

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



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

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FOREWORD

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

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

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

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

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

Oana-Mihaela Mocanu, PhD

Director General of the European Institute of Romania

EXECUTIVE SUMMARY

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

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

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

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

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

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

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

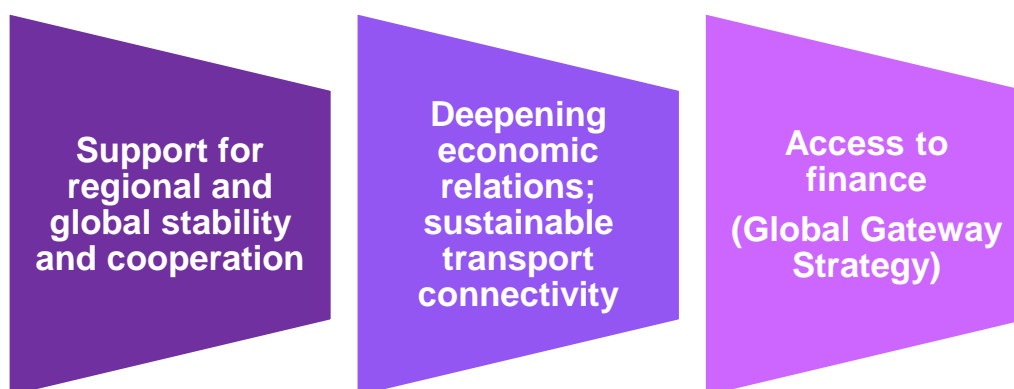
Several general ideas that emerge from the experts' contributions:

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

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

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

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



Mihaela-Adriana PĂDUREANU
Expert, Studies Unit

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

Nargiza UMAROVA

Nargiza UMAROVA is a Senior Research Fellow at the [Institute for Advanced International Studies \(IAIS\)](#), University of World Economy and Diplomacy (UWED), Uzbekistan. Her research activities are focused on studying the developments of Central Asia, trends in regional integration and the influence of great powers on this process. She also explores the current policy of Uzbekistan on the creation and the development of international transport corridors. Contact her via nargiza.umarova@iais.uz.



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

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

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

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

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

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


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

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

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

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

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



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

AFTERWORD

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

Mihai SEBE

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

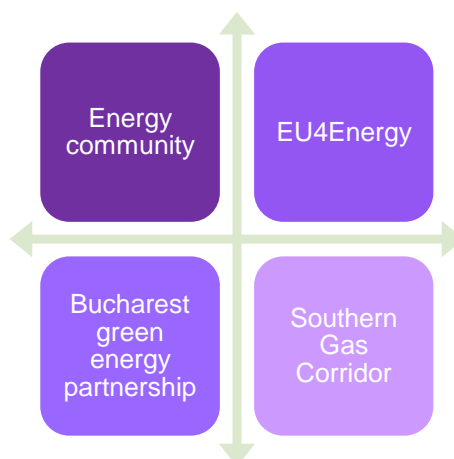


The Black Sea region has occupied an important role in the collective mythology and economy of this part of the world ever since Antiquity as a crossroad of cultures, civilizations, trade and opportunities. Its complexities can be seen in the earlier evolution of its name from [*Póntos Áxeinos \(Inhospitable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

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

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

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



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

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

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

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

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

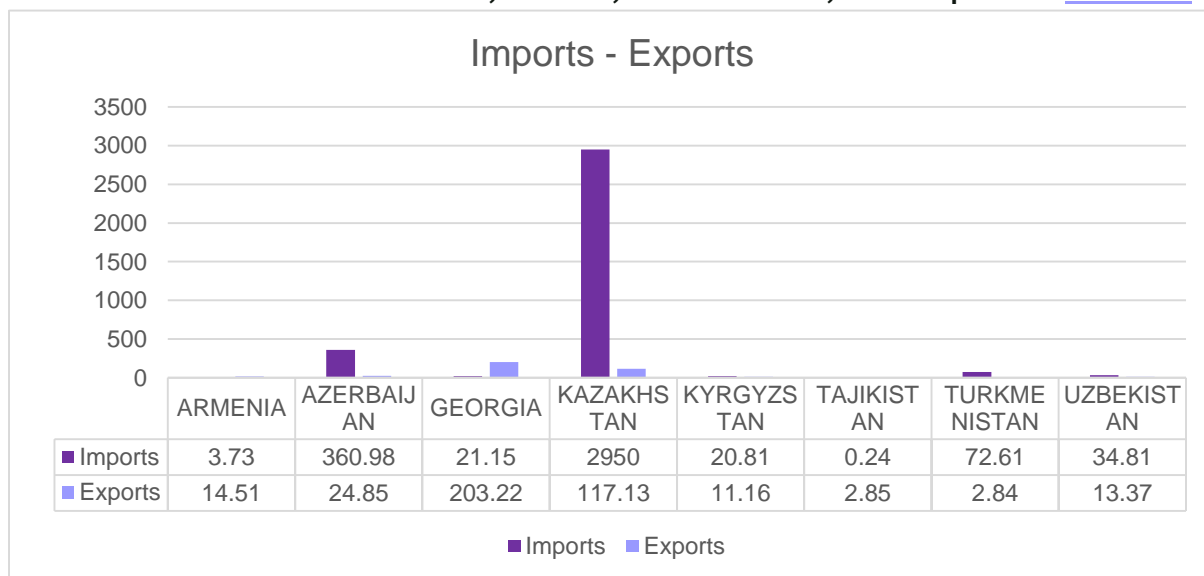
As for the transportation, we must first and foremost notice the increasing role of the Port of Constanța following the war of aggression against Ukraine. The Constanța Port had a significant [growth](#) amidst all the EU ports due to taking over the role of the ports in southern Ukraine. This brought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

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

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

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

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



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

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Bucharest

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