



The Effects of Zangezur Corridor on Türkiye's Eastern Mediterranean Ports Hinterland*

Zangezur Koridorunun Türkiye'nin Doğu Akdeniz Limanları Hinterlandına Etkileri

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Abstract

In the historical process, it is seen that many roads such as the Silk Road and the Spice Road have been established to maintain international trade between the continents of Asia and Europe. Countries located on these routes have gained significant socio-cultural and economic gains with these structures they are a part of. It is seen that these trade routes have been changed, disused or restructured with the changes experienced over time, such as geographical discoveries. The corridor known as the Zangezur Corridor which will be focused on within the scope of this study, is considered as one of these new structures. The Zangezur region, which was given to Armenians by the Soviets to cut the relations between Türkiye and Azerbaijan, was taken back by Azerbaijan in 2020. The Zangezur region, with its location on the Azerbaijan-Nakhchivan border, has a very critical importance in terms of a trade route that can be established. In this study, the effects of this logistics corridor between Türkiye and the Turkic Republics, which have cultural and historical ties, on Türkiye's Eastern Mediterranean ports will be analyzed. With this connection, in addition to the road and railway infrastructure of the region, it is thought that important advantages can be developed within the scope of Asia-Europe trade with port connections with an expanded hinterland. In this study, expectations for this structure, and existing commercial and transport infrastructure will be analyzed and suggestions will be tried to be developed.

Keywords: Transport Geography, Zangezur Corridor, Eastern Mediterranean, Port.

Özet

Tarihsel süreçte Asya ve Avrupa kıtaları arasında uluslararası ticaretin sürdürülebilmesi için İpek Yolu ve Baharat Yolu gibi birçok güzergâhın kurulduğu görülmektedir. Bu güzergâhlar üzerinde yer alan ülkeler, parçası oldukları bu yapılarla önemli sosyo-kültürel ve ekonomik kazanımlar elde etmişlerdir. Coğrafi keşifler gibi zaman içinde yaşanan değişimlerle bu ticaret yollarının kullanılmaz hale geldiği ya da yeniden yapılandırıldığı görülmektedir. Bu çalışma kapsamında odaklanılacak olan ve Zangezur Koridoru olarak bilinen koridor da bu yeni yapılardan biri olarak değerlendirilmektedir. Türkiye ile Azerbaycan arasındaki ilişkileri kesmek amacıyla Sovyetler tarafından Ermenilere verilen Zangezur bölgesi, 2020 yılında Azerbaycan tarafından geri alınmıştır. Zangezur bölgesi, Azerbaycan-Nahçıvan sınırındaki konumu ile kurulabilecek bir ticaret yolu açısından oldukça kritik bir öneme sahiptir. Bu çalışmada, Türkiye ile kültürel ve tarihi bağları olan Türki Cumhuriyetler arasındaki bu lojistik koridorun Türkiye'nin Doğu Akdeniz limanlarına etkileri analiz edilecektir. Bu bağlantı ile bölgenin

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karayolu ve demiryolu altyapısına ek olarak genişletilmiş bir hinterlanda sahip liman bağlantıları ile Asya-Avrupa ticareti kapsamında önemli avantajlar geliştirilebileceği düşünülmektedir. Bu çalışmada bu yapıya yönelik beklentiler, mevcut ticari ve ulaştırma altyapısı analiz edilecek ve öneriler geliştirilmeye çalışılacaktır.

Anahtar Kelimeler: Ulaşım Coğrafyası, Zangezur Koridoru, Doğu Akdeniz, Liman.

1. Introduction

It is seen that different transport routes have been established between countries since the ancient periods of history. In the creation of these routes, trade structures established in order to meet different social needs from different regions as well as military purposes have also had an impact. These transport routes have enabled the countries that have a say in these routes to develop economically and socio-culturally. This has caused countries to develop commercial relations over these routes or to want to have a say in international trade by creating new routes. This picture is not different today as it was in the past. In particular, globalization, which means the free movement of products (goods and services), information, money and people, and technological developments that enable this to happen faster than in the past, have further expanded the geographical scope of commercial relations today.

Commercial routes such as the Silk Road, the King's Road and the Spice Road have played important roles in the historical process and have been effective in the development of trade between countries, especially in distant geographies. However, new and alternative routes have emerged as a result of political, economic and technological developments over time and the increase in the need for transport. One of these routes is the possible Zangezur Corridor. In 2020, after the 44-day-long "Nagorno-Karabakh War", the region came under Azerbaijani sovereignty and is seen as a trade route where important cooperation can be established in terms of Asia - Europe connection, especially with Türkiye and Turkic Republics.

Based on these points, this study aimed to evaluate the effects of the possible Zangezur Corridor on the hinterland of the ports located in the Eastern Mediterranean region of Türkiye.

In this study, first of all, the studies on trade routes and transit routes between Asia and Europe in the literature were analyzed. In addition, taking into account that Zangezur had passed to the sovereignty of Azerbaijan in 2020, the publications on the Zangezur corridor after 2020 were examined. Then, trade data of the region and data on port structures were also analyzed and assessments of the possible Zangezur corridor and its effects have been made.

In this context, firstly, trade routes and Asia-Europe trade volumes were evaluated, and then information about the Zangezur corridor, which was considered as a new route, was given.

Finally, the possible effects of this corridor on the Eastern Mediterranean ports were discussed, and the findings and suggestions obtained as a result of the evaluations were included.

2. Asia-Europe Trade Routes

Since the ancient times of history, societies have made various attempts to meet their needs, to open up to new areas and to reach new resources. In line with these initiatives, strategic agreements are made between countries to facilitate and increase trade and transport routes are established to carry out logistics activities. Globalization has led to an increase in social awareness levels starting from individuals with the developments in communication and transportation technologies. In this way, existing structures are changing or evolving towards new structures within the framework of the possibilities of time. While established cooperation and agreements are seen as an important driving force at this point, rapid access to information with advanced technology has also become critical.

When these points are evaluated as a whole, it is seen that supply chain structures have a wide geographical spread within the framework of today's conditions. The structure created between Asia and Europe and the trade volume reached are the best examples of this.

One of the most important points in the context of foreign trade is transport routes. These routes have played an important role in the economic, political, social and cultural development of the countries on the routes as well as in the conduct of commercial relations between countries since ancient times. Within the framework of all these developments, it is seen that today, efforts are being made to create suitable routes in terms of time, cost and the number of countries travelled through and the bureaucratic burdens they will bring. In these efforts, alternative routes are created by considering multimodal transport conditions.

Within the scope of this study, the structures between Asia and Europe will be emphasized. It is seen that the volume of trade both from Asia to Europe and from Europe to Asia is quite high. The COVID-19 pandemic, which has created significant global effects, has clearly shown the magnitude of the effects that disruptions in this flow may cause in terms of country economies. In the study conducted by Esmer (2023), it is stated that Asian countries will become more dominant in terms of economy in parallel with the change in population structures, technological developments and the search for alternative resources. In addition, it is emphasized that trade routes will also change with approaches that prioritize sustainable energy policies, especially after the pandemic (Esmer, 2023).

To give an idea, the cargo volumes on the main routes used in maritime trade are given in Table 1. The table shows three main routes used in container trade. In the Transpacific route, the West-East direction represents the Asia-West America, while in the Far East-Europe route, the West-East direction represents the Europe-Asia direction. Finally, in the Transatlantic route, the West-East direction represents the America-Europe direction.

In terms of main routes, the Transpacific route maintained its first place in 2022 with 32.7 million TEU[†] (full) cargo. While China-US transports reached 26.1 million TEUs, 6.6 million TEUs were carried in the opposite direction. The total transport on the Far East-Europe route, which is the subject of our study, is 26.3 million TEU. 19.6 million TEU of the transports on this line is in the China-Europe direction. In Transatlantic transport between two economically developed regions, the amount of transport is considerably lower than the other lines (8.9 million TEU). However, EU-US transports are stronger in this line (Table 1).

Table 1. Container trade on main routes (Full, 2018-2022 million TEU)

Years	Transpacific			Far East-Europe			Transatlantic		
	West-East	East-West	Total	West-East	East-West	Total	West-East	East-West	Total
2018	20,7	7,4	28,0	7,0	17,3	24,3	3,1	4,9	8,0
2019	19,9	6,8	26,7	7,2	17,5	24,8	2,9	4,9	7,8
2020	20,6	6,9	27,5	7,2	16,9	24,1	2,8	4,8	7,6
2021	24,8	6,8	31,6	7,2	19,3	26,5	2,9	5,3	8,2
2022	26,1	6,6	32,7	6,6	19,6	26,3	3,0	5,3	8,9

Source: Review of Maritime Transport (2023) UNCTAD. Geneva, Switzerland.

The Belt and Road Initiative announced by China has developed alternative routes between East and West. The Northern, Central and Southern corridors are important corridors that are located in Eurasia and connect the trade structures between the countries there (Tümenbatur, 2021: 103).

[†] Twenty-foot equivalent unit, abbreviated as TEU, is a unit of volume used in maritime transport statistics, equivalent to a 20-foot ISO container.

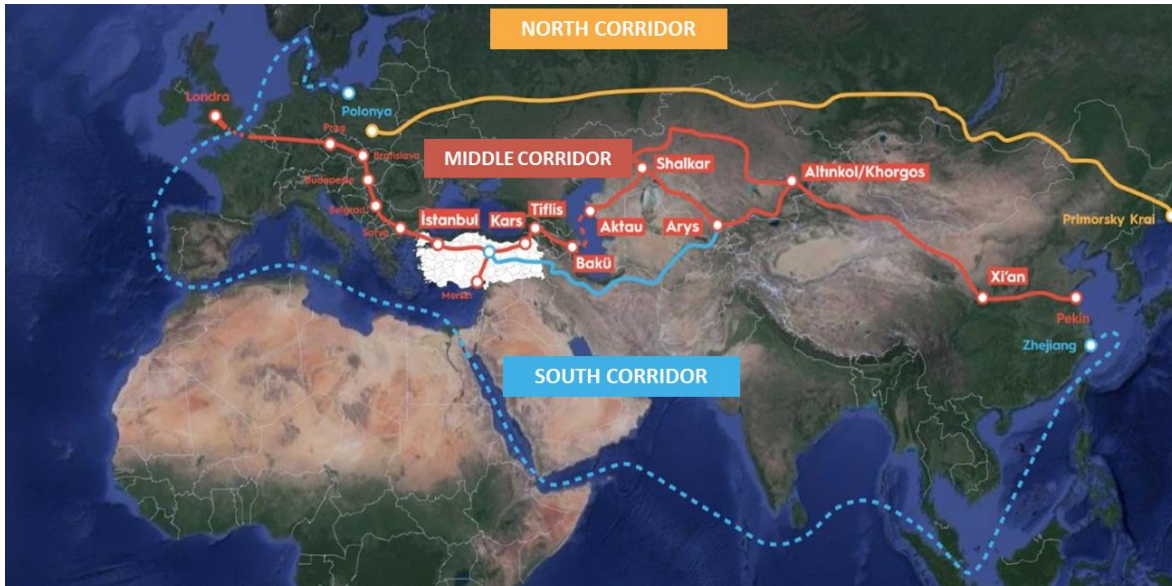


Figure 1. Euroasia Corridors

Source: <https://www.eurasian-research.org/publication/zengezur-koridorunun-azerbaycan-ve-bolge-icin-onemi/?lang=tr> Date of access: 08/11/2023

As can be seen in Figure 1, the northern corridor passes through Russia. This route has become a route with significant disruptions due to the Russian invasion of Ukraine in 2022, the war in the region and the embargo imposed by European Union (EU) countries on Russia. The war environment that started with Russia's invasion of the region after the pandemic period caused significant uncertainties again. Significant constraints have emerged in terms of global supply chains as well as national economies (Cengiz, 2023: 487). The problems experienced in the northern corridor have led countries to search for alternative markets and routes.

The southern corridor is seen as one of the 3 important routes in the world within the Far East-Europe main maritime trade route, thus within the scope of maritime trade. When these routes are ranked according to cargo volume, they are Trans-Pacific, Far East-Europe and Trans-Atlantic maritime trade routes. However, the temporary closure of the Suez Canal on the Far East-Europe route due to a ship accident has further triggered the search for alternative structures to this route.

The Middle Corridor, which is an alternative to these two corridors, has gained importance with the idea of reviving the historical Silk Road with China's "Belt and Road Initiative", just like the Northern Corridor. Announced in 2017 by China, the "Belt and Road Initiative (BRI)" is a 1 trillion-dollar infrastructure project that focuses on transport between Beijing and London in

the global context. With this unique structure, railways, roads and pipelines are considered to have significant potential (Sternberg et al., 2017:1).

Especially in the recent period, events such as the Covid-19 pandemic, which had global effects in 2020-2021, the Suez Canal crisis, the Russia-Ukraine War, the Palestinian-Israeli war, as well as the climate crisis, have further increased the tendency to create new transport routes in trade between countries. To summarize, the Middle Corridor has started to become the focal point of trade between Asia and Europe due to the negativities experienced in terms of the northern and southern corridors as well as the investment projects carried out within the scope of the BRI project. At this point, as mentioned before, the political, economic and social strengthening of the countries in the region has also been effective in the re-emphasis of the road. In addition to the dense population, the region attracts attention with its alternative resources and Gross Domestic Product (GDP) in a growing trend (Tezer, 2018:8).

In the study by Sacar and Özdemir (2022), the northern and southern corridors are compared with the central corridor. According to this comparison, it is stated that despite the harsh climatic conditions of the northern corridor, the middle corridor has more favorable regional conditions and is shorter and faster in length. When compared with the southern corridor, it is stated that the transport time will be shortened by approximately 1/3.

Within these structures, Türkiye is an important link for trade flows from Asia to Eastern Europe within the framework of TRACECA, which was proposed by the EU in 1993. Within two weeks, Chinese products are transported through Central Asia, across the Caspian Sea to the port of Alat and then to Türkiye via the Baku-Tbilisi-Kars railway. Afterwards, they are transported to Europe by different modes (Gawliczek & Iskandarov, 2023: 44). At this point, there is another corridor opening that should be emphasized. This alternative corridor is the Zangezur corridor, which came under the control of Azerbaijan in 2020 and is an important transit alternative on the central corridor.



Source: Eldem, 2022:6

Figure 2. Zangezur Corridor

The Zangezur corridor, which also constitutes the main subject of this study, is considered a new opening. It is expected that the region, which has become more important in parallel with the closure of the northern corridor, the energy crisis and similar developments, will assume important roles in world trade with the new corridor.

3. Zangezur Corridor as a New Opening

The Zangezur region, which is about 45 kilometers long and separates Azerbaijan and Nakhchivan, has a strategic position today as in the past. In the 1920s, the population of the region, 70% of which was composed of Turks, was tried to be changed by the Russian policy of settling Armenians in the region (Memmedov & Hasanoğlu, 2023: 335). Giving the region to Armenians to maintain their dominance in the region is seen as a tactical approach to disrupt the territorial integrity of Azerbaijan and to cut the connection between the Turkic Republics (Kazancı & Barun, 2023: 575).

The region came under Azerbaijan's sovereignty again in 2020. Thus, the connection between Azerbaijan and Nakhchivan was restored. As a result of the trilateral agreements concluded following this period, Armenia guaranteed security in the Azerbaijan-Nakhchivan connection and important steps were taken towards the realization of new infrastructure projects in the region.

It is aimed to establish a new alternative trade route in this region. To ensure development in the region, which was reclaimed by Azerbaijan after 30 years, planning the transport

infrastructure is of critical importance (Bayramov et al., 2022: 32). The corridor, which is also described as the Turkish Corridor, is of great importance in terms of strengthening the relations from the past. There is a strong historical, cultural, linguistic and religious bond between Türkiye and the Turkic Republics. Especially after the Turkic Republics gained their independence in the 1990s, strong political, commercial and economic relations have been established. In parallel with these recent developments, it is seen that the strategic cooperation established for all parties is very important. The planning for this corridor is shown in Figure 2 (Nakanishi, 2023:30).



Figure 3. Zangezur Corridor Map (Planned)

Source: <https://aze.media/wp-content/uploads/2022/01/Zangezur-corridor-map.png>, Cited: Nakanishi, 2023:30.

It is thought that the Zangezur Corridor will contribute to the development of regional transport infrastructure, encouraging cooperation between the countries of the region and ensuring regional development, as well as increasing the importance of the region in terms of the existing Euroasia corridors (Gulahmadov & Huseyn, 2023: 116). It is thought that a new transport corridor to be established in the region, which is historically of great importance for Azerbaijan,

will have strategic importance as a new transport line for the European Union countries and other countries as well as the countries in the region. This will increase the investment in the region. With this route, road and rail transport will be provided between Türkiye and Azerbaijan, and then access to Central Asian countries and China will be provided through the Caspian Sea (Jabbarov et al., 2022: 46). It is aimed to establish cooperation through commercial and economic agreements between Azerbaijan, Türkiye, Georgia, Russia, Armenia and Iran, which are the countries that can use this route.

With this structure, an uninterrupted transport structure based on different modes will be established between the countries in the region. In their study, Kazancı and Barun (2023) discussed the benefits to be obtained with this corridor in terms of different stakeholders as follows:

- An uninterrupted route will be established between Türkiye and the Turkic Republics. Considering that the route could be an alternative to China's Belt and Road Initiative, the Turkic Republics will be able to assume important roles on a global scale.
- Armenia, which has weak global trade and integration, could benefit economically from intercontinental trade.
- Countries in the European continent will be able to trade with eastern countries, which are important suppliers, through different alternative routes.

It will also create opportunities for Russia to develop trade relations with its neighbors such as Türkiye, Iran, South Asia and the Caucasus. With the integration to be achieved among the Turkic Republics, which have a very large economic structure, the importance of these countries at the international and regional level will become even more critical. It will also be effective in creating new alternative routes (Bayramov, 2022: 38). In the study by Gawliczek and Iskandarov (2023), referring to Blank (2022), it is stated that the Zangezur corridor is shorter than the existing route and is more reliable than the trade route through Georgia in terms of Moscow - Tbilisi relations (Gawliczek & Iskandarov, 2023: 44).

As a result, it is seen that this alternative route will have significant impacts in both global and regional dimensions, considering the trade volumes in the existing structures.

4. Effects of Zangezur Corridor on the Hinterland of Eastern Mediterranean Ports

Maritime transport is seen as an indispensable element of today's trade routes. At this point, as well as the cost advantage it provides, the integrated structures created with other transport modes in the port hinterland are also effective. This corridor will be integrated with Türkiye's road and railway connections. For this reason, it has significant potential, especially for the railway-connected ports of Türkiye.

Within the scope of global supply chains, approximately 12 billion tons of products are transported by sea annually. This volume means that 80% of global logistics activities are carried out by sea (<https://www.ics-shipping.org/shipping-fact/shipping-and-world-trade-driving-prosperity/>). Ports, which are one of the most basic components of maritime transport, are of critical importance in terms of global supply chains with their connections with both maritime transport and other modes of transport. When evaluated in this way, it is seen that countries that support their ports with the right investments are in an advantageous position in the global context in terms of economic, political and social aspects. Especially the logistic advantages provided by container transport and mainly the use of maritime transport are especially effective in the realization of this structure.

In the Belt and Road Initiative, the southern corridor is mainly based on the sea route. However, as mentioned before, unfavorable developments have led to the search for alternative structures. In terms of the central corridor, which is another corridor focused on in the study, it can be said that there is a project structure predominantly based on road and railway, but maritime connections are also very important. In the study conducted by Ferrari and Tei (2020), it is stated that the structure created will create significant effects in terms of maritime transport and logistics elements, and the region where these effects will be felt the most will be the Mediterranean region connecting Europe to Asia.

The Mediterranean, which is connected to the Atlantic Ocean and the Indian Ocean by the Strait of Gibraltar and the Suez Canal, two important passages on the Far East-Europe main maritime trade route, is considered one of the most important regions in terms of maritime transport and natural resources (Aydın, 2021: 25). The Eastern Mediterranean region, also called Lavent, is a region of social, cultural, economic and geopolitical importance where the first civilizations in history were established. It is of great importance for the Belt and Road Initiative as it provides the shortest connection between Asia and Europe via the Suez Canal (Dizdaroğlu, 2022: 6).

Türkiye, on the other hand, has an absolute advantage geographically with the longest coastline in the Eastern Mediterranean and a low deviation distance to the main trade routes. In addition, with its geopolitical structure, it acts as a bridge between East and West within the region. In parallel with the recent developments, it is seen that it has an important role in world trade as an important stakeholder of supply chains for many products, especially energy, and as a logistics centre. The routes determined within the scope of the Trans-Caspian and Belt and Road Initiative can be analyzed in Figure 4. As can be seen, these routes enter Türkiye via Georgia after the Caspian Sea crossing, and a branch of the route on Türkiye extends to the Eastern Mediterranean coast. The Zangezur corridor bypasses this existing structure (especially Georgia) and provides a more advantageous connection with the Turkic republics both in terms of transit time and cost.

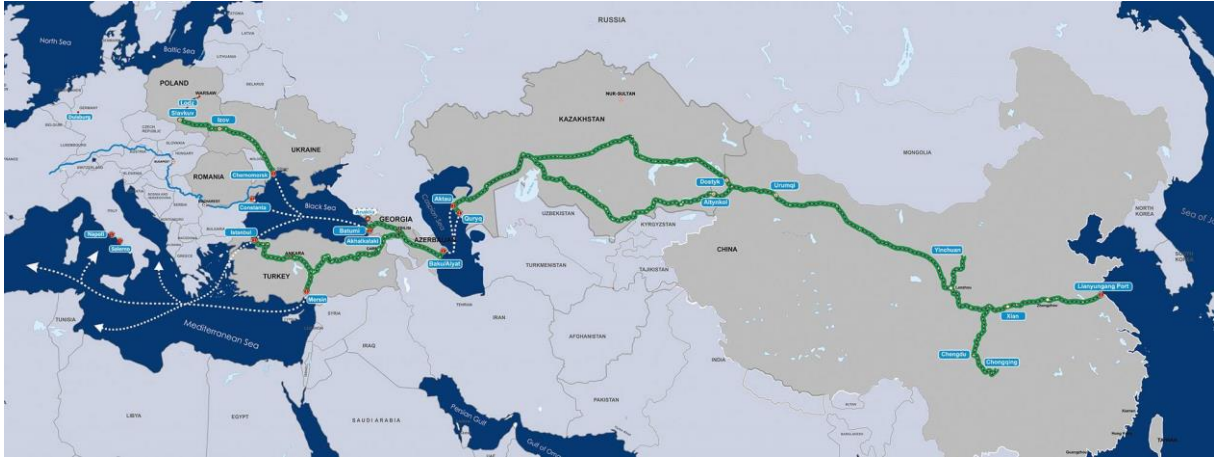


Figure 4. Trans-Caspian International Transport Route

Source: <https://middlecorridor.com/ru/marshrut> Accessed 09/11/2023.

In addition to its importance in global transport routes, the Eastern Mediterranean is a region with various advantages for Türkiye. The Eastern Mediterranean region of Türkiye, which includes provinces such as Mersin, Adana, and Hatay and has effective connections to industrial cities such as Gaziantep and Kayseri, is a region with a high level of industrial development. The manufacturing sector, especially the energy and petrochemical industries, is highly advanced in the region. This development is supported by organized industrial zones and free zones. In addition, more than 30 port facilities serve the region's hinterland. According to the data of the General Directorate of Maritime Affairs of the Ministry of Transport and

Infrastructure of Türkiye, 1/3 of the total cargo handled in Türkiye is processed in these coastal facilities.

Figure 5 shows the ports operating in Türkiye. In addition, Figure 6 shows the port infrastructure in the Eastern Mediterranean, especially in Iskenderun Bay.

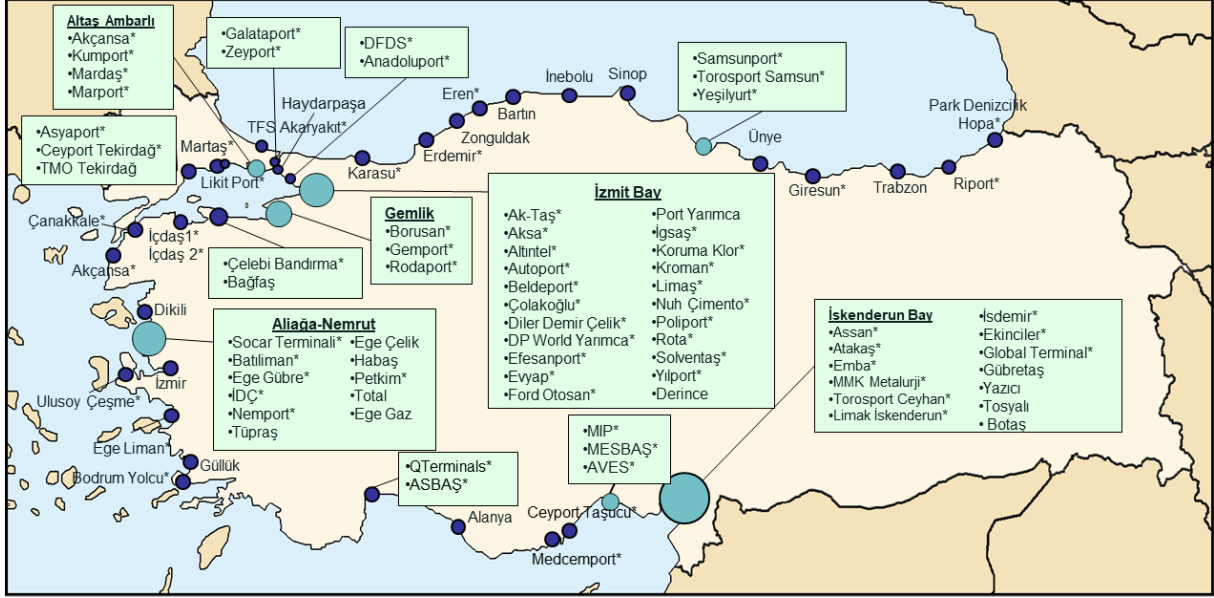


Figure 5. Ports in the Eastern Mediterranean



Figure 6. Iskenderun Bay Ports

Source: <https://iskenderun.denizticaretodasi.org.tr/tr/limanlar/iskenderun/ana-sayfa> ,

Accessed: 21.11.2023

The 3 container terminals operating in the Eastern Mediterranean region play an important role in the exports of the region. Among these ports, Mersin International Port (MIP) and Limak port are the ports with railway connections. These railway connections are directly linked to Kars, to which the Zangezur corridor will connect. Therefore, the opening of this corridor will make the direct connection of the hinterland with the Eastern Mediterranean much stronger in terms of both transit time and cost. In this way, the railway hinterland extending to China will bypass the Suez Canal and reach the Mediterranean, creating a critical route alternative for access to North Africa, the Eastern Mediterranean, the Western Mediterranean and the Atlantic Ocean. According to the data of the Ministry of Transport and Infrastructure of the Republic of Türkiye, these ports handled a high volume of 2.6 million TEU in 2022. However, these ports currently have expansion projects. As a capacity increase is expected in the region in the short term, there is no capacity risk for Zangezur-bound cargo.

5. Conclusion and Recommendations

One of the recent developments in the world economy that has significant effects is the increase in the share of Asian countries in world trade. With the increasing importance of the region in terms of population, resources and production factors, new transport routes have also come to the agenda in terms of increasing trade volume. Today, it is seen that some of the transport routes designed so far continue, some are not used and some are trying to be revitalized. New networks that may emerge and the effective use of these networks will provide significant advantages for the countries and businesses that are located on the network or have chain structures that interact with the network. In this sense, the world economy and changing conditions should be carefully monitored.

Based on these points, this study aims to evaluate the impact of the Zangezur corridor, which can create an alternative structure to the middle corridor, on Türkiye's ports located in the Eastern Mediterranean Region.

The Zangezur corridor, which is predicted to provide significant advantages for the countries in the region, has the potential to be an important transit line between Azerbaijan and Türkiye for the trade of both energy and different product groups. Especially when the trade volume between Asia and Europe and the problems in the existing corridors are considered, it is seen that the alternative structure to the middle corridor can create significant opportunities. It is seen that the potential of access to other countries not only by road or railway but also by sea through the Eastern Mediterranean region is quite high.

As a result, when evaluated in terms of logistics, it will be beneficial to determine the right investment points and establish an integrated structure through cooperation and projects to be carried out between countries. With the correct structuring of the Zangezur corridor and Eastern Mediterranean port connections, it can be said that the countries in the region will have a competitive advantage in accessing global markets, thus their share in world trade will increase and an important alternative structure can be created to the Belt and Road Initiative put forward by China. In this way, an important alternative will emerge for the Far East-Europe maritime trade route, which is one of the 3 important maritime trade routes of the world and has an annual volume of 26.3 million TEU.

It is seen that the studies conducted in this field mostly focus on the international relations dimension. It is thought that it is important to evaluate the subject academically with studies focusing on transport structures in different countries and their integration within the scope of the logistics discipline.

With this study, practitioners can make a potential opportunity analysis for the creation of new transport opportunities, as well as analyses of the effects of this potential route on existing structures. It can be estimated that the route mentioned in the study has the potential to affect international transport routes. For this reason, technical analyses of this potential route can be made especially by making transit time-cost analyses. These studies can also be carried out by academics.

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