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Advancing a **Cross-Regional Connectivity Agenda**, linking the EU with Central Asia, via Türkiye and the South Caucasus

Key findings from assessment of regional connectivity priorities

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1 Introduction

Reliable, sustainable, and diversified connectivity between Europe, the South Caucasus, and Central Asia is critical for trade, energy security, digital integration, and socio-economic resilience. As the **European Union is developing a Cross-Regional Connectivity Agenda** enhancing the links between the EU with Central Asia via Türkiye and the South Caucasus[1], this report aims to provide a summary of recommendations based on an assessment of existing and planned initiatives to **leverage the full potential of the Trans-Caspian Transport Corridor in the fields of transport, including trade facilitation, energy and digital**. The summary will provide a basis for sector-specific discussions with partner countries, International Financial Institutions and the EU until Q1 2026 to advance on a common priority list of cross-regional investments in hard and soft connectivity.

- **Goal and Scope**: Identify common regional priorities and guide future cooperation and investment under the Cross-Regional Connectivity Agenda. This report covers the fields of transport and trade, energy, and digital sectors across EU Member States around the Black Sea (Bulgaria, Romania), Türkiye, Eastern Partnership countries (Ukraine, Moldova, Georgia, Armenia, Azerbaijan), and five Central Asian countries (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan).
- **Methodology:** From August to October 2025, the study team conducted a literature review and consulted local and international experts to identify cross-regional trends and bring together recommendations for all partners.

2 Regional Priorities in the Transport and Trade Sector

The European Union's strategic approach to the Black Sea region[2] recognises the Black Sea and its neighbouring countries as a pivotal gateway linking Europe to Türkiye, the South Caucasus, Central Asia, and beyond. Stronger transport links within and between Türkiye, the South Caucasus, and Central Asia can speed up intraregional trade flows, thus unlocking the growth potential of the region. Following the significant increase of traffic in the region and the 8 August agreement between Armenia and Azerbaijan, the Trans-Caspian Transport Corridor stands out as the most viable route for sustainable, diversified, and resilient regional connectivity.

In this context, the meta-study confirms priorities identified by the European Bank for Reconstruction and Development (EBRD) as well as the World Bank (WB) and emphasises **the following priorities** further complementing actions already implemented in the region.

1 Invest in impactful infrastructure developments

Despite recent progress, the Trans-Caspian Transport Corridor faces **operational constraints**: fragmented logistics, multiple border crossings, and limited digitalisation. For the EU, **enhanced corridor performance** would enable faster and more reliable imports of goods and raw materials, while also opening new export markets across Eurasia, resulting in advancement of mutually beneficial, **both cross-regional and intra-regional trade**. It will also be providing significant advantages to landlocked countries as they gain better access to seaports, thus catalysing a growth in trade opportunities.

By supporting **impactful infrastructure developments in the region,** the EU can help unlock the corridor's full potential, and **promote open, coordinated governance** of the corridor and solutions protecting the long-term interest of the countries and their citizens along the Trans-Caspian Transport Corridor. To realise this potential, priority steps include co-investing in the development of critical hubs (e.g., logistics terminals, border crossing points (BCPs), intermodal centres, key routes, ports, as well as rolling stock and sea vessels), and boosting diversification of connectivity among partner countries, promote coordinated and joint governance of corridor investments. The extension of the Trans-European Transport Network (TEN-T) agreed to in 2021 provides the basis for transport investment planning in the South Caucasus.

[1] https://www.consilium.europa.eu/en/press/press-releases/2025/10/20/co-chairs-conclusions-on-strengthening-cross-regional-security-and-connectivity/

[2] JOIN (2025) 135 final

In Central Asia, an EU-funded study by the **EBRD** identified several priorities for hard infrastructure investments essential for improving capacity and efficiency along the Trans-Caspian Transport Corridor, while the **World Bank in joint efforts with the EU and partners** is currently looking also on the western side of the Caspian Sea into the most immediate bottlenecks and investment needs, including on the TEN-T, to ensure the corridor's long-term viability. These stretch from the Third Bosphorus Bridge in Istanbul to the Port of Baku and will need to be prioritised as critical by the partner countries and IFIs.

2 Opportunities to improve connectivity in the South-Caucasus

As peace negotiations between Armenia and Azerbaijan advance, opportunities are emerging to re-establish **transport links connecting Armenia, Azerbaijan, and Türkiye**. Developing additional connections has the potential to strengthen overall corridor performance and diversity as well as increasing projected trade volumes. Regional stakeholders are actively pursuing initiatives to reopen and develop transport links between these countries.

Armenia's Crossroads of Peace Initiative (2023) seeks to strengthen regional connectivity through reciprocal access. It proposes seven new road checkpoints on borders with Azerbaijan and Türkiye, alongside the rehabilitation of key rail segments. The U.S.-backed TRIPP initiative (2025) envisions a similar corridor developed under a long-term U.S. lease, linking more broadly to ongoing railway infrastructure projects in Azerbaijan, including in Nakhchivan, and in Türkiye.

In light of these developments, the European Commission and the countries in the region could consider initiating technical discussions on how to ensure that the reopening of these transport links is aligned with the TEN-T extension.

3 Promote soft connectivity and compatibility with common standards

The EBRD, World Bank, OECD, Asian Development Bank, and other international organisations repeatedly stress the importance of **soft measures** to improve **trade facilitation, border management, and service delivery**. It is pointed out that the absence or incompatibility of these measures can severely impede potential benefits of the hard infrastructure improvements.

These studies underline the potential of advancing digitisation and interoperability across the corridor through adoption of common standards, enabling paperless trade, harmonised technical standards, and streamlined border procedures. They also stress the need to support transparent and predictable frameworks for tariff-setting, market access, and infrastructure maintenance, which would foster **fair competition and long-term reliability** of transport links.

4 Promote partnerships with the private sector

Partnerships with the private sector and local business in the implementation of corridor projects across engineering, construction, logistics, and digital systems can be fostered, with a focus on **interoperability and high-quality, trusted solutions**. This would promote global standards and technologies and enhance sharing of best practices. In this context, specific infrastructure development proposals could be tailor-made in cooperation with the private sector to address hard infrastructure challenges along the Trans-Caspian Transport Corridor.

5 Integrating Ukraine and Moldova into European networks

The Trans-Caspian Transport Corridor serves as a key East-West artery, and Ukraine and Moldova represent an important complementary dimension in the connectivity landscape. Their strategic orientation is primarily defined by EU integration, but they still connect to the Trans-Caspian Transport Corridor through the Black Sea and Danube ports and link to key European Transport Corridors of the TEN-T network.
Major investments in hard infrastructure are planned through the TEN-T network extension, however, achieving full integration requires **faster progress on soft connectivity measures**, aligned with EU and international standards.

3 Regional Priorities in the Energy Sector

Both the EU and the partnering countries face energy **availability and accessibility challenges** due to dependencies on imported oil and gas and structural weaknesses in electricity networks, from national transmission and distribution grids to cross-border interconnections. leaving some of the countries in the region exposed to supply disruptions or price peaks, while infrastructure limitations demand urgent investments. The varying degrees of regulatory alignment of the partnering countries with EU standards also pose a challenge. In the EU, the Repower EU plan addresses these vulnerabilities, by accelerating clean energy deployment, boosting energy efficiency, and diversifying energy supplies. For the regional cooperation in the Black Sea region and Central Asia, the following strategic directions stand out: to accelerate the deployment of renewables and take up of energy efficiency measures; build the cross-border interconnections that enhance regional connectivity and energy security; support diversified and future-proof energy routes for mutual economic benefit; and ensure energy infrastructure is resilient. The strategic directions are further broken down into six priority areas as outlined below, showing where the EU and partner countries can most effectively align their efforts to build a resilient, competitive and climate-aligned regional energy system. These priorities reflect insights from literature review and publicly available studies. They do not constitute a cost-optimal assessment of energy system needs in the EU or in partner countries.

The EU's new global climate and energy vision guides its external energy policy, promoting strengthened partnerships, driving sustainable change, while supporting industrial and technological strengths. To achieve this, the EU already supports its partners in investing in renewables and enhancing infrastructure (such as electricity grids, and intra-regional and inter-regional cross-border interconnections through the Global Gateway and TEN-E framework) to create a resilient, integrated energy system and ensure long-term security. To achieve this, the EU will also support its partners - when relevant and desirable - in advancing regulatory alignment with EU best practices, including the development of policy frameworks and regulations that promote the transition to a low-carbon energy system, to facilitate a more integrated and sustainable energy market.

1 Connecting the electricity markets

Investments in domestic grid upgrades and energy storage is crucial to unlock the vast renewables potential in the region. At the same time, cross-border interconnections can provide additional potential for the balancing of renewable energy sources in a cost-effective manner and potential electricity exports over time. Priority should therefore be given first and foremost to reinforcing national transmission and distribution grids, and integrating storage capacities, as essential preconditions for enabling cross-border electricity trade. As domestic infrastructure and regulatory bottlenecks are effectively addressed, key interconnection projects, such as the new Black Sea Submarine Cable between Romania and Georgia or the Armenia-Georgia interconnector as part of the Caucasus Transmission Network project will enable cross-border electricity flows enhancing system stability and flexibility. Central Asia is developing large-scale renewables and green hydrogen projects, with plans for a trans-Caspian electricity link and a green energy corridor to Europe.

2 Transitioning towards a resilient energy mix

Ensuring the **security of supply** is a critical concern. The development of **renewable energy sources** is the top prioritiy, as they offer a long-term solution to reducing dependence on fossil fuels and promoting energy security. Sizeable renewable projects are under way in Romania, Bulgaria, Türkiye, Azerbaijan, Georgia and Uzbekistan. However, in the short term, the diversification of existing gas supply remains an essential pillar of energy security. Moreover, it is also crucial to ensure that fossil fuels, are not dependent on a single supplier, and to start reflecting on the future of current fossil fuel infrastructure, including the potential for repurposing for alternatives such as hydrogen, to minimize stranded assets and facilitate a smooth transition to a low-carbon energy system. To successfully transition towards a resilient energy mix, it is furthermore essential to prioritise the increasing electrification of all sectors, including heating, which is of particular importance in most parts of the region.

3 Soft connectivity measures to support market integration

Domestic market-driven energy policy reforms and constitue the foundation for any regional market integration. Developing domestic power markets should be prioritised to ensure competitive energy pricing transparent tariffs and predictable investment conditions for the private sector. Underpinning domestic energy markets and facilitating market integration will require stepping up reform momentum and regional co-operation and building capacities enhance regional balancing, harmonisation of grid codes and Guarantees of Origin (GOs). Addressing regulatory gaps and enhancing capacity of the relevant institutions alongside upgrades in grid infrastructure will create truly interconnected and competitive domestic electricity markets enabling cross-border electricity.

4 Strengthening infrastructure security

Ensuring that energy **infrastructure is reliable, resilient, and protected against disruptions**, whether from technical failures, cyberattacks, or sabotage, shall stand as major cross-cutting principles in prioritising potential investments. Protecting critical energy infrastructure, including electric and smart grids, gas pipeline sensors, and wind and solar technologies is vital as it enables stable energy flows between countries, prevents supply shortages, and supports the goal of an integrated, secure energy market. Actions should include conducting regular risk assessments, implementing robust cybersecurity measures, and developing emergency response plans.

5 Public private partnerships for regional energy infrastructure development

The region offers potential for the developmenf of clean tech value chains such as for renewable energy technologies grids, energy storage, electrification of heat and industries, and hydrogen. By channelling public investment and policy support towards these areas, the region can unlock its potential for sustainable energy development. This can be achieved by strengthening transmission networks, promoting grid modernisation, and encouraging the adoption of innovative technologies and knowledge-sharing with international partners.

6 Ensuring energy decarbonisation in sectors affected by CBAM

Studies note that starting in 2026, the European Union will apply a carbon charge (CBAM) on the embedded emissions in a select group of imported goods: steel and iron, aluminium, cement, fertilisers, electricity, and hydrogen.

For sellers in the partner countries, this means the carbon footprint of how these goods are produced will directly affect their final price at the EU border.

To maintain smooth trade flows between the EU and regional partners, energy transition projects in sectors representing significant and strategic imports should be supported and implemented to reduce the carbon footprint of these goods and partner countries.

4 Regional Priorities in the Digital Sector

Countries in the Black Sea region, including Türkiye, in the South Caucasus, and Central Asia still face challenges in accessing **high-capacity, secure, and affordable digital infrastructure** – which is limiting their ability to fully leverage the potential of the digital economy.

The **shared cross-regional strategic interests** may be twofold:

1. Keep **digital corridors open, secure, and reliable**, with fair access and internationally aligned security standards across fibre networks, internet exchange points (IXPs), and data centres.
2. **Improve interoperability with global digital markets,** including the EU Digital Single Market, enabling partner countries to connect more easily, expand digital services, and support digital trade and innovation.

For instance, installing fibre cables at the same time as building energy and transport routes and setting up carrier-neutral IXPs in Türkiye, the Caucasus and Central Asia, are among the most effective ways to increase capacity, reduce costs, and keep data traffic local. These priorities are fully aligned with the EU's Global Gateway, which aims to boost smart, clean, and secure links in digital, energy, and transport sectors, and with the Digital Decade Policy Programme 2030, which sets ambitious targets for secure and sustainable digital infrastructure, digital skills, and digitalisation of public services.

Accordingly, the following priorities provide **an investment-oriented pathway** to develop alternative, resilient and secure digital networks while also boosting innovation and competitiveness.

1 Secure and diversify strategic digital corridors

Building resilient, multi-route terrestrial and subsea corridors reduce dependency on single paths and enhance security, enabling trusted connectivity between Central Asia, the South Caucasus, Türkiye, Ukraine, and the EU. **Co-invest in high-capacity systems**, ensuring open-access governance and quantum-safe designs, and **integrate** Ukraine, Türkiye and Armenia as key nodes to strengthen inter-regional connectivity.

2 Integrate digital infrastructure with energy and transport

Deploying **fibre alongside energy and transport routes** using "dig-once" principles would leverage existing rights-of-way and infrastructure to accelerate rollout, reduce permitting complexity, and increase resilience of multi-sectorial assets. It would ensure that digital connectivity grows in tandem with strategic energy and transport corridors, creating **operational synergies and economies of scale**, while also harmonising governance processes across sectors.

3 Build regional internet exchange points (IXPs) and caching hubs

To convert transit corridors into reliable, affordable services, **local capabilities to handle traffic** should be developed. Co-investments in national fibre backbone development, IXPs and caching hubs (local servers storing frequently accessed online content) in regional cities keeps data closer to users, strengthens redundancy, and reduces reliance on distant IXPs, thus also improving quality of service. By harmonising peering rules and using carrier-neutral facilities, countries can create better interconnection conditions, boost market visibility, and accelerate traffic growth.

4 Use satellite connectivity as interim solution for resilience and coverage gaps

Satellite connectivity provides a practical bridge during the development of terrestrial and subsea corridors. It ensures continuity in geographically challenging areas, preventing service gaps that could stall economic and social development.

As new routes/corridors come online and national backbones are extended, connectivity should follow hybrid satellite-terrestrial systems, where the main traffic migrates to ground connections and satellites act as backup, providing reliable fallback options and long-term resilience. Strong, internationally aligned security standards should be applied, so that universal-service funds can support backhaul development (links between local access networks and the operators' core networks) without distorting wholesale markets.

5 Promote active participation of trusted regional and international companies in corridor projects

Trusted digital suppliers bring technologies and standards that underpin secure, interoperable corridors. The facilitation of trusted technology offers relying on public-private cooperation would provide regional and international companies the opportunity to contribute and lead the development of corridors' projects through coherent, standards-based and security-aligned solutions. Such coordinated offers can accelerate deployment and embed trusted architectures in the design of connectivity cables, while fostering collaboration with local partners and developing in-country operational skills/capabilities.

6 Ensure cyber resilience and promote internationally recognised technology and standards

As corridors expand towards inter-regional reach, trust and interoperability become critical for scale and security. By promoting the adoption of internationally recognised and EU standards such as the EU's 5G cyber-security toolbox, including data privacy standards, partner countries can build secure, future-proof networks that are compatible with European and global markets, further reducing vendor and supply chain risks, facilitating interconnection and unlocking concessional finance. Partners could also explore options for developing regional Computer Emergency Response teams and Computer Security Incident Response Teams to enhance resilience against cyber threats.

7 Support emerging and enabling technologies, with a focus on AI

Beyond connectivity, advanced technologies like AI and high-performance computing drive innovation and competitiveness. Cross-regional collaboration through research partnerships, joint labs, and pilot projects would ensure responsible deployment and interoperability with international trust frameworks and would better position countries to translate scientific collaboration into growth and competitiveness gains.

8 Grow start-up ecosystems and increase cross-regional and international linkages

Start-up ecosystems drive sustainable digital transformation and technological synergies. In that regard, connecting local entrepreneurial ecosystems to more established international and European business networks would increase opportunities for mutually beneficial partnerships, including increased funding, mentorship, and market access. Such efforts would create a dynamic innovation landscape that would perfectly complement the Trans-Caspian Transport corridor development.

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