



DISCUSSION PAPER

Assessing Global Connectivity Projects: The Development Road vs. IMEC

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Introduction

In the realm of international commerce, global powers are increasingly recognising the pivotal role of land and maritime corridors. These corridors serve as vital conduits for transportation, trade, and energy, shaping the dynamics of international order and fostering connectivity across regions, thereby influencing economic and geopolitical landscapes.

Therefore, securing global interconnectedness and the ensuing efficient transportation of goods and services via regional and global routes is a major geopolitical endeavour. The recent Houthi attacks in the Red Sea and Bab el-Mandeb, which many consider a spillover effect of the Israel-Palestine conflict, brought this fundamental truth again to the fore.

Disruption to shipping lanes posed a substantial [risk](#) to 12% of global trade, predominantly in the energy sector, underscoring the urgent need for alternative maritime and land routes.

In the case of Israel, the Houthis' disruptive effect on its economy pushed Israeli decision-makers to seek alternative routes. A logistics start-up company, Trucknet, introduced a land route starting from the UAE's Port of Jebel Ali and Bahrain's Port of Mina Salman, passing through Saudi Arabia and Jordan before finally reaching Haifa.

Meanwhile, China also faces similar concerns. The Strait of Malacca, which is the shortest sea route between the Middle East and East Asia, is the main route of Chinese trade. However, its strategic location is a double-edged sword because it could easily be disrupted in case of tensions with the US. Beijing's "Malacca Dilemma" points to the vulnerability of this chokepoint, considering the ever-growing insecurity in the South China Sea and prompting a geostrategic pivot towards the China-Pakistan Economic Corridor (CPEC).

Therefore, the imperative to ensure the uninterrupted flow of global trade has re-emerged as a critical issue in world affairs. Examining various projects, initiatives, and routes is pertinent in this context.

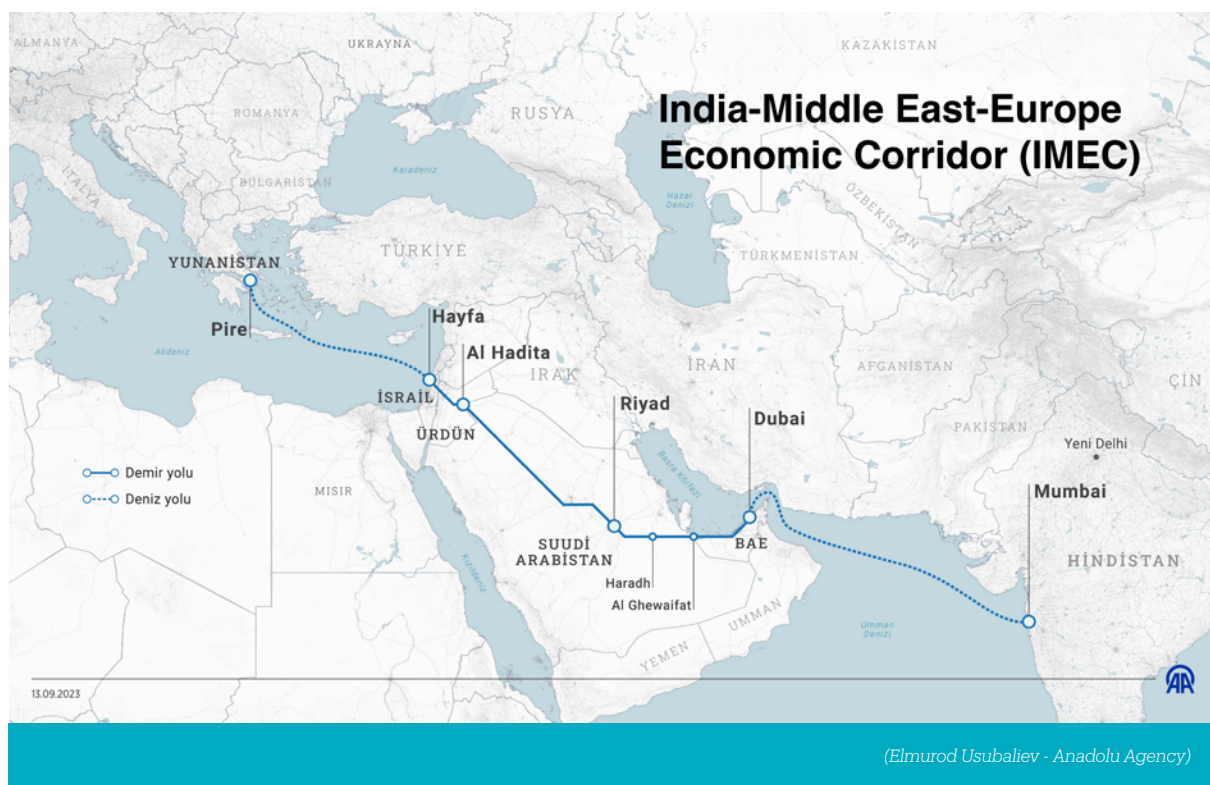
Given the significance of the ongoing escalation in the Middle East, this paper primarily focuses on two key initiatives: The Development Road Project, which symbolises the cooperation between Türkiye and Iraq, and the India-Middle East-Europe Corridor (IMEC), introduced at last year's G-20 Summit in New Delhi, whose viability has become a matter of debate in light of the war in Gaza.

Both trade routes present distinct advantages and disadvantages concerning security, partnerships, foreign investment attraction, financing, and sustainability. This discussion paper compares these two initiatives by evaluating their relative opportunities and risks from a security, feasibility, and global power competition perspective.

India-Middle East-Europe Corridor (IMEC)

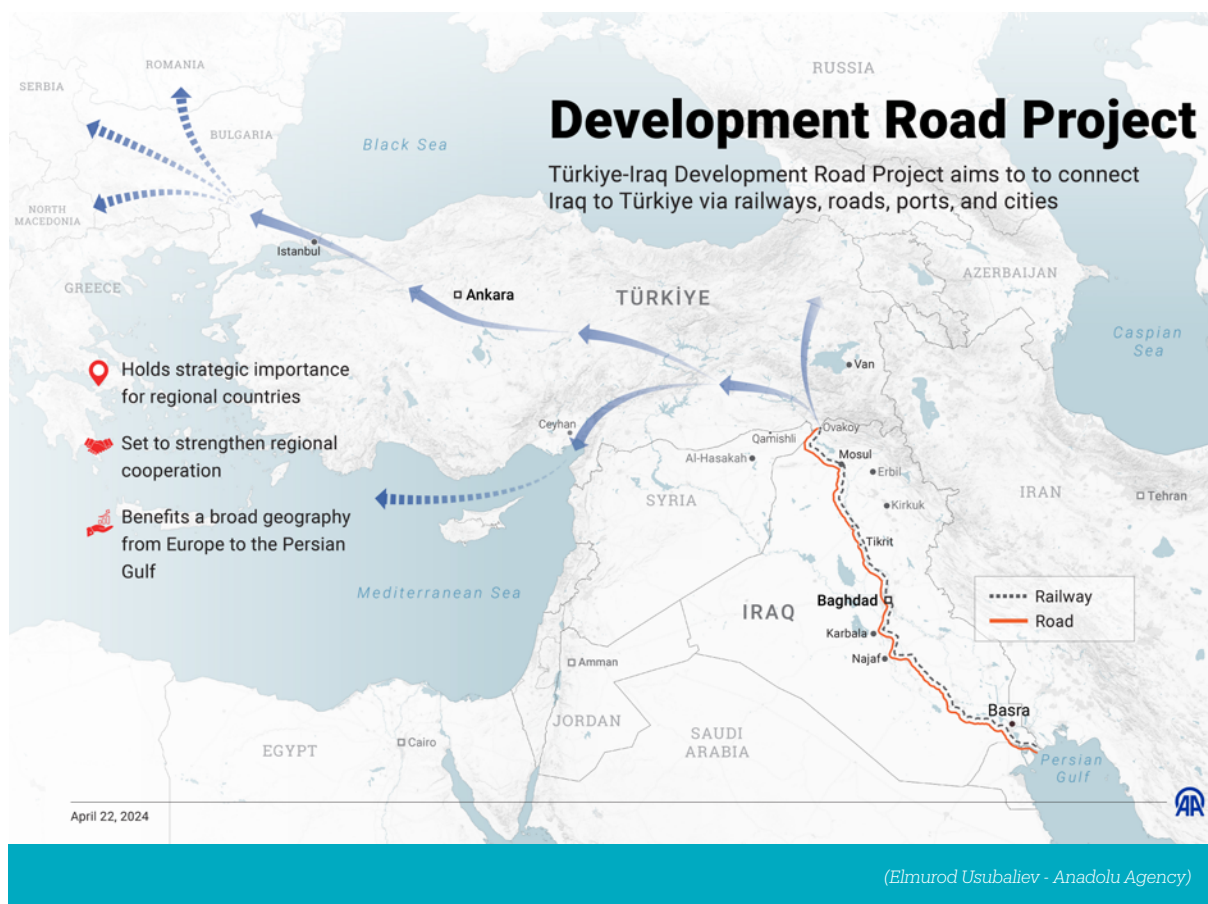
The India-Middle East-Europe Corridor (IMEC), announced at the G-20 Summit held in New Delhi in 2023, is a strategic initiative aimed at facilitating the flow of goods from Mumbai to European markets. The proposed route involves maritime transport from Mumbai to Dubai, followed by overland transit through Saudi Arabia and Jordan, reaching the port of Haifa, and then continuing via the Mediterranean Sea to Europe. Key stakeholders in the IMEC project include India, the United Arab Emirates, Saudi Arabia, Jordan, Israel, France, Germany, Italy, and the United States. An initial memorandum put a two-month deadline for stakeholders to develop an action plan. However, this objective has been put on hold due to the resurgence of the Israel-Palestine conflict on October 7.

At the annual Raisina Dialogue held in New Delhi in February 2024, leaders, including Greek Prime Minister Mitsotakis and Indian Prime Minister Modi, [underscored](#) that while recent developments in the Middle East are significant, the IMEC represents a strategic long-term priority. Shortly before these discussions, India and the UAE signed an intergovernmental framework agreement related to the project. Additionally, in February, French President Macron [appointed](#) Gérard Mestrallet, the former head of the Engie energy company, as the Special Envoy for IMEC. These political statements and actions signal a continued commitment to IMEC and efforts to revive the initiative, which had faced [waning](#) optimism.



(Elmurod Usulaliev - Anadolu Agency)

The Development Road



The Development Road, born from [Türkiye-Iraq cooperation](#), is a significant regional connectivity initiative. It aims to facilitate the flow of goods from Al Faw Port in the Basra Gulf through road and rail connections across Iraq to Ovaköy, a border city in the southeast of Türkiye, and then into European markets. This project, which links the Gulf and Europe via Iraq and Türkiye, exemplifies the peak of recent diplomatic engagement between the two nations that had some problems arising from the fight against PKK terrorism and transboundary water-sharing issues in the past.

With an estimated cost of \$17 billion, the project is set to make Al Faw Port the largest in the Middle East, driving economic growth, employment, and foreign investment in Iraq, thereby enhancing its regional position. Türkiye presents an alternative connectivity route, countering its exclusion from the IMEC route. President Erdoğan highlighted

Türkiye's indispensable role in regional connectivity by [stating](#), "We say that there is no corridor without Türkiye." During Erdoğan's official visit to Iraq in April 2024, a quadrilateral agreement also involving Qatar and the UAE was signed, demonstrating broader regional support for the project. This initiative underscores the ongoing multi-layered diplomacy and extensive cooperation on security and trade between Ankara and Baghdad, reinforcing their mutual benefits and strategic interests.

IMEC vs. the Development Road

The comparative analysis of IMEC and the Development Road highlights the importance of considering security and feasibility factors in implementing regional connectivity initiatives. Each project carries distinct benefits and challenges, shaped by their geopolitical contexts and strategic objectives in international power politics. Each sub-section below delves into one area of comparison.

1. Security Perspective

From a security perspective, the IMEC and Development Road projects confront some uncertainties that require careful consideration. Notably, the IMEC route from Mumbai to UAE ports transits the Strait of Hormuz, a region under significant Iranian strategic control. For Iran, which is excluded from the corridor, this situation might be perceived as a strategic leverage point. One cannot assess potential threats to IMEC without considering Iran's probable disruptive actions directly or via proxy. An illustrative case is the attacks by the Houthis in Yemen on the Red Sea. This group, which developed strong affinities with Iran, [targeted](#) three oil tankers and an under-construction extension of Abu Dhabi International Airport with drones and missiles in February 2022. More recently, a few weeks ago, the group launched attacks on ships in the Gulf of Aden and the Indian Ocean, demonstrating that the Houthis' operational reach can [extend](#) beyond the Bab el-Mandeb Strait to a broader area.

When evaluating the security risks associated with IMEC, particularly in the maritime segment, the initial stage of the corridor in and around Emirati ports is critical. If pushed to the corner, the Iranian regime could easily use covert actions to sabotage maritime activity in the vicinity of UAE ports.

One should not forget that the Iranian regime has endeavoured to enhance the status of its recently upgraded port, the Chabahar Port, in international trade. While sanctions pushed away foreign companies, which became reluctant to participate in the port's expansion, India recently [signed](#) a 10-year agreement with Iran to develop and operate the port.

Historically, India has pursued a deal on Chabahar to bypass its rival Pakistan's Gwadar Port, developed under CPEC, and to gain access to Central Asian markets. However, this initiative lost momentum during the Trump administration's maximum-pressure campaign following the US withdrawal from the Joint Comprehensive Plan of Action (JCPOA).

Currently, there has been no significant change in the pressure and sanctions on Iran, but a potential Trump re-election in the November elections could signal a return to the maximum pressure strategy. Trump's transactional approach to foreign policy is also significant in this context. The IMEC is grounded in the collaboration established by the I2U2 group, which includes India, Israel, the US, and the UAE—a framework initiated during Trump's presidency. Consequently, Trump is likely to prioritise the commercial potential of a connectivity project like IMEC and to incentivise normalisation between Israel and Arab countries. In this regard, his administration may tolerate India's economic engagement with Iran for the benefit of the corridor simply because this move can be a release valve to avert any potential Iranian-instigated aggression toward the project.



(TCCB / Murat Çetinmühürdar - Anadolu Agency)

From a security perspective, the primary challenge for the Development Corridor is PKK terrorism. The project's decision to bypass Northern Iraq for topographical reasons was met with some resistance. However, President Erdoğan's [official visit](#) to Iraq in April alleviated many potential sources of friction, significantly strengthening bilateral cooperation, which is crucial for the Development Corridor.

The possibility of the PKK conducting sabotage activities led to extensive diplomatic engagements. As a result, Ankara and Baghdad agreed on a unified approach to combat terrorism, leading the Iraqi National Security Council to list the PKK as an outlawed organisation. Security and military training are particularly noteworthy among the 26 cooperation agreements signed between the two countries. Türkiye aims to intensify comprehensive operations against the PKK in the latter half of 2024, focusing on eradicating terrorist safe harbours in the region.

Despite these efforts, the [support](#) provided by the Patriotic Union of Kurdistan (PUK) in Sulaymaniyah to the PKK—such as training, issuing identification papers, and providing operational freedom—has been a long-standing concern for Türkiye. In response, Türkiye has closed its airspace to flights coming from or going to Sulaymaniyah and continued issuing warnings. The common grounds reached with Erbil suggest that PUK-related concerns may no longer represent a significant issue for Ankara in its fight against the PKK.

Stopping terrorism in the region is vital not only for Türkiye's border security but also for Iraq's sovereignty and its goals of economic development, job creation, and attracting foreign investment through the Development Road. This shared interest incentivises Iraq to contribute substantively to Türkiye's counter-terrorism efforts. A key indicator of progress in diplomatic relations is the positive stance of the Popular Mobilization Forces (PMF) toward clearing Sinjar of PKK presence. The attendance of Falih al-Fayyad, head of the Hashd al-Shaabi Commission, at the meeting where the PKK was outlawed, and Turkish Foreign Minister Hakan Fidan's recent optimistic [statements](#) about PMF cooperation in Sinjar reflect a significant shift in counter-terrorism dynamics. Also, given that Sinjar is not only a simple base for PKK but also a vital channel for its Iraq-Syria nexus, the eradication of the terrorist organisation from there will be a significant blow to its mobility and resources. In summary, Ankara has already taken proactive measures to address the PKK terrorism risk to the Development Road.

Alongside the terrorist threats, the position of Iran remains perplexing. Tehran has expressed neither opposition nor

support for the project, but the exclusion of Iran from the route could be perceived as a threat to its strategic interests. It is also a fact that Iranian industries seek to have a monopoly over the markets of Iraq and Syria, and the competition from the far-advanced Turkish products would strike a blow to these aspirations.

The Iranian leadership is probably sitting on the fence. The fact that a quadrilateral agreement involving Qatar and the UAE was reached reinforces the importance of this route without undermining the strategic importance of the [Strait of Hormuz](#), as energy transportation from the Gulf would continue crossing the Hormuz.

Türkiye's approach to the project is inclusive, suggesting that a formula to incorporate Iran could be developed, as Foreign Minister Hakan Fidan stated on some occasions. Even in a scenario where former President Trump is re-elected and maximum pressure on Iran is reinstated, Iran could maintain its role as a significant energy supplier and need to focus more on its domestic economy, which does not have a promising outlook since the Covid-19 pandemic. Also, domestically and in its areas of influence, the primary demand from the civilian population is to improve its socio-economic welfare, and the ideological zeal pushed by hardliners has lost its appeal among the urban youth.

A similar behaviour is observed in Iraq, where people strive for improved social services and infrastructure in a terror-free country. Also, Iran recognises that it cannot monopolise regional connectivity where many other stakeholders have strategic interests, and efforts to undermine a potentially beneficial initiative could ultimately damage its long-term interests by straining relations with Türkiye.

The alignment on Sinjar between Türkiye and the Popular Mobilization Forces (PMF), which includes all Iran-backed groups as an umbrella organisation, may provide some significant insights into [Iran's approach](#). Türkiye has made notable progress by establishing diplomatic communication channels with various actors, fully cognizant of regional geopolitics and realities.

2. Feasibility Perspective

In comparing the feasibility of the Development Road and the India-Middle East-Europe Corridor (IMEC), it is evident that significant progress has been made in the construction of the former, including ports and railways, while the latter remains largely in the planning stages and needs the completion of the eastern phase of the corridor. This step requires enhanced cooperation for the development of infrastructure between the UAE and Saudi Arabia.



(Haidar Mohammed Ali - Anadolu Agency)

The Development Road's starting point, Al Faw Port in the Persian Gulf, is advancing through a three-stage process. The first stage, which aims to make the port operational, is nearing completion, with a target to be fully operational by 2025. The second stage envisions the creation of an industrial zone around the port. The General Company for Ports of Iraq has already started [awarding](#) contracts to various companies, including an agreement [signed](#) in April 2024 with the Emirati company AD Group, intended to accelerate infrastructure development around Al Faw Port. This phase includes the construction of a gas treatment plant, a grain warehouse, a steel plant, and a refinery. The final phase involves the construction of Al Faw city, which will follow the completion of the earlier stages. The successful completion of the port's first phase will serve as a crucial test for investor confidence in the overall Development Road project. At this stage, the construction and infrastructure developments and signed agreements for the surrounding area indicate a promising future for the project.

Additionally, Iraq is repairing existing railway routes and planning a new railway extending to Türkiye as part of the Development Road's railway segment. Such an endeavour includes the construction of a 1,175 km electrical railway and the restoration of a line from Mosul to Türkiye's south-eastern province, Gaziantep. This railway is [projected](#) to increase capacity from 3.5 million to 7.5 million containers annually and from 22 million tons to 33 million tons of cargo, potentially transporting approximately 13 million passengers as well. It represents a critical land connection for the Development Road, facilitating goods and passenger flow.

Furthermore, the Turkish Minister of Transport and Infrastructure, Abdulkadir Uraloğlu, has recently [highlighted](#) the Via Carpatia Highway Project in the context of the De-

velopment Road's land connection phase to European cities. This 712 km highway project, planned under the Three Seas Initiative, will directly connect Türkiye to the Middle Corridor. It will start from Klaipeda Port in Lithuania and extend to Istanbul, passing through Poland, Slovakia, Hungary, Romania, and Bulgaria to the port of Thessaloniki. The project, expected to be completed by 2027, is anticipated to enhance Türkiye's global competitiveness and create significant economic opportunities, facilitating the Development Road's extension to Europe through Türkiye.

From a feasibility perspective, these concrete projections underscore that the Development Road is significantly more advanced than IMEC. For IMEC, while some bilateral and multilateral framework [agreements](#) have been made (i.e. the recent framework agreement between the UAE and India in February), the participants have not committed to definitive deadlines for port or land connections. The eastern segment of IMEC, involving substantial infrastructure investments by India, Saudi Arabia, and the UAE, prioritises establishing land connectivity and is going to be a litmus test for the future trajectory of the overall initiative. Despite the absence of major security risks at the ports, IMEC faces significant [challenges](#) in its land and rail connections. A 2000 km railway from the UAE to Haifa is required, with several missing links. The UAE is continuing to construct railways from its ports towards the Saudi Arabian border under the Etihad Rail Project, and Saudi Arabia is progressing with the construction of the North-South railway project. Of the total 2,915 km rail route from Fujairah Port to Haifa, 1,095 km remains incomplete, with 536 km under construction, leaving 559 km yet to be built. Similarly, the proposed rail routes from Jebel Ali Port to Haifa span 2,565 km, with 745 km lacking connectivity, though work is already underway on 186 km.

In addition to the feasibility comparison regarding existing

infrastructure and land connectivity, it is almost certain that the Development Road project will be realised earlier than the IMEC initiative. This likelihood necessitates considering it as another critical feasibility metric for evaluating the future of both projects.

The implementation of the Grand Al Faw Port as part of the Development Road project is expected to cause a significant shift in the Gulf's trade network. Countries such as Saudi Arabia, the UAE, and Qatar view Iraq as a key destination for [foreign investment](#), particularly in infrastructure, energy, and real estate sectors.

In June 2023, Qatar's Emir, Sheikh Tamim bin Hamad Al Thani, visited Baghdad and [pledged](#) \$5 billion in investments. Similarly, in May 2023, Saudi Arabia's Public Investment Fund announced the establishment of a \$3 billion unit to invest in various sectors across Iraq. Furthermore, Turkey reiterated its goal to increase investments and bilateral trade volume with Iraq during President Erdoğan's recent official visit. With Iraq attracting substantial foreign investments, Baghdad is likely to find it much easier to secure funding for the Development Road project. In this way, Development Road is expected to begin its operational stage well before the IMEC, and a significant portion of the Gulf trade network can be directed to this route.

Discussing Iraq's increasing foreign investments and the growing interest in the Development Road project necessitate a closer examination of the factors that enhance its feasibility compared to its competitors. The optimism surrounding the IMEC project was significantly dampened by regional escalation risks, notably highlighted by the war in Gaza and Houthi attacks in the Red Sea that can be seen as the expansion of the war. In response, in December 2023, the Israeli logistics firm Trucknet [announced](#) the development of a land corridor from UAE and Bahraini ports to Israel via Saudi Arabia and Jordan. This development reflects efforts to maintain connectivity amidst high regional insecurity.

Despite [reports](#) from pro-Iran Al Mayadeen claiming the nonexistence of such a land bridge, they also paradoxically [reported](#) that the Iranian-backed group, The Al-Ashtar Brigades, attacked Trucknet's office in Bahrain with drones. This shows that claims about the existence of such a land bridge are highly true. Trucknet's solution indicates ongoing efforts by IMEC stakeholders—UAE, Saudi Arabia, and Israel—to ensure regional connectivity amid the war in Gaza. [Deals](#) signed in December 2023 between the Emirati company Puretrans and the Egyptian WWCS aim to establish a land connection from Gulf ports to Israeli ports, bypassing Houthi attacks in the Red Sea. However, there is limited photographic or video evidence of this corridor, and it is primarily restricted to truck transportation, not the

rail network envisioned for IMEC. It is also noteworthy to mention that the public opinion in the Arab world now is not conducive for the officials to explicitly announce any such development that can be potentially interpreted as siding with Israel.

Considering these developments, a detailed analysis with the latest information and updates on how such mega connectivity projects like IMEC and the Development Road project are progressing, and the potential impacts of the land corridor designed by Trucknet would be more accurate and insightful.

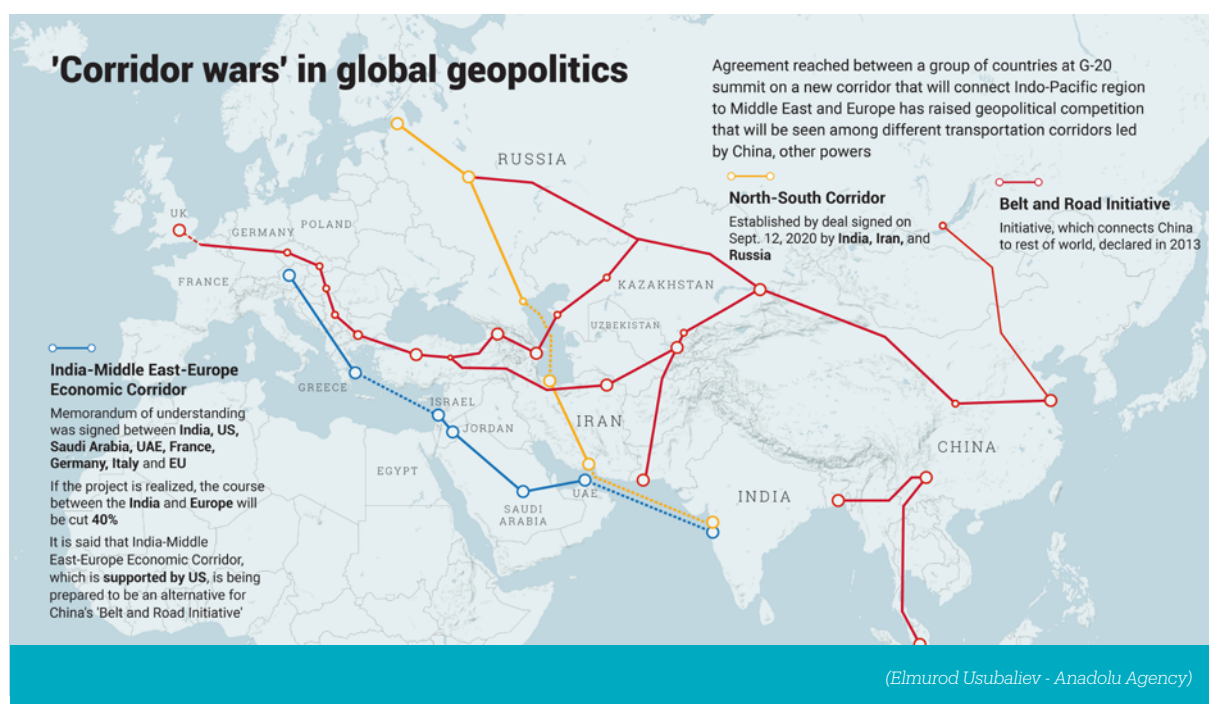
3. Global Power Competition Perspective

From a security and feasibility perspective, it is essential to also analyse and compare the Development Road and IMEC initiatives through the lens of global power competition. Trade corridors have emerged as new forms of power in the evolving landscape of global rivalries. The IMEC project is essentially an extension of the G-7's Partnership for Global Infrastructure and Investment at the macro level and a continuation of the Arab-Israeli normalisation initiated by the Abraham Accords during the Trump administration, further developed under the Biden administration with the I2U2 partnership. Globally, IMEC is positioned as a [counter](#) to China's Belt and Road Initiative (BRI).

However, viewing IMEC solely as an anti-BRI initiative is flawed. Unlike IMEC, BRI extends beyond constructing transport routes to facilitate trade; it is a comprehensive strategy for expanding China's influence through a network of infrastructure projects across various continents, an effort sustained for over a decade despite criticisms. While some Washington think tanks like to position IMEC against BRI, this approach is not realistic, considering China's growing economic clout, East Asia's economic boom, and the gradual decline of American grip over global economic output in the past two decades.

This situation has prompted many countries to avoid siding with one or the other protagonist but rather manoeuvre with both sides depending on their own national interests. For instance, [Gulf countries](#) welcome Chinese investments while maintaining security ties predominantly with the US, as evidenced by arms trade and widespread American military presence.

Conversely, the Development Road project can be viewed as a tangible manifestation of middle powers leveraging their geopolitical advantages and proactive foreign policies to carve out their roles in this new era of global power competition. Türkiye exemplifies this by utilising its strategic location and dynamic foreign policy, includ-



ing counter-terrorism efforts and developing a national defence industry, to assert itself globally. Türkiye signals its stance through calls for structural reforms in the UN Security Council and engaging in multilateral agreements with regional countries. The collaboration with Iraq on the Development Road, including partners like the UAE and Qatar, might attract more regional stakeholders in the future. This project, therefore, highlights Türkiye's ambition to address regional security challenges independently and

establish itself as a key player in the emerging competition over strategic corridors without relying on any major power ally or receiving any criticism from neighbouring countries as experienced in the past when Iraqi authorities widely characterised cross-border operations against PKK as a violation of its sovereignty. This new era opens a new chapter in bilateral relations, which would differ from the previous experiences.

Conclusion

In conclusion, the Development Road and IMEC are significant initiatives for regional and global connectivity. Each presents distinct scenarios and evaluations when examined from security, feasibility, and global power competition perspectives.

The Development Road, starting from Iraq and aiming to facilitate the flow of goods to European markets through Türkiye, is expected to become operational soon. This expectation is linked to the progress of cross-border operations aimed at eliminating PKK terrorism and the completion of the necessary infrastructure networks. On the other hand, IMEC remains largely in the conceptual phase, currently limited to strategic framework agreements among collaborating partners. The completion of the first phase, which requires constructing new railways to ensure land connectivity between the UAE and Saudi Arabia, is crucial for understanding IMEC's trajectory.

The regional spread risk of the conflict in Gaza has dampened hopes for the project, and it is currently being bolstered through micro-level agreements. The United States' positioning of IMEC as a competitor to China's Belt and Road Initiative (BRI) will likely provoke a response from China, given the multipolar and multi-aligned nature of the current international power structure. Forcing countries into unconditional alliances with one bloc could backfire.

In summary, the Development Road and IMEC highlight that trade corridors are now becoming key metrics in the international power system, alongside conventional indicators of hard power such as nuclear armament, missile range, and military personnel and equipment. This shift underscores the evolving dynamics of global power and the importance of connectivity projects in shaping future geopolitical landscapes.

