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TRANSPORT AND LOGISTICS CONNECTIVITY OF CENTRAL ASIA IN AN ERA OF GLOBAL INSTABILITY

Abstract. Today the world is facing geopolitical turbulence and economic recession. During this period, due to its geographical location, Central Asia plays an increasingly important role in the global economy and geopolitics. In this regard, it is necessary for Kazakhstan and the countries of the region to consolidate to maintain stability and stimulate economic growth. This academic article explores the interconnectedness of the Central Asian region in the transport and logistics aspect in the conditions of modern instability. The article analyzes the factors influencing the transport and logistics infrastructure of the region and how it adapts to the challenges of our time. Particular attention is paid to changes within the region and its external connections, including the “Middle Corridor” and the “Belt and Road Initiative”. The study concludes that in the current difficult conditions, Central Asia is becoming a “testing ground” for innovation in the transport and logistics industry, which makes a significant contribution to the development of cooperation between the countries of the region.

Keywords: Central Asia, transport, infrastructure, highways, investments, cross-border infrastructure, transit.

Бауыржан Әукен, Айболат Көшкімбаев ЖАҒАНДЫҚ ТҰРАҚСЫЗДЫҚ ДӘУІРІНДЕГІ ОРТАЛЫҚ АЗИЯНЫҢ КӨЛІКТІК-ЛОГИСТИКАЛЫҚ ӨЗАРА БАЙЛАНЫСЫ

Андатпа. Бүгінде әлем геосаяси турбуленттілік пен экономикалық құлдырауды бастан кешуде. Осы кезеңде Орталық Азия өзінің географиялық орналасуына байланысты жаһандық экономика мен геосаясаттағы маңызды рөл атқарады. Осыған байланысты Қазақстан мен аймақ елдері тұрақтылықты сақтау және экономикалық өсуді ынталандыру үшін бірігуі қажет. Бұл академиялық мақала заманауи тұрақсыздық жағдайында Орталық Азия аймағының көлік-логистикалық аспектідегі өзара байланысын зерттейді.

Мақалада аймақтың көліктік-логистикалық инфрақұрылымына әсер ететін факторлар және оның заман талабына қалай бейімделетіні талданады. Аймақ ішіндегі өзгерістерге және оның сыртқы байланыстарына, соның ішінде «Орта дәліз» мен «Белдеу және жол» бастамасына ерекше назар аударылады. Зерттеу қорытындысында Орталық Азия қазіргі күрделі жағдайда көлік-логистикалық индустриядағы инновациялар үшін «сынақ алаңына» айналуға, бұл аймақ елдері арасындағы ынтымақтастықты дамытуға елеулі үлес қосады.

Түйін сөздер: Орталық Азия, көлік, инфрақұрылым, автомобиль жолдары, инвестициялар, трансшекаралық инфрақұрылым, транзит..

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ТРАНСПОРТНО-ЛОГИСТИЧЕСКАЯ ВЗАИМОСВЯЗАННОСТЬ
ЦЕНТРАЛЬНОЙ АЗИИ В ЭПОХУ ГЛОБАЛЬНОЙ НЕСТАБИЛЬНОСТИ

Аннотация. Сегодня мир переживает геополитическую турбулентность и экономическую рецессию. В этот период благодаря географическому расположению, Центральная Азия играет все более важную роль в мировой экономике и геополитике. В этой связи, для Казахстана и стран региона необходимо консолидироваться для поддержания стабильности и стимулирования экономического роста. Данная академическая статья исследует взаимосвязанность Центрально-Азиатского региона в транспортно-логистическом аспекте в условиях современной нестабильности. В статье анализируются факторы, влияющие на транспортно-логистическую инфраструктуру региона и то, как она адаптируется к вызовам современности. Особое внимание уделяется изменениям внутри региона и его внешним связям, включая «Средний коридор» и инициативу «Пояса и пути». В исследовании делается вывод, что в нынешних непростых условиях Центральная Азия становится «полигоном» инноваций в транспортно-логистической отрасли, что вносит существенный вклад в развитие сотрудничества между странами региона.

Ключевые слова: Центральная Азия, транспорт, инфраструктура, автомагистрали, инвестиции, трансграничная инфраструктура, транзит.

Introduction

In the evolving global landscape, marked by significant transformations, the pivotal determinant influencing the sustainable development of nations is regional integration and interconnection. In the exclusive context of Central Asia, the singular landlocked region worldwide, the nexus between transport-logistics interconnection and economic stability assumes paramount significance. Consequently, an investigation into the impact of the global agenda on the developmental policies governing the region's transport and logistics infrastructure emerges as a particularly pertinent inquiry.

The geopolitical upheavals in world politics have further propelled the nations in the Central Asian region to establish the multilateral “Central Asia Plus” framework, fostering deeper collaboration with developed nations [1].

Noteworthy is the profound influence of the crisis, which has catalyzed increased unity among the regional countries. Concurrently, Kazakhstan, strategically positioned as a transportation hub, has proactively engaged in the development of the “Middle Corridor” in collaboration with its partners.

The academic article delves into the intricate web of factors influencing the region's transportation networks amid global uncertainties. Drawing upon a diverse array of scholarly sources, the study starts with exploring the C5+1 framework as a mechanism for regional cooperation. Tyulebekova's historical analysis offers valuable insights into the evolution of Central Asia's transportation networks. Mamuka Tsereteli's exploration underscores the geopolitical significance of transportation infrastructure in promoting regional integration and stability. Additionally, Irakli Danelia's examination of the Middle Corridor highlights opportunities for enhanced connectivity. Michaël Levystone and Alberto Turkstra's analysis emphasizes the transformative potential of improved connectivity for fostering regional stability and prosperity. Yaroslav Lissovlik's exploration of China's cooperation with Central Asia sheds light on the role of external actors in shaping connectivity dynamics. Furthermore, Firdavs Kobilov's analysis underscores the importance of addressing logistical and regulatory challenges to maximize the effectiveness of connectivity initiatives. Finally, Catherine Putz's examination of sustainable transport corridors provides valuable insights into determining the most viable connectivity routes from Central Asia to Europe.

This scholarly article aims to undertake the analysis and systematic organization of data pertaining to the transport and logistics interconnection within the region, delving into the distinctive characteristics of each country in this context. The main tasks of the work are to determine the characteristics of the transport and logistics network of each country of Central Asia, to assess the main obstacles that prevent continuous communication and to determine the possibilities of increasing the transport and logistics communication.

Research methods

The article employs a comparative research methodology, characterized by a systematic analysis and comparison of the evolution of the transport systems across Central Asian countries. This method facilitates a comprehensive examination of the effectiveness of the region's transport infrastructure and trade routes, enabling the identification of key similarities and differences.

Through the implementation of a comparative analysis of each country's transportation systems, the study endeavors to attain a heightened comprehension of the structural and technological dimensions of the region's infrastructure development. By scrutinizing similarities and differences in this domain, the research aims to pinpoint the factors and drivers influencing the degree of interconnection among trade routes within Central Asian countries.

Historical review

The period of the industrial revolution in the 19th century was connected with the territorial changes of the Russian Empire. This in itself has had a

significant impact on transport routes in Central Asia. At that time, the caravan routes through Orinbor, the Turkmen steppe and Western Siberia were actively used for trade. However, due to the complexity of trade routes, the main route was Orinbor-Tashkent. However, the trade route took three months, and when delivering goods to Moscow, the travel time was about six months.

At the end of the 19th century, the problem was solved with the Transcaspiian railway connecting Samarkand and Tashkent with the Caspian Sea. This direction significantly reduced the delivery time and contributed to the industrial development of Central Asia, especially in the agricultural sector.

At the beginning of the 20th century, the Orinbor-Tashkent railway passing through the cities of Kazakhstan was built, which led to an increase in the export of Central Asian products to Russia. At the same time, the currently unused Sulukku railway between Kyrgyzstan and Tajikistan was launched.

In the following decades of the Soviet period, large-scale projects were implemented, such as the Turkestan-Siberian railway, many railways and highways connecting the countries of Central Asia. These infrastructure projects were important for improving the transport accessibility

Discussion and results

Today, when considering Central Asia as a region, experts have a question about the correctness of the interpretation given by the mentioned geographical space. If we consider the region in terms of geographic, cultural and economic proximity, then the five states of Central Asia - Kazakhstan, Turkmenistan, Uzbekistan, Tajikistan and Kyrgyzstan - can be defined as a geopolitical region. They are neighbors, have common historical and cultural ties, as well as similar economic characteristics.

Over time, the world economy is moving to a different growth mode. At the same time, South-South cooperation takes a special place in ensuring the efficiency of the global economy. Central Asia, uniquely located in the heart of the Eurasian continent, plays a crucial role in the geopolitical dynamics of the modern world. The region is strategically important because it is located on the traditional trade routes of the Silk Road. Central Asia is located between industrialized Europe and rapidly developing economies of East, South and Southeast Asia. This adapts the region to economic and cultural exchange, making it a crossroads of various interests and related opportunities.

However, despite the advantages, the countries of Central Asia face significant difficulties in establishing effective communication with each other and with the rest of the world. This depends on a number of factors. Geographical location deprives the region of access to water resources. Also, the historical aspect, that is, the period of Soviet influence, had its impact on the formation of regional relations.

The conflict in Eastern Europe has inflicted substantial damage on the strategic landscape of Eurasia, encompassing Central Asia, thereby rendering the link between the Black Sea and the Caspian Sea crucial for a multitude of stakeholders spanning from Western China to Central Europe. Consequently, the traditional transport corridors from Kazakhstan through Russia and Belarus

have become ineffective due to this conflict. Moreover, challenges such as instability in Afghanistan and sanctions on Iran have compounded the difficulties associated with travel to and from Central Asia. In response to this altered reality, the South Caucasus emerges as the sole conduit for the transportation of Central Asian goods and products to Europe, as well as goods originating from the West. Europe, in turn, exhibits a keen interest in diversifying its energy and resource suppliers, emphasizing the need for alternative access options to its trading partners in Asia.

The aforementioned conflict has amplified the significance of the “Middle Corridor” connecting Western China with Europe through Central Asia and the Caucasus. However, the lack of infrastructure and inefficient management of the entire transport system across numerous countries and modes have failed to attract substantial trader engagement, impeding transit growth to date. Additionally, the Caspian Sea’s shallow waters, coupled with limited capacity, necessitate a specialized approach to transshipment. This involves employing a dedicated shuttle flotilla of container and bulk carriers capable of expeditiously and cost-effectively moving cargo between the sea’s eastern and western shores. Addressing this challenge requires attention to issues such as tariff harmonization, customs procedures at border crossings, port readiness for handling diverse cargoes, and the availability of rail rolling stock along the corridor.

To further foster the Caspian-Black Sea relationship and optimize transit and economic opportunities for Central Asia and the South Caucasus, coordinated efforts are imperative to establish more efficient and cost-effective transportation links among the primary transit countries in the region. This, in turn, promotes the engagement of regional and global trade and shipping companies [3].

Kazakhstan assumes a pivotal and decisive role as a transit country owing to its strategic geographical location bridging Europe and Asia. The state has extensively developed its transport infrastructure, encompassing railways, roads, ports, and air transport, to facilitate the seamless movement of goods across its territory and contribute to the East-West initiative. Kazakhstan’s transit potential holds particular importance for transporting energy resources, including oil and gas, from Central Asia to international markets, along with agricultural, food, engineering, and chemical products.

The key export and import partners of Kazakhstan, including China, Italy, Russia, Korea, the Netherlands, and Germany, underscore the critical role of its geographic location bridging East and West. Notably, imports from Kazakhstan to Germany have witnessed a remarkable average annual growth rate of 16.6% over the past 26 years [4].

In Central Asia, including Kazakhstan, highways predominate as the primary means of freight transportation. However, in Kazakhstan, rail transport is more widespread than in other Central Asian countries due to two principal reasons. Firstly, Kazakhstan hosts over half of the region’s railways. Secondly, this prevalence is linked to a substantial investment plan in transport infrastructure. Another noteworthy aspect of Kazakhstan’s transport network pertains to its

access to the Caspian Sea through the ports of Aktau and Kuryk, where cargo traffic doubled in the first half of 2023.

Turkmenistan, positioned along the Caspian Sea, has actively capitalized on its coastline in recent years, with ports such as Aladzha, Khazar, Ekerem, and Turkmenbashi. Even before the completion of the expanded and modernized version of the Turkmenbashi complex, capable of transporting 4 million tons of cargo annually, authorities initiated the construction of the M37 highway connecting it with Ashgabat, the country's capital and transport hub. Turkmenistan has also invested in developing railway corridors, primarily aimed at augmenting export volumes, including oil, oil products, construction materials, among others. Despite the political system's closed nature, interest in railway infrastructure has extended beyond Turkmenistan's borders, evident in its diplomatic relations established with Iran and Afghanistan since 2014.

Kyrgyzstan and Tajikistan share similarities in their transportation sector, with underdeveloped railway networks, primarily due to challenging mountainous terrain that is not conducive to building extensive infrastructure of this kind. The national autonomous railway lines in both countries run from north to south, connecting to the networks of neighboring countries. Notable connections include Balykshi in Kyrgyzstan to Lugovoi in Kazakhstan, as well as the cities of Bekabad and Kokan in Uzbekistan with Kanibabad in Tajikistan, both of which the countries plan to electrify. These economically underdeveloped Central Asian nations rely on foreign aid, exemplified by loans from institutions like the Asian Development Bank (ADB) and the Japan International Cooperation Agency (JICA), for upgrading their transport infrastructure. Noteworthy projects include the reconstruction of routes like Bishkek-Osh, Bishkek-Naryn-Torugart, and Osh-Batken-Isfana in Kyrgyzstan.

Uzbekistan, recognizing its central regional location, initiated a four-year plan in 2015 to develop and upgrade its transport networks. Tashkent authorities have demonstrated interest in the railway sector, launching the first high-speed passenger trains in Central Asia in 2011 and opening new corridors such as Navoi-Nokis and Kumkorgan-Tash-Gozar in Afghanistan. Simultaneously, Uzbekistan has expanded its electrified railway lines, currently amounting to 1100 km. Since 2016, as part of President Mirziyoyev's "good neighbor" policy, Uzbekistan has actively participated in the construction of cross-border infrastructure to facilitate the flow of goods and people. This includes a road and rail bridge connecting Turkmenabat, south of the Farab and Amu Darya rivers, with the international border post near the city of Beyneu.

For China, the Central Asian republics serve as a gateway to diverse land routes leading to Western markets, alleviating congestion in eastern China and its ports. The Asian Development Bank estimates a staggering \$33 billion per year between 2016 and 2030 will be required to address the substantial infrastructure deficit in Central Asia. The region inherited the crumbling infrastructure of the Soviet era, characterized by the "all roads lead to Moscow" approach. However, given the current predominant trade model between East and West, there is a pressing need for modern infrastructure. Complicating matters is the varying width of railway tracks, with former Soviet republics using a wider gauge

(1520 mm) compared to the standard used in China and Europe (1435 mm). This necessitates track changes or platforms for trains passing through Central Asia. This infrastructure deficit contributes to Central Asia's low ranking in the 2016 Global Connectivity Index, with only Kazakhstan in the top 100 (60th place), while Uzbekistan and Kyrgyzstan are in the last places (139th and 124th, respectively).

The large-scale “One Belt, One Road” initiative has the potential to serve as a catalyst for promoting communication and cooperation in the region. Central Asian countries should responsibly promote this route through their territories and develop plans to maximize its positive impact on the economy.

Today, both regional and global powers are increasingly focusing on Central Asia, investing political and economic capital to strengthen relations. Beyond the EU, Turkey, China, and the US, India also has a policy of “connecting Central Asia” while Pakistan aims to deepen cooperation with the region to address current energy shortages. In this context, concerns about conflicts of interest are often raised due to Central Asia's overlapping sphere of influence among several powerful powers. However, current dynamics suggest that the countries of the region are striving to maintain a delicate balance between competing major states, marking a departure from past geopolitical games [6].

Economic cooperation between Central Asia and China holds significant potential, promising mutual benefits for both regions. Notably, trade collaboration has witnessed substantial success in recent years, with a remarkable 31.9% increase in trade turnover between China and Central Asian countries in 2022, surpassing 32 billion dollars. The inaugural China-Central Asia Summit in Xi'an is expected to further solidify this positive trend in growing South-South cooperation.

In particular, trade turnover between China and Kazakhstan, the largest economy in Central Asia, experienced a notable surge, exceeding 34% growth in 2022, with total trade surpassing 24 billion dollars. Recognizing the positive trajectory of bilateral economic cooperation, Kazakhstan's Prime Minister, Alikhan Smayilov, expressed the country's commitment to working towards the goal set by the presidents of both nations to increase bilateral trade turnover to 35 billion dollars by 2030.

Given the unique economic landscapes of the Central Asian countries—Kazakhstan being the largest landlocked economy globally, Uzbekistan separated from the coast by several countries, and Kyrgyzstan and Tajikistan being landlocked with mountainous regions - transport plays a pivotal role in China's investments in regional economies. By September 2022, China had invested approximately 3 billion US dollars in transportation and warehousing in Kazakhstan, illustrating the significance of this sector in regional development.

Investments aimed at establishing transport links are yielding tangible economic results in countries like Uzbekistan. Leveraging the Belt and Road Initiative as a gateway to Eurasia, local manufacturers are expanding their market reach not only to China but also to Iran, the European Union, India, Turkey, and other nations. The improvements in transport infrastructure associated with the Belt and Road Initiative are anticipated to reduce delivery

times from Uzbekistan by nearly 15%, marking the most substantial reduction among countries participating in the initiative and leading to a projected 13-23% increase in Uzbekistan's exports.

Another potential avenue for economic cooperation between China and Central Asia is through participation in BRICS Plus. Tajikistan was the first Central Asian country to participate in the ninth BRICS summit in 2017, under China's chairmanship. Kazakhstan also participated in the 14th BRICS summit in 2022. There is potential for other Central Asian countries to join the BRICS dialogue in the future. Membership in the new BRICS Development Bank stands out as a promising direction for the region's economy, offering additional resources for the development of Central Asia [7].

Europe stands as a paradigm for transport connection development within its region. Examining the European experience and incorporating its practices into Central Asia can fortify integration and cooperation in the realm of transport links. For instance, the implementation of integrated regional "smart" management can enhance the quality of local public and private transport services. This approach aims to mitigate the negative environmental impact of automobiles, improve safety, and alleviate road traffic congestion.

Effective and proficient management forms the cornerstone of any successful system. Furthermore, key factors for the advancement of regional transport connections include openness, cooperation, mutual trust, and determination. Central Asian nations may find it beneficial to consider technical aspects and structures of European Union roads, especially those regionally similar. Notably, provisions such as designated facilities for truck drivers to rest and dine, as mandated by the European TEN-T standard for roads connecting member states every 100 km, could serve as a model. Additionally, the establishment of gas filling and charging stations for various vehicle types, including cars, electric vehicles, trucks, and motorcycles, is imperative, with an average requirement of approximately 4.8 fuel stations and 2.7 charging stations per 100 km for electric vehicles.

Several factors contribute to the subpar transport links between Central Asia and the EU. Firstly, the geographical factor: all five Central Asian states lack direct access to the world ocean, and the mountainous landscape poses challenges to transport infrastructure development. Additionally, the absence of a common land or sea border between the regions of Europe and Central Asia necessitates dependency on other countries for land connections. Secondly, the lack of a unified strategic regional plan is attributed to the geographical dispersion of the countries. Kazakhstan and Turkmenistan are the only two countries with direct access to the Caspian Sea through the ports of Aktau and Turkmenbashi, while Kyrgyzstan, Tajikistan, and Uzbekistan must rely on these ports to transport cargo to Europe via the Caspian Sea and the Caucasus. These specific conditions pose obstacles to the formulation of a regional strategy for establishing transport links between the EU and Uzbekistan.

Furthermore, the pressing need for a unified regional approach and strategy for transport link development with the EU is underscored. Each country in the region pursues its own developmental approach based on national interests and

economic conditions. However, noteworthy efforts have been exerted to address these challenges, and there is mutual interest among the involved parties to further develop interregional transport relations.

A European study on sustainable transport links with Central Asia has determined that the “Middle Corridor” traversing southern Kazakhstan, holds the potential to provide the most sustainable transport link between Europe and Central Asia. The study considered a territory 300 km to the north and 600 km to the south of the main direction, impacting all five Central Asian states. This route encompasses four of the five most populous cities in Central Asia: Tashkent, Almaty, Bishkek, and Shymkent.

Conducted by the European Bank for Reconstruction and Development (EBRD) and funded by the European Commission for implementing the European Union Central Asia Strategy 2019 and the Global Gateway 2021 strategy, the study evaluated several route options in a 55-page report. Recommended actions for trade route development encompass both “soft connectivity” (enabling environment) and “hard connectivity” (physical infrastructure). The study, focusing on “hard connectivity” identified the necessity for 33 infrastructure investments in the region. In terms of “soft communication” seven coordinated actions were identified.

According to the study, the total investment required for the development of the “Middle Corridor” is approximately 18.5 billion euros. This includes the restoration and modernization of the railway and road network, expansion of rolling stock, increase of port capacity, improvement of border crossings, and construction of multimodal logistics centers [9].

Conclusion

In light of the challenges faced by the global community, it is evident that Central Asia holds significant strategic importance as a crossroads connecting East and West, North and South. The effective development of transport and logistics infrastructure, coupled with enhanced cooperation among the region’s countries, presents a unique opportunity to expand trade routes, attract investment, and foster deeper cultural ties. However, realizing this potential necessitates collaborative efforts from all stakeholders and the implementation of a sustainable political settlement strategy in the region.

Amid a period of global turbulence and instability, the imperative to strengthen cooperation and integration becomes paramount for ensuring sustainable development in Central Asia. The region, positioned as a pivotal link in international cooperation for global trade, is poised to expand its influence in response to contemporary challenges and opportunities.

The ongoing development of the “Middle Corridor” assumes critical importance in enhancing regional interconnectedness. This infrastructure initiative offers a unique chance to foster interaction and collaboration among Central Asian countries. The improvement of transport connections, establishment of logistics centers, and creation of stable trade routes contribute not only to the economic growth and development of the region but also to the reinforcement of cultural and humanitarian ties.

With effective strategies and concerted actions, Central Asian countries have the potential to surmount global instability and serve as a model of successful cooperation and development, irrespective of the prevailing global political climate.

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