corridors** - with a special focus on the Trans Caspian Transport Corridor (TCTC a Global Gateway flagship in Central Asia); **cooperation on critical raw materials: developing the region as a clean energy hub**; and **increasing support for good partnership through communication**. At the end of the Summit, the EU and the five Central Asia countries announced the intention to deepen their relationship by [establishing](#) a strategic partnership.

In this context, experts from Austria, Belgium, Bulgaria, France, Greece, Poland, the Republic of Moldova, Türkiye, Ukraine, Hungary, the Islamic Republic of Iran, India, Pakistan, the Republic of Korea, Armenia, Azerbaijan, Georgia,



Kazakhstan, Uzbekistan and Romania have been asked to provide analysis on the changes we can see in the region.

The contributions focus on topics such as the economy (especially increased *interconnectivity*), Romania's role as a [nearshoring hub](#) for automotive industry (which may serve as a model for the region); *political reforms, the energy sector and access to finance, sustainability and environmental protection, defence cooperation, but also the role of cultural ties or the activity of regional organization for the development of extended partnerships.*

We also have a number of eight contributions from Romania. As one of the first countries to recognize the independence of the five Central Asia countries, Romania has developed friendly relations with the Central Asia [countries](#). In addition, in 2019, during its Presidency of the Council of the EU, [Romania](#) has actively supported the EU Strategy for Central Asia. Therefore, Romania, as an EU member state, can continue to be a strategically relevant actor in the wider Black Sea region and contribute to the partnership between the EU and Central Asia.

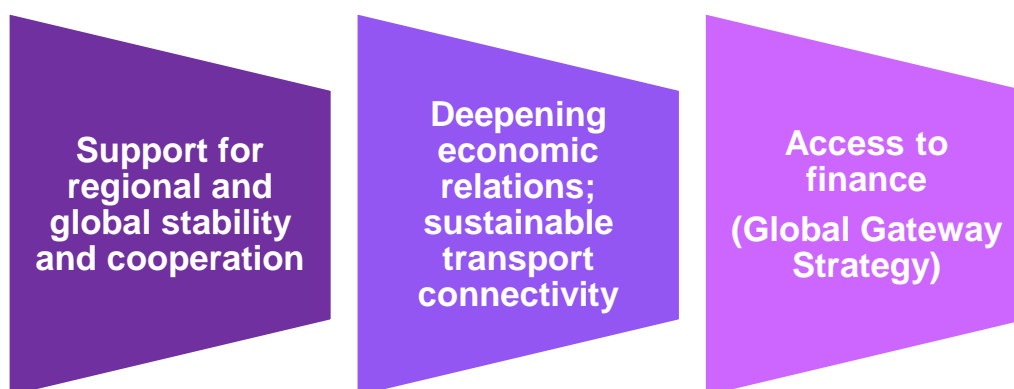
Several general ideas that emerge from the experts' contributions:

- *Enhanced and coordinated support for deepening regional cooperation* (complementary to global stability, with funding based on the Global Gateway Strategy).

- *Increased cooperation in the economic sphere* to increase interconnectivity and the efficient and sustainable transport of commercial products;

- *Support for extended cultural exchanges and the development of regional forms of cooperation.*

These themes highlight the importance of regional integration, connectivity, and strategic engagement in strengthening ties between the EU and the South Caucasus - Central Asia region.



Mihaela-Adriana PĂDUREANU  
Expert, Studies Unit



## Views from Europe

## Building Geoeconomic Bridges: Austria's Role in Connecting the EU with South Caucasus and Central Asia

Velina TCHAKAROVA

**Velina TCHAKAROVA** is founder of FACE - For A Conscious Experience in Vienna, and Geopolitical Strategist covering global risks, trends and scenarios. She is the former Director of the Austrian Institute for European and Security Policy.




Eastern Europe and the South Caucasus have become pivotal regions in the evolving competition over global connectivity corridors, linking Europe, Asia, and the Middle East. These areas, rich in geographic and economic potential, are at the heart of the major geoeconomic projects, such as Russia's International North-South Transport Corridor (INSTC), China's Belt and Road Initiative (BRI), and the European Union's (EU) energy and trade networks. As the EU steps up its engagement with South Caucasus and Central Asia, through initiatives like the Global Gateway and the Trans-Caspian International Transport Route, the need for reliable partners within the Union becomes ever more pressing.

Austria, with its deep-rooted diplomatic traditions, economic stability, and geographic proximity to Central and Eastern Europe, is uniquely positioned to contribute meaningfully to this emerging strategic corridor.

### **Austria as a Connector and Facilitator**

Austria has long served as a bridge between Western Europe and its eastern neighbours. This role can now expand further eastward. While Austria is not a direct neighbour to South Caucasus or Central Asia, it holds influence through its multilateral engagements, economic ties, and expertise in sectors crucial to the development of the *Central Asia-Caucasus-European Corridor* (CACE). Moreover, Austria occupies a pivotal position in enhancing the *Three Seas Initiative* (3SI) by bridging North-South connectivity and facilitating the EU's enlargement efforts in the Western Balkans and Eastern Europe.

Its strategic location and robust infrastructure make it a linchpin in connecting Central Europe with the South Caucasus and Central Asia, thereby strengthening geopolitical and geoeconomic ties between these regions and the EU. Finally, Vienna is home to numerous international organizations and serves as a hub for dialogue and diplomacy. This status could be leveraged to foster political trust and regional cooperation between the EU and Central Asian republics. Austria's



ability to convene and mediate makes it an ideal partner for navigating the complexities of this new geopolitical landscape.

### **Investment and Infrastructure**

Austria's role extends beyond Europe, serving as a key transit hub linking Western and Eastern Europe and, thus, facilitating trade between Europe and Asia. Its involvement in global transport initiatives positions Austria as a bridge between the EU and regions like the South Caucasus and Central Asia. By integrating these corridors with the encompassing EU framework of current initiatives, Austria can enhance trade routes and economic ties between these regions and the EU.

Austria's well-developed infrastructure sector and strong private investment landscape present key assets. Austrian companies, particularly in logistics, construction, green technologies, and energy, are well equipped to support the development of sustainable transport routes and renewable energy projects across Central Asia and the Caucasus. Austria's financial institutions can also contribute to de-risking investments and co-financing infrastructure projects, in cooperation with European and international development banks. This kind of financial diplomacy would be essential for building confidence among investors and local stakeholders in a region where governance and legal frameworks often remain uncertain.

### **Championing Sustainability, Educational and Cultural Diplomacy**

Austria can act as a voice for embedding EU core values into economic engagement and trade ties. The country could push for mechanisms that tie EU investment and infrastructure support to benchmarks on governance and transparency, aligning economic cooperation with democratic reforms. Another soft power tool at Austria's disposal is education. Through programmes such as *Erasmus+*, Austrian universities and institutions can foster academic partnerships and student exchanges that deepen people-to-people relations and promote shared understanding.

### **Strategic Outlook**

In the short term, Austria can promote Austrian business participation in Global Gateway projects, support inclusive dialogue with Central Asian and Caucasus states, and advocate for joint EU funding mechanisms to reduce investment risks. Over the medium term, Austria could lead in establishing EU parliamentary dialogues with these regions, expand its diplomatic presence, and foster academic partnerships to encourage knowledge exchange and policy innovation.

Austria's strategic posture, economic capabilities, and diplomatic credibility make it a vital player in the EU's push to strengthen ties with South Caucasus and Central Asia. By combining investment, skilled diplomacy, and soft power tools, Austria can help the EU turn this geoeconomic corridor into a model of sustainable, inclusive, and future-oriented cooperation.

## Danube, the next European *Blue Banana* - potential backbone of the regional logistics of South-Central Europe

Prof. Valentin CÂRLAN, PhD

Joost HINTJENS, PhD

Prof. Thierry VANELSLANDER, PhD

**Valentin CÂRLAN** is, since 2014, a researcher at the Department of Transport and Regional Economics at the Faculty of Business and Economics, University of Antwerp. His research interest includes economics assessment models, cost and benefits quantification methods for innovations, and applications of cost-effectiveness analysis for AI and ML solutions implementation. His Ph.D. dissertation is titled "Costs, benefits and cost-effectiveness of ICT innovation in the maritime supply chain". He carries out research for projects like: SPEED, Smart Ports 2025 and Self-service in logistics.




**Joost HINTJENS** got his master degree in Commercial Engineering at the University of Antwerp in 1986 and started a career in the industry while getting his Master in Management at the University of Ghent in 1993. He worked for several mid-sized European industrial companies with a focus on international marketing and logistics and moved into academia in 2002. He is currently chair of the course group Supply Chain Management at Artesis Plantijn University of Applied Sciences and researcher at the University of Antwerp at the department Transport and Regional Economics where he is focusing on the role of ports in the supply chain. He promoted in November 2019 with a doctoral dissertation on port cooperation. His interest goes to the role of logistics at mid-sized companies and the relations with their clients and suppliers in controlling the supply chain, their drive for sustainability and in the threats and opportunities the New Silk Road presents.



**Thierry VANELSLANDER** is a professor at the Department of Transport and Regional Economics of the University of Antwerp. He is currently course co-ordinator for the courses "Port Economics and Business" at C-MAT, and 'Transportbedrijfseconomie' and 'Maritieme en Havenconomie' at the Faculty of Business and Economics. His research focuses on business economics in the port and maritime sector, and in hinterland transport and urban logistics. Furthermore, he is the chair of the SIGA2 Maritime and Ports and topic area manager Transport Modes within WCTR, and chair Freight & Logistics at ETC.



Central Europe is navigating a period of economic strain, with rising inflation, energy insecurity, and the ongoing impact of regional conflicts. Slowed investment and supply chain disruptions challenge growth, demanding urgent focus on



resilience, innovation, and regional cooperation to stabilise and rebuild momentum. But what is a conceptual solution that leverages existing assets to give new development perspectives?

In this context, Europe needs practical concepts to leverage its existing assets. The concept of the [\*Blue Banana\*](#) goes back to the 1980s and it covers the economic heartland of Europe formed by an uninterrupted zone starting in Birmingham and going across the Channel to the Benelux, Western Germany, Switzerland and Northern Italy, where there is a high concentration of population with a high GDP *per capita*. It is a region which consumes and produces high volumes of goods with a high added value. The backbone of the region is the river Rhine, which has been a thoroughfare for the wider region since the Middle Ages. Moreover, we may think that the Danube could potentially play a similar role for the region of south-central Europe. The paragraphs below describe why this would be a good development and what is needed to make this happen.

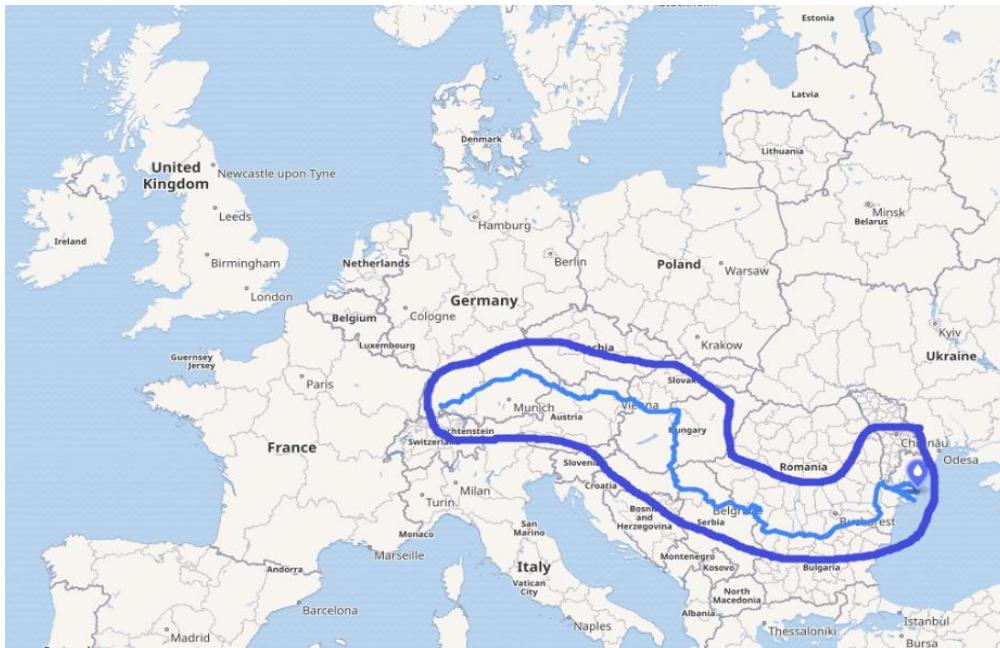
A well-developed logistics network, connected to an efficient seaport for overseas connectivity, gives a region access to a large supply of both raw materials and finished goods and to an almost unlimited global market with customers. Such a network is built on three pillars: infrastructure, services and digital tools.

On the infrastructure side: a resilient and efficient network offers seaport services that connect to the global markets, an extensive road network of highways, a network of connected rivers and canals and a rail network. A large waterway, like the Danube (similar to the Rhine), can be a very efficient transport carrier and serve as a backbone connecting all the other infrastructure and transport modes. Barges have a much higher potential capacity than trucks, and even trains, and can be run with minimal external costs. A key challenge that also needs to be solved is a water-level management system. Barges need a depth of 2,5 to 3,5 m to be able to work with a full load, so dredging, locks, and adjacent river controls might be necessary to be set in place. Ideally, the water network is expanded beyond the Danube to its tributary area.

Secondly, one needs companies that offer services on this network. The transport sector typically consists of large companies with a relatively high number of assets benefiting from economies of scale, and smaller family-owned companies, with a few vehicles very flexible in their offerings. The region around the Danube offers the perfect location for these businesses to flourish and exploit their advantages. Companies operate along the axis from Galați/Constanța (Romania) to Germany, with strong potential of serving and linking Central-Eastern European capitals, but also expanding widely into the territory. They should aim at developing reliable logistics services, complementing each other in multimodal networks and collaborating as closely as possible to respond near in real-time to potential disruptions.




**Figure 1 - The Danube River and the potential *Blue Banana***



*Source: Own creation.*

Thirdly, to optimise the use of this network and services, a central data platform (or virtual data space) that allows companies' seamless transfer of data between companies is also needed. When used and shared properly, they can increase efficiency with their data, such as load factors and reduce waste - like empty (or partially filled) vehicles. For this to work optimally, a digital network must support this physical infrastructure, and the services offered thereon. To bring the highest value-added, digital information needs to be shared, and this creates a relationship between the source of the data and the user. Everybody wants to receive information, but many are reluctant to share, especially if they have no control over the identity of the receiver. This can be the data space concept, which ensures confidentiality and assures that only the proper authorised parties have access to the information they need.

A good example of how the three pillars work together in Western Europe is the "Extended Gateway" concept. It is an inland port on a river or a canal and functions as a terminal of the main seaport. It allows overseas cargo to leave the arrival port quickly and to be transported in a bundled, - and thus efficient, and low-cost - transport much closer to the final destination, or vice versa in the case of export. This port serves as depots for empty containers and offers value-added services like stuffing and stripping, and also customs formalities. They typically use a central data platform to exchange data with the interested parties. These gateways are multimodal, where two or more transport modes meet, so cargo can be transferred from a bundled mode, like barge or rail, to a last-mile transport mode, most often a truck.



Industries will choose to implant themselves in the neighbourhood of such an extended gateway for fast and low-cost access to the world market, while still benefiting from cheap land and labour. This combination of a seaport connected via a major river to a network of inland terminals with road and rail infrastructure attached to it and supported by a digital environment with companies developing digital applications to support the logistic operations, could make the Danube River and its tributaries the next “Blue Banana”.



## BULGARIA

### The cooperation between the EU and the South Caucasus and Central Asia: competition between EU members is to give way to complementarity

Yasen GEORGIEV


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Competition between countries for foreign direct investments (FDI) or for building larger and more functional transport and/or energy hubs is not something multinationals have to complain about. On the contrary, the increased competition goes hand in hand with numerous government incentives, which, generally, results in better market conditions for investors to establish and expand their business. In the best-case scenario, this would lead to lower prices and better products or services, which are of benefit to customers and which supports local economies through job creation, tax incomes and various spillover effects.

This type of competition is not an exception even when European Union (EU) member states are considered. Which prevents this race from reaching extreme levels is, though, the fact that member countries could not provide excessive stimuli that violate common principles that include state aid restrictions, for instance. As a result, countries try to compete by focusing on other competitive advantages, such as predictable political landscape and a clear focus on strategic direction, existing (or soon to be built) infrastructure, availability of well-trained and affordable labour force, considerable local market with potential for increasing purchasing power and, of course, (strategic) location, just to name a few. Indeed, location is one of the factors that EU countries in the Black Sea region put an emphasis on when they try to position themselves as the EU's gate to regions as the South Caucasus and Central Asia.

Considering the majority of the above-mentioned competitive advantages, as seen from Sofia, Romania seems to be better prepared than Bulgaria to play an active role in EU's cooperation outreach to South Caucasus and Central Asia. However, there are several factors that speak against an approach that puts all eggs in one basket, no matter which of the two countries has a temporary better pole position. Firstly, it is the domestic political landscape in either country that could



considerably change within a very short period and, thus, potentially impact, in one way or another, any of both countries' stance on EU's direct approach towards these two regions. Secondly, one should consider that the traditional efforts of the countries in this part of Europe to establish, as a hub of something -be it transport, energy, digital connectedness etc. - usually do not result in a better performance, but in cannibalizing of each other's advantages. However, much more desired is the creation of an ecosystem of smaller and more flexible local hubs that are rather complementing each other than directly competing against each other.

Finally, yet importantly, given the increased level of global and regional uncertainty, decision-makers at EU and national level should consider that connectivity projects in the field of energy or transportation in the region is to be developed, not entirely based on economic efficiency. In order for these projects to be viable and resilient in case of external events - that could include environmental shocks or foreign malign interference - they should not be concentrated in a certain location, but rather geographically dispersed among more than one country and/or among several regions. The latter could allow for alternative routes and solutions, hence, for greater levels of complementarity, interchangeability and interoperability - features that are to pay off their increased initial costs at the beginning, in the event of any emergency in the future.

## Why are the Black Sea and Caspian Sea strategic for Europe?

Emmanuel DUPUY

**Emmanuel DUPUY** is the President of the Institute for European Perspective and Security Studies (IPSE), a think tank focused on track two diplomacy and strategic prospective analysis with offices in Paris, Brussels and Rabat. He is an Associate Professor at the Catholic University of Lille, in the Institut Supérieur de Gestion (ISG, Paris and Strasbourg) and in the South Champagne Business School (SCBS, Troyes) as well as various universities across the world (Geneva in Switzerland, Hangzhou, in China), specializing in war and security studies. Emmanuel Dupuy served as advisor to the French Secretary of Defence and Veterans Affairs (2008-2010), and political advisor to French military forces deployed in Afghanistan (2011).



With the creation of the *Eastern Partnership* in May 2009, as part of the European Neighbourhood Policy - which was later renewed in November 2015 and again in April 2022, governing the EU's relations with its 16 closest eastern and southern partners - the concept of the European Union's (EU) strategic autonomy. This policy, frequently emphasized by President Emmanuel Macron, undeniably involve a privileged partnership with both Poland and Romania.

Indeed, Bucharest and Warsaw must now be considered “pivotal” nations. This is to be seen both in terms of the “NATOisation” of the Baltic Sea (particularly following the accession of Finland in 2023 and Sweden in 2024) and the Black Sea (given the presence of three of its members - Romania, Bulgaria and Türkiye) - in relation to Russia. Also, we might consider it in terms of its expected “Europeanisation” in the light of the EU's enlargement towards Ukraine, the Republic of Moldova and Georgia, despite the procrastination of Irakli Kobakhidze's current “Eurosceptic” government.

The geo-economic dimension is important, but it is not the only reason for the renewed interest in the Baltic-Black Sea-Caspian zone. A veritable race for “middle corridors” seems to have begun. We are, of course, referring here to the gigantic road, rail and energy infrastructure project of the *International North-South Transport Corridor* (INSTC) linking India to Russia, via Iran and Azerbaijan. However, since the outbreak of the war in Ukraine, France has tended to prefer the *India Middle-East Europe Economic Corridor* (IMEC) project, linking India to the Mediterranean, while deliberately avoiding Russian Federation and Iran.

The same applies to the effective implementation, since May-June 2018, of the *Southern Gas Corridor*, connecting Baku to Ceyhan in Türkiye, via Tbilisi, through the *Trans-Anatolian Pipeline* (TANAP), now extended to the Western Balkans and *de facto* Europe, through the *Trans-Adriatic Pipeline* (TAP).

There are many other Eurasian interconnectivity projects: *Trans Caspian International Transport Route* (TITR) linking China to Europe; electricity distribution corridor through transcontinental cooperation on green hydrogen, linking

Kazakhstan - Azerbaijan - Georgia - Romania - Hungary; “*Lapiz Lazuli Route*” (Afghanistan - Turkmenistan, Azerbaijan - Georgia and Türkiye); “*Casca Route*” linking Central Asia, South Caucasus and Anatolia (Kyrgyzstan - Uzbekistan - Turkmenistan - Azerbaijan - Georgia - Türkiye). Indeed, the war in Ukraine has reinforced the idea that Europeans need to build a strong resilience on the EU’s Eastern flank and NATO’s Northern and Eastern pillar.

The initiatives taken by Bucharest in this direction - such as the creation of the *Bucharest Format* (B-9), unifying the nine states bordering Russia, Belarus and Ukraine (Latvia, Lithuania, Estonia, Hungary, Bulgaria, Poland, Slovakia, the Czech Republic and Romania) - are further cementing the certainty that bringing Bucharest and Sofia into the Schengen area -now finally a reality since 1 January 2025 - will consolidate the security zone against Russia.

France (which now deploys more than 2,000 troops in Romania, as part of its *Aigle* mission, a multinational battalion - France, Belgium, Luxembourg - and as part of the *NATO Response Force*, between the shores of the Black Sea and the slopes of the Carpathians) has always been determined to work towards the integration of Romania and Bulgaria into the Schengen area.

Paris has understood perfectly well that not only is the future of the EU at stake, particularly in the East, in the face of Russia’s aggressive stance, but that the future shape of an enlarged EU of 35-37 members over the next ten to fifteen years is also taking shape there. This enlargement process will be done either through the faltering and hesitant establishment of the European Political Community (EPC) - the future laboratory of an enlarged Europe of 47 states and organisations, in search of strategic convergence - or through the promises made to our partners in South-East Europe.

The Western Balkans are particularly disappointed by the way Romania and Bulgaria are being treated. The six countries of the Western Balkans (Bosnia-Herzegovina, Kosovo, Serbia, Montenegro, Northern Macedonia and Albania), each at different stages in their process of joining the EU, and taking on board the *acquis communautaire*, are realising that they will be treated in the same way during the EU accession process and even afterwards.

In this respect, it is worth recalling the relevance of the *Three Seas Initiative* (3SI or TSI or 3seas or *Trimarium* or Baltic, Adriatic, Black Sea - BABS) - which exists in the form of a Forum made up of 13 EU states (Austria, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia, Greece) created in 2015 and relaunched on 28<sup>th</sup> of April in Warsaw, under the Polish Presidency of the EU Council.

This project, initiated in 2014 by the American liberal-democrat think-tank *the Atlantic Council*, in fact takes up the idea of “*identity*”, launched by the Polish Marshal Jozef Pilsudski, head of the Polish state (1918-1922) after the First World War. Its objective is to create an “*intermarium*” connection between the Black, Baltic and Adriatic Seas, in order to secure the European *Rimland* against Russia and its “*near abroad*” approach - or in other words, what Moscow considers to be its

post-Soviet “*Marches*” (Belarus, Ukraine, Georgia, Armenia, Azerbaijan and the countries of Central Asia - most notably Kazakhstan).

In the energy sector, the prospect of an interconnection between the Black Sea and the Caspian Sea, via the future *Trans-Caspian Pipeline* - pending the signature of an agreement between Turkmenistan and Azerbaijan - reinforces Europe’s interest in the region, which handles three million barrels of oil a day and is home to no fewer than eight gas pipelines connected to Europe, as recently mentioned during the last OPEC + Summit, in Vienna, on 31<sup>st</sup> of May, 2025.

This new approach, known as the “second circle” of our neighbourhood (in addition to the *Eastern Partnership*, around the Black Sea and in the Southern Caucasus) was strengthened in September 2022, with the “*Global Gateway*” initiative. The strategy was presented by the President of the European Commission, Ursula Von der Leyen, in her State of the EU address in December 2021 and it entails a structural investment of €300 billion in EU’s Eastern and Southern neighbourhood, aimed at strengthening the EU’s interconnection with the rest of the world.

Through this initiative, over €40 billion will be spent on technology and infrastructure in the eastern dimension of the EU’s Neighbourhood Policy. This is seen by many, and rightly so, as the embodiment of this quest for influence on the eastern shores of the Black Sea and towards Central Asia. The Global Gateway initiative is intended and perceived, as a response to the new Silk Roads, following the “*One Belt, One Road - OBOR*” launched in November 2013, in the presence of the Chinese President, Xi Jinping, and the Kazakh President, Nursultan Nazerbayev, in Astana, which has since become the “*Belt and Road Initiative - BRI*”.

The most accomplished organisational expression of transcontinental corridors is the *Shanghai Cooperation Organisation (SCO)*. The organization, for the benefit of Beijing, has a population of 2.8 billion people and represents 40% of natural gas reserves, 20% of oil, 40% of coal reserves and 50% of uranium reserves, according to the recent SCO University Conference, held on 12<sup>th</sup> of May, 2025, in Urumqi, China.

The EU has a number of interests in this area, which is - both geographically and politically - a natural corridor between Europe and Asia. It is geographically situated at the heart of Eurasia, being a source of many energy resources and a strong potential market.

A total of €10 billion was mobilised in 2022 at the first *EU-Central Asia Business Forum*. An additional €12 billion were pledged at the recent Samarkand summit, held in Uzbekistan on the 3<sup>rd</sup> and 4<sup>th</sup> of April, 2025, which brought together the so-called C5 countries (Kazakhstan, Uzbekistan, Turkmenistan, Tajikistan and Kyrgyzstan), in the presence of European Commission President Ursula Von der Leyen and Antonio Costa, the President of the European Council. The second *Investment Forum* should confirm this investment in a few weeks’ time.

What might at first glance appear to be yet another cooperation meeting between the EU and neighbouring region reveals, at a much deeper level, a desire on the part of these landlocked states to consolidate their strategic and multilateral

position, as well as the ideal opportunity for the EU to extend its legitimacy more firmly into the heart of the Asian continent.

It would, therefore, be in the EU's real interest to enhance its relations with the countries of Central Asia - even after the Taliban takeover of Afghanistan in August 2021 - and to recognise the importance of this region as a political partner in its own right. The region is particularly valuable through the interconnection between Kazakhstan and Turkmenistan, the countries of the Southern Caucasus - in particular Azerbaijan - then, by crossing the Black Sea and Romania, a veritable hub for Northern Europe and, finally, the Baltic Sea, up the Danube, once again the economic and diplomatic corridor of Central and Eastern Europe (CEE).

In this context, Romania and Poland, both having demonstrated a genuine and frequently renewed commitment to international cooperation, particularly in the area of border security, are of major geopolitical importance to the EU. Their commitment towards the EU and their stance in foreign affairs were also important matters in their recent presidential elections.


Today, the Central Asian region, like that of Central and Eastern Europe (CEE), is of growing strategic importance to Europe. The 27 EU Member States, the five Central Asian countries and the six countries making up the *Eastern Partnership* (minus Belarus) are united by the same beliefs that the importance of law, the legitimacy of legal standards and the relevance of converging social criteria, in particular those tending towards harmonisation of ESG (environmental, social and governance) and DEI (diversity, equity and inclusion) rules, provide the cohesion the EU needs in the face of the external challenges and the changing geopolitical context.

This legal, normative and pragmatic diplomacy would not only be mutually beneficial, through socio-economic harmonisation and diplomatic cooperation, but it would also have for the EU the great advantage of revisiting the dogmas of a transatlantic relationship that is floundering. At the same time, it would allow Eastern Europe and Central Asia to distance themselves from the influence that Moscow intends to maintain, in a kinetic or hybrid manner, over its former Soviet socialist republics.

Russia's invasion of Ukraine on 24 February 2022 has fundamentally changed the traditional means of obtaining the necessary energy resources and food products. What's more, the new path in foreign policy of the new Trump administration offers many advantages in turning to the 13 countries belonging to the 3SI project.

From now on, as Europeans, convinced of our strength, vigilant and quick to highlight and defend our strategic and vital interests, we too must have our own Silk Roads, enabling us to position the EU in the interconnectivity of major transcontinental projects (such as INSTC, IMEC, Traceca European corridors or the 3SI). "*Geography is nothing other than history in space, just as history is geography in time*", wrote Elisée Reclus in 1905.





As in the second half of the 19<sup>th</sup> century and the beginning of the 20<sup>th</sup> century, when the “parent” of world geopolitics, British Admiral John Mackinder, realised that the heart of the world (*Heartland*) was in Central Asia - we now need to understand that the Chinese rivalries are playing a part in the affirmation of a structured and coherent Eurasian space on the world stage.

To achieve this, we can be sure that the next six-month Presidency of the Council of the EU, which will be held by Denmark from the 1<sup>st</sup> of July, 2025, (taking over from Poland), will take the trouble to understand the strategy of its joint presidencies of the Council of the EU, the *Three Seas Initiative*, and the *European Political Community* (EPC), relaunched on 23 June 2022 by Emmanuel Macron, with its 47 Member States and intergovernmental organisations, whose sixth meeting was held in Tirana on the 16<sup>th</sup> of May, 2025.

## France and South-Caucasus/Central Asia: From a patchwork of initiatives to a strategic approach?

Romain LE QUINIOU

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France has recently rediscovered an interest in Eastern Europe and in more distant regions, such as the South Caucasus and Central Asia, in light of rising global instability. This renewed strategic focus became more pronounced since Russia's war of aggression against Ukraine. Paris increasingly views these regions as strategically important for several reasons: countering Russian influence, securing energy and other strategic supplies - such as uranium - and developing new markets for its defence industry. However, France's approach remains largely unilateral and opportunistic, lacking a clear, coherent regional strategy. Its actions so far suggest a pragmatic attempt to seize emerging opportunities rather than the implementation of a long-term vision. Paris should strive for more coherence across different regional policies, while promoting European cooperation to increase the European Union's (EU) strategic presence at a global level.

In the South Caucasus, France's renewed attention dates back to the 2020 Nagorno-Karabakh war. At that time, Paris witnessed the ineffectiveness of the Minsk Group (France, the US, and Russia), which highlighted Europe's marginal role in regional security. France's reengagement deepened after the 2022 Russian war of aggression against Ukraine, and especially following Azerbaijan's successful offensive in 2023. A strengthened strategic partnership with Armenia has since emerged. Yerevan is eager to pivot westward, after growing disillusionment with its alliance with Russia, and France is seeking to assert its influence in Moscow's traditional sphere of influence. This is the French response to Russia's recent assertiveness in Africa. France and Armenia have signed a series of defence cooperation agreements, focused on two main pillars: support for the modernization of the Armenia's armed forces (including training missions); and the provision of modern defensive military equipment, notably *CAESAR self-propelled howitzers*.

However, France's presence in the region remains narrowly concentrated on Armenia. Relations with Georgia are minimal and seem unlikely to improve - given Tbilisi's current political trajectory. Tensions with Azerbaijan are expected to





persist as a consequence of France's deepening ties with Armenia and Azerbaijan's aggressive behaviour towards France in return (such as in the New Caledonia). As a result, France's South Caucasus policy appears overly focused on defence and on a single partner, limiting its broader strategic leverage.

In Central Asia, France has also increased its engagement since the early 2020s. Two key motivations stand out:

1. Securing access to strategic resources - particularly uranium;
2. Capitalizing on Russia's weakening regional influence post-2022.

France is especially interested in uranium supplies, as some of its traditional supply sources are threatened now by the political instability in Sahel. Consequently, Paris has pursued new partnerships with Kazakhstan, Uzbekistan, and even Mongolia.

The second motivation is more geopolitical. With Russia losing its grip on Central Asia, and China asserting its presence, France sees an opening to promote its role and bolster the EU's strategic presence. This includes opportunities for the French defence industry, even though potential partnerships are only starting to take shape.

More broadly, Paris is attempting to foster a more strategic European posture in the region so that European Union does not fall behind other global players. Nevertheless, France's approach remains narrowly sectorial and bilateral with a focus on energy resources. It lacks a more balanced, mutually beneficial framework that could underpin a more sustainable relationship. Moreover, despite the growing importance of connectivity and trade routes, France has shown little interest in the Middle Corridor, which links Central Asia to Europe via the South Caucasus. Instead, it seems more invested in developing the India-Middle East-Europe Economic Corridor (IMEC), developed in partnership with India, which may limit its engagement in Eurasian connectivity efforts.

At present, France is an opportunistic player in both the South Caucasus and Central Asia. It has yet to formulate a coherent, strategic vision for either region - let alone one that connects them. France would benefit from considering these areas part of a broader Eastern Neighbourhood strategy, building on its recent initiatives in the Black Sea region focused on security, prosperity, and connectivity.

Finally, France should adopt a more European approach in both regions. Acting alone, it will not be able to fully leverage opportunities in these complex and competitive environments. If Paris genuinely seeks to promote European interests in the South Caucasus and Central Asia, it must work in concert with EU partners and embed its actions in a broader, coordinated European framework. France has clearly reengaged in these regions - but now it must transform that engagement into a strategic and collective effort. Only such an approach will allow Paris to maximise its own strategic interests and contribute meaningfully in those regions.

## Diversification of supply chains: EU cooperation in South Caucasus and Central Asia and the significance of the Black Sea region

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The diversification of supply routes and the emerging trend of nearshoring are a unique opportunity for the countries of the Black Sea, South Caucasus and Central Asia regions to leverage their geo-strategic location and developing economies, to become important international logistics and nearshoring hubs.

In a globally connected world of multiple suppliers, carriers, regulatory environments, and market demands, external shocks - like natural disasters, geopolitical tensions or other global events, expose the vulnerabilities of complex supply chains. During the pandemic, mobility limitations resulted in increased transportation costs, delays and shortages of goods. Regional tensions caused supply routes to shift from the well-established and cost-effective **Suez maritime route** to the faster **Northern Corridor**; only to be shifted again to new alternatives away from the Russian Federation, following the Russian war of aggression against Ukraine and the subsequent sanctions. Similarly, the alternative US-backed **India - Middle East - Europe Economic Corridor (IMEC)** - a ship-to-rail transit route linking India to Europe through the Middle East - has also been disrupted due to the ongoing war in Gaza.

To improve operational efficiency, markets seek sustainable alternatives that mitigate risks and counter dependency on single vectors. Solutions like the **diversification of supply routes** and the prominent **nearshoring** emerge as viable alternatives to support the resilience of global supply networks.

**The Middle Corridor** gains ground as the fastest and most direct trade route that avoids dependency on Russia, and is far away from the regional tensions of the Middle East. **The Central Asia - Caucasus - European Corridor**, known as the Middle Corridor, is a multimodal transport route that connects China, Central Asia, South Caucasus, and Europe. It offers a clear advantage in terms of transport time between

China and Europe: ten days via the Middle Corridor, compared to up to [20 days on the Northern Corridor or 45 to 60 days by sea](#). In 2024, 4.1 million tons of cargo moved through the corridor, representing a 63% year-over-year increase.

It is not the first time the European Union (EU) has shown interest in cooperation with the Eurasian countries. Being rich in energy resources, critical mineral reserves, and a pivotal geo-strategic transit, **the Central Asia - South Caucasus - Black Sea** wider region has always been a central stage for competition among external powers (like China, Russia, and the West) over political and economic influence. This time, it seems that there is a convenient opportunity for both the EU and the countries of Eurasia, given that amidst growing international uncertainty, their geopolitical and economic interests intersect.

For the EU, the development of the **Middle Corridor** is an appealing opportunity to assert itself geopolitically in the region while diversifying its energy resources and transport channels away from Russia and the Middle East. To increase its involvement in Eurasia, the EU offers regional growth and project development through joint ventures, like the recently launched EU Global Gateway that fosters climate resilience, energy transition and digital connectivity.


For the countries of the wider region, the **Middle Corridor** is an opportunity to boost their national economies, by attracting foreign investments and infrastructure development. Besides, with China enticing nations into [debt traps](#), and the US adopting onshoring policies, the countries of Eurasia seek new partnerships to mitigate over-reliance on a single vector.

Building on this momentum, the first high-level EU - Central Asia meeting was held in April 2025 in Samarkand, Uzbekistan, and its [Joint Declaration](#) reaffirmed the two sides' commitment to deeper cooperation. Similarly, the recent launch of the EC Joint Communication on [the EU strategic approach to the Black Sea](#), to revamp the EU Black Sea Synergy Initiative (2007), signals the EU's renewed commitment to the region amid escalating global competition.

Whether this commitment will flourish remains to be seen as the **Middle Corridor is not a panacea**, neither for the EU, nor for the Eurasian states. A risk would be applying a one-size-fits-all policy to a region already facing geopolitical and economic challenges. Political instability, present territorial disputes, and shifting alliances along the countries of the Corridor are underlying disruption risks. The Russian Federation may leverage its relations with the countries to evade Western sanctions using the Corridor, while [Türkiye could use its strategic position to counter European interests](#).

Another risk is replacing one monopoly with another, potentially overlooking significant alternatives for supply diversification like nearshoring. For the EU, it entails the additional risk of becoming over-reliant on trade with China, which could potentially undermine its strategic objective of economic diversification.

**Nearshoring** is a growing trend for creating shorter, more reliable supply chains. Unlike onshoring, which keeps operations domestic with the risk of higher



labour and operational costs, nearshoring offers lower costs by moving to neighbouring countries, while avoiding the risks of offshoring to distant regions.

In the post-pandemic era, nearshoring for EU companies has shown [positive results](#). Given the ongoing infrastructure development, and the digital and energy transition efforts of the neighbouring Black Sea and South Caucasus countries, the latter could leverage their proximity to EU markets to become nearshoring hubs. Romania is a good example, emerging as [Europe's nearshoring hub for the automotive industry](#).

## The South Caucasus' Road to Net Zero goes via Romania


Ilya Roubanis

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Romania's connection to the South Caucasus is the key to the region's net-zero transition. In July 2024, the Italian technical consulting and engineering company CESI presented the initial conclusion of the Feasibility Study on the 1100 km BSCC cable designed to enable energy exports to Romania and, thereon, Central and Southeast Europe. Funded by the World Bank, the [study](#) determined the economic viability of the BSCC, while there is a parallel technical study ([ESPIRE](#)) - a seabed survey to determine the optimal subsea route. The national grid companies of Georgia, Romania, Azerbaijan, and Hungary back the project. The BSCC has the [stated support of the European Commission](#) and the four states support an application for the designation of the project as a "mutual interest" project (PMI). That will likely accelerate the [project's access to direct grants, soft financing, and accelerated permitting](#). While the capacity of the cable does not exceed 1,3 GW - enough to electrify a city of slightly over a million people - the project is groundbreaking in that it opens a second market for the South Caucasus electricity market, besides Türkiye.

Two points are worth discussing in this regard. Georgia's hydroelectric capacity is the second only to Norway's in Europe. The country's 300 rivers hold the [production capacity of 50TW](#). Over 85 per cent of the country's electricity generation is hydro type, although only 22,5 per cent of the estimated potential is exploited. The disruption of hydro-ecosystems for energy production is [controversial](#) on several fronts, including issues with the flow of migratory fish and silt necessary to replenish agricultural soil. From an investor's perspective, [the development of hydroelectric energy](#) requires long-term commitment, upfront capital investment, and a tumultuous process of stakeholder management. Timeline and cost overruns are the rule rather than the exception. Georgia has only theoretical capacity unless a grid is available to carry this energy to export markets. This vision is articulated in the *Black Sea Submarine Cable* project (BSCC), linking the region via a subsea cable to Romania.



According to a World Bank study, Azerbaijan has a wind generation capacity of around [157 GW](#), equivalent to more than 20 times its current installed electricity capacity. In sum, Azerbaijan could evolve from a fossil fuels middle power to a renewables powerhouse. In 2022, Baku unveiled a roadmap for installing 7gw offshore Wind Capacity by 2040, meeting 37 per cent of its [domestic energy needs](#). However, the country's renewable capacity requires investment in infrastructure, comparable to the rush for the pipelines that placed the country on the fossil fuel map in the 1990s and early 2000s. Theoretically, investment in “upstream” production, the national grid and transborder interconnectors should enable the evolution of Azerbaijan's role in energy value chains. Completing BSCC would go a long way in pushing Baku towards a virtuous circle of using oil revenue to substitute oil with electricity exports.

The upscaling of the BSCC to avoid “congestion” is already underway, with a view to 4-to-6 GW capacity. Renewables require investment. Unless Romania becomes the gateway to the EU market, the South Caucasus may never be able to transition to net zero.



## Building geo-economic bridges: European Union - South Caucasus - Central Asia. The role/position of Hungary

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Hungary joined the European Union in 2004, thus fulfilling the main aim among the three priorities of Hungarian foreign policy after the regime changes in 1989. These were joining the trans-Atlantic and European organizations; sheltering good neighbourly relations, and consolidating the links with the Hungarian minorities across the border. In 2010, the Hungarian government launched its “Eastern opening” policy, reaching out to the Caucasus and Central Asia, among other regions.

In consequence, Hungary has generally supported the development of the relations between the European Union and both the Caucasus and Central Asia. Thus, Hungary attaches special importance to Central Europe’s energy security, that is why the Hungarian foreign policy supports connections and pipelines which supply oil, natural gas and electricity from Central Asia and the Caucasus to Europe. Good cooperation with both origin and transit countries is one of the priorities. In this regard, Hungary supports all the projects that bring Central Asia and the Caucasus closer to Europe, such as the *Baku-Tbilisi-Ceyhan pipeline* or the *Black Sea Submarine Cable Project*.

In the broader context of Hungary’s relations to and perception of the region, Hungarian-Russian, as well as Azeri-Israeli relations should be taken into consideration. While these regions have not always been in the forefront of the Hungarian foreign policy, certain bilateral relations have remained relatively active. However, the two regions have usually been approached separately, rather than as a one unit. Further away, Central Asia mainly hit the Hungarian headlines in the form of the *Organization of Turkic States*, where Hungary holds an observer status and hosts the Organization of Turkic States’ only out-of-area office in Budapest. The underlying objective of Hungary’s engagement with the Organization of Turkic States is related to connectivity, coupled with the historic Turkic element in Hungary’s identity, even though this is still much debated.

With regard to the Caucasus, Hungary has not had a regional policy, as relations have been operated on a bilateral basis with each of the three countries.



Azerbaijan is part of the *Organization of Turkic States* and is particularly important for Hungary, as it is for the EU, from the standpoint of the opportunities in the areas of connectivity and gas supply. Moreover, Hungary offered support in the reconstruction of Nagorno Karabakh.

Relations with Armenia date back around 800 years, with an Armenian minority acknowledged as one of Hungary's thirteen national minorities, by the Act LXXVII on the Rights of National and Ethnic Minorities. Nevertheless, due to a [criminal case](#) concerning the murder of an officer of the Armenian Armed Forces by an Azerbaijani officer in Budapest, in 2004, diplomatic relations were suspended. This resulted from Hungary's decision to hand over the offender to Azerbaijan, where he was hailed as a hero. It took ten years and constant efforts on the Hungarian side, among which mediating the release of Armenian prisoners of war by Azerbaijan and enhancing relations between the Hungarian and the Armenian churches, to reestablish the diplomatic relations in 2022.

Among the three Caucasus states, Hungary has probably the closest diplomatic relations with Georgia. While these relations have a strong emotional background, based on their similar character and them acting as protectors of Christianity for centuries, political ones have developed very fast after the opening of the embassy in 2008. Bilateral relations with Georgia have remained a priority on the Hungarian agenda, in spite of the change in the Georgian government. This is reflected on the frequent high-level visits and the “joint cabinet meetings” started in 2022. However, in spite of the very close political relations and efforts, economic ties are poor, lagging far behind the political commitments. Hungary is also a firm supporter of Georgia's EU accession and welcomed the decision of Georgia receiving the candidate status in 2023. In the light of the Georgian domestic changes, the accession process seems to be put on the backburner, but Hungary remains a firm supporter of Georgia's integration within the EU. In conclusion, both within the EU framework and based on its bilateral relations, Hungary supports the EU's objective of bringing both the Caucasus and Central Asia closer, through supported projects of connectivity and expanding cooperation



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The Central Asia and South Caucasus have gained geopolitical and geoeconomic importance again recently, primarily due to the shifts caused by the Russian Federation war of aggression against Ukraine, in terms of East-West trade routes. Moreover, its significant natural resources have also played an important role in this change. It is, therefore, not a surprise that the interest of great and middle powers in the Central Eurasian region has increased. Russia's role and influence in this area is still decisive today, due in part to the common Soviet past and Russia's ongoing view that the entire region is part of its sphere of influence.

China is currently the most important economic partner in the region in terms of trade and exports. Within the framework of the *Belt and Road Initiative*, it is implementing significant infrastructure projects, like a new *Silk Road*. Its goals are pragmatic, focusing primarily on economy and technologies, achieving significant results.

With regard to the United States, Central Asia's stability was important because of its activities in Afghanistan. Currently, as its interests are practically exclusively economic, it does not seek to gain geopolitical influence, either here or in the South Caucasus. Therefore, the US is rather interested in stability and the established power-political status quo.

Türkiye, as a significant middle power, is highly influential in both regions, particularly as most of the countries in Central Eurasia are Turkic states. An important example of its influence-seeking activities is the *Organization of Turkic States*, which includes four out of the five Central Asian countries - and one of the three Caucasian countries. Based on this organization, Ankara has built up strong economic and political influence and its presence in the region can be considered natural. This is true, even for non-Turkic countries such as Georgia, where the Turkish economic presence is significant.

Furthermore, we should also consider regional powerhouses, such as Iran, whose good relations with Central Asia and the Caucasus represent an opportunity



to break out of isolation. Azerbaijan and the Caspian Sea, for example, are an almost exclusive transit route for trading with Russia, while for the region itself Iran is a logical way to reach the Persian Gulf and the world's seas.

It is not by chance that I left the European Union at the end of the list; its importance and role in the South Caucasus and Central Asia are even more limited than Iran's. On one hand, it lacks proximity to the region, and, on the other hand, the EU has not yet fully defined its goals in the area, and whether these are related to politics, security or economic influence. Since the EU is unable to become a significant player in the first two fields, it seems like it would rather focus on strengthening economic relations. However, by the time this trajectory was decided at the EU level, the possibilities had narrowed considerably, primarily because of the China's engagement in the region. The countries in the region are happy to welcome European investments and technologies, but there is practically no domain in which they would be dependent exclusively on the EU. It has also been proven that they are not receptive to the European values, despite the EU has spent more than one billion euros on promoting them in the last decade.

The EU's room for manoeuvre is significantly hampered by the fact that there is a lack of a unified foreign policy. However, individual member states can develop projects, partnerships and bilateral agreements. One of these is the special investment project - implemented in cooperation with Hungary and Romania, as well as Azerbaijan and Georgia - which aims to establish a power cable under the Black Sea for the transport of green electricity, thus helping the involved countries to achieve energy and climate policy goals. The importance of this project is highlighted by the fact that both Kazakhstan and Uzbekistan have also manifested their intention to join the project.

In conclusion, the EU has relatively limited opportunities in the region, compared to the Member States, which have significant opportunities to strengthen their presence in the Central Eurasian region. Countries like Hungary or Romania can find opportunities primarily in niche sectors. However, it is important to emphasize that, based on experience, the basic condition for high-level relations with the countries in the two regions is mutual respect, avoiding a lecturing tone and non-interference in each other's internal affairs. Understanding these particularities the opportunities in the region become unlimited.

## The Republic of Moldova's Perspective on Romania's Engagement with the South Caucasus and Central Asia

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From the Republic of Moldova's (RM) perspective, Romania is an important bridge to both the Caucasus and Central Asia, particularly through its initiatives in the energy sector, which are among the main priorities of the current pro-European government.

The strategic partnerships between Romania and Azerbaijan and Kazakhstan support RM's goals of achieving energy diversification. The Trans-Balkan pipeline, which the Romanian Transgaz operates, has enabled the transportation of Caspian gas to European markets since its establishment. Since the onset of the full-scale war in Ukraine in 2022, [RM has been importing exclusively gas from the European market - marking a historic shift away from Russian market for.](#)

The Moldovan Parliament Speaker Igor Grosu [explicitly mentions the SOCAR and Romgaz agreement that](#) enables Azeri gas to reach RM via Türkiye and Romania through the Ungheni-Iași interconnector pipeline. This agreement enhances EU energy security by providing a direct gas supply to RM.

Romania's Energy Minister, Sebastian Burduja, stated that [Romania stands ready to deliver the necessary gas](#) whenever needed, through the Greece-Bulgaria-Romania corridor and LNG infrastructure, to RM and other countries. Romania's role in Central Asia has quietly, yet steadily grown. Kazakhstan, for instance, sees it as its closest energy ally in Europe. A good example of this is how Kazakh oil is being refined in Romania through the KazMunayGas - Rompetrol partnership, in which the

[Romanian government holds nearly 45% of the Petromidia refinery](#), one of the largest in the region.

Additionally, Romania's energy infrastructure projects offer immediate opportunities for RM. The 43-km Iași-Ungheni pipeline, built with EU funds in 2014, and activated only in late 2022, is one of many examples. This interconnector, designed to reduce RM's dependence on imports of Russian gas, now carries Romanian/European (and ultimately Azeri) gas to RM. In the short term, RM can buy Azeri gas delivered via this route ([up to 1.5 bcm/year](#) under the SOCAR-Romgaz contract) and store excess in neighbouring facilities. In the long term, Romania's planned Black Sea offshore gas (*Neptun Deep*) and a future Constanța LNG terminal could further diversify supply and even allow RM to transit gas to Ukraine.

In turn, [RM took the decision to open an embassy in Astana](#), calling it a meaningful step towards stronger ties in 2025. Just recently, in April, RM's Energy Minister and Kazakhstan's ambassador talked about RM's renewable energy potential and explored opportunities for mutual investment.

Another important aspect for RM is that Romania can use EU funds and advocate for policies towards engaging the Caucasus/Central Asia. For instance, Romania's Transgaz participated in EU-Azerbaijan *Southern Gas Corridor* councils, highlighting EU-level cooperation on energy matters.

In summary, for RM, engaging with South Caucasus and Central Asian partners has become a top priority since the outbreak of the full-scale invasion of Ukraine by Russia. The main reason behind this move is the concern related to energy independence. On its part, RM can also share lessons (e.g. decoupling from Russian supply chain networks) with South Caucasus and Central Asian partners. Moreover, it also provides a strategic corridor, for pipelines going through its territory, connecting the Black Sea to Ukrainian infrastructures with Romania and beyond. This is the most important thing in the future reconstruction process of Ukraine.

## Learning from China: Middle Corridor as a tool to reinvigorate EU relations with South Caucasus and Central Asia

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The past decade, which was of less stable geopolitical relations, has reinvigorated interest in transcontinental economic corridors. First, China with its *Belt and Road Initiative* has proven that investments in infrastructure (to increase connectivity with some regions) are worthy and could serve to reorient supply-chains towards its own strategic interests. Beijing invested a lot -and not only in subsidies - to revive the Silk Railroad - stretching from China through Russia into the European Union via the terminal on the Eastern border of Poland in Małaszewicze. It also heavily invested in acquiring stakes in different ports all over the globe. The Chinese global logistic operators have become shareholders of thirty-four container terminals just in the European Union, among them in [three largest EU ports](#): Rotterdam, Antwerp and Hamburg.

China's bet on infrastructure has turned out to be highly beneficial. The Covid-19 pandemic, followed by the Russian invasion of Ukraine, have proven that geopolitical tensions could seriously disrupt the global supply chains, resulting in serious losses to economies. Central European countries that understood this too late - such as the Czech Republic, Slovakia Hungary or Germany - had serious problems with supplies of energy resources. The EU, as an economic bloc, also could not match China's in granting access to the resources needed for energy and electric vehicles transitions from Africa. Only recently has the European Commission acknowledged the level of dependence of the European ports on China while trying to develop the EU ports strategy and stress more the term of economic security.

However, the EU policy cannot be only reactive, as we need more activity in shaping the economic relations with strategically valuable regions. Therefore, a perfect supplement to the EU actions focused on the economic security dimension should be a greater engagement in the development of economic corridors. The EU has already recognised that it needs more leverage in the fight against Russia's

violations of the imposed economic sanctions. In this context and since Russia is no longer a credible transit country, expanding connectivity with South Caucasus and Central Asia is an important strategic goal. Without such efforts, this rich in resources region, especially in rare earth elements, will be prone to the policies and influence of both China and Russia.

Last year brought significant changes on the Middle Corridor, which run from China through Caspian and Black Sea towards the EU. So far, Beijing has been interested in building connectivity with Central Asia to access its resources and markets. However, due to problems with transporting goods via the Suez Canal, the Red Sea crisis and congestion on the Silk Railroad in Russia, China has become very interested in the transport of goods to Europe through the Transcaspian corridor.

According to the data of [Eurasian Rail Alliance Index data](#), in 2024 the flow of the containers on the route rose by 180% to 56 500 TEU. It was mainly the result of an increase in traffic of block trains (which transport only containers) from China from 11 to 358 (year-to-year). The result is still much lower than that on the Silk Railroad, where in the same period 380 000 TEU were transited. Moreover, the volume of traditional bulk goods, such as grain or oil (that are mostly transported from Central Asia to Europe) also developed well, increasing by 18%, and significantly exceeding previous forecasts.

The previously discussed trends show that the development of the Middle Corridor not only makes sense from an economic perspective, but it might also fulfil the EU strategic goals of assisting South Caucasus and Central Asia regions in order to diversify from Russia. Nevertheless, a key factor of success is a good strategy and its consequent implementation. It is important that Central European states such as Bulgaria, Poland, Romania and at some point, perhaps, also Ukraine, should actively involve in setting the right EU framework for improving connectivity.

The updated concept of the Eastern Partnership together with the new EU project of the *Black Sea Strategy* might contribute to this objective. Dialogue with Western European nations like Germany, France, and Italy is also essential to success, as is helping the transit nations coordinate effectively and align their laws to promote the smooth movement of commodities. Furthermore, another interesting partner in this respect might also be Türkiye. The connectivity agenda should be taken into account in any potential talks with Ankara about the modernization of the custom union.



## Poland-Central Asia Relations: Untapped Potential

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Poland's relations with Central Asian countries represent an intriguing example of cooperation between an EU member state and a post-Soviet region of significant strategic importance. President Aleksander Kwaśniewski launched Poland's initiative for active engagement in the region in his visit in 2002, during which Poland declared its willingness to advocate for Central Asian countries in their contacts with the West.

One of the drivers of closer bilateral relations was the presence of a sizeable Polish diaspora in Kazakhstan. This led to the establishment of the Kazakh-Polish commission on trade and economic cooperation. In line with its policy of diversifying energy sources, Poland expressed interest in importing Kazakh oil, while bypassing Russia. A central component of this strategy was the planned extension of the Odessa-Brody pipeline into Poland. Despite Kazakhstan's initial support for the project, it later insisted on involving the Russian Federation, which met with resistance from Warsaw and led to a cooling of bilateral relations. To date, the pipeline remains unbuilt due to financial disagreements and geopolitical instability, especially in the context of the ongoing war in Ukraine. In the long term, it was also envisioned a parallel gas pipeline, in order to deliver gas from the Caspian region to Poland and Europe. However, this project also failed to move beyond the conceptual phase.

From Poland's perspective, stability in the Caspian region remains a key objective, as the area plays an important role in the architecture of energy and geopolitical security. Warsaw is not only interested in securing energy resources, but also in supporting the region's economic development and security. Nonetheless, fields such as education and research, agriculture, renewable energy, forestry, and modernization of administrative systems (including the implementation of ISO standards) remain underdeveloped. Unlocking their potential could strengthen Poland's presence in the region.



More broadly, EU policy towards Central Asia, including that of Poland, continues to be inconsistent and short-term. European efforts are largely shaped by immediate economic interests, which have allowed Russian influence in the region to grow. As an EU border state, Poland could play a more prominent role in shaping a long-term EU strategy towards Central Asia, yet this area currently appears to lie outside the scope of Polish foreign policy priorities.

In light of rapid economic growth, Poland sees Central Asian countries as a key source of labour, particularly in sectors that rely on seasonal work. At the same time, Polish universities – due to their relative affordability and cultural proximity – are increasingly attractive to students from the region. Academic cooperation, in this regard, can serve as a foundation for building long-term cultural and social ties. Shared historical experiences, such as being part of the Soviet sphere of influence, also play a role for connection. Poland can thus be an important partner in sharing its experience of political transformation and democratization. Such engagement is also in Poland's interest, as it contributes to the country's image as a friendly and cooperative partner in the region.

In conclusion, Poland's relations with Central Asian countries are developing more slowly than their potential would suggest. Geopolitical constraints, the lack of a coherent EU strategy, and the unpredictability of regional partners limit the effectiveness of Polish efforts. Nevertheless, with a comprehensive long-term strategy encompassing both energy and socio-cultural cooperation, Poland has the potential to become a key player in the region.



## Increasing resilience through connectivity: the EU, Türkiye and the South Caucasus

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Geo-economic power is commonly understood as the strategic deployment of economic instruments to achieve geopolitical objectives ([Schneider-Petsinger, 2020](#)). Within this framework, the European Union (EU) has traditionally drawn its influence from economic strength. However, the international system is increasingly characterized by illiberal trends, the rise of protectionism, and the weakening of multilateral institutions. In this shifting environment, the EU faces mounting pressure to recalibrate its foreign policy and external economic engagement strategies, especially in its neighbourhood, where geopolitical competition is intensifying.

The South Caucasus and Central Asia have emerged as focal points of global geo-economic contestation, with major powers seeking to assert political and economic influence. China's *Belt and Road Initiative* (BRI), comprising the *Silk Road Economic Belt* and the *Maritime Silk Road*, has become the principal instrument of Beijing's regional outreach. Countries like Tajikistan, Kyrgyzstan, Uzbekistan, Kazakhstan, Georgia, Armenia, and Azerbaijan are actively participating in BRI-related infrastructure and connectivity projects. These initiatives serve China's broader geopolitical ambitions, by positioning it as a central actor in regional and global economic systems.

In response, the EU has launched the *Global Gateway initiative*, aiming to promote sustainable and strategic connectivity worldwide. With an investment package of €300 billion, the initiative seeks to strengthen ties with regions such as Africa, the Asia-Pacific, and Latin America. However, the EU faces structural and strategic limitations in matching the speed and coherence of China's efforts. While China operates through a centralized and coordinated state apparatus, the EU's capacity to act is often constrained by internal divergences among its member states, bureaucratic complexity, and the normative commitments embedded in its external action, particularly those related to sustainability and regulatory standards.



To address these limitations requires not only institutional reform, but also a more dynamic engagement with the EU's Eastern Neighborhood. The Union is not in any position to go through a treaty change and achieve the institutional reform it needs. Nonetheless, it is trying to find ways to overcome structural barriers.

The South Caucasus had always been strategically important due to its energy resources, transit potential, and geographic location linking Europe and Asia. In this context, Romania, as an EU member state, and Türkiye, as both a candidate country and a key regional actor, can serve as key partners in establishing integrated transit and logistics corridors.

Transportation and connectivity have been featured prominently in the EU strategies such as the *Black Sea Synergy* and the *Eastern Partnership*. Yet, these frameworks have struggled to produce a cohesive and cooperative regional environment. Today's geopolitical pressures and shifting trade routes create new incentives for coordination. The EU should prioritize infrastructure projects that enhance economic integration -, particularly through a modernized EU-Türkiye Customs Union and expanded trade agreements like the *Deep and Comprehensive Free Trade Areas* (DCFTAs) and **Comprehensive and Enhanced Partnership Agreements** (CEPA) with the Eastern countries.

Beyond trade, Türkiye and Romania can also enhance regional resilience to contemporary challenges. Türkiye's advanced capabilities in security and defense sector make it a valuable partner in crisis management. Romania, as an EU and NATO member with a strategic position at the Black Sea, can complement these efforts by serving as a coordination hub for disaster preparedness, emergency logistics, and civil-military cooperation. Joint initiatives might include early warning systems, regional training centers and critical infrastructure protection, particularly in transport and communications.

This collaborative approach would not only bolster the EU's credibility and influence in its Eastern Neighborhood, but also align with its long-term vision of fostering sustainable, secure, and cooperative regional environments.

## The Black Sea routes and Eurasian corridors: Romania's Strategic Role and Ukrainian Contribution to Strengthening EU Ties with South Caucasus and Central Asia

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Geographical position in the periphery of the EU and at the Eastern flank of NATO provides both opportunities and challenges in the period of geopolitical turbulence. Romania's geopolitical positioning potentially can make it simultaneously a gateway between Europe, the South Caucasus, and Central Asia and a fortress on the Black Sea. The Black Sea may serve both as frontier but also as a booster for commerce, energy, and infrastructure development.

The Port of Constanța already benefits from this positioning and could become the critical element for the **Central Asia-Caucasus-European Corridor (CACE)**, if investments in modernization and capacity expansion are timely and the political stability of Romania remains vigorous. The *Danube Transport Corridor*, through the Rhine-Main-Danube and Rhine-Amsterdam canal networks, links Constanța (Romania) to Rotterdam (Netherlands). With greater attention and investments, Constanța-Rotterdam riverine transport has the potential to transform Eastern and Central Europe. Additionally, the expected purchase of the Moldovan port of Giurgiulești can be of added value.

Increased American and European interests in secure and sustained economic engagement with resource-rich Central Asia and Caucasus may further attract investors to the region. Potentially, in case of a positive development in Ukraine, the ports can be helpful not only for the East-West, but also for West-East transportation roots.

The same logic is applicable to Romania's potential in the field of transport connectivity, particularly, by integrating Romania's rail and road networks with the **Trans-Caspian International Transport Route (TITR)** projects, also known as the **Middle Corridor**, can propel cargo movement between Europe and Asia. The Russian-Ukrainian war has limited freight transport through the *Northern Corridor*, so the *Middle Corridor* is considered a promising alternative in terms of distance and duration. Ukraine has been a full member of the TITR since April 2017, with its


national railway company, Ukrzaliznytsia, joining the international association to facilitate container transport from China to Europe via Kazakhstan, Azerbaijan, Georgia, and Türkiye. This membership enables Ukraine (alongside with Romania) to serve as a critical transit hub, linking the *Middle Corridor* to European markets. [Meanwhile, in 2022, there was a 153% jump \(1.5 million tons\), followed by 86% \(2.8 million tons\) growth in 2023, and a more modest 21% in 2024 \(3.3 million tons\).](#) And according to the [World Bank's forecast](#), by 2030, the turnover may increase to 11 million tons.

In 2023, the railways of Kazakhstan, Azerbaijan, and Georgia established a joint venture, namely *Middle Corridor Multimodal*, in order to serve customers on a single-window principle with guaranteed delivery times and costs. The European partners of the Project should consider similar approaches to boost the efficiency of the route.

Romania's participation in expanding the *Southern Gas Corridor*, including projects like the *Trans-Caspian Gas Pipeline* (TCGP), can strengthen its energy security. Although this project has been under debate for decades, the Russian war of aggression against Ukraine revitalized it - just like in the case of the *Middle Corridor*. In July 2023, the Ministry of Foreign Affairs of Turkmenistan published [a statement for media](#), stating that *the construction of the Trans-Caspian pipeline was directly related to the delimitation of the seabed between Turkmenistan and the Republic of Azerbaijan. In addition, Turkmenistan is convinced that there are no political, economic, financial factors hindering the construction of the gas pipeline. While Russia and Iran are the key opponents of the project, their current status of hostile to the EU states opens the window of opportunity.*

Another Romanian asset in this regard can be the modernization of the Constanța LNG terminal capabilities and the digitalization of energy transit infrastructures for enhanced security, efficiency and resilience. Obviously, **there are still obstacles that we must consider**. First, and foremost, it is **Russia's attempts to preserve its energy dominance over Europe**. The efforts aimed at diversification of the sources of energy supply may face the risks of Russian hybrid warfare and the attempts to the revitalized *North Stream* related grand strategy of the Russian Federation. Also, the **growing tensions between the US and China may also influence the EU-China relations** and, therefore, trade roots may eventually face a decrease in demand. Besides, Russia and Iran already speculate that undersea pipelines in the Caspian Sea may result in ecological issues (that can be staged by the interested actors). Finally, **Russia invests a lot into instability within the EU**, leveraging political consensus, promoting the growing influence of its political proxies and invigorating political crisis in leading CEE states.

Deterring Russia and achieving a just peace in Ukraine can contribute significantly to the evolution of the existing projects and elaboration of new ideas. These may help the region and attract significant investments, in order to upgrade existing infrastructure to meet international standards and handle increased cargo



volumes alongside with harmonizing customs procedures and regulations with neighbouring countries.

## Views from South Caucasus and Central Asia

## Deeper cooperation with the EU sought amidst geopolitical turmoil

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We can define Armenia's current priorities regarding the further development of relations with the EU through the ongoing consultations on a new EU-Armenia partnership agenda, meant to supplement the *Comprehensive and Enhanced Partnership Agreement* (CEPA), the recently launched visa liberalisation dialogue, and the law to launch EU accession process, adopted by the National Assembly of Armenia on 26<sup>th</sup> of March 2025. In the current setting, Armenia additionally relies on the EU's contribution to regional stability by means of the *EU Mission in Armenia* (EUMA), as well as the assistance under the *European Peace Facility* (EPF). The latter is aimed to enhance the logistical capacities of the Armenian armed forces and improve the protection of civilians in crises and emergencies. Regarding the EPF - worth €10 million - was approved in 2024 with a few months delay, as [Hungary kept pushing](#) for a similar provision for Azerbaijan. Additionally, on 27<sup>th</sup> of May 2025, during a discussion at the Yerevan Dialogue Forum, Foreign Minister of Hungary Péter Szijjártó stated that adoption of the second assistance measure of €20 million would again depend on an equal allocation for Azerbaijan.

The short and medium-term challenges are intertwined with Azerbaijan's imposition of preconditions for signing the peace agreement, despite having already agreed on the substance of it as such. These preconditions and related rhetoric appear as a tool for persuading the domestic political discourse in Armenia, ahead of the 2026 parliamentary elections. Simultaneously, Russia's ties with some of the Armenian political circles and its strong intelligence activity could be seen as tools aiming to exert influence over the political discourse. A report published by the *Digital Forensic Research Lab* (DFRL) at the Atlantic Council in mid-January 2025 noted that Russia and Azerbaijan have been using the same propaganda narratives to undermine Armenia's partnership with the Western actors, vilifying the engagements with the EU and the United States, the EUMA, and the visa liberalisation dialogue. Hence, in addition to bilateral and multilateral diplomacy supporting the peace agreement, Armenia might also benefit from EU member states' expertise in strategic communication and dealing with hybrid threats.





Although the opening of new East-West transportation routes still depends on the successful conclusion of a peace deal with Azerbaijan, and large-scale infrastructure and logistical projects are not on the table yet, Armenia - a net exporter of electricity (having an operational interconnection with the Georgian grid), - would be interested in joining the Black Sea Energy submarine cable project. In addition to enhancing cooperation in the energy sector, it may further contribute to confidence building. Moreover, potential increasing of electricity generation without importing additional amounts of Russian gas might be possible. The government of Armenia is interested in the possibility to import gas from Turkmenistan, so it has initiated consultations with Ashgabat, which involve the possibility of a swap deal with transit via Iran.

From an Armenian perspective, an important opportunity for Romania to leverage its position, as an EU and NATO member, is the contribution to secure operation of the maritime transportation routes, particularly regarding the recent decision to resume the ferry connection between Ukraine and Georgia. This development is also an additional stimulus for Armenia to proceed with the development of a transportation link connecting the Black Sea and the Persian Gulf. However, this objective depends on a favourable outcome of the U.S. - Iran negotiations for a renewed nuclear deal.

## Azerbaijan as a pivotal hub for the European Union

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For the past 30 years, pundits and policy makers have debated and discussed the European Union's (EU) involvement in the South Caucasus and Central Asia region, and developed various scenarios for an efficient and mutually beneficial policy in this direction.

While this period of time has been filled with many success stories - such as cooperation in energy security, fight against terrorism and extremism, development of economic interlinkages, transport corridors and significant progress in the area of reforms and modernization based on EU laws and practices - the overall strategic objective of the EU in the region remains vague. The countries in the region have received mixed signals from Brussels, regarding the pace and format of the integration process, as well as membership criteria for new members. These difficulties have also been parallel to the wars in Ukraine and Georgia, which many analysts link with the European integration and aspiration of these countries, and respective response to these processes from Russia. Unresolved and frozen conflicts in the area, and inconsistent approaches to the separatist regimes have created additional problems for the EU policy in the region.



Azerbaijan has always advocated for a pragmatic approach in the EU's policy towards the Caspian region. It has also been a reliable partner for the EU on many issues, even at times of severe pressure from other regional powers. While not seeking membership in the EU, Azerbaijan has developed extensive networks of energy and transport corridors, which strengthen the EU-Caspian relations and open new opportunities for cooperation in the future. The liberation of the previously occupied territories of Azerbaijan from the Armenian occupation open opportunities for the Zangezur corridor, as well as peace and comprehensive regional cooperation in the South Caucasus. EU's involvement in this process can be helpful if attention is geared towards investments into the region, assistance with the cleaning of the land mines, development of the ruined infrastructure and return of the Azerbaijani IDPs. In this process, we have yet to see the balanced approach from the EU politicians.

The Caspian region can no longer be considered a periphery to the EU interests. Recent developments between the US and the EU have shown that the security architecture of the EU will need to change and new partnerships will require to be formed. In this regard, focus on economic and trade relations with China will become even more important. This, in turn, will need to pass via South Caucasus and Central Asia. This region will also provide critical minerals, which are essential for the European economy.

Relations with Russia will need to find a new point of cooperation and, thus, the EU will have to rely on the Turkic world against external threats. Therefore, cooperation with Türkiye and other Turkic states in the Caspian region will be important for the EU, especially in areas such as joint efforts against illegal migration, fight against radicalism, extremism, violent separatism, development of the Middle Corridor, focus on green energy and other trade and economic issues. The export of the Caspian green energy into the EU markets is already becoming a reality with the development of the *Black Sea Submarine Cable* project.

As long as Azerbaijan receives fair treatment regarding the regional conflicts and peace processes, it will prioritize its economic and trade policies with the EU and focus on strengthening of the mutually beneficial projects and programmes. EU will need to review its past shortcomings in the region and develop new approaches, in light of emerging external threats and global risks.

## Geopolitics versus Democracy: Georgia's Transactional Calculus and the EU's Dilemma

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Central Asia and the South Caucasus feature prominently on the European Union's (EU) geostrategic agenda. The latest [EU-Central Asia Summit](#) underscored the EU's intention to strengthen trade, transit and investment ties with the region. For the South Caucasus, the Eastern Partnership facilitates similar engagement framework.

As both regions play a substantial role in boosting trade between Asia and Europe, the EU is intensifying its transactional involvement. While strategic interests often trump democratic concerns in the EU's dealings with Central Asia and the South Caucasus, the EU's stance towards Georgia - an EU candidate country - has been more nuanced. Despite continued cooperation at the bureaucratic level, regarding transit and infrastructure, political relations between Tbilisi and Brussels are now at a low point.

In shaping its approach towards Georgia, the EU must tread carefully. Turning a blind eye to Georgia's *autocratization* and its growing ties with Russia and China, the EU risks to weaken its credibility, both in Georgia and among other candidate countries. The EU must use its conditionality wisely and make it clear to the Georgian authorities that the support for the connectivity projects depends on Georgia's renewed commitment to democracy and EU accession.

Georgia plays an important transit role in the Asia-Europe connectivity. With its strategic location and access to the Black Sea, Georgia is part of the so-called *Middle Corridor*, an alternative transportation route bypassing Russia. The EU has recently [committed](#) to mobilizing EUR 10 billion towards its development. As part of the [Economic and Investment Plan for the Eastern Partnership](#), the EU also aims to strengthen transport and energy links with the South Caucasus. One key initiative is the *Black Sea Submarine Cable* project, scheduled for completion by 2030-2032, which would connect Georgia's electrical power systems with the European ones, ensuring fibre-optic connections, as well. However, the success of this depends on the financial backing from the EU or international financial institutions.



Since the beginning of the war in Ukraine, Georgia's ruling party has become more authoritarian at home, while diversifying its foreign policy options, seeking to develop close ties with Beijing, Moscow, while also maintaining its connection with Brussels. In 2023, the Georgian government signed a strategic partnership with China. In 2024, it awarded a Chinese-Singaporean company a bid to build the Anaklia Deep Sea Port, thus giving China a significant advantage in the region. Georgia also cultivates close economic ties with Russia while maintaining a formal political distance due to the history of war and the realities of Russia's occupation of Georgian territories. At the same time, Georgia's ruling party seeks a transactional partnership with the EU. Just like other autocracies, it wants to gain EU support to strengthen its transit position, despite strained political ties between Brussels and Tbilisi.

This places the EU in a difficult position. It must decide to either tolerate Georgia's *autocratization* and its foreign policy alignment with China and Russia, while also continuing cooperation on transit and trade, or use its advantage to affect the ruling party's undemocratic behaviour. Unlike Central Asian states and Azerbaijan, which hold significant resources, Georgia is more dependent on the EU funding and support. The EU should use this leverage to bring Georgia's ruling party back on the democratic path, and in line with its commitments as an EU candidate country. It could do so by continuing *Georgian Dream's* political and diplomatic isolation and freezing support for the *Black Sea Submarine Cable* project until democracy and the EU accession process are restored.

Romania, as a key partner to Georgia, in terms of its connectivity prospects with the EU, should play a leading role in shaping this approach. By tolerating Georgia's autocracy and its pro-Russian and pro-Chinese leanings, the EU not only undermines its normative credibility, but also allows Chinese and Russian political and economic influence to be consolidated in Georgia. In the longer term, this outcome would undermine the EU's security.

## KAZAKHSTAN

### Kazakhstan and Romania: Partnership amid a Changing Geopolitical Landscape

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Bilateral relations between the Republic of Kazakhstan and Romania demonstrate a steadily developing dynamic, grounded in political dialogue, mutual economic benefits, and reciprocal support within multilateral frameworks. Against the backdrop of global transformations and growing turbulence in international affairs, this partnership serves as an example of a balanced and pragmatic cooperation oriented towards strategic stability and long-term development.

Romania has consistently supported Kazakhstan's key foreign policy initiatives. Its endorsement of Kazakhstan's 2010 OSCE Chairmanship and the hosting of the OSCE Summit in Astana, participation in the international exhibition EXPO-2017, and backing for Kazakhstan's candidacy for a non-permanent seat on the United Nations Security Council for 2017-2018, all reflect the high level of mutual political trust and engagement. Moreover, Romania actively supported Kazakhstan's accession to the *Asia-Europe Meeting* (ASEM), underscoring its interest in deepening EU-Central Asia dialogue.

A pivotal institutional step in bilateral relations was Romania's ratification of the *Enhanced Partnership and Cooperation Agreement between Kazakhstan and the European Union* on the 10<sup>th</sup> of May 2017. This agreement laid the foundation for closer cooperation in trade, energy, transportation, digitalization, environmental protection, and sustainable development. In this context, Romania serves as a vital

bridge between Central Asia and the European political and economic space, promoting Kazakhstan's cooperation with European structures.

[The economic dimension of the partnership has shown consistent growth. In 2024, bilateral trade between Kazakhstan and Romania reached USD 2.92 billion, marking a 1.6% increase compared to USD 2.87 billion in 2023.](#) Kazakh exports totalled USD 2.78 billion, while imports from Romania amounted to USD 138 million. This trade structure reflects Kazakhstan's resource-based specialization and Romania's industrial profile, revealing a high degree of complementarity and predictability in economic relations.

[Between 2005 and the third quarter of 2023, Romania's cumulative direct investment inflow into Kazakhstan reached USD 1.57 billion. Approximately 40 Romanian-affiliated companies operate in Kazakhstan, while 35 Romanian - registered legal entities involve Kazakhstani capital.](#) These figures point to a growing interest among business communities in long-term collaboration across construction, logistics, energy, and infrastructure.

Given current global challenges – such as ensuring food security, facilitating a green transition, and developing rural areas – closer cooperation in agriculture has become increasingly relevant. Romania is one of the largest producers of cereals in the EU and the largest producer of sunflower seeds, honey and plums, which offers valuable insights for Kazakhstan's agribusiness modernization. Collaborative projects in agro-processing, smart farming technologies, and supply chain development could only improve national sectoral performance of Kazakhstan.

Another area of strategic interest is the digital governance. According to the [UN E-Government Development Index \(EGDI\) for 2024 data](#), Kazakhstan is ranked 24<sup>th</sup> out of 193 countries, reflecting its significant achievements in online public services and digital transformation of the public sector. In comparison, Romania occupies the 72<sup>nd</sup> place in the same index. This disparity suggests untapped potential for knowledge exchange and joint initiatives in the field of e-government. Kazakhstan's experience in developing digital public services could be particularly beneficial for Romania to modernize its state services and enhance interaction with citizens.

In sum, Kazakhstan-Romania relations represent a model of constructive interregional cooperation that demonstrates resilience and adaptability to contemporary challenges. With a strategic orientation, institutional maturity and strong mutual interest, the partnership holds substantial potential for further expansion - at both bilateral and multilateral levels - focused on sustainability, technological innovation, and economic complementarity.



## Building geoeconomic bridges: European Union - South Caucasus - Central Asia. Views from Kazakhstan

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Kazakhstan has become a strategic economic and political partner for the European Union (EU) in Central Asia. In 2024, bilateral [trade between Kazakhstan and the EU](#) exceeded \$50 billion, marking a 17% year-on-year growth. The EU remains Kazakhstan's largest trade and investment partner, accounting for over 30% of its external trade and more than \$180 billion in cumulative foreign direct investment since 2005. Kazakhstan's contribution to the EU's engagement is underpinned by its strategic location, energy resources and stable multivector foreign policy in the region.

Key opportunities include expanding non-resource exports - such as green hydrogen, uranium and agritech goods - and enhancing digital connectivity. However, challenges involve infrastructure gaps, limited transport corridors, and growing geopolitical competition in the region. Addressing these requires coordinated investments in Trans-Caspian logistics (e.g., the *Middle Corridor*), diversification of supply chains and a policy alignment on the green transition and digital governance.

In this broader context, Romania - as an EU and NATO member with direct access to the Black Sea - is well positioned to serve as a logistical and diplomatic bridge between Europe and Central Asia. Romania's support for the *Trans-Caspian International Transport Route* (TITR) is crucial. For instance, in 2024, Romania and Uzbekistan expanded trade by 111%, reaching \$41.6 million - a sign of untapped potential.

Strategic projects where Romania could engage include:

- Developing Constanța Port as a key terminal for Caspian goods;

- Investing in multimodal infrastructure along the TITR;
- Facilitating digital and energy interconnectivity (e.g., green electricity corridors);
- Launching joint academic and innovation hubs focused on climate, food security, and digital policy.

By positioning itself as a gateway to Central Asia, Romania can both enhance its geopolitical role and economic resilience within the EU.

At the same time, the EU has a unique window of opportunity to solidify its influence in Central Asia and the South Caucasus, amid shifting geopolitical alliances and the rise of China's *Belt and Road Initiative*. Opportunities include accessing critical raw materials (for example, Kazakhstan supplies 41% of EU's uranium), fostering digital transformation and promoting sustainable connectivity. However, the EU faces challenges such as limited regional integration, authoritarian governance patterns and dependency on fossil fuels.

Kazakhstan can contribute by advancing regulatory convergence, expanding its role as a green energy supplier (targeting 15% renewables by 2030) and reinforcing regional platforms like the C5+EU format. The government's "Foreign Policy Concept 2024-2034" underscores the commitment to align with European standards in trade, energy and digitalization.


Within this evolving geopolitical landscape, Romania must navigate complex dynamics, balancing economic outreach with responsible diplomacy. It can do so by promoting inclusive economic partnerships, particularly in infrastructure and energy, while actively supporting conflict resolution mechanisms and regional dialogue forums.

Participation in multilateral security platforms (e.g., EU-Central Asia High-Level Security Dialogue) and targeted investments in resilience (cybersecurity, food security, climate adaptation) would help Romania align its economic strategy with broader EU foreign policy goals. Kazakhstan, for instance, offers a stable counterpart: it ranks 25<sup>th</sup> globally in nuclear security and maintains balanced relations with all major powers, making it a low-risk, high-value partner for Romania's regional ambitions.

Finally, enhanced EU-Central Asia energy cooperation offers Romania a strategic opportunity to access diversified energy sources. Kazakhstan, the ninth-largest oil exporter in the world and a top global uranium supplier, shipped over 70% of its oil exports to the EU in 2023. With Kazakhstan aiming to produce 1 million tons of green hydrogen by 2030, and developing a Eurasian electricity market, Romania can integrate into future clean energy supply chains.

Specific investments should focus on:

- Upgrading Constanța Port and Black Sea terminals to accommodate energy and container flows from the Caspian Sea;
- Building LNG terminals and smart grids aligned with EU Green Deal objectives;

- 
- Developing railway and digital corridors linking Central Asia through the South Caucasus to Europe;
  - Supporting pipeline extensions or electricity interconnectors under the Southern Gas Corridor framework.

Such projects would not only support EU energy diversification, but also position Romania as a regional energy logistics hub in the Eastern Neighbourhood.

## Central Asia and the European Union: Discovering New Economic Frontiers

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With over 15 years of experience, she has led multiple impactful projects, including as a Consultant for the Aga Khan Foundation and the USAID-funded Youth Employment (YES) Project, which focused on supporting entrepreneurship education, skills development, and labor market policies for marginalized groups. She has also worked as a consultant for UNDP, the European Training Foundation, the International Organization for Migration, and other international organizations.



Central Asia has about [82 million people](#) and a gross domestic product of [approximately \\$450 billion](#). It is one of the largest suppliers of minerals in the world, producing resources such as [30 billion barrels of oil](#), [20 trillion cubic meters of gas](#).

The relationships between Central Asia and the European Union (EU) countries changed a lot in the last decade, as trade between them grew significantly, increasing four times to reach [54 billion euro](#) in the last seven years.

Uzbekistan made important strides in establishing a comprehensive cooperation with the EU. The Enhanced Partnership and Cooperation Agreement signed in 2022 aimed to strengthen ties in various areas, including politics, economics, human rights, education, energy and innovation. Over [1 000 enterprises with European capital](#) were operating in Uzbekistan, and direct investments from Europe exceeded [\\$1.2 billion in 2022](#), primarily focused on energy, agriculture, and infrastructure. Uzbekistan's trade relations with the European Union increased significantly, growing by [1.6 times to reach nearly 6.4 billion euros](#).

In 2024, [Uzbekistan's exports to the EU](#) reached \$1.75 billion. The composition of these exports is diverse, with 54% consisting of chemical products, which include uranium and fertilizers. Other significant categories include textile products at 8.4%, and ferrous and non-ferrous metals at 8.2%. Uzbekistan's imports from the EU were \$4.7 billion, indicating a substantial trade relationship. The main categories of imports include machinery and equipment, which account for 49%, followed by chemical products (25%) and food products (9%). In 2024, Uzbekistan's trade with EU countries showed a varied distribution of trade percentages. Germany and France are the top partners, making up 19.1% and 17.8% of trade, respectively. Other important countries include Lithuania at 9.4%, Italy at 6.9%, and the Czech Republic at 6.8%. Smaller contributions come from Poland, Latvia, the Netherlands, Belgium, and Austria. The "Other EU countries" category accounts for 18.7%.



A joint declaration from a recent summit held in Samarkand, Uzbekistan aimed to boost the relationship between the EU and Central Asian countries to a strategic partnership. Germany and France are key partners in this effort, focusing on security issues. The declaration highlighted economic cooperation, especially in critical raw materials and transport infrastructure, like the Trans-Caspian transport corridor. To support a new stage of cooperation, the EU has announced an investment package of [€12 billion](#) within the framework of the Global Gateway strategy. It aims to support transport, climate, energy and water supply, digitalization, and critical raw materials. Additionally, the EU plans to launch a dialogue platform for cooperation with Central Asia to address issues such as combating terrorism and managing the situation in Afghanistan, among other areas.

Trade and economic cooperation between Romania and Uzbekistan is developing dynamically as part of the EU's initiatives. According to the Statistics Agency of Uzbekistan, the volume of exports to Romania in 2024 reached [\\$41,2 million](#), while the volume of imports from Romania amounted to [\\$37,3 million](#). This trade growth demonstrates the strengthened economic ties between the two countries and highlights the potential for further collaboration in various sectors.

Fostering innovation and technology transfer through partnerships between educational institutions in EU and Uzbekistan and businesses lead to solutions in key sectors like energy and agriculture. Additionally, supporting sustainable practices, particularly in resource management, harness Central Asia's considerable renewable energy potential.

It's important to develop sector-specific strategies that optimize resources and address the unique strengths of both regions. Strengthening regional cooperation among Central Asian countries, alongside leveraging EU investment opportunities under initiatives like the Global Gateway strategy, will enhance infrastructure and development projects. Promoting gender inclusivity in economic policies will ensure that women contribute significantly to entrepreneurship and labor markets, creating a more resilient economy. By implementing these recommendations, Central Asia and the EU can build on their existing partnerships and pave the way for a prosperous and sustainable future together.

## Potential for Cooperation between Uzbekistan and Romania in Developing Trans-Caspian and Black Sea Transport to Europe

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The war in Ukraine has created a new geopolitical reality in Eurasia, where Central Asia is acquiring exceptional significance in strategic communications between East and West. The region's connecting role, with its vast resource potential, offers ample opportunity to strengthen the economic power of the European Union in a rapidly changing world.

Central Asia, as an emerging independent subject of international relations, is committed to an open, pragmatic dialogue with the European Union (EU), which was clearly shown at the first joint high-level summit held on April 4, 2025 in Samarkand, Uzbekistan. This summit provided a platform to outline and align the positions of the parties regarding the priorities of the strategic partnership, as declared in the outcome document of the Samarkand meeting. It may serve as a valuable guide for the implementation of the updated *EU Strategy for Central Asia*, adopted in 2019.

At the current level of cooperation, both Central Asia and the EU give high priority to the development of trade, economic, and transport ties. These areas are interdependent and, therefore, cannot be considered separately. Intensification of trade stimulates the growth of freight transport, which requires efficient routes. A similar effect, only in reverse order, is achieved when establishing reliable transport communications - the existence and diversity of trade routes gives impetus to increased turnover.

Based on the current geoeconomic interests of the EU in Central Asia, three trigger points for growth of interregional transport can be identified. These are cooperation in trade, energy and critical minerals. In this regard, Uzbekistan is ready to be a key partner.

Uzbekistan's foreign trade, including its export performance, demonstrates steady growth. Thanks to the GSP+ system of preferences, since 2021, exports to the EU had nearly tripled, reaching [\\$1.15 billion](#). Duty-free exports have been established for more than 1 100, out of the 6 200 eligible product categories, including agricultural, fabric, electrical engineering, and chemical goods.

In 2024, the volume of international freight transportation in Uzbekistan reached approximately [60 million tons](#). The share of the European segment in it



continues to grow, which seems to be a long-term trend, given Tashkent's targeted policy to develop the republic's transit potential by the implementation of promising transport corridors. In this regard, the partnership with Romania - one of the largest trade gateways between Central Asia and Europe - is of critical importance.


In terms of logistics, Uzbekistan and Romania cooperate within the framework of the TRACECA (*Transport Corridor Europe-Caucasus-Asia*) Programme and the *Trans-Caspian International Transport Route* (TITR). In 2019, at the proposal of the Uzbek side, the multimodal transport corridor Asia-Pacific Countries-Europe was launched, also known as CASCA+ (*Central Asia-South Caucasus-Anatolia+*). It involves the ports of Turkmenistan, Azerbaijan, Georgia, Romania and Bulgaria. Meanwhile, Bucharest is promoting its *Caspian Sea-Black Sea International Transport Corridor* (ITC-CSBS) project, positioning the port of Constanța as the main gateway to Central Europe. The idea of connecting the two seas has been supported by Tashkent, in view of its active desire to diversify transport flows in the western direction, as well as the desire to use Turkmen transit to access the Caspian Sea and the South Caucasus.

In the future, it seems feasible to harmonize both corridors, which would lead to mutually beneficial outcomes. This would clearly expand the group of participants along the connecting route on the “*China-Central Asia-Europe*” axis. Potential interested parties may be Kyrgyzstan and Tajikistan, which traditionally rely on Uzbekistan's transit for transport to the EU via the Caspian and Black Seas. The construction of the China-Kyrgyzstan-Uzbekistan railway, launched in December 2024 with an estimated annual capacity of up to [15 million tons](#), and its further extension to the Turkmenbashi port on the Caspian Sea, will enhance the output capacity of the CASCA+ corridor, ensuring a stable cargo flow towards Romania's Port of Constanța. This development, on one hand, will strengthen the transit positions of Tashkent and Bucharest, while, on the other hand, will encourage the countries to enhance mutual coordination on the issue of interregional connectivity.

The dynamic growth of Uzbekistan's trade with the EU, which reached [€6.4 billion](#) in 2024 - coupled with the parties' far-reaching plans to deepen investment partnerships, in such critical sectors like green energy and the extractive industry, lays a solid foundation for the intensification of international freight transport from Central Asia to Europe using Romania's transport infrastructure. It is important to mention that this applies to the delivery of a wide range of goods, including energy.

With its strategic location at the crossroads of the European trade routes, the largest port on the Black Sea, and an integrated network of railways and roads, Romania rightfully lays claim to the role of a transit energy hub. Bucharest is promoting the *Southern Gas Corridor*, aimed at diversifying energy supplies to the European market. This project is of particular interest to Central Asian states, which are seeking to expand the geography of their energy exports and are actively cooperating in this regard with Azerbaijan and Georgia — key transit nodes for deliveries between Central Asia and the EU.





Uzbekistan is actively expanding its solar and wind energy capacity, with the shares expected to reach [54%](#) of the country's energy mix by 2030. An estimated [10-15 billion kWh](#) of electricity will be transmitted to Europe. To this end, a “green energy corridor” is being developed, which envisions the laying of a cable along the seabed of the Caspian and Black Seas. The joint initiative of Uzbekistan, Kazakhstan and Azerbaijan aligns with Romania's strategic objective of becoming a distribution a key energy distribution hub between the South Caucasus Central Asia, and the EU. Surely, this will pave the way for Uzbek-Romanian relations to reach a qualitatively new level.

## The EU and Central Asia: towards pragmatic engagement

Zilola YUNUSOVA

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Today, the world order is undergoing serious changes. The transformation of traditional trade routes and supply chain networks, food and energy security concerns, and the climate change challenges not only have a significant influence on national and international efforts to achieve sustainable development goals, but also open up new opportunities and promising areas for cooperation.

One such positive trend can be noticed in the relations between European Union and Central Asia. Both parties are actively working to raise the bilateral cooperation to a qualitatively new level. The first Central Asia - EU Summit in Samarkand on April 3-4, 2025, and previous high-level meetings in Astana and Cholpon-Ata, the EU-Central Asia connectivity conference in Samarkand and the EU-CA High-Level Conference on Environment and Water in Rome - all of which reflect EU's growing engagement in the region.

Accordingly, the EU is now one of the most important partners for Central Asian countries in trade, energy, investment and development aid. It is noteworthy that the EU has begun to reassess its strategy towards Central Asia, taking into account an assessment of the current internal and regional dynamics, as well as responding to the actual needs of Central Asian countries.

The EU recognizes the strategic importance of Central Asia, which serves as a transcontinental bridge between Europe and the vast Asian continent. Following the *Global Gateway Investors Forum for EU-Central Asia Transport Connectivity* (Brussels, January 2024), a commitment was made to allocate €10 billion for the development of the *Middle Corridor*, which is the important part of the Caspian-Black Sea international transport root. This will reduce travel time between Europe and Central Asia by almost half – to just [15 days](#).

Furthermore, the EU is developing a strategic partnership roadmap with Central Asian states, particularly Kazakhstan and Uzbekistan, focused on critical raw materials. The EU has proposed to become a partner in developing the region's local processing industry, including the construction of value-added local production facilities across the entire value chain, from extraction to processing, as well as opening laboratories and training specialists.

At the bilateral level, the EU is expanding *Enhanced Partnership and Cooperation Agreements* (EPCAs) with Central Asian countries. At present, only Kazakhstan and Kyrgyzstan have such an agreement with the EU. With Uzbekistan, an EPCA is currently being prepared for signature, while with Tajikistan negotiations are still ongoing. In the case of Turkmenistan, there is only an interim trade agreement in place.

All of these developments reflect the common interest and focus on long-term and sustainable cooperation in multiple sectors, including security, economy, trade, transport, environment, energy, raw materials extraction, digital infrastructure, technology, science, education, culture and tourism.

Meanwhile, Uzbekistan is strongly interested in the development of sustainable, inclusive and pragmatic cooperation with the EU, through adopting practical mechanisms of interaction, in order to raise the region's capacity for industrial production, economic diversification and transport infrastructure development. However, while investments in software infrastructure are valuable - particularly on the long term - progress cannot be achieved without the simultaneous development of hard infrastructure to physically link both regions. Moreover, narrowly focused economic cooperation - in energy, critical raw materials, or geopolitical competition - is unlikely to strengthen EU's position as a reliable partner in the region.

Pursuing a pragmatic, active and constructive foreign policy, and being the part of the vast Eurasian continent - as well as the Muslim and Turkic world - Uzbekistan is increasingly playing an important role in the region by contributing to enhanced cooperation in the "Central Asia+" formats. Through new mechanisms of regional cooperation initiatives in Central Asia and close engagement with all neighboring countries and foreign partners, Uzbekistan is highly committed to promoting mutually beneficial cooperation among the countries.

In this context, Romania - as an EU, NATO and OSCE member, and having a strategic location on the coast of the Black Sea, which provides access to the Caspian-Black Sea international transport route - could play an important role in facilitating economic cooperation between the EU and Central Asia and South Caucasus.

Moreover, Romania is also actively involved in the EU's *Global Gateway Team Europe* Initiative in Central Asia, which focuses on supporting clean energy transition, improving digital connectivity and developing efficient transport links. Furthermore, Romania's expertise in various sectors along with Uzbekistan's dynamic economic reforms and the favourable regional atmosphere in Central Asia can forge new partnerships that can contribute to the prosperity of both countries.

Hence, in view of long-term strategic objectives, it is time to develop closer cooperation between Central Asian states and the EU Black Sea littoral states, in order to intensify political dialogue, consolidate trade and economic ties, and develop a concrete agenda for cooperation through the Black Sea/EU - Caspian Sea - Central Asia.



## Views from other Asian states

## Geopolitics of Trade Corridors in Eurasia

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From a geostrategic perspective, Eurasia, the Mackinder's Heartland, forms a bridge for trade routes and energy corridors between Asia and Europe. The global trade system, long dominated by Western-centric maritime routes and choke points like the Suez Canal and Malacca Strait, is transforming significantly. The conflict in Ukraine, the U.S.-China tensions, and the imposed sanctions on Russia and Iran have accelerated the search for alternative corridors. From the windswept ports of the Caspian Sea to the industrial hubs of India's western coast, new transport corridors are being carved to support a rapidly shifting global order and web of supply chains.

The *Middle Corridor*, the *International North-South Transport Corridor* (INSTC), the *Chennai-Vladivostok Maritime Corridor* (CVMC), and the *India-Middle East-Europe Economic Corridor* (IMEC) are not merely logistical projects, but instruments of strategic recalibration. They seek to rebalance trade flows, diversify dependencies, and carve out room for emerging powers such as India, Türkiye, and Central Asian states in a world no longer tethered to the unipolar frameworks of the past.

Together, these corridors represent an alternative vision of the Chinese-led *Belt and Road Initiative* (BRI). They embody a new geography of cooperation rooted not in hegemony, but in the pragmatism of the multipolarity. The war in Ukraine, Western sanctions on Russia and Iran, and the intensifying U.S.-China rivalry have exposed the fragility of legacy routes like the Suez Canal and Malacca Strait. Once seen as peripheral in the global supply chain, Eurasia is rapidly becoming its strategic centre.

The *Middle Corridor*, also known as the *Trans-Caspian International Transport Route*, connects China to Europe via Central Asia, the Caspian Sea, and Türkiye. It bypasses Russia and Iran, offering a 12 to 15-day overland route compared to the 40-day maritime journey via the Suez. Backed by the EU's *Global Gateway initiative*, it enhances Europe's access to Central Asian energy and mineral resources while bolstering Türkiye's growing clout.

The 7 200 kilometres **INSTC**, stretching from Mumbai to St. Petersburg through Iran and the Caucasus, is India's answer to bypassing Pakistani and Chinese bottlenecks. It integrates the Chabahar port, skirts Western-controlled sea-lanes, and anchors India's ambitions in Central Asia. For Russia, it, serves as vital link to the Indian Ocean amid its economic isolation from the Western markets. For Iran, it is a rare opportunity to monetise its geography despite sanctions. This corridor forms a significant prong of Russia's pivot to Asia.

The **CVMC**, linking India's Chennai with Russia's Far Eastern port of Vladivostok, became operational in late 2024. It reduces shipping time by nearly 40% and advances India's "Act Far East" policy, aimed at tapping into Russia's resource-rich Pacific territories.

Perhaps the most ambitious is the **IMEC**, launched at the 2023 G20 Summit. It connects India to Europe via the Arabian Gulf and the Levant. weaving in ports, railways, energy pipelines, and digital cables. Endorsed by the U.S. and EU, it is positioned as a democratic counterweight to China's infrastructure push. However, the prognosis of this corridor is mired in critical uncertainties owing to the ongoing conflicts in West Asia.


There is little doubt that these initiatives are redefining Eurasia's trade landscape. They promote redundancy in global logistics, offer alternatives to monopolised routes, and empower regional powers. The simultaneous pursuit of INSTC, IMEC, and CVMC for India is not just economic hedging -it is a geostrategic playbook that maximises India's options to connect with diverse regions.

However, the stark reality remains that **none of these corridors is without friction**. Many suffer from incomplete infrastructure and underinvestment. The *Middle Corridor's* Caspian ports and customs regimes remain patchy. The unfinished Chabahar-Zahedan rail link stalls INSTC's progress. CVMC is still limited in volume and port capacity. IMEC, while promising, must overcome the volatility of the West Asia, where even a single crisis, like the ongoing Gaza conflict, can derail timelines.

Then there is the **question of coherence**. Each corridor crosses multiple sovereign jurisdictions with varying regulations, tariffs, and transport standards. **Regulatory harmonisation remains elusive**. Without serious coordination - ideally through BRICS+, the *Eurasian Economic Union*, or bespoke multilateral frameworks- these routes risk becoming costly patchworks instead of seamless arteries.

Apart from deterring investors due to the inherent **geopolitical risks** of global hotspots, there is an inherent **infrastructure deficit** due to underfunding and incomplete infrastructure. Furthermore, **environmental and social impacts** of large-scale infrastructure projects risk ecological degradation and social displacement.

In addition, **economic viability** is not guaranteed. Overland corridors often face higher costs than established maritime routes, especially when multi-modal transfers are involved. Their success will depend on scale, consistent investment, and strong private sector involvement. Environmental and social concerns, often sidelined in the rush to build, could further complicate implementation.



Despite the hurdles, the strategic rationale behind these corridors is compelling, reflecting a strategic shift toward non-BRI routes. In a fragmenting world, they embody a different vision of globalisation and are redefining global connectivity - one that is decentralised, resilient, and adaptable. They offer to the Global South countries the ability to shape their trade futures, without being caught between great-power entanglements.

These corridors diversify trade routes, reducing reliance on vulnerable choke points, thus enhancing economic diversification and resilience. They would also boost regional integration, fostering economic diplomacy among diverse stakeholders. For India, these corridors are not about choosing sides, but **building strategic advantage**. Russia and Iran represent economic lifelines. For Europe, they diversify the risks. For Central Asia, they unlock long-awaited integration. The corridors may not yet rival the scale or speed of China's BRI, but they don't need to. Their value lies in flexibility, multilateralism without coercion, and the promise of shared benefit over strategic dependency. The road ahead is long, and the literal and political terrain is rugged. However, if managed wisely, these emerging Eurasian pathways could do more than move goods. They could move the world towards a more balanced, multipolar future.



## Opportunities and challenges for the EU in Central Asia and the Caucasus

Ayjaz WANI


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Russia's war of aggression against Ukraine has dramatically reshaped the geopolitical landscape, prompting the European Union (EU) to reassess its position where former certainties have vanished. Amid global power competition, the EU has redirected its focus towards the East to pursue new partnerships in Central Asia and the Caucasus, as Russia's influence wanes and China's ambitions rise. Rich in resources, energy, and essential transportation routes, Central Asia has emerged as a pivotal frontier for Europe's political sovereignty and economic security.

The *Trans-Caspian International Transport Corridor* (TITR), frequently referred to as the "Middle Corridor" represents a significant advancement in the movement of products and energy between Europe, the Caucasus, and Central Asia. In the aftermath of the Russia-Ukraine conflict, the EU has recognised the pressing necessity to identify alternative routes that circumvent Russian territory. The TITR - which encompasses 4 250 kilometres of rail and 500 kilometres of maritime routes - is 2 000 kilometres shorter than the traditional northern and significantly faster, reducing transit times to merely 15 days - compared to nearly a month by sea. Currently positioned at the forefront of the EU's *Global Gateway Initiative*, this corridor has been allocated approximately \$11 billion for modernising and enhancing its infrastructure.

Through significant investments in its modern Caspian seaports and the Baku-Tbilisi-Kars railway, Azerbaijan has established itself as a critical transit hub connecting Central Asia's abundant resources to European markets and beyond. The corridor's strategic importance is reflected in the over 30% increase in container traffic along the route in [recent years](#). Furthermore, the strengthening of ties between the EU, Azerbaijan, and other regional actors extends beyond commerce,




focusing on the creation of a resilient network capable of enduring global challenges in the future. The EU is building a safer and more autonomous future by diversifying supply chains and reducing dependency on Russian routes. At the same time, Central Asian governments are gaining new strength and opportunities to shape their multivector foreign policy, thus balancing the influence of larger nations and paving the way for greater regional integration.

Central Asia possesses extensive resources that are deemed indispensable to Europe. For the EU, which is actively pursuing alternatives to Russian energy and ensuring access to rare earth elements essential for its industries, the substantial availability of oil, gas, uranium, lithium, and other critical minerals has emerged as a significant asset. Until recently, Europe predominantly depended on Russia, China, and Malaysia for these resources—an unsettling reality that recent global events have vividly illustrated. In response to the ongoing energy transition, the EU has allocated over [\\$7.2 billion](#) towards hydrocarbon and renewable energy initiatives across Central Asia states. Analogous to the *Southern Gas Corridor*, emerging partnerships facilitate the direct flow of oil and gas into European markets. The EU's objective is to create a sustainable and secured supply chain, while endorsing local initiatives that engage in producing and processing essential minerals. Currently, Kazakhstan alone provides 19 of the 34 minerals classified as critical for the economic well-being of the EU.

Despite its potential, the region faces significant challenges, especially competition among global powers. For many years, the ambitions of Russia and China have influenced the geopolitics of Central Asia and the Caucasus. With a foundation in military presence and historical ties, Moscow's role has traditionally shaped the regions' political and security landscape. In contrast, China's growth has led to significant infrastructure development and investment, spearheaded by the *Belt and Road Initiative* (BRI), which seeks to integrate these countries into its economic sphere. Both nations have sought to maintain their dominance in the area, limiting the influence of other actors, such as the EU. With support from the European Union, China is seeking to connect its BRI with the TITR. Recognising the dangers of excessive reliance on China and Russia, Central Asian nations are increasingly keen to broaden their alliances. As the EU deepens its involvement, these countries have an opportunity to gain greater independence and balance the influence of their larger neighbours.

The complicated network of rivalries and unresolved regional disputes is also a great obstacle. For example, the persistent conflicts between Armenia and Azerbaijan compromise the stability of vital trade routes and energy corridors. Navigating these geopolitical crossroads for the EU will call for patience, diplomacy, and a clear-eyed awareness of the area's hopes and fears.

From resolving long-standing border conflicts to starting new economic lines, Central Asian nations have lately made actual progress in their cooperation. Emphasising sustainable, values-based partnerships - supporting local businesses,



promoting slow democratisation, and investing in the foundations required for long-term development - the EU's approach to the area stands apart.

Nonetheless, the EU's growing commitment, reflected by large expenditures and high-level conferences, bodes well for closer economic relations and regional stability. The success of these initiatives will ultimately depend on both parties' capacity to negotiate internal conflicts and manage outside rivalry. Ensuring reliable access to raw materials and energy, while developing robust supply networks free from reliance on China and Russia is the ultimate goal. To transform potential into reality, the EU and Central Asia will need patience, investment, and a willingness to navigate a complex geopolitical landscape. Focus should be kept on energy, connectivity, geopolitics, and prospects for a deeper regional integration.

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Although the Islamic Republic of Iran remains critical of NATO and the United States in the Central Asia and South Caucasus regions and supports the 3+3 model (Iran, Russia, Türkiye+ Armenia, Azerbaijan, Georgia) in the South Caucasus, as well as regional platforms - such as the *Eurasian Economic Union* and the *Shanghai Cooperation Organization* (SCO) - there still exists potential for cooperation and interaction between Iran and the European Union (EU). Maintaining political stability in the countries of the region, economic and trade cooperation, energy, transit corridors, and the environment can be the main axes of cooperation between Iran and the EU in Central Asia and the South Caucasus.

For example, in political and geopolitical matters, Iran - like the EU - supports a peace agreement between Azerbaijan and Armenia and the normalization of relations between Armenia and Türkiye. Both Iran and the EU oppose changing international borders in the South Caucasus and realizing the Zangezur Corridor through force, without Armenian control and supervision. Furthermore, despite its close ties with Russia, Iran, similar to the EU, has not recognized the independence of the Abkhazia and South Ossetia regions from Georgia.

In addition, in terms of trade, transit and transportation, the “Persian Gulf-Black Sea Corridor” can be envisaged as a multimodal and combined network of ships, rails, and road freight routes connecting Iran, Armenia, Georgia, Bulgaria, and Greece. It would link Iranian ports in the Persian Gulf and the Sea of Oman to the Georgian ports of Poti and Batumi on the Black Sea, allowing trucks and containers to be transported by roll-on/roll-off ships from the Black Sea to Bulgarian ports, including Burgas and Varna. Romania could also explore joining this corridor, with Constanța Port, in the Black Sea.

In the energy sector, Iran could become an alternative supplier of natural gas to Armenia, Georgia, and Eastern Europe, as an alternative to Russian gas. Iran has been supplying part of Armenia’s gas for two decades, and an agreement to extend the deal until 2030 has been reached. However, there is a conflict of interest between Iran and Russia in the gas market of Armenia. The original Iran-Armenia



agreement detailed the pipeline's diameter at 1,420 millimetres (56 inches), but was reduced to 700 millimetres (28 inches) - in what many suspect to be pressure from Gazprom, which purchased a majority share in the Armenian section of the pipeline through its subsidiary, Armrosgazprom ([Azatutyun](#), March 19, 2007). If the pipeline had been built at the initial diameter, it would have allowed Iran to export natural gas to Georgia and the European markets, competing with Russia's own natural gas industry. In addition to Russian obstruction, the economic sanctions on Iran are also a serious obstacle to the development of Iran's gas industry and increasing production and export capacity. However, if these were lifted and the country will be able to attract foreign investment in the oil and gas sector again, Iranian gas exports to Eastern Europe could further diversify the European gas market and reduce dependence on Russian and Azeri gas.

Areas such as the construction of hydroelectric power plants, water consumption management, and communication infrastructure including fibre optics, telecommunications, and smart cities can be one of the focus points of cooperation between Iran and the EU in Central Asia and the South Caucasus.

In the environment protection area, Iran and the EU have a very high capacity for cooperation. In the South Caucasus, pollution of the Kura-Aras Rivers, and also pollution and a significant decrease in the water level of the Caspian Sea are significant concerns. In this context, Iran and the EU could establish joint environmental teams aligned with international environmental conventions.

## South Korea's Strategic Perception on Romania and South Caucasus-Central Asia Nexus

Wooyeal Palik


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South Korea's understanding of the complex relations between the South Caucasus and Central Asia remains limited at best because its strategic horizon has been largely limited to the Indo-Pacific region, particularly East Asia. In particular, the South Caucasus (Azerbaijan, Armenia, and Georgia) is perceived more distant than Central Asia (Uzbekistan, Kazakhstan, Kyrgyzstan, Tajikistan, and Turkmenistan). The latter has been exposed to South Korean actors, especially economic business entities, who invest and offer manufacture, as well as involving in import- and export. South Korean enterprises, which have strong governmental and Asian Development Bank support, have tried to contribute to infrastructure and logistics projects across the regions. [Moreover, tens of thousands of Central Asian workers have become an indispensable labour resource for South Korea's manufacturing and agricultural sectors.](#)

Nonetheless, a growing number of strategic experts in East Asia are beginning to recognize the great potential in the South Caucasus and Central Asia as a more likely visible regional bloc that would deal with the great powers that had dominated them for at least the last two centuries. These two regions are increasingly entering into multiple agreements on energy and connectivity, such as the *Trans-Caspian East-West Middle Corridor Agreement* among Türkiye, Azerbaijan, Georgia, and Kazakhstan in 2022. [The Caspian Sea and the Black Sea could be more tightly connected, truly realizing the European Union's \(EU\) objectives.](#) EU countries - especially those of the Central and Eastern flanks - are also keen on joining this





emerging regional connectivity movement for their own energy and logistics interests. Countries like Romania stand to benefit substantially from the connectivity potential of the two regions. Thus, these areas could provide a link with China and potentially the South and North Korea, along with continental Southeast Asian countries, and bypassing Russia.

China's interests dwarf those of South Korea, Japan, and the Southeast Asian countries. China is indispensable for this regional integration process because the Central Asian and South Caucasus countries aim at becoming an alternative bridge between China and EU countries, to that of Russia. China has been pushing hard to develop more continental connectivity towards Europe, which is one of its top exporting destinations. Even though China-EU relations have been strained in recent years, the two deeply understand their economic partnership's uncovered potential during the global hegemonic power competition and the returning time of war in the Eurasian continent. China's *One-Belt One-Road* and the EU's *Global Gateway* strategies compete to contribute to this new bridge formation for energy and logistics.

The other East Asian countries have limited interest and influence in this regard. Even though South Korea and Japan are primary economic players in Central Asia, these two regional powers have very limited interest and influence in the South Caucasus. Although South Korea's growing interaction with Central and Eastern European countries, such as Romania, Poland, or the Czech Republic, via conventional and defence industrial cooperation at the time of the Ukraine-Russia war expanded its strategic area of interest, it did not yet reach to South Caucasus. Nevertheless, any developments related to China and Europe influences South Korea and its East Asian neighbours.

Along with Poland, Romania is one of the European countries that recently got attention from South Korea's decision makers, strategists, and the informed public. The defence industrial cooperation, which also enhances Romania's position on NATO's Eastern flank and in the Black Sea, is a primary reason. However, South Korea's strategic relations with Romania can go beyond that. As one of the *Three Seas Initiative* nations, Romania - which has ties with both the South Caucasus and Central Asia in terms of regional stability, economic cooperation, and energy security - can be an ideal partner for South Korea, as well as other East Asian countries, for participating in this promising regional connectivity and integration process. These Asian countries are highly capable of constructing infrastructure such as roads, railroads, power grids, pipelines or ports, as well as developing their overall economy, while balancing China's dominance in the geopolitical game.



## EU Climate Engagement in the South Caucasus and Central Asia: A Pakistani Perspective

Neelum NIGAR

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Over the past three years, the European Union (EU) has quietly redefined its engagement across Central Asia and the South Caucasus. While its earlier focus centred on pipelines, transport corridors, and customs reform, the agenda has now shifted toward decarbonisation, water security, and climate-resilient value chains. This transition was formalised through two key documents - *the EU-Central Asia Green Agenda Roadmap* (2022) and the 79-point *Joint Roadmap for Deepening Ties* (2023). The inaugural EU-Central Asia Summit, held in Samarkand on 3-4 April 2025, further elevated climate cooperation to the head-of-state level.

Given Pakistan's geographic proximity and shared glacial dependencies, being downstream of the Pamir-Himalaya cryosphere and acutely vulnerable to glacial melt and water stress, this evolving EU posture is far more than a mere redirection of trade routes. It reflects the EU's commitment to positioning climate risk as the central organising principle of its engagement with a region that closely parallels Pakistan's own environmental vulnerabilities. Emerging policies, standards, and financing mechanisms are set to reshape the ecological-security architecture along Pakistan's northern border, regardless of Islamabad's formal participation in negotiations.

### EU Climate Engagement beyond Hard Connectivity

The EU's evolving connectivity agenda demonstrates a deliberate shift from infrastructure-heavy interventions to the construction of an integrated, low-carbon governance ecosystem. At the political level, the Samarkand Summit announced a €12 billion Gateway Investment Package for clean energy, digital infrastructure, and climate-smart transport, complemented by an additional €10 billion earmarked for the [Trans-Caspian International Transport Route](#). Key initiatives, like the *Horizon Europe* (2021-2027), with a budget of €93.5 billion, serve as the knowledge backbone, supporting climate research, innovation, and [alignment with the SDGs](#).

Complementing this, the *Green Central Asia II programme* (2024-2028), co-funded by the EU and Germany, enhances regional resilience through glacier monitoring, early-warning systems, gender-sensitive adaptation planning, and open access to [hydrometeorological data](#). Infrastructure connectivity is addressed through

the [Black Sea Green Energy Corridor](#), a 1 GW subsea link transmitting Azeri wind power to Romania, illustrating how decarbonisation goals are embedded in transregional energy projects. Meanwhile, the EU-Kazakhstan strategic partnership on critical raw materials institutionalises *Environmental, Social and Governance* (ESG) audits and supply-chain traceability, embedding Paris-compatible standards at the point of extraction and reinforcing climate accountability in resource flows.

### **Climate Vulnerabilities Driving the Agenda**

Central Asia's glaciers are retreating at one of the world's fastest rates, imperilling summer flows that feed agriculture and hydropower for [70 million people](#). The South Caucasus faces parallel climate threats, with UNEP documenting glacier retreat of up to [600 metres](#) since the 1960, directly impacting the Kura-Araks river system that underpins water security in Armenia, Azerbaijan, and Georgia. In Central Asia, upstream states like Tajikistan and Kyrgyzstan depend on hydropower exports, while downstream countries - Kazakhstan, Uzbekistan, and Turkmenistan - rely heavily on irrigation. These interdependencies are increasingly strained as climate stress intensifies existing *Water-Energy-Food* (WEF) trade-offs across the region. Brussels' programmes address this nexus directly, including drip-irrigation pilots linked to solar pumping, climate-smart wheat varieties, and basin dialogues based on the *EU Water Framework Directive*.

For an observer in Islamabad, where similar Indus tensions loom, the integrative logic of these projects offers a valuable template. Moreover, as manifested globally, climate impacts in mountain and dryland communities disproportionately hurt women, pastoralists and youth. In this regard, the *Green Central Asia II initiative* mandates gender-sensitive budgeting and community participation in all grant windows, thus raising the bar for inclusive adaptation funding.

### **Why these Developments matter from a Pakistani Lens**

From Pakistan's vantage point, the EU's evolving climate engagement in Central Asia and the South Caucasus carries several indirect, yet strategic, implications. First, the EU's investment in transboundary early-warning systems and glacier monitoring will significantly enhance regional climate forecasting capabilities. These initiatives, while not directly involving Pakistan, still hold the potential to improve disaster preparedness and resilience across the High Asia region, particularly Pakistan's northern part. In an era of increasing climate shocks - glacial lake outburst floods, droughts, and erratic monsoons - such shared data infrastructure is invaluable.

Secondly, the ESG standards being integrated into EU-backed mineral supply chains in Kazakhstan and beyond are likely to become *de facto* benchmarks for regional extractive industries. As Pakistan positions itself to tap into its own critical mineral reserves, particularly in Balochistan and Gilgit Baltistan, aligning with these standards could unlock premium markets, while mitigating ecological damage and social backlash. The shift from purely transactional extractive deals to value-based, sustainability-oriented partnerships is one that Pakistan cannot afford to overlook.

Moreover, the EU's emphasis on clean energy diversification, including green hydrogen, cross-border hydropower trade, and grid decarbonisation, illustrate a shift in the geopolitical logic of energy connectivity. These developments validate low-carbon trade models that might one day extend into South Asia, providing alternatives to carbon-intensive fuel imports and offering a more climate-resilient energy future. For Pakistan, that faces volatile LNG markets and rising power demand, this transformation worth to be observed closely.

Importantly, the language and framing of EU climate engagement, focusing on water diplomacy, community resilience, and gender-inclusive adaptation - echoes many of the narratives Pakistan promotes at global forums, such as COP and the UN. This creates opportunities for convergence in international negotiations, especially around themes like loss and damage, climate justice, and climate finance for vulnerable countries. Amid ongoing tensions between India and Pakistan and the resulting strain on the Indus Waters Treaty, the emerging EU-Central Asia climate frameworks present a potential opportunity for Pakistan to engage in shaping a broader, transboundary water governance model. These models, with their emphasis on glacier monitoring, early warning systems, and basin-wide cooperation, offer templates that could be adapted to the South Asian context. By aligning with regional efforts in Central Asia and beyond, Pakistan can position itself as a proactive actor in developing cooperative mechanisms for managing shared water resources, especially those originating in the fragile Pamir-Himalaya cryosphere.

Finally, the expansion of EU research and innovation programmes, like *Horizon Europe*, to include Central Asian institutions opens indirect opportunities for Pakistani think tanks, universities, and civil society actors. By collaborating with regional counterparts in joint applications, Pakistan-based entities can access new funding streams and knowledge platforms that were previously out of reach.

### Conclusion

Although Pakistan lies outside the formal structure of the EU's climate frameworks for Central Asia and the South Caucasus, its geographic and ecological interlinkages make it a critical stakeholder. As Brussels advances a connectivity model centred on climate resilience and ESG norms, the resulting shifts will inevitably affect Pakistan's resource governance and ecological stability. For Pakistan, engagement with this shift is no longer optional: the glaciers that sustain the Amu Darya also feed the Indus, and ESG rules now applied to lithium in Kazakhstan could soon shape copper and rare-earth projects in Balochistan and Gilgit-Baltistan. Ultimately, the impact of this approach will depend on the rigour of the EU safeguards, the transparency of fund allocation, and the extent to which local communities are granted real decision-making power-factors that will determine not just its success in Central Asia, but also its relevance to countries like Pakistan.



## Views from Romania

## Green Diplomacy - The European Union's Environmental Cooperation with South Caucasus and Central Asia

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Over the years, the European Union (EU) has put great emphasis on the issue of climate and environmental change and has focused on designing actions through which the impact of these changes could be mitigated. Setting very ambitious objectives in this sector - such as reaching climate neutrality by 2050, acting as an advocate, and promoting more responsibility and cooperation at the international level, the EU has positioned itself as a global leader in terms of climate action. Thus, its external relations are increasingly aligned with green diplomacy objectives.

The EU has described climate change as a [threat multiplier](#) and a central pillar of its external action and, as a result, it has decided to implement internal reform and to promote environmental sustainability globally. The [European Green Deal](#) is the main instrument that will allow the EU to secure its own transformation and push for higher standards at the international level.

Through trade conditionalities, political engagement, and development assistance, the EU seeks to promote its environmental standards. The “Green Agenda for the Western Balkans” and the [“Global Gateway” initiative](#) (2021) are examples of broader neighbourhood involvement, particularly with Central Asian and Eastern Partnership nations.

The EU's cooperation with Central Asia and South Caucasus is mainly focused on enhancing economic ties, trade and investment, transport connectivity, and natural resources. However, as climate action has been included on the EU's foreign affairs agenda and new global realities - including geopolitical fragmentation and climate insecurity - underscore the importance of sustainable cooperation with neighbouring and partner regions, climate and environmental change has also become an area of cooperation between the EU and the two regions.

Thus, in the past years, there have been several environmental and climate initiatives and programmes between the EU and the countries in Central Asia and South Caucasus. One such example is the [EU4Environment Programme](#), in which the countries in South Caucasus - Armenia, Azerbaijan and Georgia - were partners, along with Belarus, the Republic of Moldova and Ukraine. The project took place between 2019 and 2024 and its aim was to preserve the natural capital of the six

countries, promote environmental actions, as well as initiate mechanisms that could tackle the impact of environmental issues.

The [EU Strategy for Central Asia](#) (2019) highlights the EU's commitment to work with the five states - Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan - by supporting them in implementing the *Paris Agreement*, promoting better environmental governance, offering its expertise in sustainable development and biodiversity protection, and mobilising financial instruments for environmental projects and initiatives.


Furthermore, the [Enhanced Partnership and Cooperation Agreements \(EPCA\)](#) that the EU has with Kazakhstan and is currently negotiating with Uzbekistan include chapters on environment and climate change. The agreements cover a vast array of topics related to these issues, including air quality, the management of water quality, forests and chemicals, and industrial pollution, thus providing a comprehensive cooperation framework.

Climate and environmental change severely affect the two regions severely. South Caucasus faces issues such as water insecurity, scarcity of water resources, land and biodiversity degradation, which are distributed unevenly across the [region](#). The economies of the three countries are relatively unstable, and thus, many of the initiatives and programmes aimed at adapting to climate change have been funded through cooperation with external [actors](#).

Concerning Central Asia, one of the main issues is that temperatures are rising faster than the global average, which leads to the fast-paced melting of glaciers. This will further jeopardize the water supply and increase the risk of flooding. Land degradation and desertification are also specific for the region of Central Asia, posing an immense risk to biodiversity. Certain vegetation cannot survive the long periods of drought, while some species of animals migrate to other areas, where they can easily find water and food supplies. Others, unfortunately, become [extinct](#).

In order to address these challenges, cooperation with the EU is an important asset, considering the EU's expertise in this area and its funding mechanisms. Romania, as a member state of the EU, geographically close to these regions, can act as a bridge and enhancer of the EU's green diplomacy. Romania shares historical and strategic ties with the South Caucasus and has intensified relations with Central Asia through multilateral formats. Its position at the EU's eastern frontier and Black Sea coastline makes it a natural conduit for environmental, energy, and connectivity initiatives.

Romania's engagement with the two regions, as well as the bilateral agreements it has with these states, provide an important opportunity for sharing best practices. Romania, being itself affected by natural hazards, such as floods, and having adopted the EU standards for environment protection, could share its knowledge in this area. Moreover, Romania's involvement in infrastructure projects such as the Black Sea Corridor highlights its commitment and interest in sustainable development and green policies.



In conclusion, EU cooperation with South Caucasus and Central Asia in the field of environmental protection is a strategic intersection of normative ambition and geopolitical engagement. While the progress is uneven and challenged by political and financial obstacles, the EU's emphasis on sustainable development provides a long-term framework for deepened relations. In an era of climate *urgency*, engaging with these regions through a green diplomacy approach is not only aligned with the EU's values, but also represent a contribution to climate resilience and to a just and inclusive green transition globally.



## Geo-economics Connections between the EU - South Caucasus - Central Asia

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In an era of shifting geopolitical alignments, the need for a robust economic and strategic linkage between the European Union (EU), the South Caucasus, and Central Asia has gained renewed interest. Romania - positioned at the crossroads of Eastern and Western Europe, and along the Black Sea shore - has a unique opportunity to serve as a bridge between these regions. With its EU membership, geographic proximity, energy potential, and cultural ties with the other regions, Romania is well placed to facilitate deeper cooperation in trade, energy, and diplomacy.

#### Strategic context

The South Caucasus (Georgia, Armenia, and Azerbaijan) and Central Asia (Kazakhstan, Uzbekistan, Kyrgyzstan, Turkmenistan, and Tajikistan) are emerging as increasingly important regions in global geopolitics. Rich in energy and mineral resources - and located at the intersection of major transport corridors - these regions are central to the EU's goals for connectivity and diversification. Contemporary initiatives like China's *Belt and Road*, Russia's assertive influence, and Türkiye's regional engagement have underscored the need for a stronger European presence.

The EU's *Global Gateway* and the *Economic and Investment Plan for Central Asia* reflect a strategic pivot towards sustainable, rule-based infrastructure and energy partnerships. Romania, as an EU member on the Black Sea - can play a bridging role, linking Europe to these regions through trade, energy, and diplomacy.

#### Romania's leverage

Romania's strengths align well with EU objectives in the region:

- Geographical proximity: Romania's Black Sea coastline provides direct maritime access to the South Caucasus, particularly through Georgia and Azerbaijan. The

Port of Constanța, already a major regional hub, can become a vital gateway for trade from Central Asia via the Caspian Sea.

- Energy infrastructure: Romania is integrated into EU energy networks (e.g. the Southern Gas Corridor via Türkiye and the BRUA pipeline linking Bulgaria-Romania-Hungary-Austria). It also has growing domestic gas production: the Neptun Deep offshore field (estimated ~100 bcm) is expected to double Romania's gas output by 2027, potentially making it an EU gas exporter. Romania has participated in high-profile regional projects - for instance, a 2022 agreement with Azerbaijan, Georgia, and Hungary to build a Black Sea electrical cable from Georgia's planned Anaklia port to Constanța. These developments position Romania as a future energy hub for East-West connectivity.
- Diplomatic and cultural capital: Romania maintains constructive relations with regional states and participates in platforms like the *Eastern Partnership* and the *Organization of the Black Sea Economic Cooperation* (BSEC). Currently, BSEC plays a greater role in cultural fields than in economics, due to the turbulent regional geopolitical situation. Nevertheless, Romania's cultural and historical ties - including cultural and academic links with Turkish and Orthodox populations from the Caucasus - add soft power depth to its diplomatic reach.
- EU representation: Romania's dual understanding of EU policymaking and Eastern neighbourhood dynamics makes it a valuable intermediary. As an EU member, it can advocate for tailored EU funding and policy frameworks to support regional development.

#### Challenges to address

Despite this potential, several constraints remain:

- Infrastructure gaps: Existing rail, road, and port facilities in Romania and the target regions often need modernization and harmonization with EU standards. Logistical bottlenecks - particularly in rail, road, and customs infrastructure - limit Romania's connectivity capacity. Modernization and alignment with EU standards are essential.
- Geopolitical competition: Competing influence from China, Russia, and Türkiye makes the region highly contested. Romania must distinguish itself through transparent, EU-aligned investment models and governance standards.
- Institutional capacity: Romania must also bolster its own public administration and project-management capabilities to successfully execute cross-border initiatives. Domestic inefficiencies in governance may hinder the delivery of complex infrastructure and energy projects. Enhancing governance and project execution capacity is essential.

#### Policy priorities

To maximize its strategic position, Romania should:

- Develop a comprehensive national strategy, by establishing a coherent policy, which integrates trade, energy, education, and diplomacy towards the South Caucasus and Central Asia.

- Invest in connectivity, by prioritizing EU-backed infrastructure that links Romania to the Black Sea and beyond. This includes modernizing transport networks and streamlining trade facilitation.
- Strengthen multilateral engagement, by deepening involvement in EU frameworks and regional organizations to amplify Romania's voice and forge collaborative ties.
- Support private sector expansion, by facilitating Romanian investment in regional sectors, like logistics, IT, and agroindustry. The government could use EU-supported risk-sharing instruments or credit guarantees to help companies enter markets in Georgia, Azerbaijan, Kazakhstan, etc., for reinforcing economic ties that complement official diplomacy.

### Conclusion

Romania stands at a pivotal moment in Europe's eastward outlook. As the EU seeks new trade routes and strategic partnerships beyond its border, Romania can emerge as a linchpin in this effort. By aligning infrastructure, diplomacy, and investment with EU priorities, it can help forge a durable and forward-looking bridge between Europe and the East, contributing to regional stability, prosperity, and resilience in an increasingly complex global landscape.

## Romania Looking East: From the Black Sea to Central Asia

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At the beginning of April this year, one of the most important gatherings between the European Union (EU) and the Central Asian states took place- the EU-Central Asia Summit in Samarkand. The event unfolded against an extremely complex regional backdrop, in which certain state actors are seeking to impose their will through crude methods that exert direct pressure on decision-making processes. This context compels Romania to closely monitor developments and act more decisively in identifying - and deepening - new avenues for economic and developmental cooperation. As an EU member, the EU-Central Asia Summit offers the Romanian authorities a favourable platform to engage beyond the wider Black Sea region, for the simple reason that the only viable option is to participate in durable discussions that generate tangible benefits for Romanian citizens. Interdependence in matters of security, access to energy resources, and commercial projects cannot be ignored.

Over the past three decades, Romania has forged several strategic partnerships with states in the South Caucasus, aimed at fostering stability, security, and resilience in the face of diverse challenges. Central Asia, too, has never been absent from Romania's strategic horizon, yet policy engagement there has been more reserved, with dialogue less public and less explicitly assumed. Today,

however, many projects, initiatives, and regional strategies of interest are being reorganised and reprioritised - something that also calls for a new foreign-policy vision in Bucharest.

When Romania looks towards Central Asia—a gaze that must inevitably pass through the South Caucasus, a region that bridges diverse interests and interactions - decision-makers should bear in mind several points. First, Romania should emphasise multilateral cooperation that embraces various forms of political-economic, commercial, and energy-security partnerships linking the two regions to the EU.

Second, Romanian officials need to define and promote an integrated vision that acknowledges the strategic importance of both Central Asia and the South Caucasus to Romania's foreign policy. The dominant perspective of interaction should concentrate on cultivating commercial opportunities by underscoring the geographic positioning of Romania and the states of these two regions - an intersection of political and economic interests, of trade and energy routes, and of strategic projects.

Third, Romania must draw closer to both regions in order to better understand the needs of their states, to contribute to their economic development, to diversify and expand its own partnerships, and to secure access to future infrastructure projects in the area. In both Central Asia and the South Caucasus, there is only a limited pool of well-intentioned partners willing to respect others' interests rather than merely extract resources.

Fourth, Romania should identify and advance initiatives that foster the sustainable development of the two regions by encouraging inter-regional cooperation and harnessing local potential. This involves capitalising on previously noted interdependencies, namely, the need for resources, for development, and for forms of cooperation that are loyal to the common interest and grounded in international law and mutual respect.

In this capacity, Romania can also promote its own system of higher education - including technical and specialised fields such as energy-resource exploitation—to the region's population, an avenue of collaboration that can prove pivotal in forging new partnerships. Romania should also use its historical relations with the countries in both regions to promote itself, alongside the EU, as a neutral actor that could be called upon to help mediate conflicts.

Finally, Romania must fully appreciate the two regions' ability to offer access both to resources and to interconnected markets whose consumers have varying profiles, while also prioritising digital connectivity, technological development, and advanced solutions for infrastructure projects.

As an EU member state, Romania must adopt a proactive stance that encourages closer ties with the South Caucasus and Central Asia on the basis of democratic development and the sustainability of long-term partnership.

## European competitiveness on the final frontier

Radu MAGDIN

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A member of *Forbes Business Council*, Radu is currently the Vice-President of the *Romanian Chamber of Commerce Singapore*, as well as a correspondent of *MEDEF International*, Ambassador of *CONAF Romania* and an Honorary Advisor on External Relations for *Bucharest Stock Exchange*. He is a NATO Emerging Leader with the *Atlantic Council* of the US (2014), a *Forbes Romania* Trendsetter (2014), *Warsaw Security* Leader (2015), as well as a yearly trainer to the Naumann Foundation's "Liberalism vs Populism" Academy.



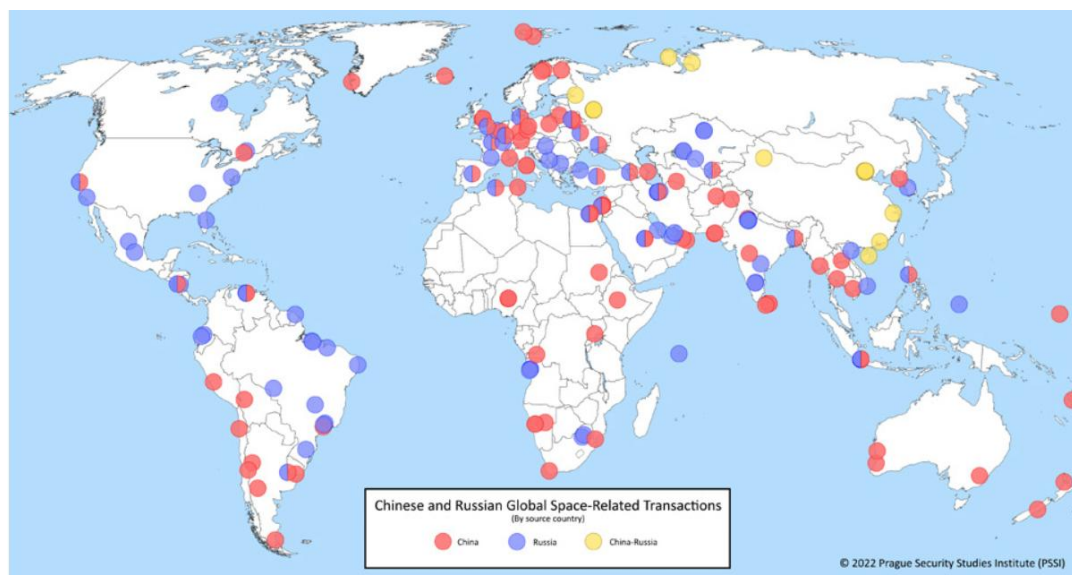
Space has become a key enabler for a wide variety of applications on Earth, from weather forecasting to the management of complex energy grids, and from international trade to environmental monitoring and disaster management. Using capabilities in remote sensing, communications, navigation, positioning and timing, a growing list of critical infrastructures on Earth have become reliant on space systems.

The European Union (EU) is one of the leading global space players, though both the US and China have drawn ahead of it, having developed critical competencies in reusability, manned launches and smallsat (Small Satellite) constellations at a more rapid pace. The EU recognizes the importance of space as a critical area of competition and cooperation, or what the Chinese like to call "[coopetition](#)". On the one hand, it has invested in key collective capabilities such as the Galileo Global Navigation Satellite System, the Copernicus Earth Observation network and the future IRIS<sup>2</sup> constellation for secure governmental communications. This reduces its reliance on foreign actors and provides opportunities for growth. On the other hand, it has adopted space as a sector for the identification and designation of European critical entities for the CER and NIS 2 Directives, it has created EUSPA (the *European Union Agency for the Space Programme*) and the *General Directorate for Defence Industry and Space*, which, in the new European Commission, also has its first dedicated Commissioner. In addition to pursuing strategic and technological autonomy, the EU must also enhance its cooperation with other entities on space to create potential economies of scale that have been lacking in the EU space sector compared to the American and Chinese ones. A series of reports from the [Prague Security Studies Institute](#) have underscored the importance of space partnerships as "*a major component of national political, economic, and military power*" which have "*now taken centre stage in the competition among the major space powers and aspirant nations*". In particular,



PSSI research has focused on the model of comprehensive Chinese and Russian space partnerships with third countries that enable them to develop new capabilities, to enhance their global footprint and achieve strategic objectives.

Figure 1. [Map of 289 comprehensive space partnerships by China and Russia](#)




The South Caucasus-Central Asian space has the potential to become a critical “Space Cooperation Corridor” for the EU, drawing either on the resources of the Global Gateway or on future dedicated instruments. The countries in this region are, regardless of their actual ambitions and level of development, consumers of space services and are therefore interested in affordable, accessible and sustainable access to critical space services and in the potential to achieve some sort of critical national capabilities. The EU can take a page from the China and Russia playbook and become a facilitator for space ambitions, providing key products and services (satellite construction and launches), financing, knowledge transfers, assistance and space services provisioning under favourable terms that enhance national security and sustainability, rather than creating dependencies to be exploited. The cooperation between Airbus and Kazakhstan on space, by providing Earth Observation satellites, high altitude platforms and investing in common industrial projects, is an achievement to be studied and replicated throughout the region.

The EU can become an “ethical and trustworthy space partner”, to borrow a phrase from the AI directives, something that developing countries (and future strategic friends) sorely need, since they can become captive partners through entrapment via comprehensive space partnerships, of which China and Russia have advanced in numerous regions (China also having a *Belt and Road Spatial Information Corridor*).

The EU, having bootstrapped its own critical capabilities to reduce reliance on often military-controlled space services providers (such as GNSS systems) can become a key partner for these countries. Along the way, it can aid them in their





own green and digital transitions enhance their resilience and ultimately their value as partners of the EU and provide a shot in the arm for the European space sector. The EU's main advantage lies in its civilian-controlled space systems that do not have the possibility of cutting access to legitimate users in the event of a military crisis. It can also sweeten the deal through a formal partnership on immediate and favourable access to space services operated by EU Member States, EU institutions and companies for situations involving crisis and emergency management, on the model of the Sentinel Asia initiative in the Asia-Pacific region or the International Charter Space and Major Disasters. This model of cooperation can later be replicated in other regions, such as Africa and Southeast Asia.

## Romania: Anchoring the European Bridge to the South Caucasus and Central Asia via Constanța

Cristian NEGRUȚIU

Cristian NEGRUȚIU is Founding Partner at *Sparking Capital*, a venture capital fund aiming to help innovative start-ups to scale-up and develop. He works side by side with the founders to build great companies that create long lasting competitive advantages. Cristian Negruțiu has extensive managerial experience acquired through various positions in different companies at executive level since the year 2000. In the period 2010-2019, he was Logistics Country Manager for *DSV Solutions in Romania*. In this capacity, Cristian served as a Board Member, fully responsible for strategy and P&L of his division. He managed more than 500 people and led several local and regional projects, ranging from IT implementation to capacity expansion.

On the academic side, Cristian has a double background, in economics and law, followed by an MBA at University of Sheffield and a PhD at Bucharest University of Economic Studies (BUES). Currently, he is Lecturer PhD at BUES, with research focused on entrepreneurship, investments, AI, and supply chain.



The European Union (EU) is strategically enhancing its engagement with the South Caucasus and Central Asia, deploying initiatives such as the Global Gateway to foster deeper economic connections. The overarching aim is to strengthen trade ties, promote sustainable transport infrastructure, and channel targeted investments into these regions. A key element of this strategy involves developing direct transport links with Central Asia via the Caucasus and the Black Sea, recognizing the imperative for diversified and resilient connectivity. While each region possesses unique characteristics necessitating tailored approaches, their combined potential offers a compelling vision for shared prosperity. This convergence of interests has led experts to advocate for a [\*Central Asia-Caucasus-European Corridor \(CACE\)\*](#), designed to reinvigorate historic trade arteries and bolster regional energy security.

Given its strategic location, its status as an EU and NATO member, and particularly its crucial Black Sea coastline, Romania is exceptionally well placed to act as a primary bridge between the EU and the South Caucasus and Central Asia. Within this framework, the Port of Constanța emerges as an asset of paramount importance, holding immense potential to become a central hub for facilitating trade and connectivity along this burgeoning East-West axis.

The Port of Constanța is already the largest port on the Black Sea and a critical component of Europe's transport network. Its geographical position makes it a natural gateway for maritime traffic originating from or destined for the Caspian Sea via the Caucasus. For goods moving along routes connecting Central Asia to Europe

that traverse the Caspian Sea and the South Caucasus, Constanța offers the most direct and efficient Black Sea entry and exit point into the EU.

To fully capitalize on this potential and solidify its role as a pivotal hub for trade with the South Caucasus and Central Asia, significant investments in Constanța's infrastructure and logistics capabilities are essential. This includes not only modernizing and expanding port facilities, such as terminals, cranes, and storage areas, but also enhancing the intermodal connections that link the port to the wider European hinterland. Improving rail and road networks radiating from Constanța is critical to ensuring the swift and cost-effective onward distribution of goods. Projects like the development and integration with the *Via Carpathia* corridor, connecting the Black Sea to Northern Europe, become vital components in positioning Constanța as an efficient transit point. Furthermore, investments in logistics parks, customs processing capabilities, and digital tracking systems around the port will streamline operations and increase capacity, thus making Constanța a more attractive option for freight traffic from Central Asia and South Caucasus.

By transforming Constanța into a highly efficient and high-capacity logistics hub for this East-West trade flow, Romania stands to gain significantly. Increased cargo volumes passing through the port will generate economic activity, create jobs in the logistics and services sectors, and enhance Romania's overall standing within European and Eurasian trade networks. This focus on the port and its hinterland connections is a tangible way for Romania to translate the strategic vision of building geo-economic bridges into concrete economic benefits.

Beyond its role in goods transit, Romania's engagement with the South Caucasus and Central Asia also presents opportunities for diversifying energy supplies. The [CACE project](#) encompasses not just trade routes but also energy corridors. As Romania seeks to enhance its energy security and reduce reliance on traditional sources, participation in major strategic energy projects involving these regions becomes increasingly attractive. The development of initiatives like the Black Sea Submarine Cable, designed to transport renewable energy from the South Caucasus towards Europe, highlights Romania's potential to act as an energy transit point and integrate new, cleaner energy sources into its national grid and the broader European energy market. Such projects align with both Romania's energy diversification goals and the EU's clean energy transition objectives.

In conclusion, the EU's increased focus on the South Caucasus and Central Asia, driven by the need for diversified connectivity and energy security, offers Romania a unique opportunity to strengthen its geo-economic position. By prioritizing the development and modernization of the Port of Constanța and its associated hinterland infrastructure, Romania can establish itself as the primary maritime gateway for trade between these regions and the EU. This, coupled with strategic engagement in energy infrastructure projects, positions Romania as an indispensable bridge within the emerging [Central Asia-Caucasus-European Corridor](#), contributing significantly to its own economic growth and the broader connectivity and energy security of the European continent.

## Clean energy as an indicator of commitment to shared values - the case of the International Solar Alliance

Mihaela-Adriana PĂDUREANU

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### Why the solar energy is important for the EU?

In this contribution, I will focus on the role and impact of easy and predictable energy access on the present and future of the European economic sector, as well as on cooperation between Europe and Central Asia. **Energy** is considered as a vital source of support and advantage for the functioning of modern economies. The past five years, more precisely the time after the COVID-19 pandemic, have proven to be rather challenging for the energy sector, at least at the regional level. The price [increases](#) that were taking place at the beginning of 2022 were further [exacerbated](#) by the Russian Federation's war of aggression against Ukraine. Energy prices soared significantly and surpassed those we saw after the [2008](#) economic crisis. One outcome of this context was the decrease in the use of natural gas - for example, in 2022 the use of natural gas decreased by 13.3% compared to 2021, while the use of oil increased by [2.8%](#). Thus, we can identify at least two major issues, which have influenced the energy sector prices:

- The first one is related to **infrastructure** - specifically, where the energy is produced and how it is transported;
- The second issue concern the capacity to transform into energy different resources, or more precisely the **technological capabilities** that allow access to more energy (like sunlight).

The concern to address the problems caused by climate change has been increasingly present at European level over the last decade. As one of the signatories to the [Paris Agreement](#), the European Union (EU) has been one of the most active and vocal actors aiming to fulfil its commitments and this is one of the reasons that led to the adoption of the *European Green Deal*. A key part of this initiative is to support a wider use of clean energy. In this context, and aiming to meet this need, the EU has supported increased use of **solar energy**, which can help facilitate the transition to a greener energy sector (and will also help reduce the [EU's dependence on fossil fuels](#)). However, it should be noted that the EU has already undertaken significant steps in recent decades to enhance the share of renewable energy within its overall energy mix. For instance, in 2023, *renewable energy represented 24.5% of energy consumed in the EU, up from 23.0% in [2022](#)*.

Another outcome of the *Paris Agreement* was the launch of the [International Solar Alliance](#). The initiative is reflecting a global trend and growing concern for green energy resources and in [2018](#), we witnessed the first *International Solar Alliance* Summit, led by India (president) and France (co-president). An important moment at the launch of the initiative was a speech by the European Investment Bank (EIB) director, Dr. Werner Hoyer in which he announced that the EIB aimed to allocate [35% of its financing](#) outside Europe to support climate related investment (by 2020).

### Romania and solar energy

The topic of climate change and renewable energy has been a constant concern for Romania. Climate change is expected to have a significant impact on Romania - including the [Danube](#) Delta. For instance, Romania had one of the highest Water Exploitation Index Plus ([WEI+](#)) in the EU - 21.0%. In this context, Romania has taken steps to address the need to respond to climate change, more precisely in the field of renewable energy. It has increased its use of energy derived from such sources and, in [2017](#) ratified the *Paris Agreement*. Following this decision, other measures have been taken, aiming to reflect the country commitment to address the effects and causes of climate change. For example, in [2023](#), the country joined the *International Solar Alliance*. The attention given to clean energy is expected to continue to be important and reflected in public decisions - including through support for investment in [clean energy](#) projects. According to the current government programme, *EUR 70 million annually, financed from European funds, will be used for the installation of solar renewable energy production capacities and energy storage capacities for the self-consumption of civilian [airports](#).*

Romania's membership in the *International Solar Alliance* may also contribute to strengthening bilateral relations between Romania and India. These countries have already taken steps to deepen their cooperation, especially in the defence [sector](#) and the dialogue continues to [expand](#).

The European funds reflect this objective - regarding the increase in the use of clean energy and the Just Transition programme emphasised support for “new electricity generation capacity with the aim to connect 950 MW of wind and solar capacity to the grid in [2024](#)”. According to official data, 31% of the EU funds allocated to the [Just Transition Programme](#) have been absorbed as of March 31, 2025.

### Conclusions

In this contribution, we presented several initiatives aimed at addressing the role and impact of the effects of climate change on access to clean energy as this transformation has significantly affected the European economic sector. Following the signing of the *Paris Agreement*, a number of initiatives have been launched to address this problem and the *International Solar Alliance* is one of them. Romania became a member of this alliance and continues to address the importance of increasing access to clean energy.

## The importance of the Middle Corridor for Romania

Tănase STAMULE

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One of the main logistical challenges facing Romania in the coming decades is attracting as much merchandise traffic from China and India into the European Union via the Port of Constanța.

Today, the main criterion for competitiveness is the transit time needed to carry a container from Asia to the EU. If we analyse the old Silk Corridor we see three traffic routes:

- The Northern (Eurasian) Corridor: Through Russia and Ukraine by rail, typically taking from 15 to 20 days to transport the containers (recent conflicts have disrupted this corridor's reliability).
- The Southern (Maritime) Corridor: By sea through the Suez Canal, it takes around 45 to 60 days (and up to 90 days if the Suez is blocked, e.g. due to Red Sea instability).
- The Middle (Trans-Caspian) Corridor: Via Kazakhstan, across the Caspian Sea by ferry, through Azerbaijan and Georgia, then onward to Europe (through Türkiye and ferry to the Port of Pireu; or can go from Georgia ferry to Constanța or Burgas). This route is roughly 6 500 km and significantly faster - shipments can reach Europe in about 10-15 days, half the time of sea transit. In particular, the branch from Georgia across the Black Sea directly to Constanța takes about 10 days by rail-and-ferry, making it the fastest option.

From Romania's point of view, its interest is to be an alternative to the Turkish route, which goes through Greece-Macedonia-Serbia and Hungary. Recent data show that freight traffic on the Middle Corridor is rapidly growing. [In 2024, Trans-Caspian traffic rose to 62% to 4.5 million tonnes.](#)

For that, Romania should pursue several directions in order to strengthen the Middle Corridor:

- Expand ferry and port capacity: Romania needs to upgrade the ferry capacity in the Port of Constanța. Currently there is only one ferry each day carrying trucks from Georgia. The capacity in the first phase could be easily increased to four ferries per day. Recent investments - including a €130 million logistics hub upgrade (with EU grants) - have already [doubled container](#) capacity to 1.5 million TEUs.

- Strengthen regional partnerships: It should strengthen the diplomatic relations with Georgia, Azerbaijan, Kazakhstan and Kirgizstan in order to create a common strategy for the *Middle Corridor*.
- In addition, it needs to create a strategic partnership with Bulgaria in order to promote together the Middle Corridor as a transport alternative.
- Secure EU funding and coherent strategy: A thorough economic analysis is needed for investments along the *Middle Corridor* (in rail infrastructure, highways and ferry capacities), in order to create a good business model. Romania and Bulgaria could then develop a project proposal to Brussels to finance its development.

These measures are justified by both recent trends and Romania's strategic position. In 2024, the volume of merchandise transported through the Middle Corridor [increased by 62% reaching 4.5 million tonnes](#) - and it is projected to reach 10 million tonnes by 2027. China supports the Turkish route because it has bought the Port of Piraeus and has a preferential relation with Serbia and Hungary and the use of their rail infrastructure. Romania must fight for the Black Sea corridor and attract merchandise through Romania and Bulgaria.

In sum, considering the high interest of companies to decrease the transportation time from China to the EU, and the very favourable geographic position of Romania, we need to make a plan for developing the *Middle Corridor* through the Black Sea and begin implementing it.



## AFTERWORD

### Romania - South Caucasus - Central Asia. New opportunities in the global context

Mihai SEBE

Mihai SEBE is the Head of the European Affairs Department, European Institute of Romania, and lecturer, University of Bucharest. His main areas of interest are European affairs, regional cooperation, etc. He is passionate about the shape of things to come.

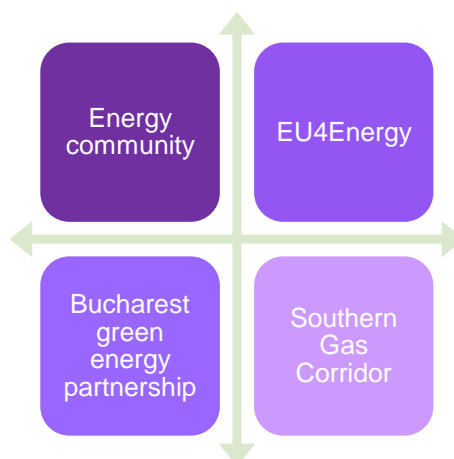


The Black Sea region has occupied an important role in the collective mythology and economy of this part of the world ever since Antiquity as a crossroad of cultures, civilizations, trade and opportunities. Its complexities can be seen in the earlier evolution of its name from [\*Póntos Áxeinos \(Inhospitable Sea\)\*](#) to the more positive form of [\*Eúxeinos Póntos \(Hospitable Sea\)\*](#), as the Greek merchants and colonists started to explore it and brought it into their sphere of influence.

Fast-forwarding to the XXI<sup>st</sup> century, the Black Sea re-emerged as a crucial connector, as the European Union (EU) became a riparian organization due to Romania and Bulgaria joining the EU in 2007.

As a first sign of more EU involvement, we have had the *Black Sea Synergy* of 2007 meant to support [\*the development of cooperation within the Black Sea region and between the region as a whole and the EU\*](#). It was a rather general framework of cooperation which yet resulted in a series of key projects in the area of energy and transport: [\*Energy community\*](#); [\*EU4Energy\*](#); [\*Bucharest green energy partnership\*](#) and [\*Southern Gas Corridor\*](#) (see below)

Figure 1 - Author's visual representation of the key projects



The EU learned the lessons of the Synergy and came up on 28 May 2025 with a new [Strategy dedicated to the Black Sea](#). The document mentioned the future pillars of cooperation in the Black Sea region:

- Enhancing **security**, stability, and resilience;
- Fostering sustainable **growth** and prosperity;
- Promoting environmental protection, climate change **resilience** and preparedness, and civil protection.

It is also about the implementation of **three flagship initiatives** like: the **Black Sea Maritime Security**, and the establishment of a **Black Sea Maritime Security Hub**; **preparedness of coastal communities and blue economy sectors** and last but not least ‘a dedicated **Connectivity Agenda** - aligned with the extended Trans-European Networks - will develop transport, energy and digital networks to leverage the potential of the Black Sea region as a vital corridor linking Europe with Central Asia through the South Caucasus, boosting economic growth and competitiveness’.

From the Romanian perspective, one of the most visible energy projects of the last years was the *Bucharest Green Energy Partnership*. [The Memorandum of Understanding on a strategic partnership in the field of green energy development and transmission between the governments of Azerbaijan, Georgia, Romania and Hungary was adopted by the Heads of States and Governments in Bucharest in December 2022, in the presence of the Commission President, Ursula von der Leyen. The partnership aims to develop a green energy corridor across the four countries, including a high-voltage direct-current line under the Black Sea, and explore possible routes to also conduct trade in green hydrogen. A series of ministerial meetings were held under this initiative in the last years, with Bulgaria and the European Commission participating as observers. Armenia, the Republic of Moldova, Ukraine, Türkiye, Kazakhstan and Uzbekistan have signalled their interest in participating in the initiative. The EU has expressed its support for Armenia’s participation \(Council of the European Union, 2024\).](#)

Additionally, we have also a key energy project under way, the [Neptun Deep natural gas exploitation project](#), situated on the Romanian Black Sea continental shelf, with an estimated total volume of around 100 billion cubic meters of natural gas, which will position Romania as the largest gas producer in the European Union.

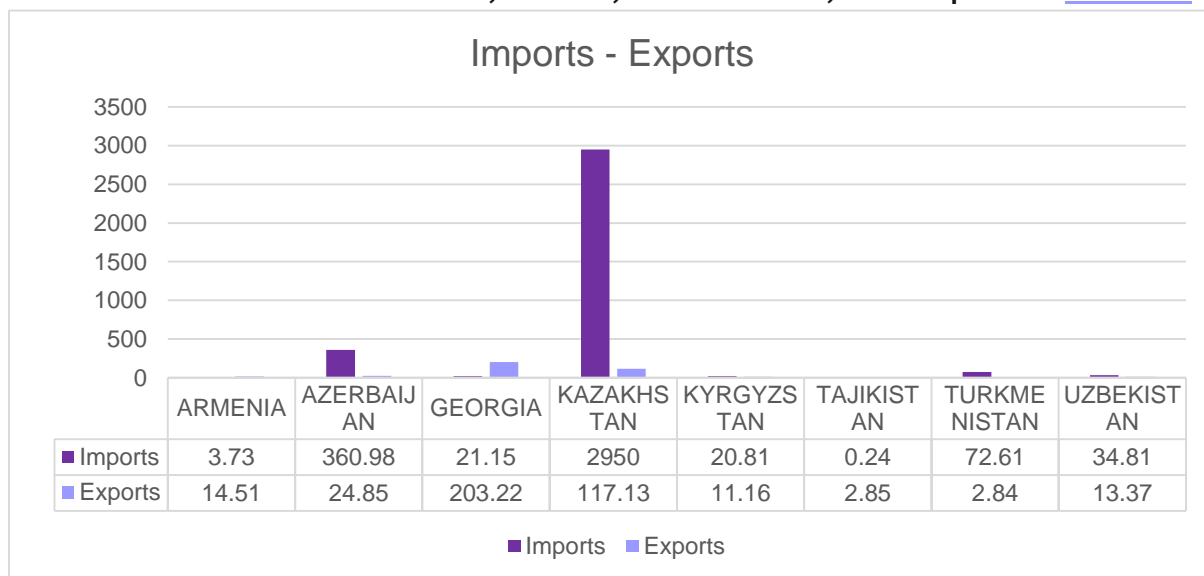
As for the transportation, we must first and foremost notice the increasing role of the Port of Constanța following the war of aggression against Ukraine. The Constanța Port had a significant [growth](#) amidst all the EU ports due to taking over the role of the ports in southern Ukraine. This brought back on the EU agenda the key role of the Danube, as a major transportation waterway. A series of studies delved [into the strategic significance of the Danube as a vector of connectivity with Western Europe, primarily with Germany, and the impact of its use for the economic development of Romania, the Republic of Moldova and Ukraine. The Danube can play](#)

[a significant role in the reconstruction process of war-affected southern Ukraine and can contribute to NATO's military mobility in the west-east direction \(NSC, 2024\).](#)

Romania is an essential part of many regional cooperation, such as, for example, *Bucharest9* or [Three Seas Initiative \(3SI\)](#), as it is positioned at the intersection of several Eurasian regional axes: [\(1\) the west-east continental axis \(west - Russia, pivot: Ukraine\); \(2\) the north-west - south-east continental axis \(west - Near and Middle East, pivot: Türkiye\); \(3\) the river axis: Danube - Main - Rhine- a European geopolitical, geo-economic and geo-strategic “diagonal”, which connects the Black Sea with the North Sea; and \(4\) the axis of seas and straits \(Mediterranean- Black Sea - Caspian Sea\)](#) (Jora *et al.*, 2024). As many experts pointed out [building rail and road transport networks between Romania and Poland will improve military mobility and accelerate economic exchanges, thus providing more leverage for enhanced posture in the region](#) (Nate, 2025).

An important aspect that needs to be reinforced is having a custom-made approach to each of the countries in the region, while, at the same time, using all the EU instruments available. One solution would be to use the parliamentary diplomacy (through the existing [bilateral friendship groups](#)), as well as the network of the chambers of commerce. In addition, the level of economic relationships remains beneath its potential, as seen below for the year [2023](#).

**Figure 2 - Author's representation of the levels of imports and exports of the states in South Caucasus and Central Asia, in 2023, million dollars, based upon the [MFA data](#)**



At the end of the day, we are faced with a series of yet unexplored opportunities. Romania can serve as a bridge towards South Caucasus and Central Asia with the [Black Sea](#) as a key interconnector. By wisely using the EU and the 3SI opportunities, we can bring our regions closer and create prosperity for all the actors involved.

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