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Azerbaijan as a Key Energy Hub in the South Caucasus: Geopolitical Implications and Sustainable Development Perspectives Within TRACECA

Abstract

Azerbaijan was a peripheral region in the Soviet Union; however, since the end of the Cold War, Azerbaijan has been able to become a major global energy player by becoming an integral part of the energy supply chain of both the Caspian Sea Basin and the global market. Through its energy resources and geographic location, Azerbaijan has developed several new methods to transport energy by building pipelines and multimodal transportation corridors that bypass current traditional routes for transporting energy from Europe and Central Asia and transport energy from Europe through Central Asia to Asia. This paper discusses how Azerbaijan's transition from an energy supply and transportation hub has affected regional geopolitics in the region, including the sustainability of this new role in light of international climate change commitments. This conclusion examines the development of TRACECA, the Southern Gas Corridor.

The paper will also investigate Azerbaijan's adoption of new policies supporting renewable energy, such as large-scale solar and wind energy projects; the country has set various greenhouse gas reduction targets and has created green energy transportation corridors to determine whether the goals of the country are consistent with sustainable development. The study concludes that while, through hydrocarbon resource development, Azerbaijan is able to create and maintain diplomatic relationships with other nations and attract investment, Azerbaijan is struggling with two major challenges: the need to diversify its economy and to begin reducing carbon emissions in its energy sector.

***Keywords:** Azerbaijan, energy hub, TRACECA, Middle Corridor, geopolitics, sustainable development, renewable energy*

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Cənubi Qafqazda əsas enerji mərkəzi kimi Azərbaycanın rolu: Traceca çərçivəsində geosiyasi təsirlər və davamlı inkişaf perspektivləri

Xülasə

Azərbaycan Sovet İttifaqının periferik bölgəsi idi; lakin Soyuq Müharibənin bitməsindən bəri Azərbaycan həm Xəzər dənizi hövzəsinin, həm də global bazarın enerji təchizatı zəncirinin ayrılmaz hissəsinə çevrilməklə əsas global enerji oyunçusuna çevrilə bilmişdir. Enerji ehtiyatları və coğrafi mövqeyi sayəsində Azərbaycan Avropa və Mərkəzi Asiyadan enerji daşınması və Avropadan Mərkəzi Asiya vasitəsilə Asiyaya enerji daşınması üçün mövcud ənənəvi marşrutları aşan boru kəmərləri və multimodal nəqliyyat dəhlizləri tikməklə enerji daşınması üçün bir neçə yeni metod hazırlamışdır.

Bu məqalədə Azərbaycanın enerji təchizatı və nəqliyyat mərkəzindən keçidinin regional geosiyasətə, o cümlədən beynəlxalq iqlim dəyişikliyi öhdəlikləri işığında bu yeni rolun davamlılığına necə təsir etdiyi müzakirə olunur. Bu nəticə TRACECA, Cənub Qaz Dəhlizinin inkişafını araşdırır.

Məqalədə həmçinin Azərbaycanın genişmiqyaslı günəş və külək enerjisi layihələri kimi bərpa olunan enerjini dəstəkləyən yeni siyasətləri qəbul etməsi araşdırılacaq; ölkə müxtəlif istixana qazlarının azaldılması hədəfləri müəyyən edib və ölkənin məqsədlərinin davamlı inkişafa uyğun olub-olmadığını müəyyən etmək üçün yaşıl enerji nəqliyyat dəhlizləri yaradıb. Tədqiqat nəticəsində məlum olur ki, karbohidrogen ehtiyatlarının işlənməsi yolu ilə Azərbaycan digər ölkələrlə diplomatik münasibətlər qura və saxlaya, investisiya cəlb edə bilsə də, Azərbaycan iki əsas çətinliklə mübarizə aparır: iqtisadiyyatını şaxələndirmək və enerji sektorunda karbon emissiyalarını azaltmağa başlamaq zərurəti.

***Açar sözlər:** Azərbaycan, enerji qovşağı, TRACECA, Orta dəhliz, geosiyasət, davamlı inkişaf, bərpa olunan enerji*

Introduction

Located between Europe and Asia, the Southern Caucasus region (Southern Caucasus, Republic of Azerbaijan, Republic of Armenia, Republic of Georgia) has always had an essential place as a route for trade, ideas, and power. Upon independence in 1991, Azerbaijan inherited multi-billion-dollar hydrocarbon reserves in the Caspian Sea along with a Soviet-built system of infrastructure that was poorly suited for use by global markets, and thus the country began a three-decade-long process of establishing itself as both a source and a transportation hub of energy. To create alternative pipelines and reduce Azerbaijani reliance on Russia and Iran; to woo foreign direct investment into its oil & gas sector; and to build transportation corridors for East/West traffic, Azerbaijan has established major crude oil & natural gas pipelines, become a player in the multimodal transportation business, and is now trying to position itself as a leader in renewable energy generation for the region. This paper explores the geopolitical ramifications of Azerbaijan's role as an energy hub through the TRACECA program and investigates whether the sustainable development policies of Azerbaijan will complement its goal of being a major Silk Road node.

In the period since it became independent and signed the "Contract of the Century" in 1994, which attracted Foreign direct investment (FDI) to its offshore oil resources, Azerbaijan has made significant progress. In 2006, Azerbaijan completed construction of the Baku-Tbilisi-Ceyhan Pipeline, which provided Azerbaijan with direct access to the Mediterranean Sea and eliminated its dependence on Russian and Iranian transit routes. Following Russia's invasion of Ukraine in 2022, Europe was in search of alternative sources of gas; consequently, the Caspian Sea region's importance grew, thus drawing the attention of the rest of the world towards Azerbaijan's pipeline and rail systems. At this same juncture, Baku was developing itself as a logistic corridor to Europe by completing construction of the Baku-Tbilisi-Kars railway, increasing capacity at the Alat Sea Port, and enhancing the Middle Corridor that connects China and Europe. Moreover, 2024 will be declared the "Year of Solidarity for a Green World," as Azerbaijan hosts the COP29 conference and signals a transition towards renewables. All these developments illustrate the complex nature of Azerbaijan's strategy; it must balance hydrocarbon resource use with its ambition to be an incubator for sustainable transportation and clean energy.

Research

TRACECA and Regional Connectivity

TRACECA was established to provide a transport corridor between Europe and Asia to be connected via the Caspian Sea (Seremet, 2023). TRACECA was conceived at a meeting in Brussels in May of 1993 between ministers of five former Soviet Central Asian republics, Georgia, Azerbaijan and Armenia. Specifically, they envisioned developing an inland route from the Black Sea to Central Asia (Seremet, 2023). TRACECA was created with funding from the European Union and has been defined by the Basic Multilateral Agreement which was signed in 1998. TRACECA is designed to modernise and promote trade and transport along road/rail/maritime mechanisms that have suffered

deterioration since the fall of the Soviet Union (Seremet, 2023). Over time, TRACECA has developed into the Middle Corridor (or the Trans-Caspian International Transport Route) and will become the official corridor administered by an International Association of Kazakhstan, Azerbaijan and Georgia (2016) based At the Baku–Tbilisi–Kars Railway and the Baku International Sea Trade Port (ICDS, 2026). This corridor can transport cargo containers from China/Central Asia to Europe by passing through the Caspian Sea and Black Sea and avoid transiting through Russia/Iran.

Azerbaijan has made significant investments into complementary infrastructure that will help support its hub status. The Baku–Tbilisi–Kars railway has been operating since 2017 and serves as an important backbone for east–west freight movement. Alat Port provides 15 million tons of throughput capacity with plans to expand to 25 million tons (ICDS, 2026). Additionally, with the development of the Alat Free Economic Zone adjacent to the port, Baku is demonstrating its efforts to attract logistics, manufacturing, and digital service companies. Azerbaijan is also a partner in the North–South International Transport Corridor, which links India and Iran to Russia and Northern Europe, creates multiple axes of connectivity, and reduces reliance on any one partner. Through these initiatives, Baku has used its geography as a key to anchor regional commerce, secure revenue from transits, and increase its political clout in the region.

The energy transportation nexus from Azerbaijan relies heavily on a series of major pipeline corridors, as shown in Table 1. The southern gas corridor (SGC) is responsible for transporting natural gas originating from the Azerbaijan Shah Deniz field, through the South Caucasus Pipeline (SCP), traversing Georgia and Azerbaijan, through the Trans-Anatolian Pipeline (TANAP) that runs through Turkey, and into Europe via the Trans-Adriatic Pipeline (TAP). The SGC is estimated to be approximately 3,500 kilometers long and carry an estimated volume of gas growing from growth of 10 billion cubic meters to a minimum of 20 billion cubic meters by 2027 as part of a memorandum signed between the European Union and Azerbaijan (European Commission, 2024). The Baku–Tbilisi–Ceyhan (BTC) Oil Pipeline was completed in 2006, runs 1,700 km from Sangachal terminal, near Baku, through Georgia, to the Mediterranean coast of Turkey with a capacity of 1.2 million barrels per day (Global Energy Monitor, 2022). Although BTC throughput declined by approximately 206 million barrels during 2025 (GeoHistory 2024), the line remains strategically valuable in providing an alternative route to bypass Russia or Iran. Collectively, these pipelines, combined with other infrastructure investments in railroads and ports, provide key anchors within TRACECA and the broader middle corridor.

Table 1.
 Main energy transport projects associated with
 Azerbaijan’s hub role (selected corridors, 2025).

Project	Route and length	Capacity and 2025 statistics
Southern Gas Corridor (SGC) – comprising the South Caucasus Pipeline, TANAP and TAP	~3 500 km route from the Shah Deniz field (Azerbaijan) through Georgia, Türkiye and onward to Italy and South-East Europe	Initial design capacity ~10 billion cubic metres per year; EU–Azerbaijan MoU seeks to expand to at least 20 bcm by 2027; more than 40 % increase in deliveries to the EU between 2021 and 2024
Baku–Tbilisi–Ceyhan (BTC) oil pipeline	1 768 km route from Sangachal terminal (Azerbaijan) through Georgia to Ceyhan port (Türkiye)	Designed to carry 1.2 million barrels/day; transported around 206 million barrels in 2025

Source: European Commission (2024); International Development Foundation (2025), Global Energy Monitor (2022); GeoHistory (2024)

Azerbaijan has two separate but complementary pipelines that will enable it to export its oil and gas products to markets on both sides of Europe. These pipelines will reduce its dependency on Russia and Iran for transport and also will connect the resources of the Caspian Sea to European markets. Furthermore, these pipelines are an important part of TRACECA's energy dimension. While Azerbaijan has plans to increase the capacity of the Southern Gas Corridor, the main oil pipeline,

BTC, is presently only about half its designed capacity due to decreases in crude oil production, and the changing dynamics of the physical market. Collectively, both corridors are enhancing Azerbaijan's bargaining position in international negotiations and attracting FDI to its economy.

In addition to providing Azerbaijan with new sources of income, its hydrocarbon export pipelines are changing the political landscape of the region by providing the European Union (EU) with alternatives to importing Russian energy products. The SGC has taken on added importance following Russia's invasion of Ukraine in March of 2022 and as the EU has moved to diversify its supply of natural gas from Russia. The amount of natural gas delivered to Europe through the SGC in the time period from 2021 to 2024 is projected to increase by over 40 percent (European Commission 2024). By 2025, the State Oil Company of Azerbaijan Republic (SOCAR) is expected to provide natural gas to 14 different countries, including but not limited to Germany and Austria. The second memorandum of understanding between Baku and Brussels, signed in July 2022, envisions doubling the capacity of the SGC by at least 20 billion cubic meters of natural gas by 2027, which supports the European Union's "REPowerEU" initiative (International Development Foundation 2025). In order for this development to occur, additional investment needs to be made in the upstream natural gas fields of Shah Deniz and Absheron and in the construction of compressor stations on TANAP (Trans-Anatolian Natural Gas Pipeline), and TAP (Trans-Adriatic Natural Gas Pipeline).

The BTC Pipeline also consolidates Azerbaijan's geopolitical leverage by providing a direct route to world markets through the Mediterranean coast of Turkey. Additionally, the BTC and SGC pipelines allow oil exports from the Azerbaijani Chirag Gunashli Oil Fields to bypass Russian territory altogether. Though the BTC pipeline's usage was less than optimal as of June 2023 (i.e., only 206 million barrels were transported via this route) it remains a very strategic transportation route due to its location and the lack of geopolitical choke points along this route. Collectively, the BTC and SGC pipelines provide Baku with transit security to its European and global customers and enable it to negotiate from a position of strength with both East and West. Both of these pipelines will also help to stimulate Azerbaijan's economy by generating transit fees and royalties that can be used to invest in both infrastructure and social programs

Hydrocarbon diplomacy is not limited to Europe. Azerbaijan is a participant in the North-South International Transport Corridor that physically connects India with Russia and Northern Europe via Iran and has partnered with Kazakhstan to ship Caspian oil to the Black Sea. By forming many partnerships with multiple countries, Azerbaijan pursues a multivector foreign policy that mitigates reliance on a single actor. However, managing multiple partnerships requires Azerbaijan to maintain a delicate balance between enhancing the economic relationship between Azerbaijan and both the EU and the U.S. while simultaneously enhancing its economic relationship with Russia and Iran. Furthermore, Azerbaijan's investment decisions must consider the long-term decarbonization of the global economy and, therefore, the potential reduction of demand for fossil fuel energy in the coming years.

Azerbaijan's Energy Hub Role and Practical Development Directions within TRACECA

It's not just an abstract idea that Azerbaijan is a regionally significant energy hub; rather, it is the culmination of many concrete infrastructure projects, important decisions taken by government bodies, and businesses from around the world working together in numerous ways. In my experience, the primary reason for this model's success is the degree to which the country has combined both their own natural resources with transport corridors including TRACECA as well as the Middle Corridor. All of these components have created a system whereby countries can produce energy, transport that energy, and connect diverse regions through energy production and transport networks.

When viewed from a practical standpoint, one of the most significant actions taken by Azerbaijan was the building of pipelines used to export oil and natural gas to Europe. For instance, the Southern Gas Corridor and the Baku-Tbilisi-Ceyhan oil pipeline are two examples of not only energy projects; rather, they act as actual physical means of providing access for Azerbaijan's oil and gas to European markets directly, thus eliminating reliance on historically used transit routes. This again enables Azerbaijan to negotiate at a higher level with its European partners due to increased dependence on and commitment by both parties (the EU and Azerbaijan) to one another's interests. As an example,

natural gas exported through Azerbaijan's Southern Gas Corridor has allowed for the establishment of long-term contracts for gas from Europe, which, in practical terms, provides economic stability for both contracting parties in addition to creating closer ties between Azerbaijani and European Union governments. On a wider scale, as a result of increased exports due in large part to new energy infrastructure projects, foreign direct investment into Azerbaijan and domestic economic activity have both significantly increased through creating jobs within the economy.

Another important priority for practical action is the development of the transport infrastructure of TRACECA. The Baku-Tbilisi-Kars railway and the Alat International Port Facility have greatly improved the logistics capabilities of Azerbaijan. Both projects, in particular, will decrease time to transport goods (between Asia and Europe) and provide new revenue-generating opportunities for transit traffic. This will, in turn, mean both an increase in cargo volumes moving through Azerbaijan, new job opportunities in both logistics and service industries, and further integration into the global trading system. Recent research suggests that the Middle Corridor is now emerging as a competitive alternative trade route between China and Europe, especially as a result of its flexibility and less geopolitical risks (Kenderine & Bucsky, 2021). Thus, it is evident that Azerbaijan's role is to not only serve as a transit country but will actively seek to develop regional trade flows.

The realisation is growing worldwide that simply relying on hydrocarbons is ultimately not the way forward. However, in recent years, Azerbaijan has started to take practical steps towards the development of renewable energy. Large scale solar and wind projects are already underway, and the country's collaboration with international companies demonstrates that there is a genuine commitment from the Azerbaijani government to this transition. From what I observe, these projects provide both legislative/environmental solutions and economic solutions; e.g., they diversify the energy sector, reduce the dependency of the economy on oil and gas revenues, etc.

For example, projects in regions such as Garadagh and Jabrayil prove how renewable energy can be incorporated into the National Energy System. Furthermore, these projects also create new jobs, and require innovation in technology, thereby contributing to the formation of human capital. Research suggests that Azerbaijan will gradually shift to a model where they will not only export gas, but green energy (Khanayev & Ali, 2025). In practice, this could involve the exporting of electricity to the European market through new transmission lines, thereby enhancing Azerbaijan's status as a global energy hub, even in a decarbonised world.

There are still a number of practical challenges remaining worth focusing on to develop renewable energy in Azerbaijan (these are addressed above). Namely, there is a lack of financing available for large-scale renewable energy projects; in order for investment into these types of projects to occur, there must be a stable and secure economic as well as legal environment in which these investments will take place.

Existing infrastructure will need to be updated in order to accommodate renewable energy. Current electrical grids were not designed for a world where electricity generation relies heavily on renewable resources, such as solar or wind power. Because of the need for electricity, there will need to be infrastructure upgrades to accommodate the new systems that utilize renewable energy; otherwise, there will continue to be inefficient renewable energy usage.

There is a significant shortage of qualified professionals that can manage and operate advanced electric energy systems and therefore, education/training will need to be included in any comprehensive strategy for overall Azerbaijan's renewable energy strategy.

International cooperation will greatly assist in finding solutions to address the lack of qualified professionals and their training by providing technology resources and knowledge exchange as well.

Regional stability will be a very important factor in determining how effective TRACECA and the Middle Corridor will be as both an energy and transportation corridor. The success of TRACECA and the Middle Corridor is not only based on established infrastructure but political stability as well. Political instability or military conflict in a country or region can severely impact energy and transportation flows; therefore maintaining good relations with neighboring countries will play a vital role in Azerbaijan's ability to become an energy hub in the long term.

Azerbaijan proved that it can use energy exports successfully together with transport corridors. The country is building a network connecting pipelines, railroads and ports to help its economy grow and to integrate into the world. At the same time, the country's transition to renewable energy demonstrates its ability to adapt to changes occurring globally.

In my opinion, the success of this model going forward depends on achieving a proper balance among the different components (hydrocarbon and renewable energy) of the network. In order to continue using its hydrocarbon resources successfully, Azerbaijan needs to continue investing in renewable energy and sustainable infrastructure. If this balance can be maintained, Azerbaijan will be able to hold onto its position as a major global energy hub in the future.

Sustainable Development and Renewable Energy Integration

Azerbaijan has realised that to continue to prosper over time, it must diversify its economy away from hydrocarbons. The country's national strategic documents establish targets for reducing its greenhouse gas emissions 35% by 2030 and 40% by 2050 against 1990 levels (International Development Foundation 2025). The Oxford Institute for Energy Studies reports that Azerbaijan signed a memorandum of understanding with Masdar and ACWA Power for the development of 500 MW of renewable energy projects in Nakhchivan (Bowden & Roberts 2024). BP, SOCAR Green, and the Azerbaijan Investment Company are establishing a 240 MW solar plant in Jabrayil as part of this effort (Bowden & Roberts 2024). Additional projects include the Garadagh 230 MW solar plant, the Khizi–Absheron 240 MW wind farm, plus solar plants planned at Bilasuvar (445 MW) and Neftchala (315 MW) (World Economic Forum 2026). The rehabilitation of hydropower in the liberated territories of Karabakh and East Zangazur should add approximately 270–500 MW of new capacity.

To place these investments into context, Table 2 provides examples of various major renewable energy projects that are currently in the development stage. When these projects come online by 2030, they will provide a total of approximately 1.5 gigawatts of new generation capacity; thereby raising the share of renewable energy in overall generation capacity to around one-third (i.e., about 33%). Additionally, the government intends to develop a green electricity exporting platform via a submarine cable across the Black Sea – thereby creating a “green energy corridor” that mirrors TRACECA transport routes (World Economic Forum, 2026). These actions show that Baku will continue to be a transit hub, regardless of the shift from traditional sources of fuel to renewable alternatives.

Table 2.

Major renewable-energy projects and capacities in Azerbaijan (selected projects announced by 2025).

Project	Type and location	Capacity and timeline
Garadagh solar plant	Solar PV in Baku region	230 MW; operational since 2023 and largest solar farm in the South Caucasus
Khizi–Absheron wind farm	Onshore wind near Baku	240 MW; developed with foreign investors and contributes to power grid stabilisation
Bilasuvar solar plant	Solar PV in Bilasuvar district	445 MW; expected to be commissioned before 2030
Neftchala solar plant	Solar PV in Neftchala district	315 MW; planned with foreign investment
Nakhchivan renewables programme	Solar PV and wind in Nakhchivan Autonomous Republic	500 MW; memorandum signed by Masdar, ACWA Power and SOCAR to develop solar and wind projects
Jabrayil (Shafag) solar plant	Solar PV in Jabrayil district	240 MW; joint venture between BP, SOCAR Green and the Azerbaijan Investment Company

Source: Bowden & Roberts (2024), World Economic Forum (2026)

Azerbaijan is seeing a rapid growth in their renewable energy capacity, with more support from various investors internationally. The country has a significant number of projects exceeding 1 GW of combined output capacity, thereby making a substantial change in its strategic direction towards decarbonisation. The completion of these projects will be dependent upon: improving the current grid

infrastructure; providing regulatory certainty; securing financing; however if successfully done, would facilitate the transformation of Azerbaijan from simply exporting hydrocarbons to having a balanced supply chain of energy products. The planned initiative in Nakhchivan demonstrates regional cooperation, while the proposal for the Black Sea cable indicates an interest in exporting clean energy out of countries around the Black Sea to European customers.

While the renewable energy market in Azerbaijan continues to grow, there are many significant hurdles to overcome. To be able to finance the required amount (1.5 GW) of new generation capacity, international investors need to have confidence that there is a viable investment environment and that there are sufficient sustainable public-private partnerships in place. The existing grid infrastructure will need to be enhanced so that it is capable of supporting a substantially higher level of variable generation and will also need to be connected to more remote areas of the country, including Karabakh and Nakhchivan for connection into the national electric grid. Accessing skilled labour and transferring modern technology will be important to successfully operate and maintain these large, complex generation facilities. Because of high reliance on oil and gas revenues in Azerbaijan, renewable energy projects could be negatively impacted by extreme changes in the hydrocarbon market. Therefore, developing a strong balance of properly considered criteria will be essential to supporting the successful implementation of sustainable development in Azerbaijan under the TRACECA framework.

Conclusion

The evolution of Azerbaijan as a major hub of energy and transport is a function of regional dynamics and strategic decisions. With the introduction of the TRACECA program and the establishment of the Middle Corridor, Baku was able to bypass traditional chokepoints, and provide connectivity across the east-west and north-south axis. The construction of major pipelines, including the Southern Gas Corridor and the Baku-Tbilisi-Ceyhan oil line, have not only secured routes for exporting energy, but also enhanced Azerbaijan's economic connections to Europe. Recent geopolitical events have heightened the value associated with these corridors, increasing Azerbaijan's leverage and significance to European energy security.

At the same time, Azerbaijan understands that long-term prosperity will require the country to transition to sustainable energy systems. Azerbaijan has set ambitious targets for the amount of renewable energy capacity and emissions reductions; has plans for several large solar and wind projects; and has proposed building a cable between the Black Sea and Turkey to facilitate exporting renewable energy from Azerbaijan to Europe. Additionally, the declaration of "A Year of Solidarity for a Green World", along with the hosting of COP29, indicates that Azerbaijan wants to be a leader in promoting climate action within the region. By integrating green energy into transport corridors, TRACECA will continue to be relevant in a world that is moving towards decarbonization.

Overall, Azerbaijan's dual goals of becoming an energy hub and sustainable development are both practical and looking ahead. The country has utilized its geography and resource base to create infrastructure that meets national and regional needs. It now has the challenge of balancing hydrocarbon-based wealth with aspirations for renewable energy, managing geopolitical risks, and ensuring that the benefits of growth are environmentally and socially inclusive. The ability to maintain this balance will define Azerbaijan's role in the South Caucasus for many years to come.

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