Making the TCTC Work

Connecting Businesses along the Trans-Caspian Transport Corridor

Hosted by: DIHK, OA, and GIZ

23rd October 2026, 9.30-14.00

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Welcome and Introduction

10.00-10.10

Dr. Nicole Renvert, Head of International Markets,
German Chamber of Commerce and Industry (DIHK)

Christiane Amari, Head of Division, Central Asia, Pakistan, Afghanistan,
Federal Ministry for Economic Cooperation and Development (BMZ)

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

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Meeting the TCTC:
Business & Investment Opportunities

Moderation: Dr. Martin Hoffmann

German Eastern Business Association (OA)

10.10-11.00

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft oa

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Central Asia

Zhaslan Zhagparov,
KazLogistics Union of Transport Workers

Asel Tursuniiazova,
Kyrgyzstan Transport Operators' Association

Bahrom Masharipov, ABBAT Tajikistan

Shakhlo Abidjanova, LLC "Hegelmann Multimodal"

Begmyrat Nepesov,
Turkmen Logistics Association

South Caucasus

Kamran Habibov,
Freight Forwarders Association of Azerbaijan

Ana Gabrichidze,
EU-Georgia Business Council

Makrita Avjyan,
Logistic Association of Armenia

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Kazlogistics

Zhaslan Zhagparov

KAZLOGISTICS

Kazakhstan’s Gateway to the Trans-Caspian Transport Corridor

Country presentation by the Union of Transport Workers of Kazakhstan

TCTC / Middle Corridor • Multimodal logistics • Germany–Kazakhstan cooperation



KAZLOGISTICS

1. Your Association

KAZLOGISTICS as a single industry platform for transport and logistics in Kazakhstan

The only nationwide association uniting all modes of transport

KAZLOGISTICS unites transport and logistics associations, companies and enterprises across railway, road, aviation, maritime and inland water transport, as well as IT, research and education organizations.

≈600
organizations represented by members

≈200k
sector employees

20+
international partners

5 national companies

11 sector associations

38 transport, logistics & IT companies

12 research / education organizations

Role in sector development

- Link between business and government
- Legislative and policy proposals
- Multimodal transport, containerization and digitalization
- Workforce development and international cooperation

Gateway for German companies

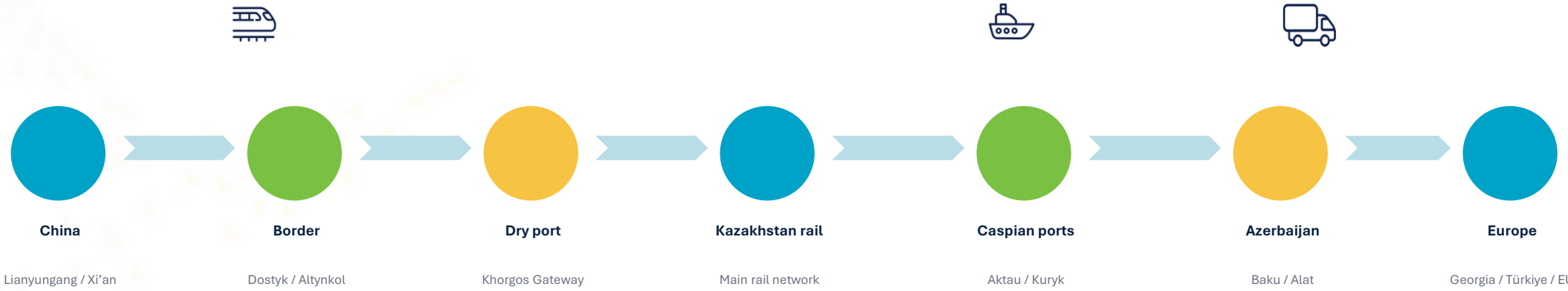
KAZLOGISTICS can help identify Kazakh partners, arrange B2B meetings, connect companies with infrastructure operators and support pilot or investment initiatives.

KAZLOGISTICS

2. Kazakhstan’s Role in the TCTC

A land bridge between China, Central Asia, the Caspian Sea and Europe

Kazakhstan provides the main dry-land segment of the Trans-Caspian route and connects China’s rail network with the Caspian ports.



4.5 mln t

TMTM freight volume in 2025

77k TEU

container traffic in 2025

2 ports

Aktau and Kuryk on the Caspian Sea

2 main rail crossings

Dostyk and Altynkol with China

Strong contribution: geography + rail network + Caspian ports + terminal investment + transit digitalization

KAZLOGISTICS

3. Key Multimodal Initiative

Aktau International Container Hub as a practical TCTC case

Aktau International Container Hub

The project strengthens the multimodal connection between China, Kazakhstan, the Caspian Sea and Europe by expanding container handling capacity at the Caspian gateway.

rail + sea + road + terminal logistics



Project partners

- Kazakhstan: KTZ / KTZ Express, Aktau Sea Port
- International: Lianyungang Port Group
- Public–private support across rail, port and terminal operators

Implementation focus

Container yard, handling equipment, terminal operating processes and integration with TCTC cargo flows.

Expected effect

Higher container throughput, more reliable rail–sea transshipment, better scheduling of block trains and stronger resilience of the Middle Corridor.

Practical entry point for German cargo owners, forwarders and technology suppliers

KAZLOGISTICS

4. Cooperation with German Companies

Concrete business opportunities along the corridor and inside Kazakhstan

Kazakhstan offers German companies both a transit route and a platform for regional logistics, technology and investment projects.

Logistics operators & forwarders

Stable EU–Kazakhstan–China and EU–Central Asia cargo flows; joint products for shippers and exporters.

Terminals & warehouse investors

Dry ports, container depots, Class A/A+ warehouses, cold chain and multimodal terminal operations.

Technology suppliers

TMS/WMS, terminal operating systems, e-documents, track & trace, IoT and AI for logistics.

Identify needs → **Match partners** → **Arrange B2B** → **Support pilot** → **Scale cooperation**

Role of KAZLOGISTICS: one industry window for German companies — access to members, sector associations, state dialogue and project owners.

KAZLOGISTICS

5. Contacts

KAZAKHSTAN, ASTANA
Kunaev st., 6
E-mail: info@kazlogistics.kz
Tel.: +7-7172-60-04-38

: @Kazlogistics

: @kazlogistics_stk

: http://kazlogistics.kz/

Thank you!



Kyrgyzstan Transport Operators Association

Asel Tursuniiazova

KYRGYZSTAN'S ROLE IN THE TCTC

• Kyrgyzstan is strategically located in Central Asia and can strengthen links between China, Central Asia, the Caspian region and European markets through interconnected transport routes.

• While Kyrgyzstan is not on the core TCTC route, it can improve corridor connectivity through regional road and rail links.

• Priorities include transport infrastructure, border procedures, multimodal logistics and digitalisation of transport services.

KEY INITIATIVES:

China–Kyrgyzstan–Uzbekistan Railway

• A major regional infrastructure project. Construction is underway on the Kyrgyz section, including tunnels, bridges and other engineering structures.

• Expected benefits include greater transit capacity, stronger logistics connectivity and trade development.

• Further priorities include road upgrades, logistics centres, multimodal terminals and streamlined digital data exchange.

COOPERATION OPPORTUNITIES:

Potential opportunities for German companies:

• Logistics centres, warehouses, freight terminals and equipment.

• Digital tools for cargo tracking, transport management and electronic documentation.

• Technologies and services to improve the efficiency and safety of road and rail freight.

• Joint projects, investment, training and knowledge exchange.

Potential role of TFCA: connect companies, facilitate B2B meetings, share information on business opportunities and communicate industry needs to partners.

YOUR ASSOCIATION:

Kyrgyzstan Transport Operators Association

Sphere: International freight transport.

Support for carriers in Kyrgyzstan.

Representative: Asel Tursuniiazova,

Association member: Zhamal Shamyralieva

Tel.: +996778087707

Mail.: asel.user@mail.ru, aseltursiniazova@gmail.com



ABBAT — Association of International Road Carriers of Tajikistan

Bahrom Masharipov

TAJIKISTAN'S ROLE IN THE TCTC

1. **Regional link:** Tajikistan can serve as a Central Asian link connecting **China with Uzbekistan, Turkmenistan, Iran, Türkiye and European markets**.
2. **Key route: China → Tajikistan → Uzbekistan → Turkmenistan → Iran → Türkiye → Europe**, providing an alternative route for international cargo flows.
3. **Key border crossings and hubs:** Kulma–Karasu, Dushanbe, Khujand and Fotehobod–Oybek are important for connecting Tajikistan with China and the wider Central Asian transport network.
4. **Multimodal potential:** Tajikistan can participate in combined **road, rail and maritime** transport chains, including connections toward the Caspian Sea.
5. **Digitalisation:** The introduction of **e-Permit and eTIR** supports faster, more transparent and paperless international transport operations.
6. **Strength of Tajikistan:** Its location, growing international road-carrier network and access to Chinese and Central Asian markets create opportunities for developing **alternative China–Central Asia–Europe supply chains**.
7. **Future opportunity:** Tajikistan can contribute to the TCTC by developing **reliable transit services, logistics hubs, digital transport procedures and partnerships between regional and European logistics companies**.

KEY INITIATIVES:

1. **Development of the China–Kyrgyzstan–Tajikistan route** and direct freight operations by Tajik carriers.
2. **Improvement of border-crossing and logistics infrastructure** to reduce transit time and simplify cargo handling.
3. **Digitalization of transport documents and customs procedures**, including electronic data exchange.
4. **Development of multimodal transport links** connecting Tajikistan with Kazakhstan, Azerbaijan, Türkiye and Europe through the Trans-Caspian route.
5. **Strengthening regional cooperation** to increase Tajikistan's participation in international transit and logistics chains.

COOPERATION OPPORTUNITIES:

Logistics
Joint supply chains between Germany and Central Asia

Technologies
e-CMR • eTIR • telematics digital platforms

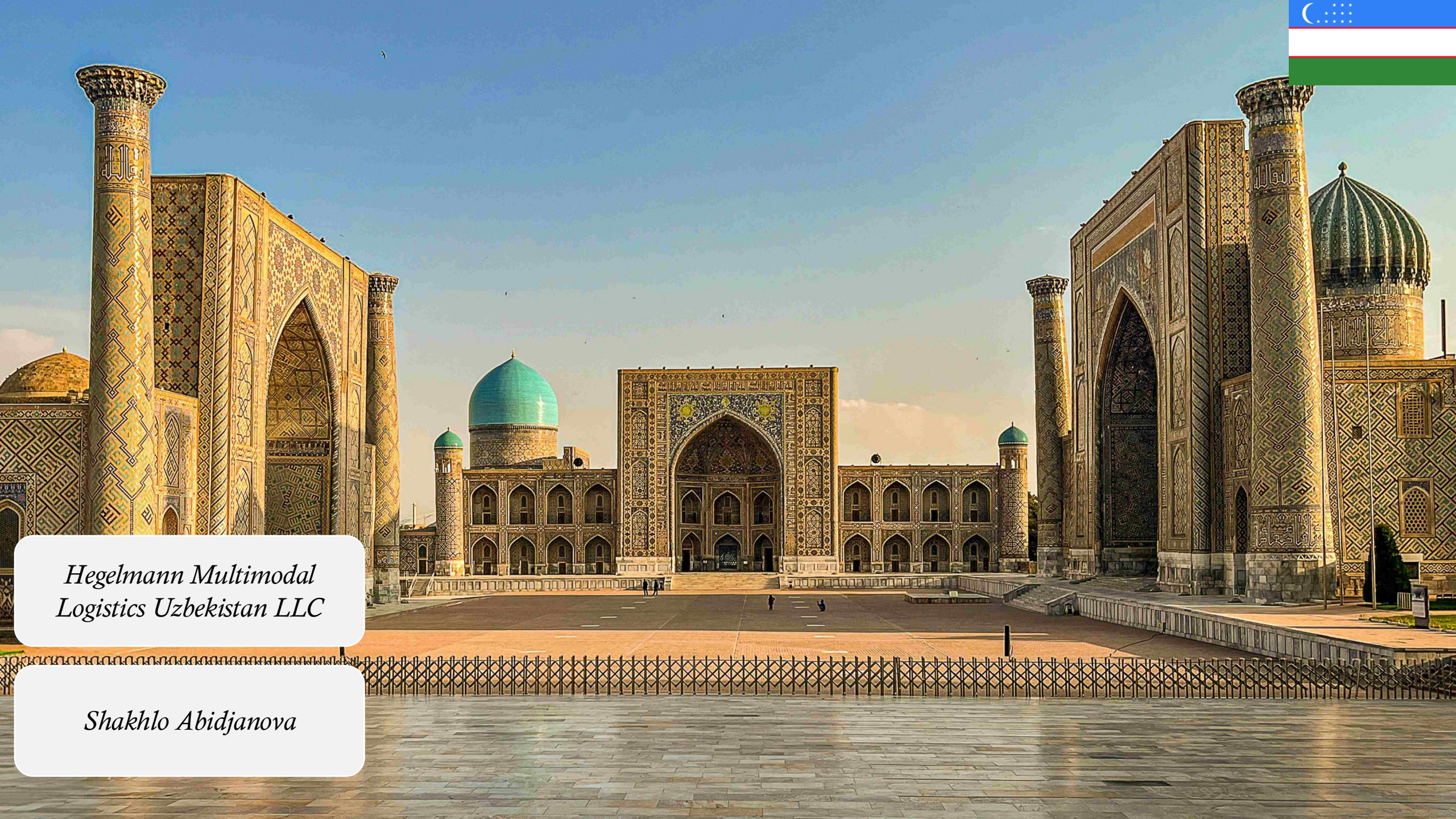
Infrastructure
Terminals • warehouses, multimodal hubs

Investments
Services • Training, Green and Digital Solutions

YOUR ASSOCIATION:

Association ABBAT represents the interests of road transport and logistics companies in Tajikistan.

1. **Industry representation:** advocates for Tajik carriers and promotes a favorable business environment.
2. **International cooperation:** develops cooperation with transport associations and international partners.
3. **TCTC participation:** supports the integration of Tajik carriers into international and multimodal transport corridors.
4. **Digitalization:** promotes electronic transport documents, eCMR and digital logistics solutions.
5. **Professional development:** supports training and qualification of drivers and transport professionals.
6. **Business partnerships:** creates opportunities for cooperation between Tajik transport companies and European, including German, businesses.



Hegelmann Multimodal Logistics Uzbekistan LLC

Shakhlo Abidjanova

ALLIANCE OF LOGISTIC CENTERS AND CARGO CARRIERS

UZBEKISTAN

CONNECTING REGIONS • DRIVING OPPORTUNITIES



PEOPLE
ROUTES
OPPORTUNITIES
A STRONGER TOMORROW

UZBEKISTAN ON THE TRANS-CASPIAN TRANSPORT CORRIDOR

Uzbekistan — A Reliable Partner for a Connected Tomorrow

Alliance of Logistics Centers and Cargo Carriers
Country association presentation
Germany, 18–24 October 2026



MULTIMODAL CONNECTIVITY

SUSTAINABLE GROWTH

STRONGER PARTNERSHIPS

PROSPEROUS REGIONS

UZBEKISTAN
BRIDGING MARKETS
EMPOWERING PEOPLE

UZBEKISTAN'S ROLE IN THE TCTC

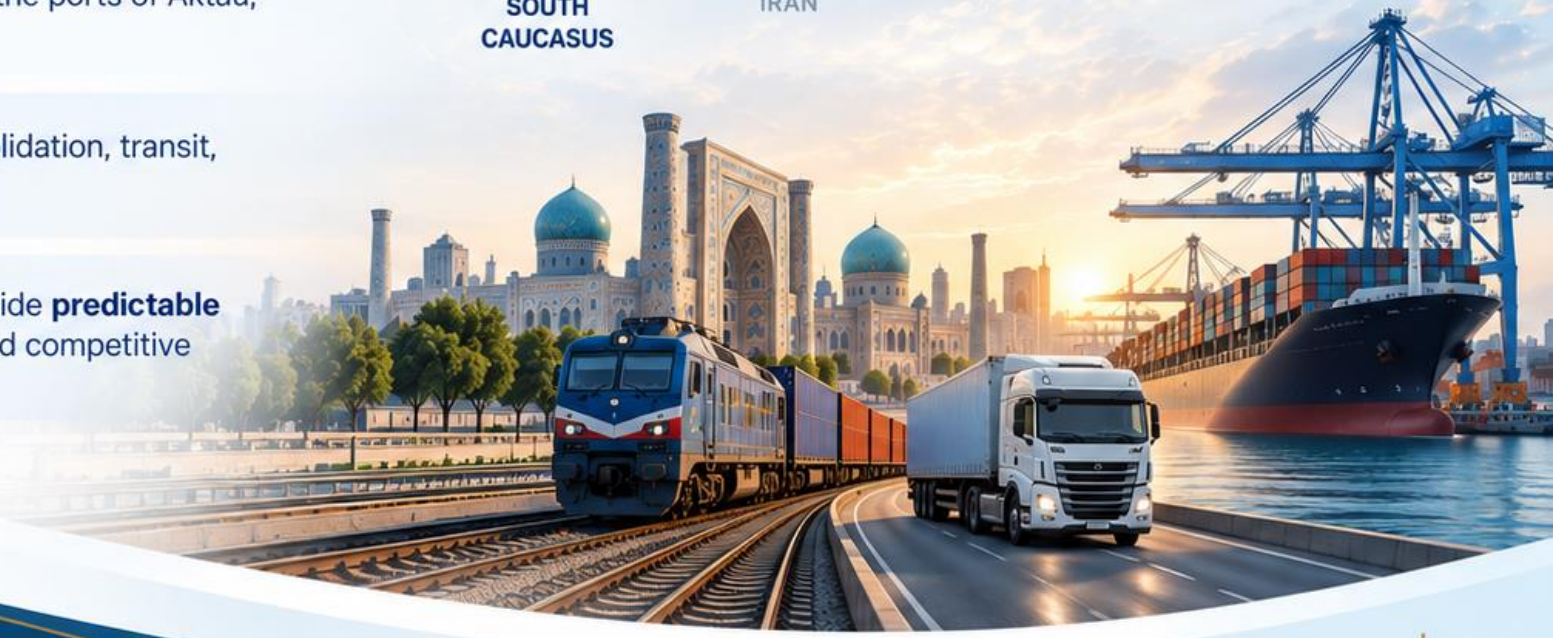
Uzbekistan **connects the markets** of Central Asia with routes toward China, the Caspian Sea, the South Caucasus and Europe.

As a double-landlocked country, Uzbekistan depends on **reliable links** through Kazakhstan and Turkmenistan to the ports of Aktau, Kuryk and Turkmenbashi.

Its **rail and road network** supports cargo consolidation, transit, customs processing and regional distribution.

Uzbekistan's contribution to the TCTC is to provide **predictable feeder services**, efficient border procedures and competitive multimodal logistics.





KEY INITIATIVES

The China–Kyrgyzstan–Uzbekistan railway will strengthen the eastern connection to Uzbekistan and create additional cargo flows for westbound multimodal routes.

Uzbekistan is developing services through Kazakhstan and Turkmenistan that combine rail, road, Caspian ports and ferry connections.

Priority reforms include electronic transport documents, pre-arrival data exchange and coordinated border procedures.

Investment priorities include logistics centers, bonded warehouses, cold chain facilities and modern cargo terminals.



COOPERATION OPPORTUNITIES

German companies can supply **terminal equipment**, warehouse automation, cold-chain technology and energy-efficient transport solutions.

Strong opportunities exist in **fleet modernization**, intelligent transport systems, cargo tracking, cybersecurity and digital customs solutions.

Joint projects can combine **German technology and** finance with Uzbek operators, industrial zones and logistics hubs.

The Alliance can identify **local partners**, organize B2B meetings and pilot projects, and channel private-sector proposals into dialogue with public authorities.



THE ALLIANCE

Alliance of Logistics Centers and Cargo Carriers

A non-governmental, non-profit platform representing cargo carriers, logistics centers, freight forwarders and related service providers in Uzbekistan.

Mission: improve operating conditions for the sector and support Uzbekistan's integration into international transport corridors.

Core work: public-private dialogue, regulatory proposals, international partnerships, business matchmaking and professional capacity building.

The Alliance convenes sector events, supports practical corridor initiatives and helps foreign partners enter the Uzbek logistics market.



PEOPLE
ROUTES
OPPORTUNITIES
A STRONGER
TOMORROW



MAIN CHALLENGES

THE EFFICIENCY OF THE TRANS-CASPIAN CORRIDOR DEPENDS ON:

- Railway capacity;
- Digitalization;
- Border crossing speed;
- Coordination between countries.

THE MOST PROBLEMATIC SECTION IS THE CASPIAN SEA CROSSING, WHERE THE MAIN CHALLENGES ARE:

- A shortage of ferries;
- Irregular sailings;
- Weather conditions;
- High transportation costs;
- Limited port infrastructure.



THE CASPIAN SECTION:
A CRITICAL BOTTLENECK OF THE CORRIDOR.

PHYSICAL INFRASTRUCTURE AND OPERATIONAL BOTTLENECKS: PROBLEMS AND SOLUTION PROPOSALS

ISSUE	DESCRIPTION	PROPOSED SOLUTIONS	RESPONSIBLE INSTITUTIONS / PARTNERS	TIMELINE
Insufficient Railway Capacity	Existing line and terminal capacity is inadequate to meet the increasing freight demand.	• Construction of double-track lines on the BTK route • Expansion of Kars Logistics Center • Increase in ferry capacity during the Caspian Sea crossing	TCDD, ADY, TITR Association, TDT Secretariat	2026–2031
Limited Port and Ro-Ro Capacity	Port capacity on the Caspian Sea is insufficient for handling, storage and Ro-Ro operations.	• Implementation of a modernization program for ports on the Caspian Sea • Development of Ro-Ro fleet and leasing mechanisms	TITR Association, EBRD, Türk Eximbank, relevant port authorities	2026–2032
Border Crossing Delays	Customs procedures and inspections cause long waiting times at borders.	• Implementation of single stop control (joint customs) model • Deployment of digital pre-declaration systems • Establishment of risk-based control mechanisms	Turkish Customs Committee, Ministry of Trade of the Republic of Türkiye, Azerbaijan State Customs Committee	2026–2028



DIGITALIZATION AND DATA MANAGEMENT: PROBLEMS AND SOLUTION PROPOSALS



ISSUE	DESCRIPTION	SOLUTION PROPOSALS	RESPONSIBLE INSTITUTION / PARTNERS	TIMELINE
Non-compliance of e-TIR and e-CMR systems	There are differences in data formats, written standards and application standards among TDT member countries.	• Full integration of the TDT Digital Logistics Platform • Acceptance of common API and data dictionary standards • Block chain–based document verification and registration system	TDT Digitalization Group UN/CEFACT IRU	2026–2028
Lack of real-time cargo tracking	Lack of uninterrupted tracking infrastructure across countries leads to delays and increased risk of cargo loss.	• Establishment of the "TDT Smart Freight System" supported by satellite • IoT sensor–based monitoring in wagons/containers	TITR Association Türk Telekom Kazakh Railways Private technology companies	2026–2029
Limited data sharing	The lack of secure data sharing among customs and public authorities causes data to remain fragmented.	• Signing of the "TDT Secure Data Sharing Memorandum of Understanding" • Reliable digital identity and authorization system at the TDT level	TDT Secretariat OECD World Customs Organization (WCO)	2026–2027

FINANCIAL AND ECONOMIC:
PROBLEMS AND SOLUTION PROPOSALS



ISSUE	DESCRIPTION	PROPOSED SOLUTIONS	RESPONSIBLE INSTITUTIONS / PARTNERS	TIMELINE
Lack of Financing for Projects	Fragmented progress of Middle Corridor investments at the country level; inability to secure the required funding.	• Operationalization of the "TDT Infrastructure Investment Fund" (in cooperation with AIIB, EBRD and regional development banks) • Standardization of public-private partnership (PPP) models	TDT Secretariat, EBRD, AIIB, Global Eximbanks	2026–2032
Lack of Insurance and Guarantee Mechanisms	Perception of geopolitical and political risks limits investment decisions.	• Establishment and pilot implementation of the "TDT Risk Insurance and Guarantee Fund" • Establishment of reinsurance mechanisms in cooperation with MIGA and similar international organizations	Turkish Reinsurance Company (Türk Reasürans), MIGA (World Bank), TDT	2026–2029
High Transport Costs	Rising energy prices, transit fees and operational inefficiencies increase the overall transport cost.	• Framework for joint fuel, energy and transit pricing for the Middle Corridor • Green logistics incentives (tax reductions, carbon credits, financing incentives)	TDT Transport Ministers Council, Ministry of Treasury and Finance, Ministries of Finance	2026–2030

OPERATIONAL AND HUMAN RESOURCES: PROBLEMS AND SOLUTION PROPOSALS



ISSUE	DESCRIPTION	PROPOSED SOLUTIONS	RESPONSIBLE INSTITUTIONS / STAKEHOLDERS	TIMELINE
Shortage of skilled human resources	Digitalization, green logistics and multimodal transport areas lack sufficient personnel. There is a shortage of qualified personnel among member countries.	• Establishment of TDT Logistics Academy • Joint training, education and certification programs • Public-private sector internship and exchange programs	TDT Secretariat, Transport Ministries of Member States, Logistics and Transport Associations	**2026 – 2028** (establishment and rollout)
Differences in language and technical standards	Transport documents, training materials and digital systems are in different languages and use different technical terminologies. This creates operational delays.	• Preparation of a common logistics terminology glossary • Development of TDT Logistics and Digital Transport Standards • Joint templates for digital documents	TDT Standardization Committee, customs and transport administrations	**2026 – 2027** (preparation and implementation of standards)
Differences in institutional capacity and implementation	There are differences in implementation capacity and institutional structures among member countries.	• Technical assistance and capacity building programs • Experience sharing and “best practices” platform • Support for trial projects	TDT, relevant ministries, international organizations	**2026 – 2029** (ongoing)
Lack of digital capabilities and system compatibility	Applications such as e-TIR, e-CMR and e-Permit require different IT infrastructure and usage levels among member countries.	• Joint digital training programs • System integration guidelines • Pilot country implementations	TDT, national digital transformation units	**2026 – 2029** (ongoing)


HEGELMANN
MULTIMODAL LOGISTICS

HEGELMANN
MULTIMODAL LOGISTICS

EU ⟵

Central Asia
road freight



ROAD FREIGHT

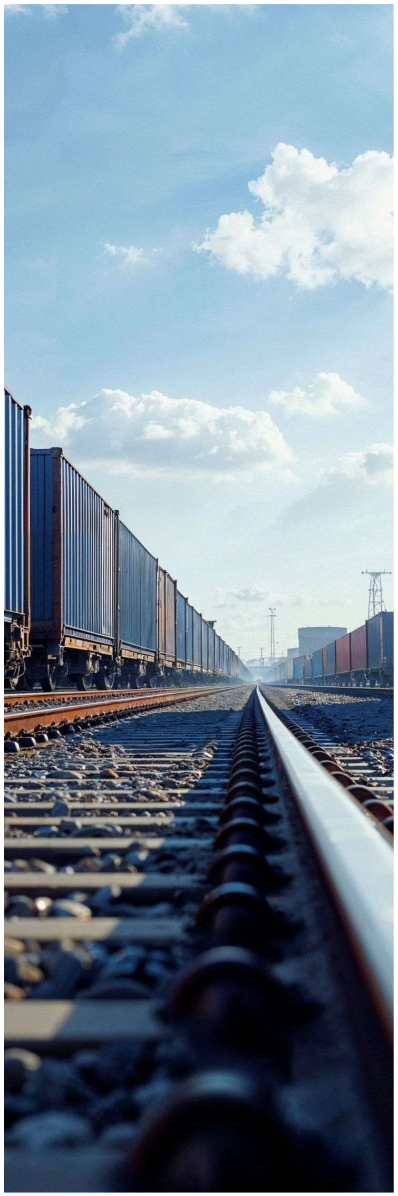
SOUTH ROUTE

EU (all countries covered) –
BG–TR–GE–AZ–KZ



ADVANTAGES

- Own fleet
- Direct trailer transportation without transshipment
- Flexible equipment options for different cargo requirements
- Express transit service available
- Strong balance between cost, service level, transit time, and cargo safety



HEGELMANN MULTIMODAL LOGISTICS

MULTIMODAL

We combine road and rail transport to provide a cost-efficient and environmentally friendly freight solution.

HOW IT WORKS

1. The container is loaded onto a truck at the shipper's location
2. The truck delivers the container to the nearest rail terminal
3. The container is loaded onto a train for the main transport leg
4. Upon arrival at the destination terminal, the container is transferred to a truck
5. The truck completes the final delivery to the consignee

KEY LANES

Europe ⟷ China

Central Asia ⟷ EU

ADVANTAGES

More cost-efficient than road transport only

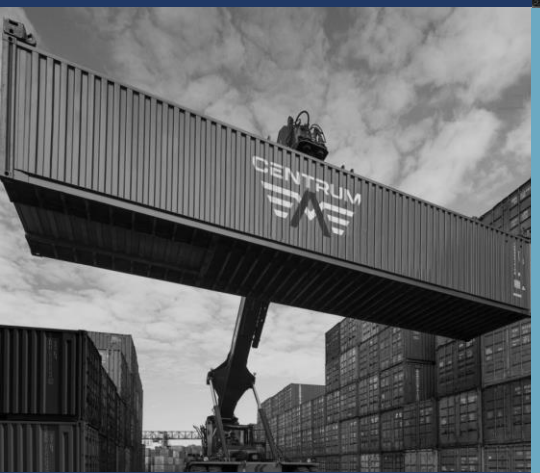
Up to 75% lower CO_2 emissions compared to road transport

Ability to transport heavier loads









Group of Companies

Centrum Logistics Group

Your global logistics operator



Centrum Logistics Group is a dynamically developing 3PL operator transporting cargo all over the world

Centrum Logistics Group provides reliable and timely delivery of your cargo worldwide. We do not just delivery goods – we overcome distances, unite partners and expand your business

More than 500 qualified specialists provides high quality service for our clients all over the world.

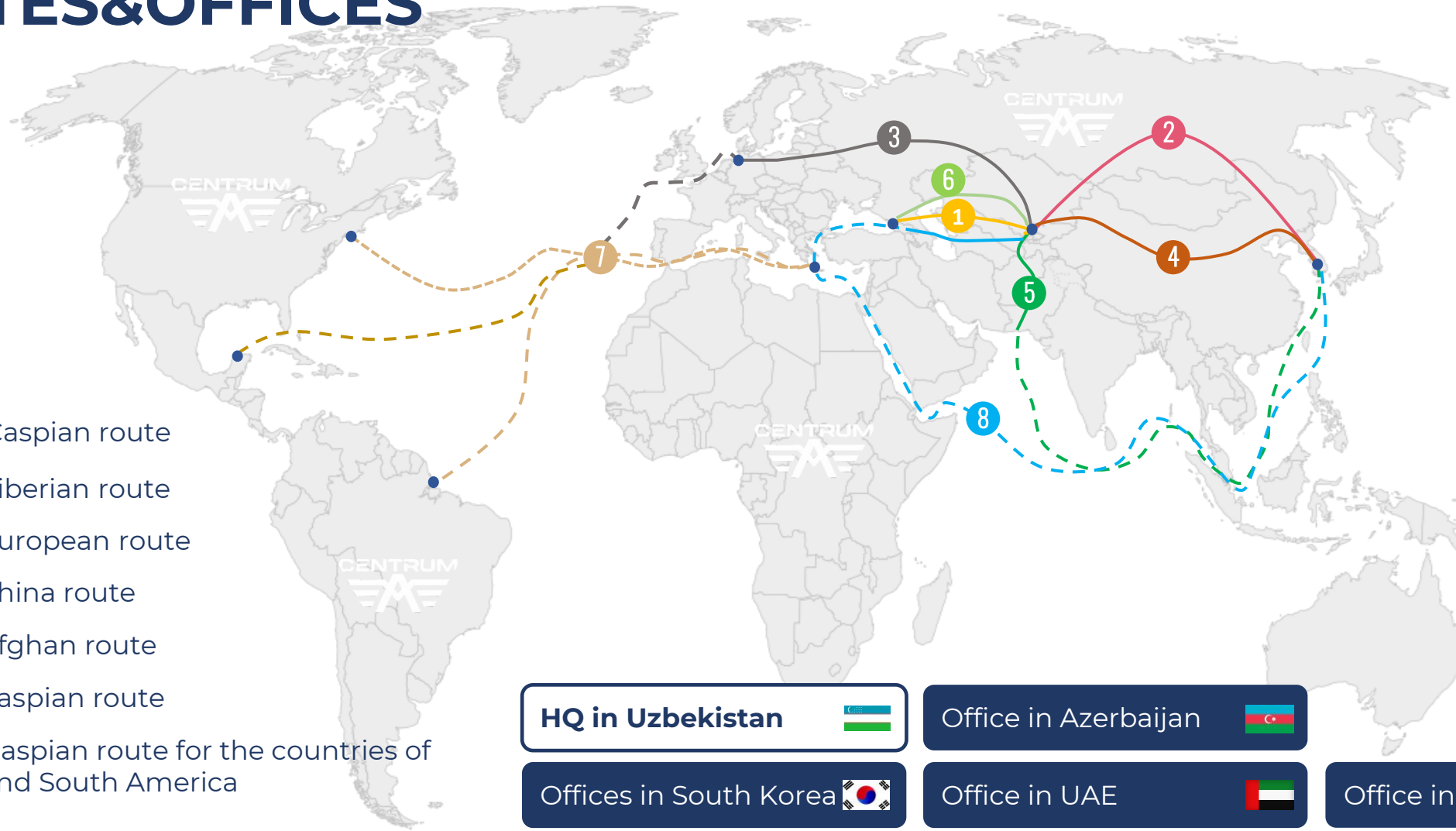
Centrum Logistics Group is a part of Centrum Holding

CENTRUM HOLDING

includes:

CENTRUM · UZLOGISTIC · MY FREIGHTER · CENTRUMAIR · CENTRUM POST · CENTRUM HOLIDAYS · CITY AUTOMOTORS

ROUTES&OFFICES



1. South Caspian route
2. Trans-Siberian route
3. Trans-European route
4. Trans-China route
5. Trans-Afghan route
6. Trans-Caspian route
7. South Caspian route for the countries of North and South America
8. South Caspian route for Southeast Asian countries

HQ in Uzbekistan

Office in Azerbaijan

Offices in South Korea

Office in UAE

Office in Singapore

Office in China

Office in Russia



Turkmen Logistics Association

Begmyrat Nepesov



TURKMENISTAN A PRACTICAL LINK IN TRANS-CASPIAN LOGISTICS

Turkmenistan's transport and logistics potential, its role in the development of the Trans-Caspian route, infrastructure projects, examples of multimodal transport, and prospects for cooperation with various logistics companies.

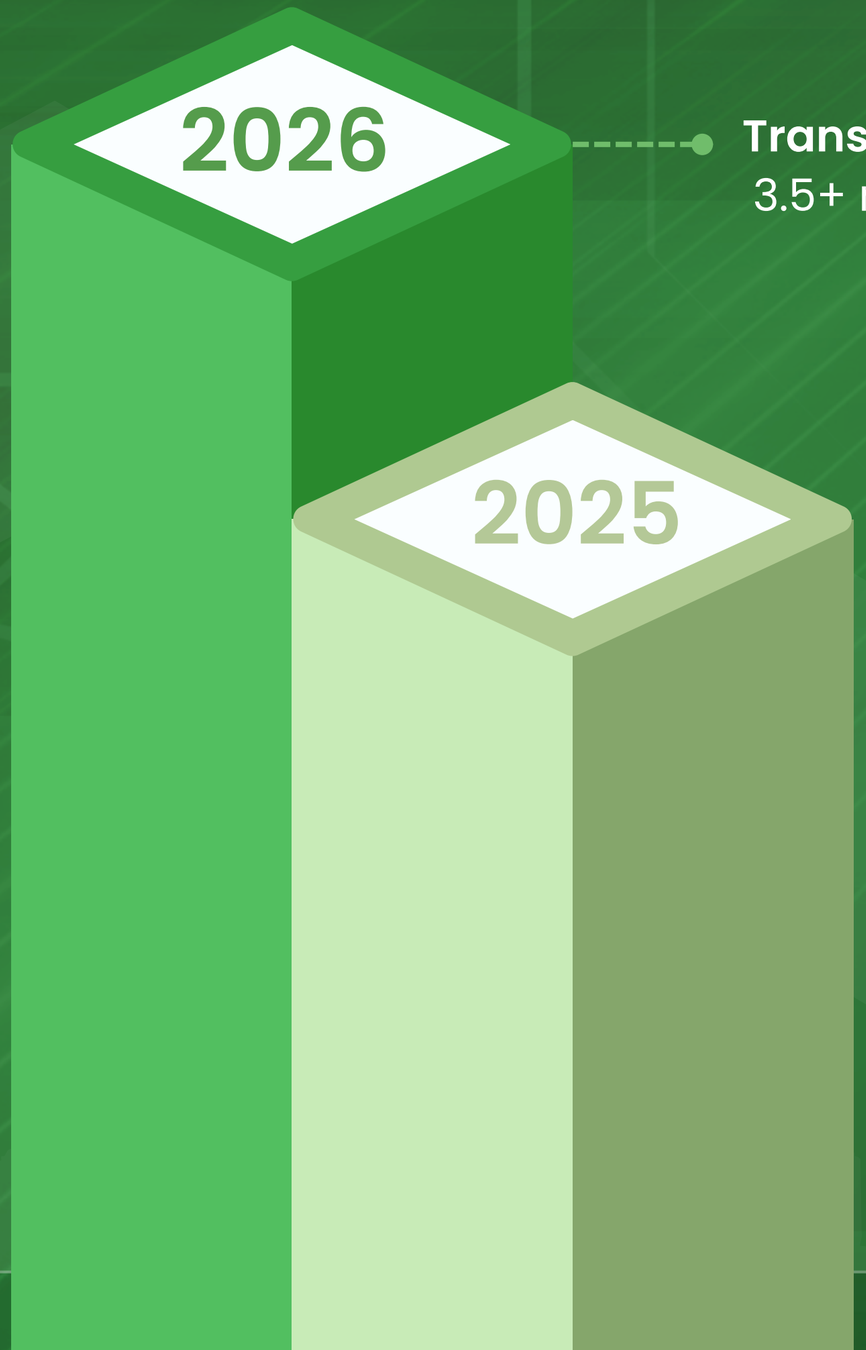
BEGMYRAT NEPESOV
Deputy Chairman of the "Turkmen Logistics" Association

WWW.TLA.TM

Transit Is Growing

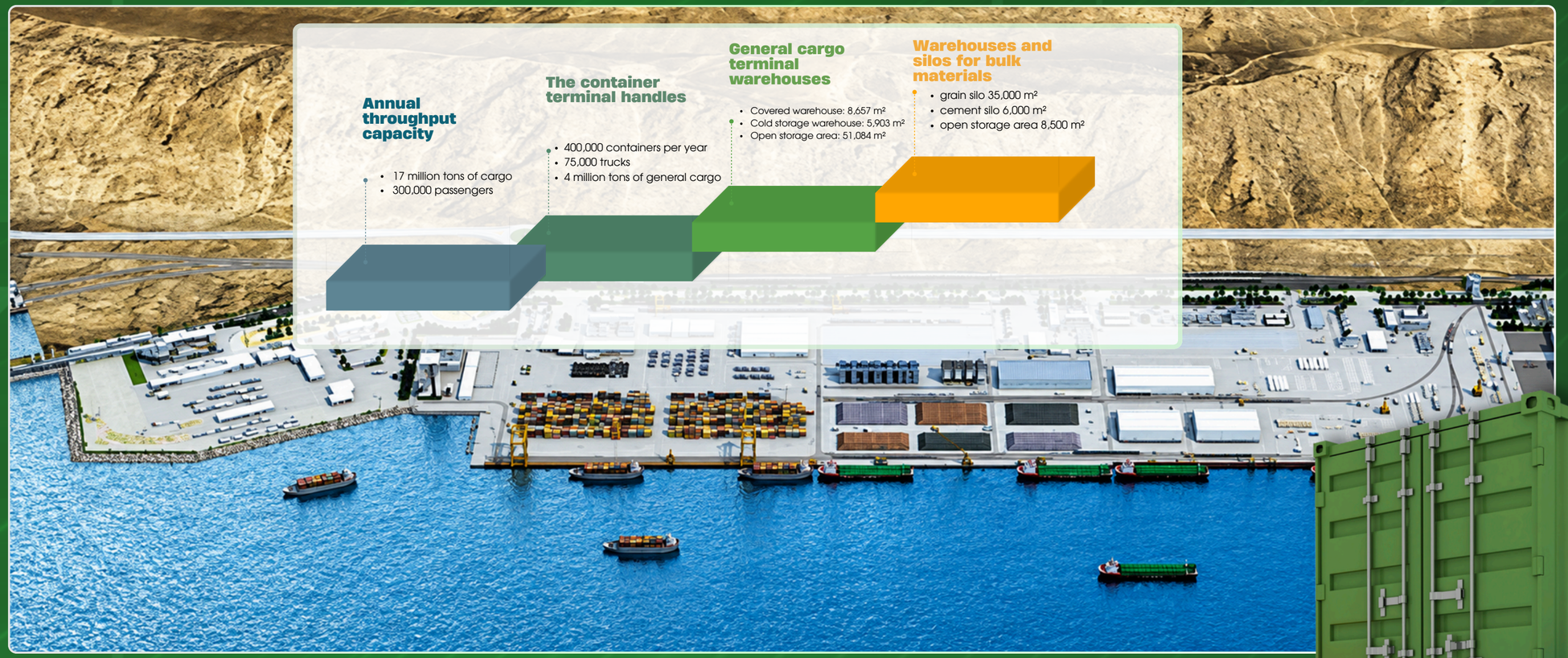
According to the State Customs Service of Turkmenistan, the volume of transit freight shipments through the country in 2025 exceeded 7 million tonnes, an increase of 28 percent compared to 2024.

In the first half of 2026, this figure surpassed 3.5 million tonnes, which is 15 percent higher than in the same period of the previous year.

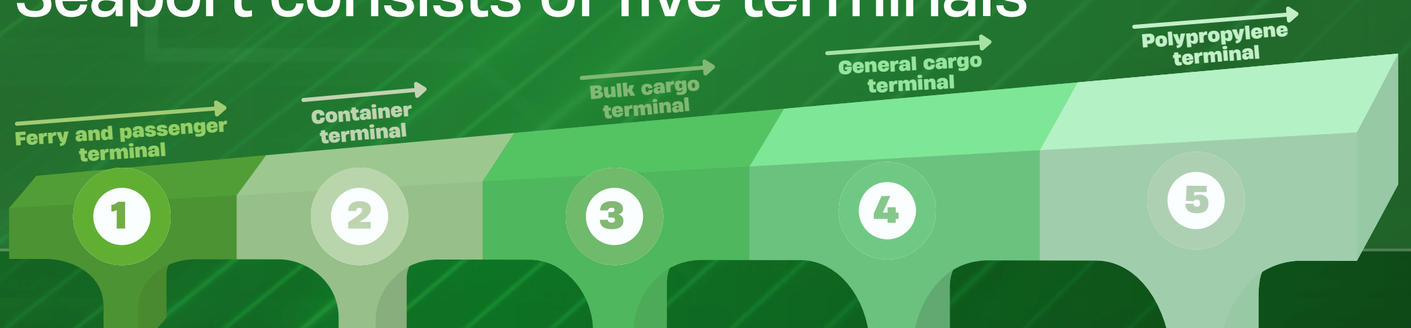


Transit for January–June 2026 (+15%)
3.5+ million tons

Transit for 2025 (+28%)
7+ million tonnes



The Turkmenbashi International Seaport consists of five terminals







TURKMEN LOGISTICS ASSOCIATION

TURKMENBASHI INTERNATIONAL SEAPORT

Load capacity
6,100 tonnes

Container capacity
240 TEU

Construction site
"Balkan" Plant

Commissioning
May 8, 2026

www.tla.tm

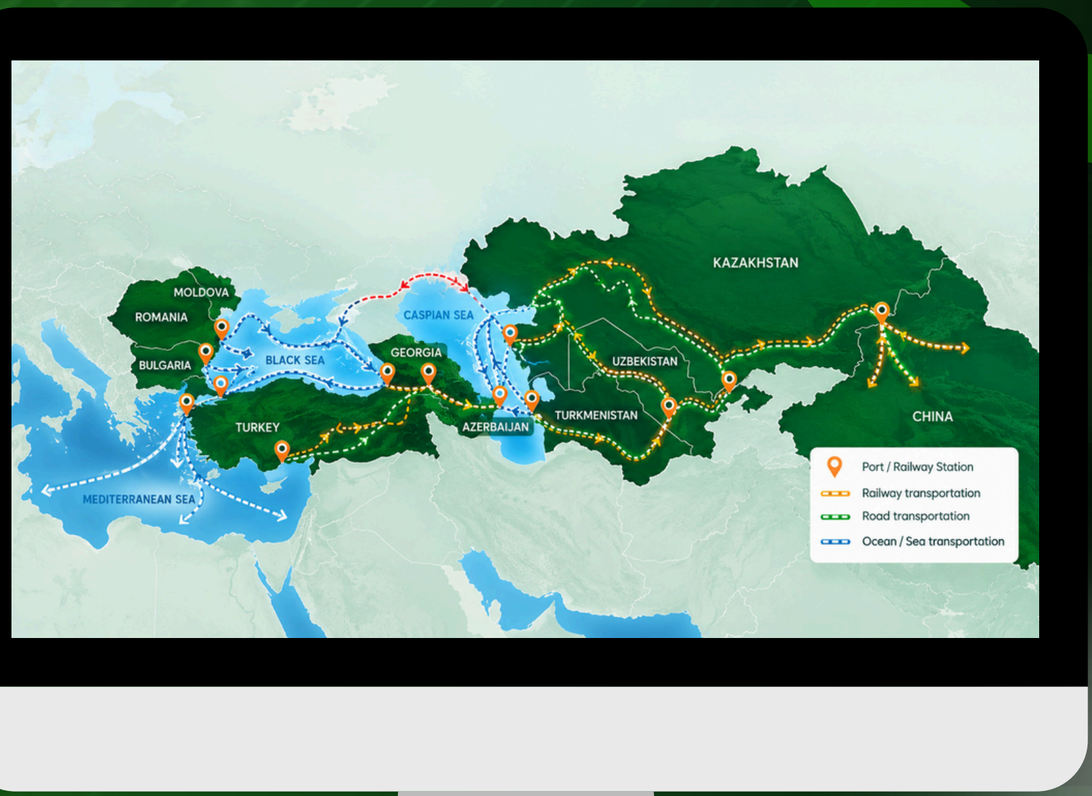
A Practical Multimodal Case: China–Turkmenistan–Azerbaijan

A Practical Multimodal Case

01 Rail
China → Kazakhstan → Turkmenistan

02 Port
Turkmenbashi International Seaport

03 Sea
Turkmenbashi → Baku



From Infrastructure to Efficient Operations

Coordination of services, tariffs and transit procedures

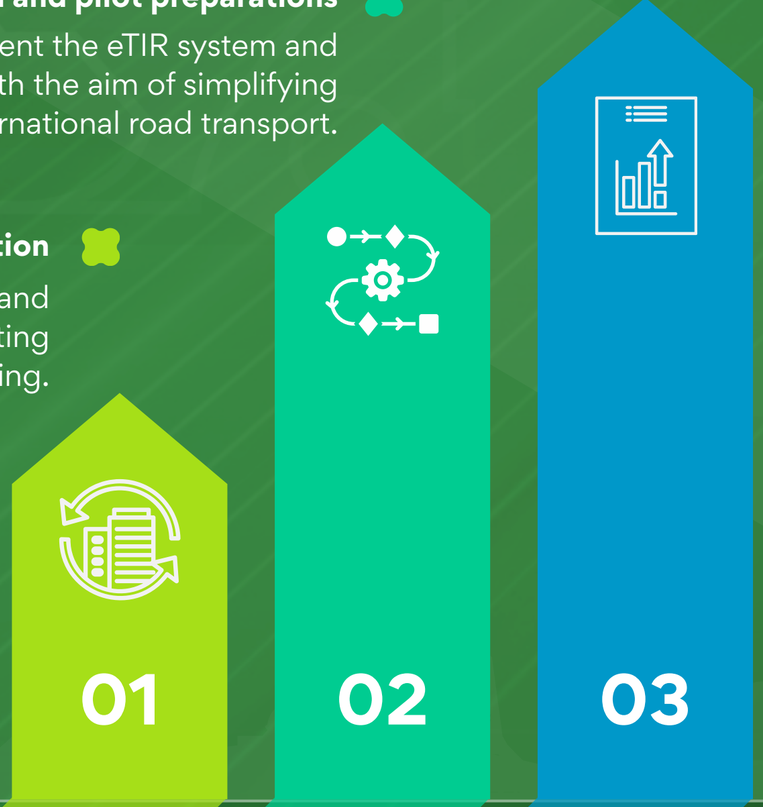
Exchange of transport data between carriers, ports, and customs authorities.

eTIR implementation and pilot preparations

Turkmenistan is preparing to implement the eTIR system and conduct pilot operations with the aim of simplifying international road transport.

Border-crossing modernization

In May 2026, the modernization of the Garabogaz and Artyk customs posts was completed, creating conditions for more efficient cargo processing.



Concrete Cooperation Opportunities for Transport and Logistics Companies

I would highlight four areas of cooperation.

01

Joint organization of multimodal transport operations using rail, road, and sea transport.

02

Developing partnerships in the areas of freight forwarding, container shipping, warehouse logistics, and door-to-door cargo delivery.

03

Digitalization of logistics, including electronic documents and the exchange of transport data.

04

Exchange of experience, professional training of specialists, and joint development of logistics solutions.

INTERNATIONAL COOPERATION



Since the establishment of the "Turkmen Logistics" Association, Memorandums and Agreements on cooperation have been signed with specialized international associations and unions:



БАМЭ

CASPIAN PORTS AND LOGISTICS 2025

LINEKA

KAZLOGISTICS
СОЮЗ ТРАНСПОРТНИКОВ КАЗАХСТАНА

german cooperation
DEUTSCHE ZUSAMMENARBEIT

Implemented by:
giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Партнёрство по транспорту и логистике в Центральной Азии

АСТРАХАНСКАЯ ОБЛАСТЬ

АРЭ

FIATA

AFG

utikad

NAFL

FFAA

АССОЦИАЦИЯ ПО РАЗВИТИЮ БИЗНЕС ЛОГИСТИКИ

КСТП ССТТ

UZT

АФАНАСИЙ НИКИТИН
АССОЦИАЦИЯ



THANK YOU

We hope our presentation is useful, for more detailed information please contact us below:

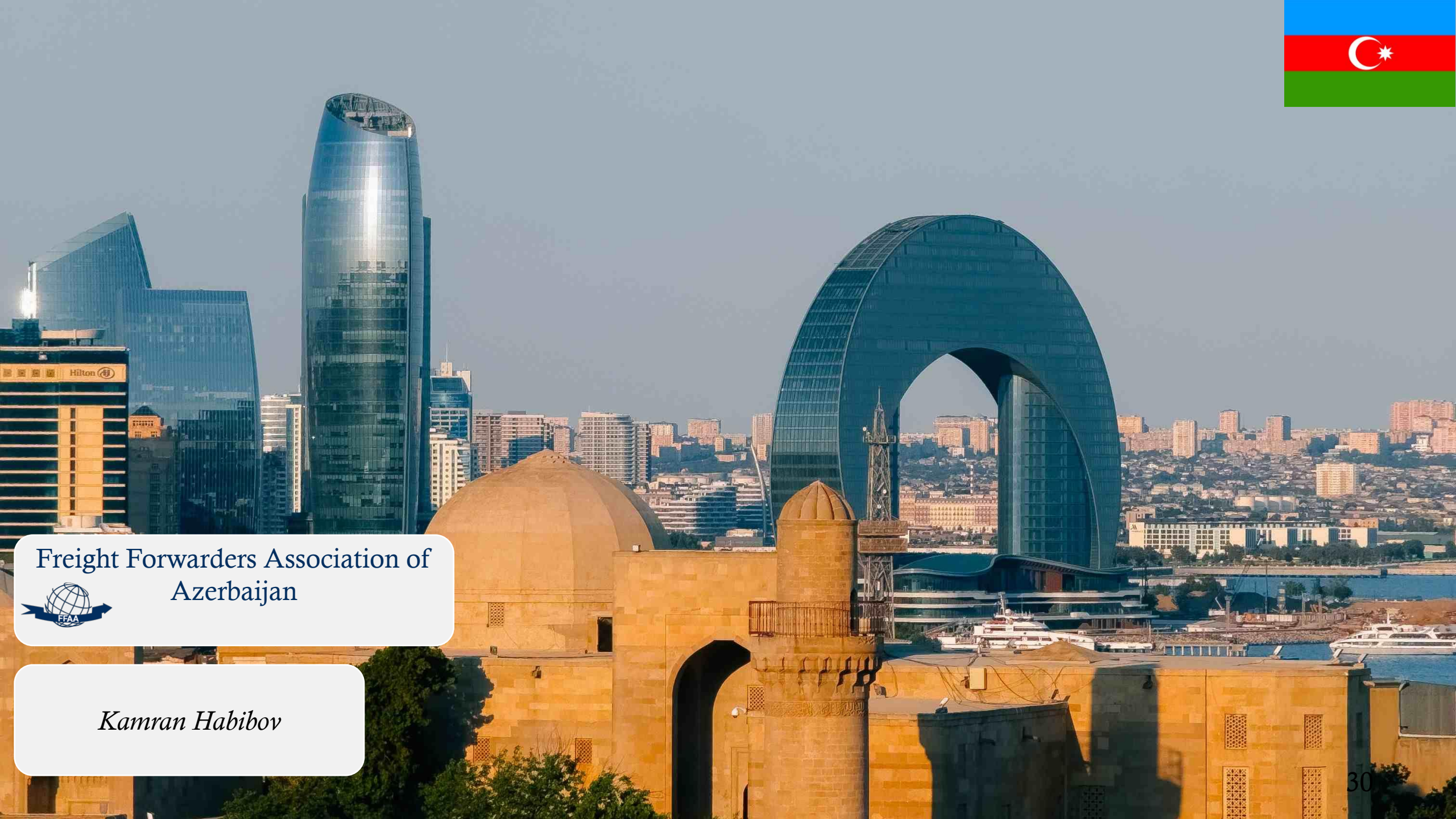
Telephone
+993 65 11 03 44

Mail
b.nepesov@tla.tm

Website
www.tla.tm



WE UNITE THE BEST FORWARDERS



Freight Forwarders Association of Azerbaijan

Kamran Habibov

AZERBAIJAN'S ROLE IN THE TCTC

1. **Azerbaijan's Role in the TCTC (Middle Corridor)****
2. **Azerbaijan serves as a vital bridge linking North, South, East, and West, functioning as a strategic multimodal hub between Europe and Asia via the Caspian Sea[cite: 2, 3].**
3. **The nation developed the Baku-Tbilisi-Kars railway and the Baku International Sea Port, which are critical for stable regional trade during global supply chain disruptions[cite: 4].**
4. **Transit volumes through Azerbaijan are scaling rapidly, reaching 14.3 million tons in 2025[cite: 16].**
5. **Middle Corridor container traffic alone hit 56,000 TEUs and 4.7 million tons in 2025, with a target capacity of 18.8 million tons by 2030[cite: 17].**

KEY INITIATIVES:

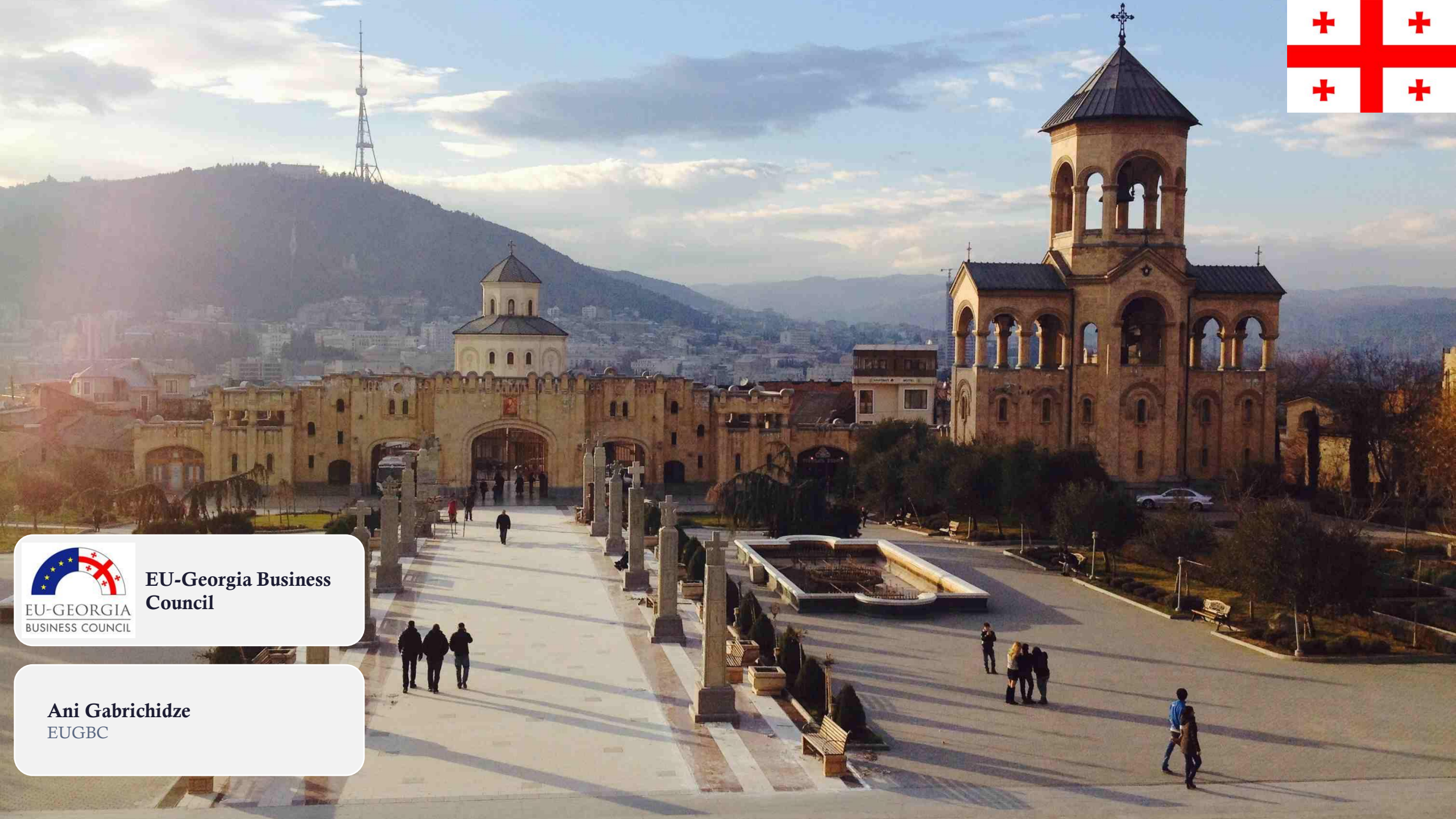
1. **The National Transit Action Plan (2024–2026) is actively upgrading physical border infrastructure, legal frameworks, and operational capacities[cite: 11].**
2. **Regulatory reforms include abolishing transit fees for dangerous goods, streamlining permit distribution, removing city entry restrictions for heavy trucks, and increasing axle weight limits from 37 to 41 tons[cite: 11].**
3. **Digitalization efforts feature a unified Digital Transport-Logistics System, a Smart Transit Portal, and integration with international e-documents (e-Permit, e-TIR, e-CIM/SMGS, e-CMR) for end-to-end cargo visibility[cite: 13].**
4. **Infrastructure expansion includes the Alat Free Economic Zone (AFEZ) multimodal hub and the ongoing construction of the Zangezur Corridor, which will connect western Azerbaijan to the Nakhchivan Autonomous Republic to add 15 million tons of projected annual capacity[cite: 8, 19, 20].**

COOPERATION OPPORTUNITIES:

1. **The framework emphasizes establishing joint ventures and partnerships to harmonize transit procedures and eliminate operational bottlenecks[cite: 12].**
2. **The Alat Free Economic Zone (AFEZ) offers investors in export-oriented manufacturing a specialized legal regime, comprehensive tax exemptions, and property immunity next to the seaport[cite: 10].**
3. **The Coordinating Council on Transit Freight acts as a platform where state bodies (such as customs and border control) and private stakeholders collaborate to manage transit logistics efficiently[cite: 14].**

YOUR ASSOCIATION:

1. The Freight Forwarding Association of Azerbaijan (FFAA) is the national organization representing stakeholders involved in international trade logistics and supply chain management across the country.
2. As an official member of FIATA (International Federation of Freight Forwarders Associations), the FFAA integrates Azerbaijan's logistics sector with global industry standards and best practices.
3. The association is dedicated to advocating for the interests of freight forwarders, enhancing professional knowledge, and ensuring a sustainable and resilient regional supply chain.
4. Under the leadership of Chairman Kamran Habibov, the FFAA actively collaborates with international bodies and local authorities in Baku to streamline transit operations and bolster Azerbaijan's role as a strategic hub in the Middle Corridor.



EU-Georgia Business Council

Ani Gabrichidze
EUGBC

GEORGIA'S ROLE IN THE TCTC

The corridor's Black Sea gateway — and cargo is already at decade high

WORLD BANK BASE CASE, TCTC 2040 · INFRASTRUCTURE ONLY

3× trade · ½ travel time · GDP +3.3% · +2M jobs

4.6 Mt

Middle Corridor flows via Georgia in 2025, doubled since 2018, but still mostly regional trade.

Transit hub

69.7% of transit runs East–West (Asia ↔ Europe); North–South carries **30.3%** (Russia ↔ Türkiye/Armenia/Iran)

15 -18 days

China–Europe via the corridor vs 45–55 days by sea

6%

Logistics share in Geo GDP

Over 58,000 direct formal positions in freight forwarding & logistics.

2.3 B

Duty Free market access FTA with the EU, China, Türkiye…



KEY INITIATIVES:

Key projects reshaping capacity, speed and market access

$372M

World Bank TC-GATE

June 2026: WB loan to finance railway rolling stock, power infrastructure, selected road upgrades, and institutional improvements

5 Mt

Baku–Tbilisi–Kars railway

Capacity lifted from ~1 Mt after modernization — the link to Türkiye

24 Hours: Border-to-port cross-country transit time.

2029

Anaklia port, phase 1

State-owned 'landlord' model since July 2026; terminal operators being sought

636.5k

TEU at APM Poti, 2025 (+17%)

APM Terminals: Q2 2026 up a further ~11%; Phase 2: $250M expansion adding 400k TEU capacity.

$150M

Tbilisi Airport expansion

2026–28, by TAV Georgia (Groupe ADP): 5M → 10M passengers; new Vaziani airport by 2031

Feb 2025

EU transit system (NCTS)

One declaration and one guarantee across the EU, UK, Türkiye, Ukraine and other CTC members

Sources: World Bank; Georgia Revenue Service; APM Terminals; PMCG.

KEY INITIATIVES: DRY PORTS AND WAREHOUSING

Rail-connected hubs are being built; modern, leasable warehouse space is still scarce

TBILISI DRY PORT

$21M
phase 1 investment, now operating

286k m²
site area, built in phases

Annual capacity, thousand TEU



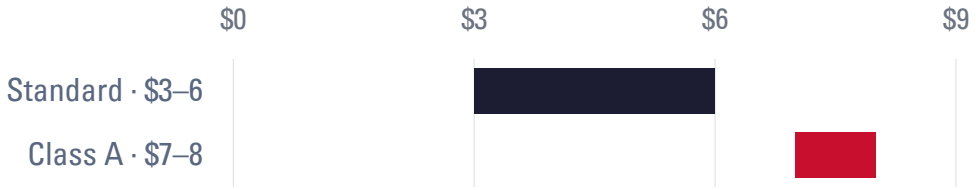
Phase 2: larger container yard, more rail sidings and a 9,800 m² Class A warehouse. **Partners:** AD Ports Group, Wilhelmsen, Inveco.

WAREHOUSING MARKET

2.2M m²
national stock: 90% dry, 10% refrigerated

+9%
a year: forecast demand growth, 2025–28

Rental rates, USD per m²



The gap: two-thirds of space is owner-occupied and only a third is leased, so modern space to rent is scarce. Room for build-to-suit and cold chain.

Sources: Ministry of Economy; TBC Capital

COOPERATION OPPORTUNITIES

Where German companies can plug in: equipment, hubs, terminals and digital

1

Rolling stock & rail tech

45 locomotives (TC-GATE) procured under World Bank rules; wagons, substations and digital rail services

TC-GATE: $387M rail component

2

Terminals / ports & IT

Anaklia terminal concessions to be tendered; Poti expansion; Black Sea feeder and ferry links/ supply green port automation and digital single-window logistics software

Anaklia terminals: $350–400M sought

3

Warehousing & hubs

Only 6% of Georgia's 2.2M m² warehouse stock is Class A; demand growing 9% a year

Opportunities for cooperation on Warehouse Management Systems (WMS) and warehouse automation

Class A rents: $7–8 per m²

4

Free zones & dry ports

Poti, Kutaisi, Hualing and Tbilisi FIZ logistics centers looking for partners;

FIZ Fiscal Incentives: 0% VAT, 0% Corporate Profit Tax, 0% Property Tax, 0% Import Tax.

Sources: Interfax / AIIB (Jun 2026); TBC Capital (2025); Georgia Revenue Service;

YOUR ASSOCIATION: EUGBC

EU-GEORGIA BUSINESS COUNCIL

2006

founded as a non-profit business support organization

120+

member companies in a growing network

Mission

Encourage investment and trade between Georgia and Europe. Our Black Sea Platform initiative (2022) works to strengthen EU–Georgia trade across the Black Sea and support the Middle Corridor.



B2B Matchmaking: Connecting German firms with vetted local and regional partners and operators

Consulting & Regulatory Advocacy : Providing direct institutional channels, PPD opportunities, support development and implementation of investment projects

Black Sea Platform: Utilizing our dedicated forum to seamlessly integrate German capital into regional infrastructure projects



Armenian Logistics Association, Association of Logistics & e-Commerce

Makrita Avjyan

Armenian LOGISTICS Association

ASSOCIATION FOR THE DEVELOPMENT OF LOGISTICS AND e-COMMERCE INFRASTRUCTURE

ARMENIA'S ROLE IN THE TCTC

1. Armenia is not on the main TCTC.
2. Armenia's **Crossroads of Peace** initiative, aimed at strengthening its role along the Middle Corridor between China, Central Asia, the South Caucasus, Türkiye and Europe;
3. Planned TRIPP through Syunik, to create a vital link in the Trans-Caspian Trade Route

Current status: *The Armenia–U.S. Framework Agreement on Strategic Cooperation was signed in* ***May 2026****. As of* ***17 September 2026****, the Armenian government was working on the legal and contractual framework for the TRIPP Development Company, including its charter and shareholders' agreement*

4. North-South International Transport Infrastructure

Efficient connection through Armenia towards north and the Black Sea

5. Opportunity to become a regional transit and logistics hub

KEY INITIATIVES:

Syunik Customs and Logistics Center

EBRD-financed project with Armenian government co-financing. Contract signed with IRD Engineering in May 2026, formally launched. Construction starts in 2027. Covers 7.7 ha near Shake village, Sisian area of Syunik Marz. The Center will combine modern customs and inspection facilities, with truck services, digitalized customs processes and LEED standards. ***Total cost : EURO 14.4. mln.***

Yerevan Customs & Logistics Center

Part of EU's Global Gateway investment framework for Armenia. EBRD financing + EU grant. The Centre will provide ~9,000 m² of warehouse and inspection facilities, parking for 408 vehicles, streamlined customs clearance through the One-Stop-Shop / Single Window principle, and target LEED certification. ***Total cost EURO 45 mln****.*

International Finance/ WB Group Armenia Country Partnership Framework (2025-2029)

USD 1.7 billion targeted to support infrastructure, connectivity, green energy, water, transport and digital transformation

Policy level

New Armenian Investment Law, adopted by Parliament on 18 June, 2026 *intended to strengthen equal treatment of domestic and foreign investors, investment protection and transparency*

COOPERATION OPPORTUNITIES:

Potential areas:

Transport & logistics infrastructure | Digital logistics | Green logistics | Customs & trade facilitation | Logistics services & know-how

Broader Investment Opportunity, as of May 2026

EU call for strategic investments in transport, energy and digital sectors; open to EU/EEA and Armenian companies, joint ventures and consortia. **Min. investment €10m; ≥20% promoter equity**.

German -Armenian business ecosystem

DWV: 120+ members (July 2026), an established platform for German -Armenian business connections.

Germany currently represents ~1% of Armenia's accumulated FDI stock, with German investment concentrated largely in IT. Existing investors include Siemens Energy, Cronimet, Würth, Zeppelin and TeamViewer.

Opportunity to broaden German - Armenian cooperation into transport, logistics, infrastructure, equipment and digital logistics.

Armenian Logistics Association (ALA)

Established: November 2024. 10 founding members and growing

Role: Industry representation. Public-Private dialogues. International partnerships

2026-2027: GIZ supported institutional strengthening (ALA ISP), including International Logistics Forum, Yerevan, spring 2027

Ambition: A stronger voice for Armenia's logistics industry and a bridge to international partners

For business cooperation: Identify market needs. Connect partners. Facilitate B2B contacts. Support potential investors.

Association for the Development of Logistics and e-Commerce Infrastructure

Established: July 2026 to accelerate the development of Armenia's logistics, supply chain, and e-commerce sectors.

Mission: To bring together businesses, government institutions, investors, and international partners to strengthen industry infrastructure and competitiveness.

Vision: To position Armenia as a strategic regional hub connecting international trade routes and markets.

Approach: To foster collaboration through public-private dialogue, professional networking, knowledge exchange, education, and innovation.

Ambition: To attract investment, advance sustainable and digital solutions, and unlock new opportunities for economic growth.

Networking Coffee

“Meet the TCTC”

11.00-12.00

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

The Global Gateway Investment Hub

Opportunities and Examples for Joint Initiatives of the Private Sector

Andrea Horf, Advisor Scaling Global Gateway, GIZ

Mirco Nowak, CEO, LUNO-Group

12.00-12.20

DIHK Deutsche Industrie- und Handelskammer

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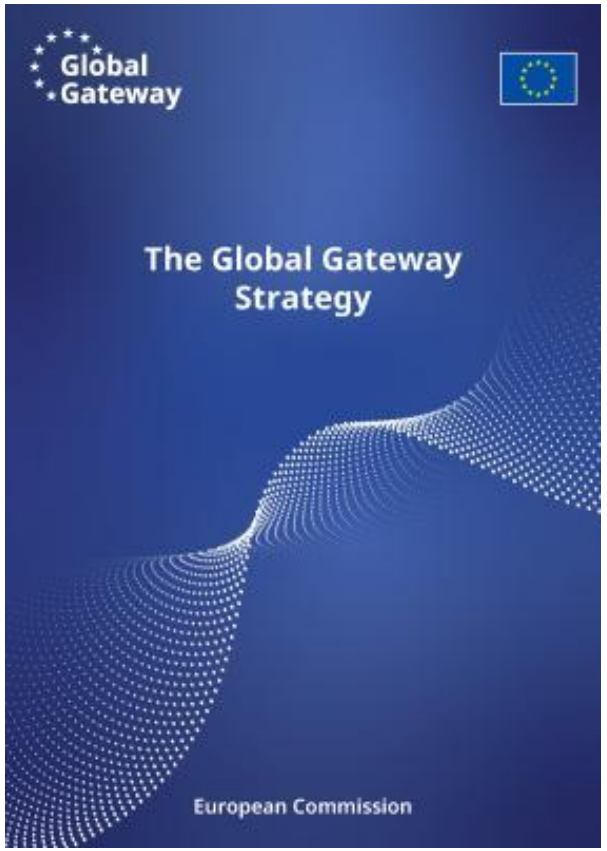
The Global Gateway Investment Hub (GGIH)



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Global Gateway in brief

- Global Gateway is the EU's main **strategy for international partnerships and investment**, focused on smart, clean and secure infrastructure in **digital, climate and energy, transport, health, and education and research**.
- It is implemented through strategic investment projects and, where relevant, strategic corridors that connect markets, value chains and regions.
- Under the 2024–2029 Commission, Global Gateway is increasingly aligned with EU geo-economic priorities, including strategic trade corridors, critical raw materials, clean energy, resilient value chains and European private-sector engagement.
- Target: mobilise up to EUR 400 billion in public and private investment by 2027.



The Global Gateway Investment Hub – A central entry point for investment projects seeking support under Global Gateway

The Hub is not a funding instrument. It helps identify and coordinate access to existing support instruments including technical assistance, guarantees, insurance, financing, risk-mitigation tools and policy support.



Via Team National

Team Germany:
AA, BMWE, BMZ
GIZ, KfW, DEG
Euler Hermes, GTAI

Global Gateway Investment Hub

Central entry point Coordination and Access Mechanism

Financing
DFIs, banks, blended finance vehicles, other financing partners

Guarantees & Insurance
ECAs, political risk insurance, investment protection, Export credit guarantees, payment guarantees

Technical Assistance
Project preparation, structuring, investor readiness, Transaction advisory, regulatory / institutional support, Skills, local value creation & community engagement

Economic Diplomacy / Policy Support
Partner country dialogue, strategic coordination, regulatory support, market access

Team Europe Coordination
EU institutions, member states, DFIs, ECAs, Technical cooperation actors and other partners

The Team National behind the GGIH in Germany = „Team Germany“

Political Steering

Federal Foreign Office

Federal Ministry for Economic Affairs and Energy

Federal Ministry for Economic Cooperation and Development

Implementing organisations

(development cooperation and foreign trade promotion)

EULER HERMES

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KFW

KFW DEG

GTAI GERMANY TRADE & INVEST

Partners in Transformation
Agency for Business and Economic Development

KFW DEG Impulse

Global Gateway Investment Hub: Deutsche Anlaufstelle
+ Link zu Proposal

What kind of projects fit?

The Hub is most relevant for larger, strategically relevant investment projects that are sufficiently mature to be assessed by financing institutions and that may require Team Europe coordination.

Strategic Relevance	• Aligned with Global Gateway priorities • Aligned **with EU strategic interests and the development priorities of the partner country** • Significant contributions to European value creation
Eligible sectors and countries	• Located in eligible DG INTPA or DG ENEST partner countries • Linked to GG sectors: **energy & climate, transport, digital connectivity, critical raw materials, clean tech, health, education & research**
EU company involvement	• Led by **EU-based project sponsor** • Exceptions: sponsors outside the EU may be considered where project demonstrably services EU and European companies‘ interests
Sufficient maturity	• **Beyond concept stage**, with a clear investment proposition and initial evidence of technical, financial and regulatory feasibility
Scale and support need	• Typically **at least EUR 10 million** (rather > EUR 50 million) investment volume (unless linked to a GG Flagship) • Requiring financial and/or non-financial support from Team Europe actors

What makes a strong submission?
Success factor for engaging with the Hub – Lessons Learnt

- Demonstrate the **project's relevance to EU strategic priorities**, incl. digital connectivity, energy security, clean energy, CRM, transport corridors and cybersecurity. + *clear articulation of* ***European value creation***
- Articulate the **project's contribution to broader geopolitical objectives**, such as diversification of partnerships, strengthening trusted ecosystems, and reducing strategic dependencies.
- Ensure **strong ownership and commitment from the partner country**, supported by evidence of engagement and endorsement.
- **Highlight the Team Europe dimension**, including in the involvement of Member States, European financial institutions, and other relevant partners.
- **Document discussions already held** with the government counterparts, financiers, and implementation partners to demonstrate project readiness and momentum.
- Clearly describe the **role and contribution of the Project Sponsor and Team National actors**, including financial contributions, where applicable. For multi-phase projects, specify contributions for each phase.
- Clearly **identify documents already in place** (e.g. MoUs, bilateral agreements, letter of intent) to demonstrate project preparedness.
- Provide a **realistic assessment of project maturity**, including milestones achieved and next steps.
- Clearly **state the type of support requested** and ensure alignment with the objectives of the Investment Hub.

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Technical Assistance for Global Gateway Investments



- GIZ is part of **Team Germany**
- **Advice** for companies on the mechanism, **exchange** on investment projects, and **identification** of suitable projects for the Hub
- **Early-stage project preparation** (e.g. feasibility studies, financial structuring)
- **Connection** to high level political decision makers and consortium building
- Enabling **conditions** for investment project

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Global Gateway Investment Hub: Deutsche Anlaufstelle
+ Link zu Proposal

Two routes for company engagement

Company-led route – „standard route“

European companies submit strategic investment ideas aligned with Global Gateway priorities through their national contact point / Team National structure.



1. Idea / Concept
2. Team National pre-screening and support-instrument check
3. DG INTPA/ENEST pre-screening and assessment, followed by EU-level facilitation phase if successful
4. Connection to support & partners

Useful links: ***Global Gateway Investment Hub: Deutsche Anlaufstelle*** **+** ***GG Investment Hub Application Form***

EU-led opportunity route

The EU may identify strategic infrastructure or value chain opportunities and seek European companies interested in contributing to a coordinated European offer. Example: the Panama-Columbia interconnector

“Innowwide” EU Funding Programme - Call for Applications for the Internationalisation of SMEs and Start-ups

Innowwide promotes joint activities to examine the feasibility of market entry, includes studies and analyses on market potential, competition, intellectual property protection and technical and legal framework conditions.

- **Deadline for submission of applications:** 1 December 2026 (14:00 CET)
- **max. 60,000 EUR funding per project**
- Open-topic **collaborations with partners** from North and South America, Asia/Pacific, the Middle East and Africa possible
- **New eligibility criterion 2026:** companies must have been founded at least two years before the date of the submission deadline

INNOWWIDE

Growth Markets Funding Guide

- New tool from the BMZ and BMWE for German private-sector:
- Funding Guide for Growth Markets - Support for Business Operations Abroad

Agency for Business and Economic Development

- First point of contact if you want to co-operate with German development cooperation and implement sustainable business models
- Our offer | Agentur für Wirtschaft & Entwicklung

Contact

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The Global Gateway Investment Hub

Opportunities and Examples for Joint Initiatives of the Private Sector

Andrea Horf, Advisor Scaling Global Gateway, GIZ

Mirco Nowak, CEO, LUNO-Group

12.00-12.20

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

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International Middle Corridor Consortium

Analyzing • Developing • Connecting
Positioning • Attracting

IMCC
INTERNATIONAL MIDDLE CORRIDOR CONSORTIUM

Mission

IMCC's mission is to establish the **Middle Corridor** as an alternative transport route in the medium term, in particular to highlight Georgia's advantages as a logistics hub and link between Europe and Asia and to develop Georgia's potential as an extended workbench for exports to Europe, China and the United States.



IMCC commissioned comprehensive and detailed feasibility study:

- ✓ Analyzing economic potential and prospects of the Middle Corridor
- ✓ Evaluating Georgia's position with its actual ports in Poti - Batumi - Anaklia (Project)

Prepared by HPC Hamburg Port Consulting, an internationally renowned consulting firm with long-standing experience in the global port, transport, and logistics sector.



Ports along the Middle Corridor

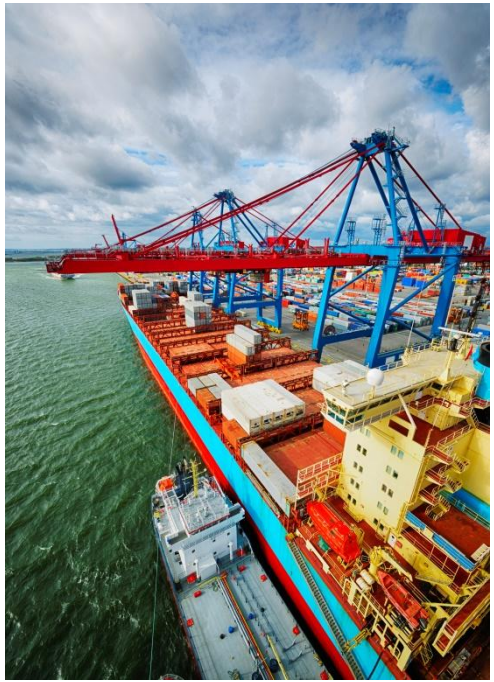
In particular, IMCC analyzed the following ports and explored opportunities for the acquisition and development of port facilities and terminals:

Black Sea

- ✓ Port of Constanta, Romania
- ✓ Poti Port, Georgia
- ✓ Port of Anaklia, Georgia

Caspian Sea

- ✓ Port of Baku, Azerbaijan
- ✓ Turkmenbashi International Seaport, Turkmenistan
- ✓ Aktau Sea Port, Kazakhstan
- ✓ Port Kuryk, Kazakhstan



IMCC
INTERNATIONAL MIDDLE CORRIDOR CONSORTIUM

Port Poti - Free Industrial Zone



Potential new terminals of the Free Industrial Zone Poti

ECOPRS: Redefining Global Cold Logistics

Passive Refrigeration Technology for a Zero-Emission Supply Chain



Capsule

Cool room

Eliminating the "Genset Trap"

Traditional Active Autonomy



- Requires a standard electric reefer + an independent diesel genset with a one-ton fuel tank.
- Plagued by diesel refueling logistics, continuous mechanical maintenance, emissions, and noise.
- Subject to increasing prohibitions of onboard diesel engines.

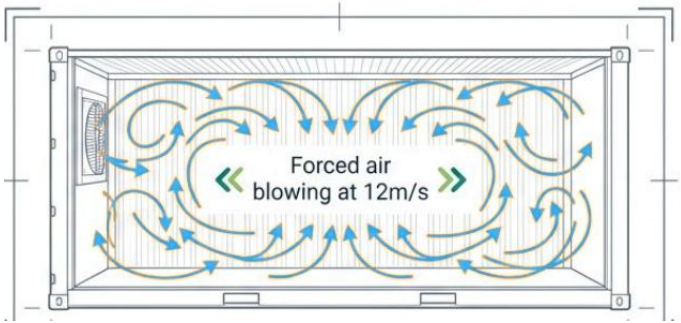
ECOPRS Hybrid Autonomy



- Delivers 15 to 20+ days of guaranteed passive operation.
- Zero fuel consumption during transit, zero emissions, zero noise.
- Virtually free from mechanical failures or breakages during the transit phase.

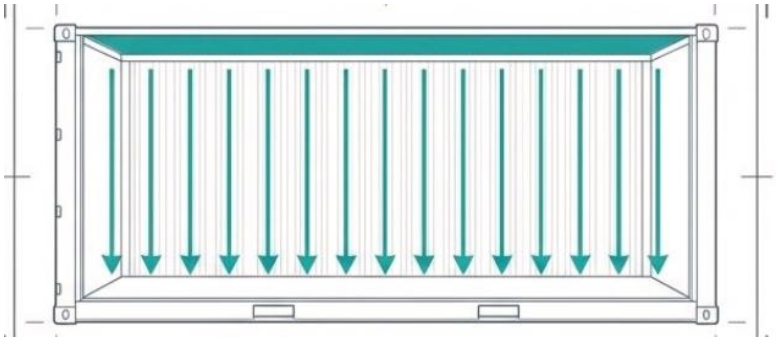
Thermodynamic Paradigm Shift

The Past (Active Cold)



Forced ventilation absorbs product moisture, causing severe cargo dehydration.

The Future (Static Cold)

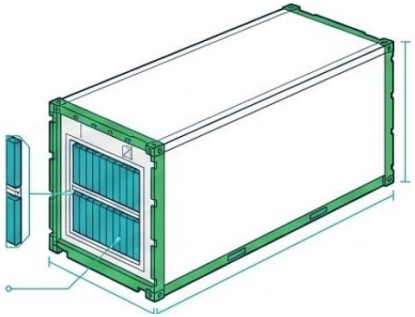


Radiant cooling. Zero forced air, no moving mechanical parts, and absolute biological control.

ECOPRS Transformer Architecture

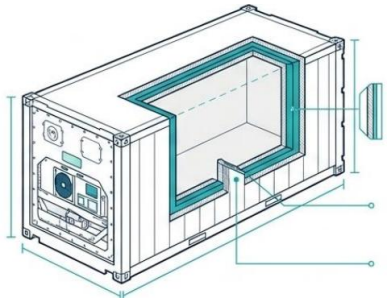
Refrigerated container is not bound to its initial hardware.
It becomes a modular asset perfectly adaptable to operational routes.

Path A: Native (100% Passive)



Maximum efficiency of passive technology. Zero machinery. The cooling unit is replaced by a custom rear panel housing extra high-density eutectic plates for maximum zero-emission range.

Path B: Smart Hybrid (Active/Passive)



Total operational flexibility. Integrates our passive thermal capsule alongside the original active refrigeration unit. Ideal for long-duration maritime transport and complex logistics routes.

Panel Discussion:
Best practices for Collaboration along the TCTC

Moderation: Mirco Nowak

Bundesvereinigung Logistik (BVL) Chapter Eurasia

12.20-13.00

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

giz Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH

Panelists:

Kabyl Oxikbayev, Junior Project Manager EECCA, Rhenus Logistics

Altynbek Adylbekov, Head of Tradeline Middle Corridor, Deutsche Bahn (DB) Cargo Eurasia

Kamran Habibov, Managing Director, Hellmann Worldwide Logistics

Igor Maiorov, Managing Director, InterRail Europe GmbH

Skndim Limani, Business Development Manager, InterRail Europe GmbH

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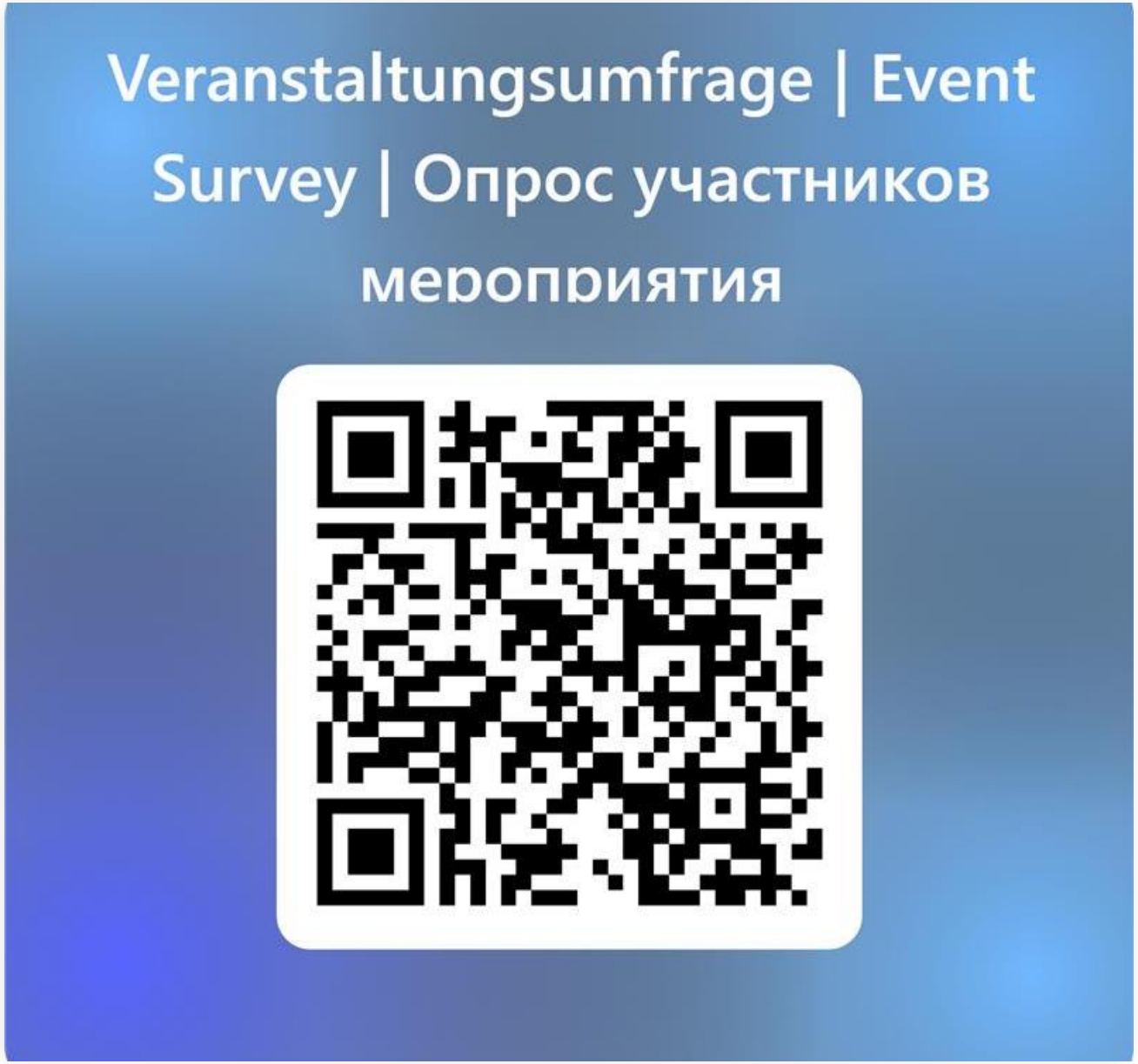
Ost-Ausschuss der Deutschen Wirtschaft

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Please scan the QR code to complete the Survey.

Your feedback is greatly appreciated.

Thank you for today’s participation!





Networking Lunch

“Meet the TCTC”

13.00-14.00

DIHK Deutsche Industrie- und Handelskammer

Ost-Ausschuss der Deutschen Wirtschaft

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