

Beyond the corridor: IMEC as a network of routes



By Afaq Hussain and Maisoon H. Kafafy



Atlantic Council

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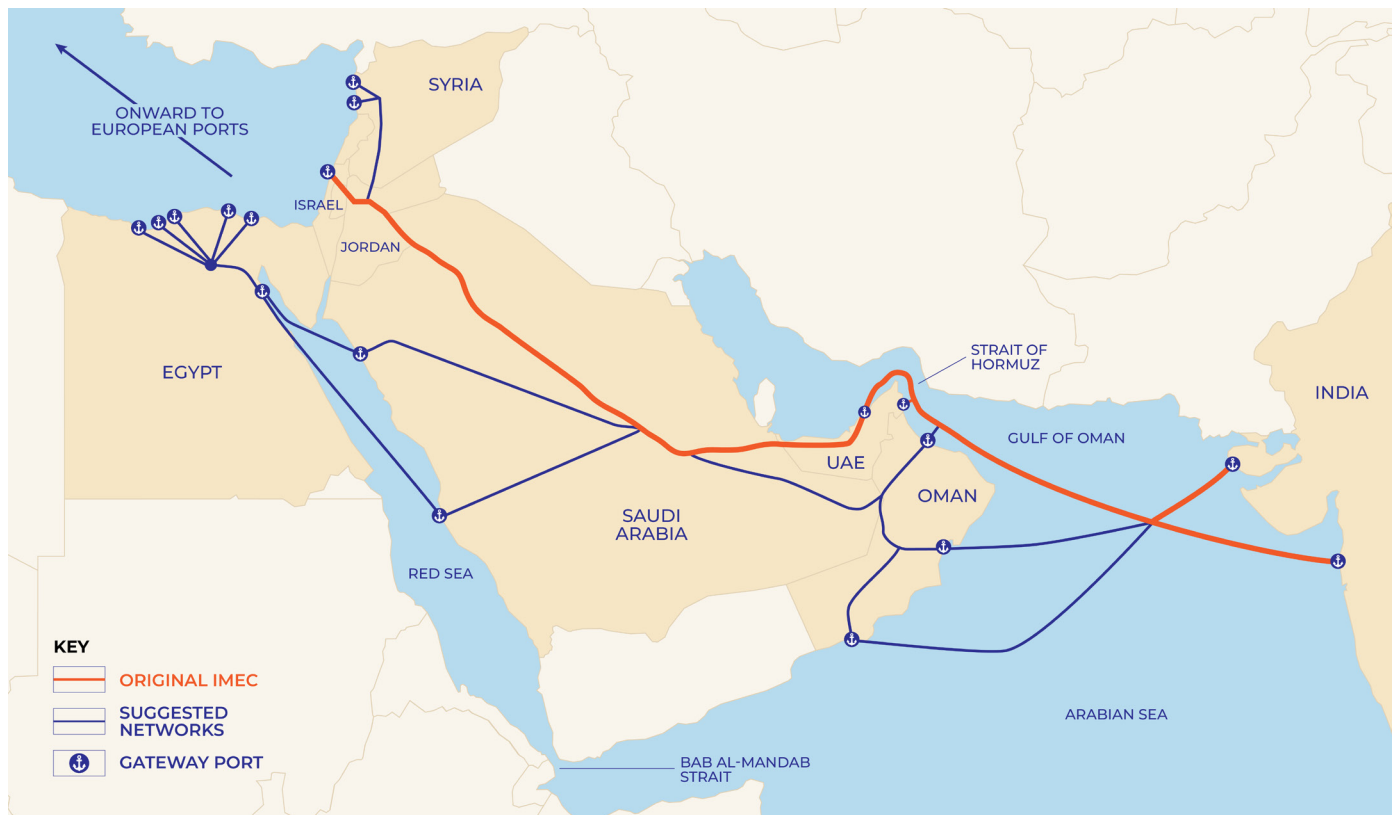
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Bottom lines up front

An expanded India–Middle East–Europe Economic Corridor, or IMEC, could replace roughly 60 percent of the container traffic that flows through the Strait of Hormuz.

Building out connected networks with nodes in Oman, Saudi Arabia, Egypt, and Syria could unlock upward of \$330 billion in trade.

This networked approach to the IMEC project hedges against the kind of disruption caused by the Houthi attacks in the Red Sea and the closure of the Strait of Hormuz.



Executive summary

At the 2023 Group of Twenty (G20) summit in New Delhi, Saudi Arabia, the European Union, India, the United Arab Emirates (UAE), France Germany, Italy, and the United States announced plans to build a multimodal transportation spine connecting India to Europe through the Gulf—the India–Middle East–Europe Economic Corridor (IMEC). A 2025 Atlantic Council report on IMEC established its economic rationale and mapped the political conditions require to realize a corridor with the capacity to carry an estimated 1.5 million twenty-foot equivalent units (TEUs) annually.¹ This report builds on that foundation—not to relitigate the case for IMEC, but to extend it. The corridor as originally conceived remains unrealized as the United States and Israel’s war with Iran continues, causing disruptions at the Jabel Ali port in Dubai as well as other parts of the Gulf. The February 2026 closure of the Strait of Hormuz produced the largest oil supply disruption in recorded history and is the latest in a series of disruptions to Middle East maritime chokepoints in recent years, reinforcing the case for IMEC as a hedge against future disruptions.

While IMEC’s core Middle East artery from the UAE to Haifa Port in Israel remains central, this report looks at IMEC as a broader network of corridors, exploring four nodes—Oman, Saudi Arabia, Egypt, and Syria via Jordan—that could be operationally credible additions to the corridor.

- Oman offers a maritime gateway entirely outside the chokepoints at the Strait of Hormuz and Bab al-Mandab, anchored by three deepwater ports.
- Saudi Arabia is the corridor’s structural backbone, and its Red Sea ports at Jeddah and Neom constitute viable alternative exits to the blocked northern route.
- Egypt is the corridor’s capable but underutilized node: its Mediterranean port cluster is being built to transshipment-hub scale and its Red Sea-to-Mediterranean rail spine is under construction.

- Syria, following Bashar al-Assad’s ouster and with the entry of shipping and logistics giants DP World and CMA CGM under thirty-year port concessions at Tartus and Latakia, offers a second Eastern Mediterranean exit that adds redundancy at the corridor’s European-facing terminus.

Together, these nodes provide approximately twenty million TEUs of annual Mediterranean exit capacity, approximately 60 percent of overall containers passing through the Strait of Hormuz, which could significantly scale up the IMEC’s handling capacity.²

Together, these nodes are estimated to underpin upward of \$330 billion in enabled trade directly relevant to the corridor’s throughput capacity and commercial potential.³ This potential demands a broader network of rail-road linkages and ports—a network architecture that preserves the original route’s potential while distributing political risk, multiplying throughput capacity, and maintaining continuity when individual nodes are disrupted. This report defines the expanded roadmap’s core nodes and sets out a stakeholder activation matrix alongside cross-cutting recommendations and constraints across political and diplomatic, regulatory and customs, commercial and financing, infrastructure and technical, and security and stability domains.

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1. Afaq Hussain and Nicholas Shafer, “The India–Middle East–Europe Economic Corridor: Connectivity in an Era of Geopolitical Uncertainty,” Atlantic Council, August 27, 2025, <https://www.atlanticcouncil.org/in-depth-research-reports/report/the-india-middle-east-europe-economic-corridor-connectivity-in-an-era-of-geopolitical-uncertainty/>.
 2. These calculations are based on: “Introduction,” World Integrated Trade Solution, World Bank, last visited June 4, 2026, <https://wits.worldbank.org/>; “Container Shipping via Strait of Hormuz under Pressure: Can GCC Bypass Ports Fill the Gap?” Hellenic Shipping News, March 17, 2026, <https://www.hellenicshippingnews.com/container-shipping-via-strait-of-hormuz-under-pressure-can-gcc-bypass-ports-fill-the-gap/>.
 3. Authors’ calculations using the same methodology cited earlier. This value does not include oil trade as the transportation corridor is relevant for the merchandise trade.

Introduction

The India–Middle East–Europe Economic Corridor was announced on September 9, 2023, at the G20 summit in New Delhi, through a memorandum of understanding (MOU) signed by India, the United States, the European Union, Saudi Arabia, the UAE, France, Germany, and Italy. The corridor was conceived as a multimodal spine—combining maritime shipping, rail, road, fiber-optic cables, and energy pipelines—connecting India’s western ports to Europe through the Gulf and the Levant. Its two-part structure comprised an Eastern Corridor linking India to the Arabian Gulf by sea, and a Northern Corridor carrying goods overland through Saudi Arabia, Jordan, and Israel to Haifa Port, from which short-sea shipping would complete the journey to terminals in Greece, Italy, and France.

The strategic logic was threefold. First, IMEC offered a direct counter to China’s Belt and Road Initiative (BRI), providing participating governments with a values-aligned alternative connectivity framework anchored in US–India–Gulf–European cooperation. Second, it encourages practical cooperation between Israel and Arab countries. By focusing on infrastructure such as railways, ports, and energy links, it creates space for economic and strategic ties even where full political normalization is still developing. Third, for the Gulf states—particularly Saudi Arabia and the UAE—IMEC aligned with Vision 2030 diversification objectives, positioning them as global logistics hubs rather than purely as energy exporters.

Within weeks of its announcement, IMEC stalled. The October 7, 2023, Hamas attacks on Israel and the subsequent war in Gaza halted Saudi–Israeli normalization talks—an important enabling condition for the Northern Corridor’s overland segment. At the same time, attacks on shipping in the Red Sea by the Houthis, which began in late 2023, reduced traffic through the Suez Canal by 50 percent and exposed how fragile global trade routes can be.⁴ Any remaining ambiguity about the region’s exposure to cascading chokepoint failures was removed after the February 2026 disruption of the Strait of Hormuz, which stranded more than 900,000 TEU of container capacity and produced the largest oil supply disruption in recorded history.⁵ Under normal conditions, the Strait of Hormuz handles 33 million TEU annually (3.5 percent of global container trade) and twenty million barrels of oil per day (20 percent of seaborne energy supply).⁶ These disruptions confirmed the rationale for IMEC and the case for redundancy its architects made in 2023.

The realization of an adaptive regional economic ecosystem hinges on redundancy and resiliency. Projects like the IMEC follow this rationale, which is aimed at strengthening the regional economic architecture. As such plans materialize into actionable policy goals and infrastructure projects, it is important to explore their full potential to expand into a web of interconnected trade routes that connect regional hubs and peripheral markets to one another.

This report explores three specific corridor extensions that add to the original IMEC route. These are

- the Oman lateral, which expands IMEC’s capacity by offering an adjacent route to the UAE that channels Asian trade through the Gulf and onward to Europe;
- the Egypt route, which carries strategic weight—leveraging existing Red Sea entry points and Suez infrastructure to create a direct Red Sea-to-Mediterranean link; and
- the Syria route, where reconstruction unlocks an additional Mediterranean outlet and reintegrates a pivotal land bridge into the network.

Each extension is examined for its individual strategic value and its contribution to the network as a whole.

The network approach allows increased capacity options, reduced exposure to political instability and trade disruptions, and the acceleration of regional connectivity. This configurability also produces better unit economics. Shared infrastructure investment across multiple corridors distributes capital expenditure, while competitive optionality between routes creates downward pressure on transit fees and logistics costs.

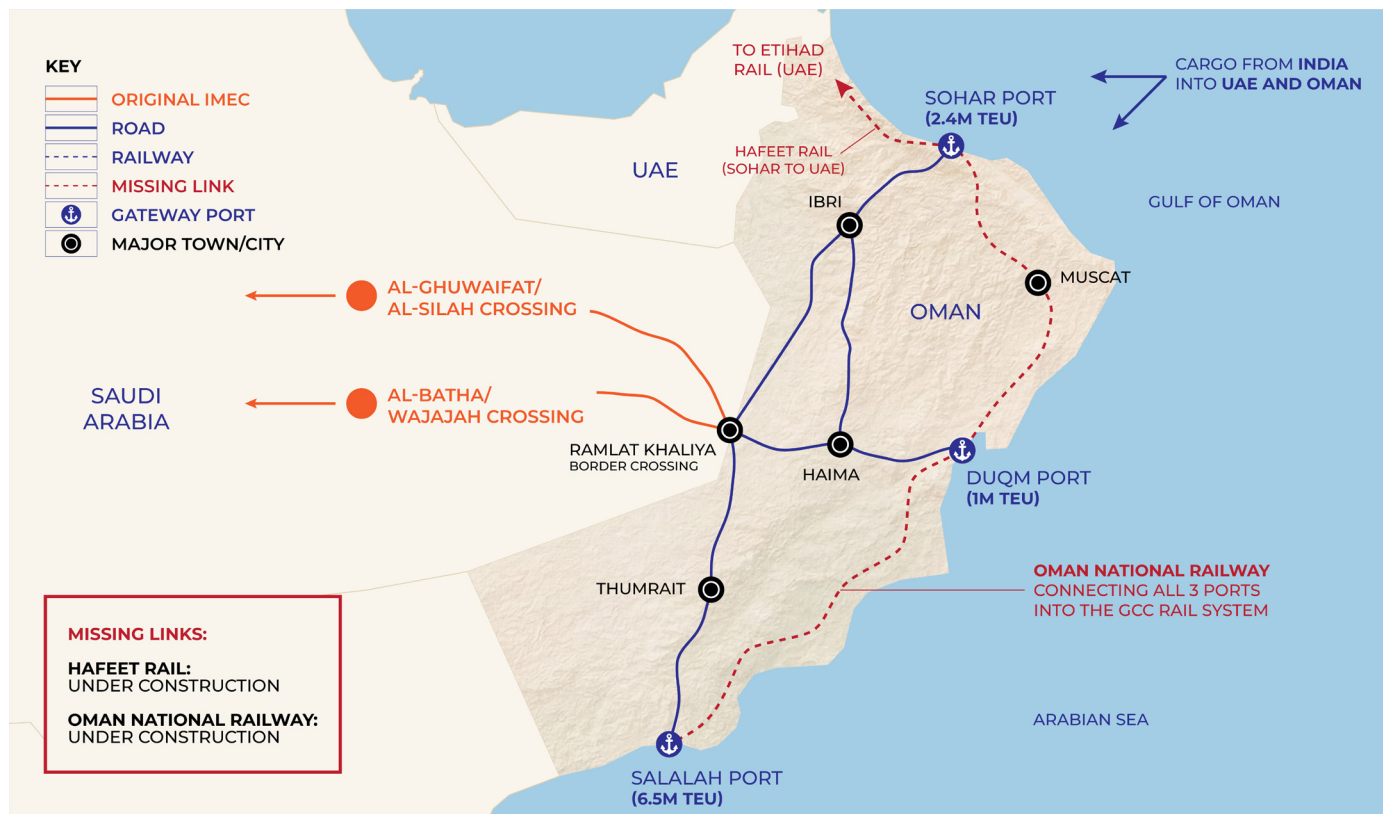
4. Parisa Kamali, et al., “Red Sea Attacks Disrupt Global Trade,” International Monetary Fund, March 7, 2024, <https://www.imf.org/en/blogs/articles/2024/03/07/red-sea-attacks-disrupt-global-trade>.

5. “Dual Chokepoint Crisis: Why the Hormuz Blockade Is Qualitatively Different from the Red Sea Disruption,” Container Management, March 1, 2026, <https://container-mag.com/2026/03/01/strait-of-hormuz-closure-container-shipping-dual-chokepoint-crisis/>.

6. “Amid Regional Conflict, the Strait of Hormuz Remains Critical Oil Chokepoint,” US Energy Information Administration, June 16, 2025, <https://www.eia.gov/todayinenergy/detail.php?id=65504>.



Oman as a complementary gateway



Strategic geography and corridor role

Oman borders the UAE, Saudi Arabia, and Yemen at the south-eastern tip of the Arabian Peninsula, with a 3,165-kilometer (km) coastline spanning the Gulf of Oman and the Arabian Sea.⁷ Oman's geographic position gives it a unique advantage among the Gulf Cooperation Council (GCC) countries because it operates ports outside the Strait of Hormuz, the world's most critical maritime chokepoint. In 2025, Omani ports handled 143 million tons of cargo, driven by organic growth and cargo diversions away from Hormuz.⁸ While IMEC connects India, the UAE, Saudi Arabia, Jordan, Israel, and Europe, Oman's geography positions it as an additional entry point into the same multi-modal connectivity ecosystem. In fiscal year (FY) 2024–2025,

India–Oman bilateral trade reached \$10.6 billion, supplemented by the India–Oman Comprehensive Economic Partnership Agreement (CEPA).⁹ The agreement further integrates Oman's ports into Asian supply chains, making them a credible alternative gateway for IMEC oriented trade flows.

Entry points: The three gateway ports

Oman's port infrastructure is anchored by three key ports—Sohar in the north, Salalah in the south, and Duqm in the center—which serve distinct geographic, functional, and cargo type roles. Together they constitute the backbone of the national logistics system, offering world class container handling, extensive industrial free zones, and deep water berths. A wave

- Annem Naga Bindhu Madhuri, "Oman's Integration into IMEC: Strategic Imperatives for Enhancement of the IMEC Eastern Corridor," National Maritime Foundation, July 9, 2025, <https://maritimeindia.org/omans-integration-into-imec-strategic-imperatives-for-enhancement-of-the-imec-eastern-corridor/>.
- "Oman Strengthens Its Maritime Position: Growth in Ship and Cargo Traffic at Ports in 2025," Oman Ministry of Transport, Communications and Information Technology, August 17, 2025, <https://mtcit.gov.om/media-4/news-announcements-11/news-85/oman-strengthens-its-maritime-position-growth-in-ship-and-cargo-traffic-at-ports-in-2025-354>. Note: The 2024 official figure is 137 million tons; the 2025 full-year figure is pending National Center for Statistics and Information (NCSI) confirmation.
- "India–Oman CEPA: What the New Trade Deal Means for Exports, Services and Jobs," Government of India Press Information Bureau, January 10, 2026, <https://www.pib.gov.in/PressNoteDetails.aspx?NotelD=156893&ModuleId=3®=3&lang=1>.

Table 1. Oman port overview—key indicators¹⁰

Port	Location	Water Body	Current capacity (TEU/yr)	Post-expansion capacity (TEU/yr)
Sohar	N. Oman, Al Batinah	Gulf of Oman	2.4M	No official plan
Salalah	S. Oman, Dhofar	Arabian Sea	6.5M	7.5M (Proposed)
Duqm	C. Oman, Al Wusta	Arabian Sea	1M	1.7M (Phase 1)
Total			9.9M	11.6+M

of recent investments—spanning terminal expansions, new industrial complexes, and green energy projects—is rapidly transforming these ports from traditional origin destination facilities into integrated multimodal hubs.

Internal infrastructure: Road and rail

All three ports connect to the national highway network leading to the Oman–Saudi Arabia border crossing at Ramlat Khaliya. Salalah’s location on the Arabian Sea also allows maritime routing via the Red Sea. The Empty Quarter Highway (which opened in February 2026) gives Sohar a direct overland route to the border, making it the primary land bridge departure point.

A new rail line, Hafeet Rail, will further establish Oman as an efficient Gulf gateway and integrated overland node for IMEC. Hafeet Rail will be the first cross border railway in the Gulf, creating a seamless rail connection between Sohar Port and the UAE’s Etihad Rail network, which connects onward to the Saudi rail system. Extending the GCC rail system directly to

the Arabian Sea with a 238 km line, the rail will reduce freight transit from Sohar to Abu Dhabi to just one hundred minutes, and each freight train will be capable of carrying fifteen thousand tons (about 270 TEU).¹¹ Although there is no clear timeline for completion, the project is on track with around 40 percent completion announced.

Missing link

Hafeet Rail is under construction and will be the first cross-border railway in the Gulf. Until its completion, Oman’s integration into the GCC rail spine remains partial, with onward connectivity dependent on completion of this link and the broader Oman National Railway network.

10. “15 Years of Growth: Hutchison Ports Sohar Elevates Trade in Oman,” Times of Oman, November 30, 2021, <https://timesofoman.com/article/109975-15-years-of-growth-hutchison-ports-sohar-elevates-trade-in-oman>; “About Hutchison Ports,” Hutchison Ports Sohar, last visited June 4, 2026, <https://www.oict.com.om/aboutus-hutchisonports.php>; “Port of Salalah Celebrates Milestone Expansion,” APM Terminals, press release, February 19, 2025, <https://www.apmterminals.com/en/news/news-releases/2025/250219-salalah-milestone-expansion>; “Omani Ports Boost Economy with 137M Tons and 4.2M TEUs in 2024,” Oman Ministry of Transport, Communications and Information Technology, April 12, 2025, <https://mtcit.gov.om/media-4/news-announcements-11/news-85/omani-ports-boost-economy-with-137m-tons-and-4-2m-teus-handled-in-2024-183>; “Asyad Ports Unveils Cutting-Edge Container Terminal at Duqm,” Zawya, press release, January 23, 2024, <https://www.zawya.com/en/press-release/companies-news/asyad-ports-unveils-cutting-edge-container-terminal-at-duqm-i2ov67ds>.
11. “The Region’s First Cross Border Rail Network,” Hafeet Rail, last visited June 4, 2026, <https://www.hafeetrail.com/>; “About Etihad Rail,” Etihad Rail, last visited June 4, 2026, <https://www.etihadrail.ae/en/about/about>.



REUTERS/Jose Luis Gonzalez

Border crossings and regulation

Context and framework

Regulatory posture shifted decisively toward transit facilitation in 2025–2026, driven by Red Sea disruption and the Strait of Hormuz closure.

Two measures define the current framework: the Transit Cargo Facilitation Package by Royal Oman Police in March 2026 and the Bayan Single-Window System.

Transit Cargo Facilitation Package: Empty containers enter and exit without customs declaration (scanning only); transit declarations are processed electronically via unified booking number; GCC-origin vehicles require transit declaration only; transit bond mechanism applies for overland cargo to Saudi Arabia, released upon confirmed border exit.¹²

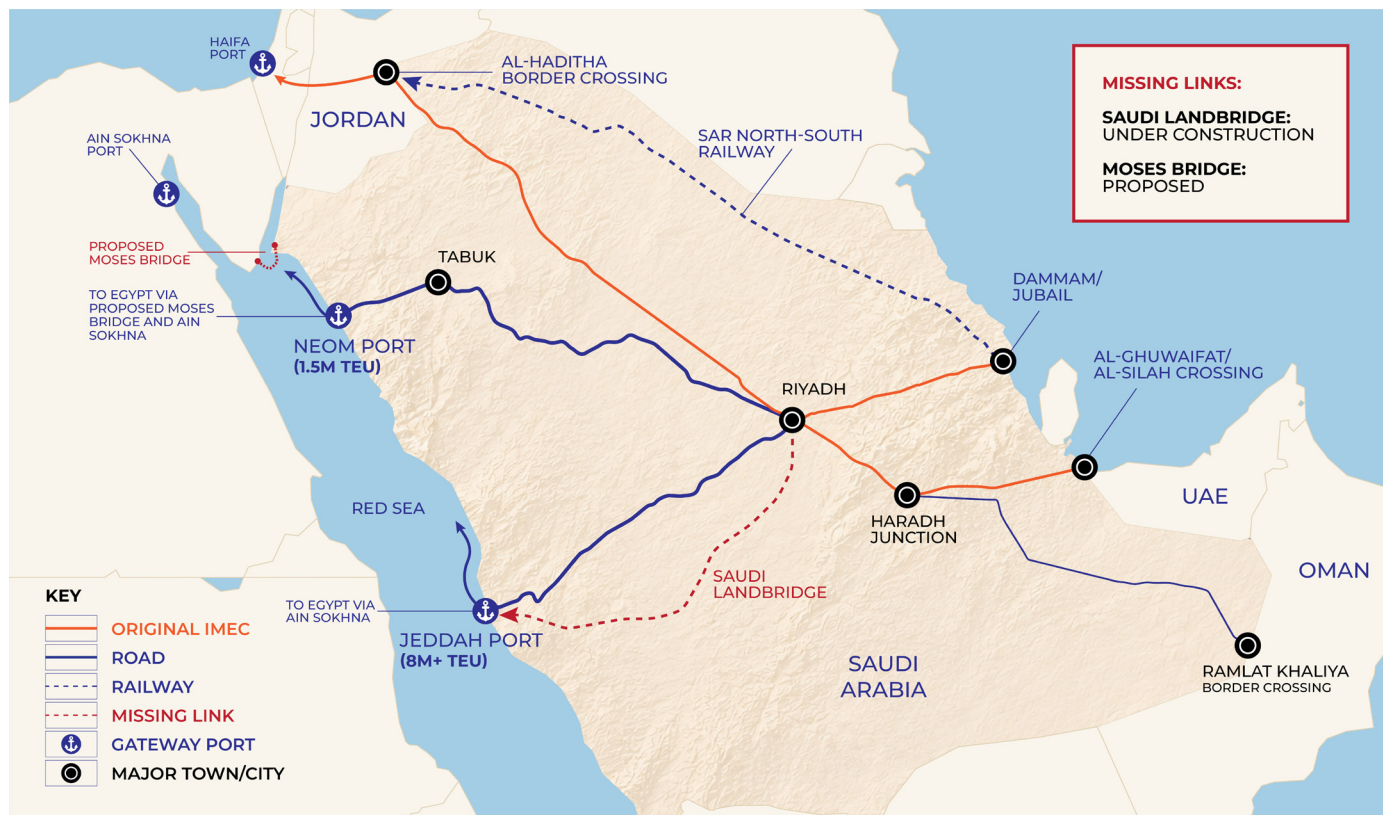
Operational detail

Bayan Single-Window System: The platform is mandatory for all customs declarations, transit submissions, and clearance applications. It integrates with port e-gate systems—released containers exit in less than ten minutes post-clearance.¹³

12. “Oman Customs Announces New Customs Facilities for Transit Goods,” Muscat Daily, March 31, 2026, <https://www.muscatdaily.com/2026/03/31/oman-customs-announces-new-customs-facilities-for-transit-goods/>.

13. “Oman Country Commercial Guide: Customs Regulations,” US International Trade Administration, last updated December 18, 2025, <https://www.trade.gov/country-commercial-guides/oman-customs-regulations>.

Saudi Arabia as IMEC's structural backbone



Strategic geography and corridor role

Under the original IMEC framework, Saudi Arabia is not just a transit corridor but the structural backbone of the route, as goods moving from the UAE to Jordan and onward to Europe pass entirely through its territory, making it the largest geographic component. It connects the Gulf's eastern entry point anchored by Jebel Ali Port to western Red Sea hubs like Jeddah Islamic Port and Neom, serving both as a through corridor and distribution hub. In the original corridor, Saudi Arabia's internal route runs from the UAE border crossing at Al Ghuwaifat northward through the kingdom to the Jordanian border at Al-Haditha—a 1,300 km overland arc that was conceived primarily as a rail corridor linking Etihad Rail in the UAE to a future Saudi–Jordan rail connection and onward to Haifa Port via the Hejaz Railway spine.

Entry points: UAE and Oman

Freight entering Saudi Arabia from the UAE converges at two primary crossing points before distributing across the national highway network. The Al Ghuwaifat–Al Silah crossing on the E11 highway is the dominant land freight artery, handling the bulk of Abu Dhabi–Jeddah corridor traffic. The Al Batha–Wajjah crossing serves secondary flows from the Al Ain–Buraimi region, including cargo originating from Oman's Sohar port and transiting through the UAE.

Internal infrastructure: Road and rail

The internal road network runs 1,800 km from the Ramlat Khaliya border crossing through the Rub' al-Khali to Haradh Junction, then onward to Riyadh and Jeddah Islamic Port. The 564 km Ramlat Khaliya–Haradh stretch crosses the Empty Quarter via a dedicated desert highway, bypassing longer coastal de-

tours.¹⁴ The full crossing can be completed by truck in roughly 22–24 hours.¹⁵

Rail connectivity remains the corridor’s most consequential infrastructure gap. The Saudi Landbridge—a 950 km railway linking Riyadh to Jeddah, with extensions to Dammam and major industrial hubs—would transform Saudi Arabia from a road-dependent transit corridor into a fully integrated rail spine connecting the Arabian Gulf to the Red Sea.¹⁶ A completed Saudi rail corridor linking Etihad Rail in the east to Jeddah and Neom in the west would create a continuous rail artery from India’s ports through the Gulf, across Saudi Arabia, and onward to Egypt and the Mediterranean. The project is targeted for a 2034 completion.

Missing link

The Saudi Landbridge would compress the current 22–24-hour truck journey to less than ten hours, with projected freight capacity exceeding 50 million tons per year.

Border crossings and regulation

Context and framework¹⁷

Saudi Arabia’s regulatory framework is anchored by the Zakat, Tax and Customs Authority (ZATCA), which has pursued a dual agenda of digital standardization and trade facilitation through 2025–2026.

Four measures are operationally relevant to corridor freight: a digital single-window clearance system, a mandatory product conformity platform, an updated customs procedures framework, and a vehicle age restriction on commercial trucks.

Fasah platform: The primary single-window clearance system across sea, air, and land ports, integrating customs, port authorities, and government agencies into a unified digital interface.

Saber platform: The mandatory conformity assurance platform for regulated product imports; revised Harmonized System tariff codes took effect January 1, 2026, and importers must verify their Saber registrations against the new code list before shipment—existing certificates of conformity remain valid.

Customs procedures: ZATCA issued updated customs regulations accompanied by more than 130 guidance manuals covering freight forwarders, certificate of origin issuance, bonded zones, land transport registration, and customs clearance professionals.

Vehicle age restriction: Commercial trucks above 3.5 tons transiting Saudi Arabia must not exceed five years of operational life.¹⁹

Operational detail¹⁸

14. “Saudi-Oman Highway: Engineering Marvel in Empty Quarter, Boosting Trade, Tourism,” Saudi Press Agency, July 31, 2024, <https://www.spa.gov.sa/en/N2147240>.
15. “Saudi Landbridge Project Overview,” Saudi Arabia Railways, 2025, <https://www.sar.com.sa/en/>.
16. Sebastian Shehadi, “Saudi Arabia’s \$7bn Landbridge Railway Is Underway. Here’s a Closer Look,” Global Construction Review, October 16, 2025, <https://www.globalconstructionreview.com/saudi-arabias-7bn-landbridge-railway-is-underway-heres-a-closer-look/>.
17. Stephan Bremmer, “Saudi Arabia Updates Customs Tariff Codes in Saber as of 2026,” Pincvision, December 18, 2025, <https://www.pincvision.com/nl/nieuws/saudi-arabia-updates-customs-tariff-codes-in-saber-as-of-2026>.
18. “Saudi Arabia Industrial and Logistics Market Review,” Knight Frank, 2025, <https://www.knightfrank.com.sa/site-assets/research/saudi-arabia-industrial-and-logistics-market-review-h1-2025.pdf>.
19. “Vehicle Import Controls,” Zakat, Tax and Customs Authority, last visited June 4, 2026, https://zatca.gov.sa/en/RulesRegulations/Taxes/Pages/customs_individual/import-vehicles.aspx.



A cargo truck drives through the Saudi-Oman border road crossing in the Empty Quarter. Reuters

Exit points: Jeddah and Neom

The absence of a Jordanian east–west rail link to Israel continues to constrain the original northern IMEC route. In the absence of this route, Saudi Arabia’s Red Sea ports provide western departure points that support trade movement toward the Mediterranean. Jeddah Islamic Port and Neom’s Oxagon terminal together constitute a maritime fork that

gives the corridor its Egyptian dimension. Jeddah Islamic Port currently handles more than eight million TEU annually.²⁰ The Port of Neom represents a \$4 billion commitment to marine infrastructure and container terminal development; it is currently 68 percent complete with a 2026 launch target.²¹

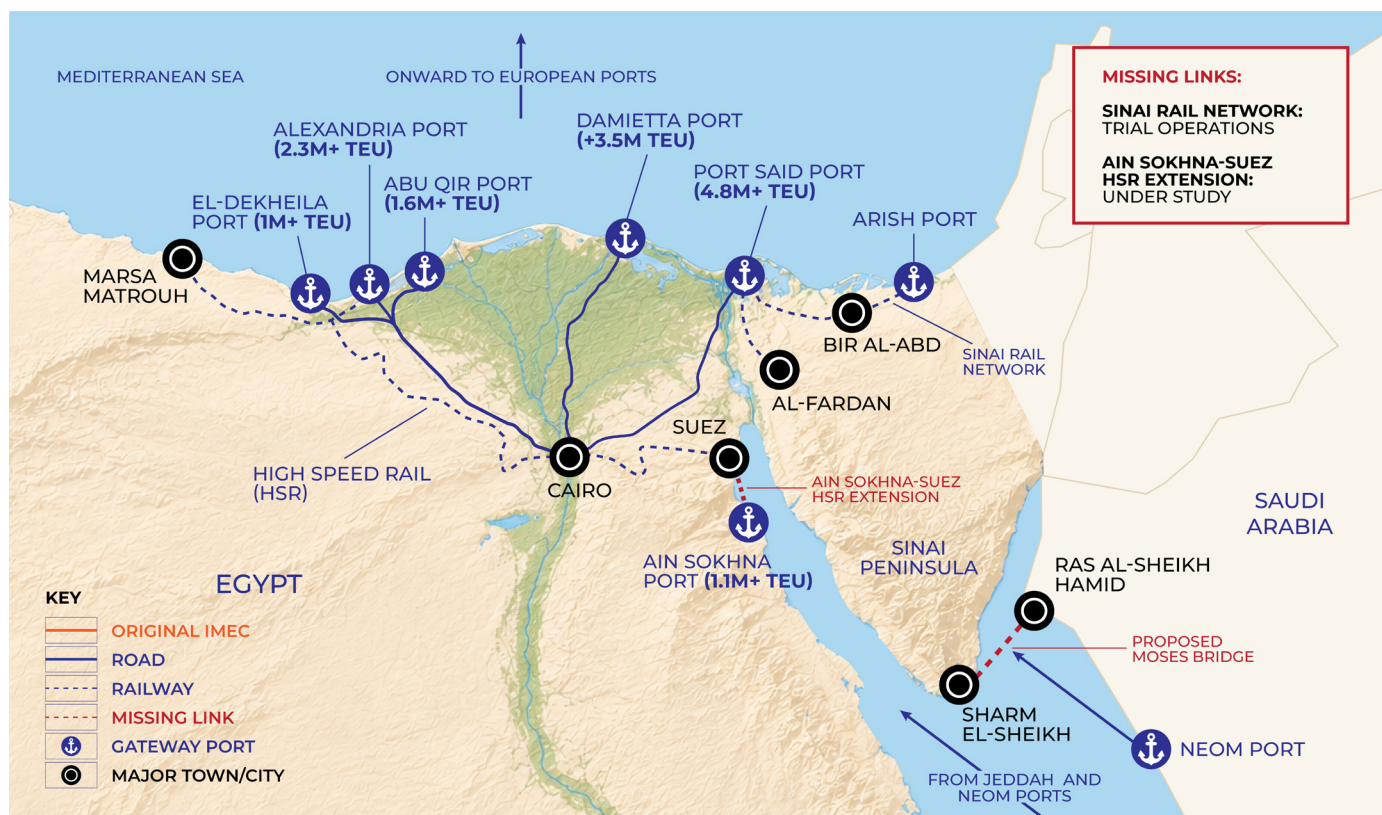
Table 2. Current and projected capacity of Jeddah and Neom ports

Port	Location	Current capacity (TEU/yr)	Post-expansion capacity (TEU/yr)
Jeddah Islamic Port	Jeddah, Red Sea coast	More than 8 million	5 million (DP World terminal long term goal)
			2.6 million (Terminal 4 under development)
			1.8 million (South Container Terminal expansion)
Neom Port	Oxagon, northwest Saudi Arabia, Red Sea	More than 1.5 million (launching 2026)	12 million (long term build out target)
Total		More than 9.5 million	More than 30.9 million

20. “NEOM Green Hydrogen Project,” Acwa, last visited June 4, 2026, <https://acwapower.com/en/what-we-do/projects/neom-green-hydrogen-project/>.

21. “Oxagon: A Reimagined Industrial City,” Neom, last visited June 4, 2026, <https://www.neom.com/en-us/regions/oxagon>.

Egypt as a Mediterranean corridor node



Strategic geography and corridor role

Egypt sits at the junction of the Red Sea and the Mediterranean, with entry points on both the Gulf of Suez and the Gulf of Aqaba and a Mediterranean port cluster spanning Port Said, Alexandria, El Dekheila, Abu Qir, and Damietta. Its corridor infrastructure—a 660 km electrified rail spine under trial operations, expanding Mediterranean terminals, and two active Red Sea entry points—functions as a set of discrete assets rather than an integrated corridor system.²² The integration challenge is connecting these assets into a single system within the regional architecture.

Entry points: Jeddah and Neom–Ain Sokhna

Cargo enters Egypt from two Saudi Red Sea departure points. From Jeddah Islamic Port, vessels transit the Red Sea northward through the Gulf of Suez to Ain Sokhna—Egypt's principal Red Sea commercial gateway, located 43 km south of Suez City and operated by DP World.²³ A terminal expansion currently under way will increase annual container capacity to 1.7 million TEU upon completion.²⁴ From Neom's forthcoming Oxagon terminal on the Gulf of Aqaba, cargo reaches Egypt via the Gulf of Aqaba to the Sinai coast. The proposed Moses Bridge—a 32 km highway-and-rail causeway across the Strait of Tiran, fully financed by Riyadh at an estimated \$4 billion—

22. "Siemens Mobility Signs Historic Contract for Turnkey Rail System in Egypt worth USD 3 Bn," Siemens, press release, September 1, 2021, <https://press.siemens.com/global/en/pressrelease/siemens-mobility-signs-historic-contract-turnkey-rail-system-egypt-worth-usd-3-bn>.
23. "Sokhna Port," Suez Canal Economic Zone, last visited June 4, 2026, <https://sczone.eg/services/ain-sokhna-port/>.
24. Manal Barakat, "Sokhna's RSCT Opens as Egypt's First Semi-automated Container Terminal," Kuehne+Nagel, January 28, 2026, <https://mykn.kuehne-nagel.com/news/article/sokhnas-rsct-opens-as-egypts-first>.

would provide an overland complement to this maritime entry, integrating Saudi and Egyptian rail networks directly.²⁵ Until it is operational, Jeddah–Ain Sokhna remains the corridor’s active entry point.

Internal infrastructure: Road and rail

The Ain Sokhna–Alexandria high-speed electric rail line will significantly enhance the efficiency and capacity of the Egypt overland corridor. It was contracted in September 2021 to a Siemens Mobility, Orascom Construction, and Arab Contractors consortium for \$4.5 billion across a fifteen-year build-and-maintain period.²⁶ The 660 km electrified line connects Ain Sokhna directly to Cairo and onward to Alexandria and Marsa Matrouh on the Mediterranean coast, operating to carry both passenger and freight services. Projected freight throughput upon completion will reach 13–15 million tons annually, against the current conventional network’s 4–5 million tons.²⁷ Trial operations commenced in November 2025.²⁸

In parallel, Egypt revived its Sinai rail network in 2024; once operational, it will provide overland freight connectivity from the Sinai coast to East Port Said on the Mediterranean. Trial operations began in October 2024 on the 100 km Al-Fardan–Bir al-Abd section, the first phase of a 500 km line connecting to

East Port Said and Taba.²⁹ A separate 59 km extension linking Ain Sokhna to Suez City is being studied and would further tighten port-to-rail integration at the canal’s southern mouth.³⁰

Missing link

The Sinai rail network’s full 500 km line and the 59 km Ain Sokhna–Suez extension both remain incomplete. A new rail line extending to connect Arish with Taba on the Gulf of Aqaba—part of Egypt’s Vision 2030—is expected to be completed by 2030.

Border crossings and regulation³¹

Context and framework

Egypt’s customs framework is managed by the Egyptian Customs Authority under the Ministry of Finance. Since 2020, digital transformation has been the organizing principle, centered on two systems: the NAFEZA national single-window and the Advance Cargo Information (ACI) system. Together they have reduced average customs clearance time from fifteen days to five.

Operational detail

NAFEZA (national single-window): Mandatory platform for all import, export, and transit clearance. All shipment documentation must be submitted electronically through NAFEZA before arrival; each shipment receives a unique ACID (advance cargo information declaration), which is required for port release. The platform integrates customs, port authorities, and regulatory agencies into a unified interface.

ACI System: Requires cargo data to be submitted at least forty-eight hours before departure from the country of export, enabling pre-shipment risk assessment. This has been mandatory for sea freight since 2021 and extended to air cargo from January 2026.

25. Agnivesh Harshan, “Saudi Vision 2030: The Moses Bridge Beckons,” Global Business Outlook, June 2, 2025, <https://globalbusinessoutlook.com/economy/saudi-vision-the-moses-bridge-beckons/>.
26. “Orascom Construction Consortium Signs USD 4.5 Billion Contract for Egypt’s First High-Speed Rail System,” Orascom Construction, September 1, 2021, <https://orascom.com/updates/orascom-construction-consortium-signs-usd-4-5-billion-contract-for-egypts-first-high-speed-rail-system/>.
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29. “Egypt Launches Trial Passenger Train Service on Newly Rebuilt Sinai Rail Line,” Egypt Today, October 7, 2024, <https://www.egypttoday.com/Article/1/135213/Egypt-launches-trial-passenger-train-service-on-newly-rebuilt-Sinai>.
30. “The First Line of the High-Speed Train Network (Sokhna–Matrouh),” Egypt National Authority for Tunnels, last visited June 4, 2026, <http://www.nat.gov.eg/LocationActivity.aspx?id=2082>.
31. “ACI and Nafeza: Redefining Egypt’s Trade Routes,” Arab Finance, December 14, 2025, <https://www.arabfinance.com/en/news/newdetails/aci-and-nafeza-redefining-egypt-trade-routes>.

Exit points: Mediterranean port cluster

Egypt's Mediterranean port complex is the corridor's exit infrastructure. East Port Said ranked third globally, and first in the Middle East and North Africa region, on the World Bank's 2024 Container Port Performance Index, handling 3.9 million TEU in 2024.³² The November 2025 expansion of the Suez Canal Container Terminal added 2.2 million TEU of annual ca-

capacity, bringing total installed capacity to seven million TEU.³³ Across all Mediterranean terminals, ongoing expansions will add approximately ten million TEU of annual capacity within three to five years. Alexandria and El Dekheila together processed 74.8 million tons in FY 2024–2025, up 14 percent year on year.³⁴

Table 3. Current and projected capacity of Egyptian corridor ports, including the Red Sea entry point at Ain Sokhna³⁵

Port/terminal	Location	Current capacity (TEU/yr)	Post-expansion capacity (TEU/yr)	Status
Ain Sokhna	Red Sea	1.1 million	1.61 million	Expansion under way
Port Said (SCCT)	Mediterranean	4.8 million	7 million	Expansion complete
Alexandria	Mediterranean	2.3 million	More than 3.5 million	Ongoing expansion
El Dekheila	Mediterranean	1 million	More than 2.5 million (Pier 100 plus existing)	Under construction
Abu Qir	Mediterranean	1.6 million	2.0 million	Hutchison–Evergreen concession
Damietta (DACT)	Mediterranean	Launched February 2026	3.5 million	Commercial operations commenced
Total		10.8 million	20–22 million	

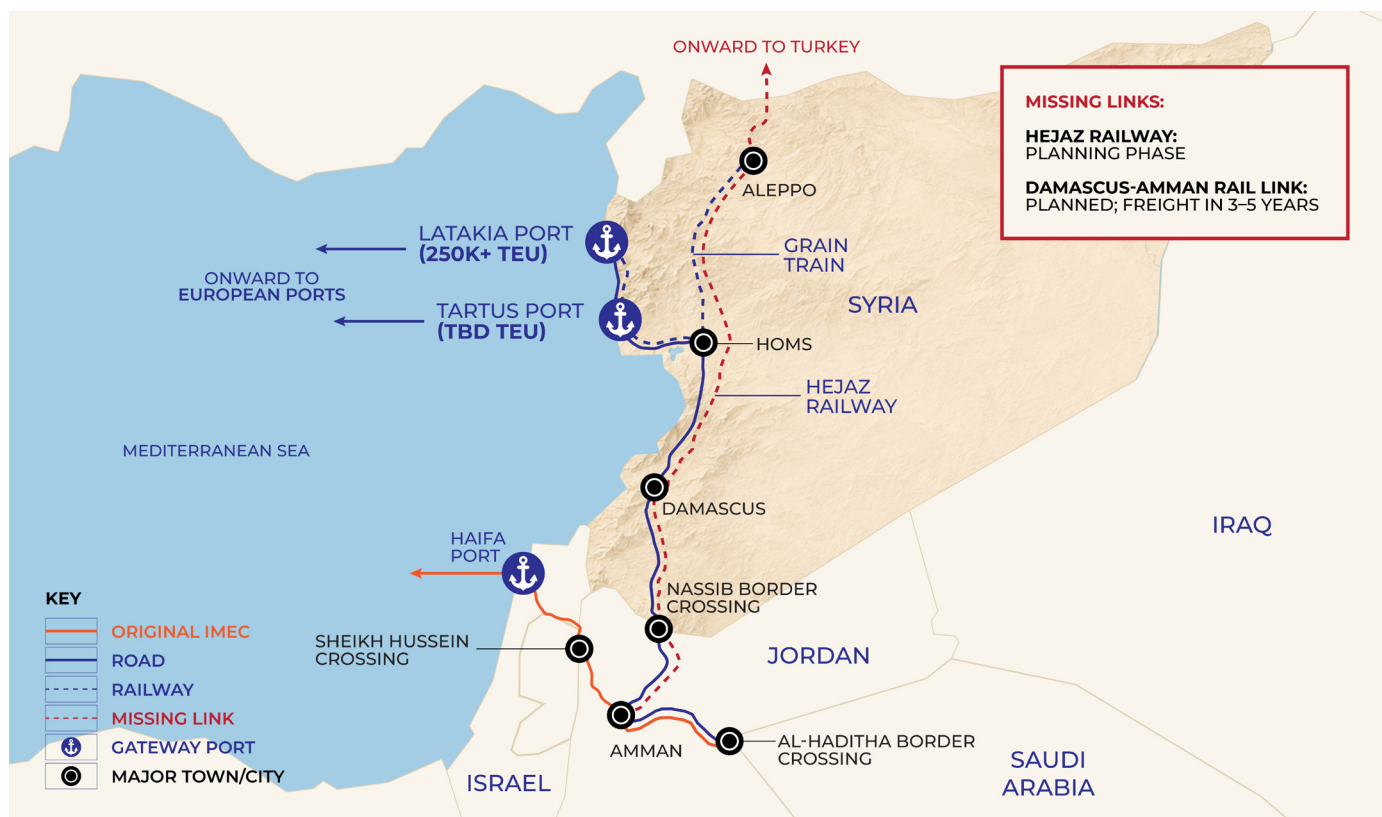
32. “Port Performance Varies Across the Globe Amid Continuing Shocks,” World Bank, press release, September 22, 2025, <https://www.worldbank.org/en/news/press-release/2025/09/22/port-performance-varies-across-the-globe-amid-continuing-shocks>.

33. “APM Terminals in Egypt Celebrates 2.2 Million TEU-expansion,” APM Terminals, press release, November 16, 2025, <https://www.apmterminals.com/en/news/news-releases/2025/251117-SCCT-celebrates-expansion>; “Supported by IFC, Egypt Opens Transformational Second Terminal at East Port Said Port,” International Finance Corporation, press release, November 17, 2025, <https://www.ifc.org/en/pressroom/2025/supported-by-ifc-egypt-opens-transformational-second-terminal-at-east-port-said-po>.

34. “The Alexandria Port Authority Achieves Unprecedented Performance Rates in Ship and Cargo Traffic during 2024/2025,” Alexandria Port Authority, August 2025, <https://apa.gov.eg/en/%D8%A7%D9%84%D9%87%D9%8A%D8%A6%D8%A9-%D8%A7%D9%84%D8%B9%D8%A7%D9%85%D8%A9-%D9%84%D9%85%D9%8A%D9%86%D8%A7%D8%A1-%D8%A7%D9%84%D8%A3%D8%B3%D9%83-%D9%86%D8%AF%D8%B1%D9%8A%D8%A9-%D8%AA%D8%AD%D9%82%D9%82-7/>

35. Pramod Kumar, “Expansion Work Begins at Egyptian Red Sea Port,” Arabian Gulf Business Insight, July 15, 2024, <https://www.agbi.com/logistics/2024/07/expansion-work-begins-at-egyptian-red-sea-port/>; “Egypt,” Ports Europe, February 2026, <https://www.portseurope.com/category/countries/egypt/>; “Supported by IFC, Egypt Opens Transformational Second Terminal at East Port Said”; “Alexandria, Egypt,” UNIS, last visited June 4, 2026, <https://www.unisco.com/international-ports/alexandria-egypt/>; “Egypt Undertakes Massive Port Expansion to Boost Trade, Logistics,” Egypt Today, August 12, 2024, <https://www.egypttoday.com/Article/1/134096/Egypt-undertakes-massive-port-expansion-to-boost-trade-logistics>; “Red Sea Crisis Could Lead to Overcapacity in Egyptian Ports,” Container News, October 2, 2024, <https://container-news.com/red-sea-crisis-could-lead-to-overcapacity-in-egyptian-ports/>; “A Brand New Terminal Steeped in History,” Hutchison Ports Abu Qir, last visited June 4, 2026, <https://www.hutchisonportsabugir.com/about-us/>; “New Damietta Alliance Container Terminals (DACT) Launches Commercial Operations,” Hapag-Lloyd, press release, February 13, 2026, <https://www.hapag-lloyd.com/en/company/press/releases/2026/02/new-damietta-alliance-container-terminals--dact--launches-commer.html>.

The Jordan–Syria corridor: Land bridge to the Eastern Mediterranean



Strategic geography and corridor role

Syria sits at the geographic hinge between the Arabian Peninsula and the Eastern Mediterranean, and its M5 highway spine—running from the Jordanian border through Damascus and Homs to the coast—offers a direct overland route connecting the Gulf to the Mediterranean ports of Tartus and Latakia. For nearly a decade, that route was severed by conflict, sanctions, and the collapse of the Syrian state. The political transition of 2024–2025 has reopened it.

The reconstruction rationale and the connectivity rationale are inseparable. Syria's Mediterranean ports cannot function as IMEC nodes without the road and rail network that feeds them, and that network cannot be rebuilt without the investment flows that corridor integration would unlock. DP World's \$800 million concession at Tartus and CMA CGM's €230 million concession at

Latakia—both signed following sanctions relief in 2025—represent the private sector's recognition that Syria's corridor potential is real and near term.³⁶ Syria's reintegration adds a third Eastern Mediterranean exit to IMEC's network architecture alongside Israel and Egypt, providing the corridor with redundancy at its European-facing terminus.

Entry points: Saudi Arabia and Jordan–Al-Haditha

Jordan is the corridor's necessary intermediary between Saudi Arabia and Syria. The landlocked kingdom is bordered by Saudi Arabia to the south, Syria to the north, Iraq to the east, and the Gulf of Aqaba to the southwest; all of Jordan's seaborne trade flows through the Port of Aqaba. Its Highway 35, the Amman–Damascus International Highway, and the Desert Highway form the land spine connecting the Saudi border at Al-Haditha north-

36. "DP World to Develop Syria's Tartus Port under Landmark 30-Year Deal," DP World, July 13, 2025, <https://www.dpworld.com/en/news/dp-world-to-develop-syrias-tartus-port-under-landmark-30-year-deal>; "CMA CGM Group Accelerates Launching the Second Phase of Latakia Port Expansion Project Syria," CMA CGM Group, August 20, 2025, <https://www.cmacgm-group.com/en/news-media/cma-cgm-group-accelerates-launching-second-phase-latakia-port-expansion-project-syria>.

ward to Amman and into Syria via the Nasib–Jaber crossing.³⁷ But the lack of a Jordanian freight rail network, combined with border connectivity issues with both Israel and Syria, continues to impede this critical keystone of the corridor.

IMEC’s principal signatories—India, Saudi Arabia, and Europe—are already Jordan’s top export markets, giving the kingdom a direct economic stake in the corridor’s activation. Cargo reaching Jordan from the Gulf enters primarily via two converging land corridors: road across the Saudi land bridge from the UAE and Oman, and the Saudi Arabia Railways North–South Railway, which became operational in March 2026 and now terminates at the Saudi–Jordan border at Al-Haditha. The SAR North–South Railway covers more than 1,700 km from Dammam–Jubail to the Jordan border, carries more than four hundred containers per train, and bypasses both the Strait of Hormuz and Red Sea chokepoints.³⁸

Internal infrastructure: Road and rail

Syria’s national highway network is anchored by two key arteries: the M5, running Damascus–Homs–Aleppo as the main north–south spine, and the M1 coastal highway linking Latakia to Tartus. All road routes from the Jordan border converge at Damascus before splitting toward the two ports.

On rail, the Latakia–Aleppo and Tartus–Damascus lines are operational for freight as of early 2026.³⁹ The critical Damascus–Amman link is not yet complete—passenger service is targeted for the end of 2026, with freight following in three to five years.⁴⁰ Once reopened, it would give cargo entering Syria at Nasib a direct rail option to Damascus and onward to the coastal lines serving Tartus and Latakia. Partial revival of the Amman–Damascus route is expected by the end of 2026.

Missing link

Once restored, the 100 km Hejaz Railway segment through Jordan would create a continuous rail spine from Dammam through Riyadh, across Jordan, into Damascus, and onward to Tartus and Latakia. Feasibility work is under way.

Border crossings and regulation

The corridor passes through two sequential border crossings. The first, at Al-Haditha/Al-Omari, connects Saudi Arabia’s Tabuk Province to Jordan’s Aqaba Governorate and is the primary Saudi–Jordan freight crossing, where the SAR rail network now terminates. The second, at Jaber/Nasib, connects Jordan’s Mafraq Governorate to Syria’s Daraa Governorate and is the primary Jordan–Syria freight artery, currently processing more than one thousand trucks per day.⁴¹ A secondary crossing at Ramtha/Daraa handles lower volumes.

A landmark policy shift in March 2026 now permits Jordanian trucks carrying Jordanian goods to enter Syria directly—and Syrian trucks to enter Jordan—without mandatory unloading and reloading at the border, dramatically reducing transit time and cost. However, trucks originating from third countries may still be subject to transshipment requirements at the border, impeding the efficiency of cargo flows.⁴² To realize Syria’s potential as a Mediterranean hub, the Syrian government, in coordination with Jordan, will need to take further steps to ease the regulatory environment.

37. “Economic Modernisation Vision Document,” Government of Jordan, 2023, <https://www.jordanvision.jo/en>.

38. “Saudi Arabia Railways Launches Rail Alternative to the Strait of Hormuz,” *Railway Gazette International*, March 31, 2026, <https://www.railwaygazette.com/freight/saudi-arabia-railways-launches-rail-alternative-to-the-strait-of-hormuz/70686.article>.

39. “Reactivating the Latakia–Aleppo Rail Corridor for Grain Transport,” *Enab Baladi*, January 26, 2026, <https://english.enabbaladi.net/archives/2026/01/reactivating-the-latakia-aleppo-rail-corridor-for-grain-transport/>.

40. Khaled al-Khawaldeh, “Damascus–Amman Train Link Could Be Completed by 2026 as Historic Hijaz Railway Restoration Plan Gains Steam,” October 10, 2025, <https://www.arabnews.com/node/2618410/business-economy>.

41. Khaled Yacoub Oweis, “Syrian–Jordanian Trade Hit as Damascus Imposes Restrictions on Transport,” *National*, February 9, 2026, <https://www.thenationalnews.com/news/mena/2026/02/09/syria-jordan-transport-al-shara/>.

42. Syria’s General Authority for Land and Sea Ports Decision issued February 6, 2026 (SANA). Jordan Ministry of Transport Official statements (al-Mamlaka TV, France 24, February 8–10, 2026). March 17, 2026, update per document reference www.sana.sy/en.

43. “Syria, Jordan, Turkey Reach Understanding to ‘Activate the Middle East Corridor,’” *Enab Baladi*, April 7, 2026, <https://english.enabbaladi.net/archives/2026/04/syria-jordan-turkey-reach-understanding-to-activate-the-middle-east-corridor/>.

44. Syrian Arab News Agency (SANA) Official report citing Khaled al-Kas’ha, Director of Freight Transport Regulation, Ministry of Transport (March 31, 2026). www.sana.sy/en

Context and framework

Syria's regulatory environment has undergone rapid transformation following sanctions relief in June 2025 and the political transition of 2024–2025. Major port concessions, a reconstituted transport administration, and new bilateral agreements have produced a swift regulatory reset, though implementation gaps remain. Three developments are operationally relevant to corridor freight: a truck entry restriction at land borders, an active freight sector reactivation, and a Three-Pillar Transit Facilitation Vision for 2026.

Truck entry restriction (Decision No. 31, February 2026): Non-Syrian trucks are barred from entering Syrian territory through land border crossings. Goods from Jordan, Lebanon, Iraq, and Turkey must be transferred to Syrian trucks at the customs yard of each crossing. Transit trucks crossing Syria to a third country are exempt, provided customs police escort them between entry and exit points.

Operational detail⁴³

Freight sector reactivation (Q1 2026): Syria's Ministry of Transport reported 4.63 million tons of cargo moved in the first quarter (Q1) of 2026, with daily cross-border freight reaching approximately 42,000 tons through Bab al-Hawa, Bab al-Salam, Jdeidet Yabous, and Nassib. The ministry is developing an electronic freight platform and introducing Global Positioning System (GPS) tracking for trucks.⁴⁴

Three-pillar transit vision (April 2026): Formalized within a trilateral MOU with Jordan and Turkey, the framework commits Syria to harmonizing border fees, linking Syrian ports to the Arab hinterland, and adopting smart transport solutions to improve corridor competitiveness.

Exit points: Tartus and Latakia

Latakia currently handles approximately 95 percent of Syria's containerized trade.⁴⁵ Daily truck volumes at the Nasib–Jaber crossing have surged past 1,300 vehicles.⁴⁶ The Bab al-Hawa crossing between Syria and Turkey reopened in February 2026 after fifteen years, allowing Jordanian trucks to reach Turkish and European markets. Turkey has formally announced the full reopening of the Turkey–Syria–Jordan land corridor by 2026.⁴⁷

45. "AD Ports Group Signs Agreement with CMA CGM Group to Acquire Minority Stake in Latakia International Container Terminal in Syria," AD Ports Group, press release, November 6, 2025, <https://www.adportsgroup.com/en/news-and-media/2025/11/06/ad-ports-group-signs-agreement-with-cma-cgm-group-to-acquire-minority-stake-in-latakia-terminal>.

46. "Rehabilitation Transforms Nasib Border Crossing, Increasing Truck Traffic to 1300 Daily," Syrian Arab News Agency, November 20, 2025, <https://sana.sy/en/economic/2278778/>.

47. Osama Ali, "After 15 Years of Closure, Jordanian Trucks Reopen a Lifeline to Turkey and Europe," Al Bawaba, February 7, 2026, <https://www.albawaba.com/business/after-15-years-closure-jordanian-trucks-1621656>.



Cargo handling at the Port of Long Beach. Afaq Hussain

Table 4. Current and projected capacity of Syrian ports

Port/terminal	Location	Current capacity (TEU/yr)	Post-expansion capacity (TEU/yr)
Port of Latakia	Northwest Syria, Mediterranean coast	250,000 ⁴⁸	625,000 by the end of 2026 ⁴⁹
Port of Tartus	Southwest Syria, Mediterranean coast	Not specified ⁵⁰	Not specified

48. “AD Ports Group Signs Agreement with CMA CGM Group to Acquire Minority Stake in Latakia International Container Terminal in Syria.”

49. Adis Ajdin, “AD Ports Buys into Syria’s Latakia Terminal in CMA CGM Deal,” Splash, November 7, 2025, <https://splash247.com/ad-ports-buys-into-syrias-latakia-terminal-in-cma-cgm-deal/>.

50. “DP World Commences Operations at Tartus Port,” DP World, press release, November 12, 2025, <https://www.dpworld.com/en/news/dp-world-commences-operations-at-tartus-port>.

Status of current infrastructure projects

Table 5. Status of current infrastructure projects

PROJECT	ABOUT	CURRENT STATUS	AUTHORS' TAKE
Hafeet Rail	(Countries: UAE and Oman) 238 km cross-border railway linking Oman's Sohar Port to the UAE's Etihad Rail network; the first modern cross-border rail link in the Gulf. Joint venture between Etihad Rail, Oman Rail, and Mubadala. \$3 billion investment.	UNDER CONSTRUCTION 40 percent complete; no official completion date announced	The single most transformative link in the corridor's land architecture. Politically insulated from regional volatility and on an accelerating construction curve. Once complete, it will close the Oman–UAE–Saudi rail loop and turn Sohar into a true overland hub. Offers a working overland alternative to the Strait of Hormuz.
Hijaz Rail	Countries: Turkey, Syria, Jordan, Saudi Arabia Revival of the 1,750 km Ottoman-era Hejaz Railway, originally connecting Istanbul to Medina via Damascus and Amman. Currently, the Jordanian segment is operational; the Syrian segment is dormant post-conflict.	REVIVAL UNDER WAY Trilateral MOU signed April 7, 2026, in Amman by transport ministers of Syria, Jordan, and Turkey. Amman–Damascus passenger service targeted by the end of 2026.	Gaining political traction after years of stalled revival attempts. The MOU represents the most concrete inter-governmental commitment. The Damascus–Amman gap, infrastructure deficits across the Syrian segment, and the need for gauge harmonization mean that the Hijaz line, as a cargo artery, remains a moderate prospect. Worth analyzing closely; the efficiency study outcome by the end of 2026 will be the next real signal.
Saudi Land Bridge	(Countries: Saudi Arabia) Railway of more than 950 km linking Jeddah Islamic Port on the Red Sea to Riyadh and Dammam on the Arabian Gulf, with extensions to King Abdullah Port, Yanbu, and Jubail.	DESIGN PHASE; PRE-CONSTRUCTION With completion target before 2034. Construction tenders expected mid-2026.	The Saudi Landbridge is the corridor's backbone and its biggest vulnerability. It will create a Hormuz-proof east–west spine. But with a 2034 target, delays are almost certain.
Moses Bridge	(Countries: Egypt and Saudi Arabia) Proposed 32 km causeway and bridge across the Red Sea linking Sharm el-Sheikh (Egypt) to Ras al-Sheikh Hamid (Saudi Arabia) via Tiran Island. It would give Neom a direct continental connection while bypassing the Suez bottleneck.	PLANNING COMPLETE; NO GROUNDBREAKING As of early 2026, no ground-breaking date announced; no official tenders or construction contracts issued. Environmental assessments ongoing.	The gap between planning completion and construction commencement has now stretched nearly a decade; as of 2026 it remains entirely at square one. Environmental concerns around the Tiran coral reef system add a genuine regulatory hurdle that has not been publicly resolved and its delivery timeline is genuinely uncertain.



The Port of Marseille. Stéphane Rouillard / Hans Lucas via Reuters Connect

Table 5. Status of current infrastructure projects *(continued)*

Syria Rail

(Countries: Syria, Turkey, Iraq, Jordan)

Syria's national railway network operated by the Chemins de Fer Syriens (CFS), comprising coastal lines (Latakia–Tartus), an inland spine (Homs–Damascus), and northern segments (Homs–Aleppo).

PLANNING COMPLETE; NO GROUNDBREAKING

Latakia–Tartus coastal line: operational (freight and passenger).

Tartus–Homs segment: operational for passenger (freight being restored).

Homs–Damascus: partial restoration ongoing with Turkish technical support. Homs–Aleppo: restoration under way.

Damascus–Amman link: passenger service targeted by the end of 2026; freight 3–5 years.

The coastal segments are already moving freight to DP World and CMA CGM terminals, and the April 2026 Syria–Jordan–Turkey MOU gives the network a formal multi-lateral spine. The constraints are infrastructure debt and an aging truck fleet. The Damascus–Amman link is what matters most for IMEC. Until that closes, Syria's rail remains a coastal asset.

That being said, the investor confidence therein remains low.

Mediterranean convergence: Two corridors, one sea

The network of corridors examined in this report converges at a single strategic question: where does the Mediterranean become Europe? The original IMEC corridor concludes at Israel's west coast port, Haifa Port. The Egypt route and the Jordan–Syria corridor discussed in this report arrive at the sea from different directions: Egypt's exit cluster spans Port Said, Alexandria, El Dekheila, Abu Qir, and Damietta along the Southern and Eastern Mediterranean coasts; Syria's exit cluster consists of Tartus and Latakia on the Levantine coast. Together, they constitute three distinct but complementary Mediterranean entry points for IMEC-oriented freight. From either cluster, goods enter the short-sea shipping lanes that feed Europe's southern ports—and it is here that the competition among European terminal candidates becomes analytically relevant.

Greece, Italy, and France are the three principal candidates for IMEC's European terminal, with Piraeus and Thessaloniki, Trieste, and Marseille all under active consideration.⁵¹ Each port offers a distinct value proposition determined by geography, hinterland connectivity, and existing infrastructure. Crucially, each connects differently to the two Mediterranean exit clusters this report describes. This is the network logic applied to Europe: just as redundancy in the Middle Eastern corridor architecture reduces exposure to single points of failure, multiple European entry points distribute the corridor's European

reach and reduce the political risk of dependence on any one terminal.

The Egypt exit cluster—Port Said, Alexandria, and the broader Mediterranean port complex—is geographically proximate to both Piraeus and the central Mediterranean, making it the natural feeder for southern European distribution. Trieste, as the northernmost Mediterranean harbor, offers the shortest maritime distance from Mediterranean and Suez Canal routes to Central European markets, and its 51 percent rail modal share—the highest of any major European port—provides unmatched intermodal connectivity to landlocked Central European nations including Austria, the Czech Republic, Slovakia, and Hungary.⁵² Syria's Levantine ports, by contrast, sit closer to the Eastern Mediterranean shipping lanes that feed Piraeus and the Greek port system, making them the natural feeder for the Balkan and Black Sea distribution network that Piraeus serves.

France has advanced Marseille, while Italy has backed Trieste—connected to an integrated railway grid with Austria and Germany—opening the possibility of shipping goods directly into the economic heart of the EU. Marseille's claim rests on its position as the Western Mediterranean's dominant port and its direct rail and road connectivity to France and the Iberian hinterland, offering IMEC a Western European terminus that neither Piraeus nor Trieste can serve as effectively.

The network dividend: What optionality unlocks

The trade potential underpinning this network is substantial. Based on author estimates, \$331 billion worth of trade could move across this integrated corridor system, providing a strong economic rationale for its development.⁵³ The expanded network route has the potential of handling more than 70 percent of the \$135 billion in estimated India–EU trade and offering an alternative route for 60 percent of the container movement that normally transits through the Strait of Hormuz. The utilization of this network could provide an alternative route for up to \$220 billion in existing GCC intra-regional trade flows currently moving through maritime chokepoints. Only this network approach can effectively mitigate dependence on the three Middle East maritime chokepoints—the Strait of Hormuz, the Bab al-Mandab

in the Red Sea, and the Suez Canal—that have all faced blockages in recent years.

Realizing this scale necessitates a network with multiple Mediterranean exit points—through Israel, Egypt, and Syria—supported by well-developed internal rail and road infrastructure across the Arabian Peninsula and the Levant. The presence of diversified exits, combined with strong inland connectivity, ensures that high trade volumes can be distributed efficiently, reducing congestion risks while enhancing reliability and speed across the full corridor. A networked IMEC architecture linking Oman, Saudi Arabia, Egypt, and Syria delivers four structural dividends.

51. Rachel Rizzo and Nicholas Shafer, “It is Europe’s Time to Shine on IMEC,” Atlantic Council, May 29, 2025, <https://www.atlanticcouncil.org/blogs/new-atlanticist/it-is-europes-time-to-shine-on-imec/>.

52. Eszter Karacsony, “Integrating the EU’s Hinterland through IMEC,” ORF Middle East, August 25, 2025, <https://orfme.org/expert-speak/integrating-the-eus-hinterland-through-imec/>; “Special Report: Intermodal Freight Transport,” European Court of Auditors, August 2023, <https://op.europa.eu/webpub/eca/special-reports/intermodal-freight-transport-08-2023/en/>.

53. Author’s calculations. Methodology in Appendix 2.

1. Resilience through optionality

By integrating Arabian Sea, Red Sea, and Levantine routes into a single multimodal system, the corridor shifts from a vulnerable linear chain to a flexible network in which disruptions are absorbed rather than amplified, allowing freight to reroute dynamically across multiple pathways.

2. Expanded throughput capacity

This same structure removes hard capacity ceilings. Instead of relying on a single rail corridor, throughput expands across interconnected port and rail systems—from Oman’s gateways to Egypt’s high-capacity Mediterranean ports and Syria’s emerging transshipment hubs—making integration and governance, rather than physical limits, the primary constraint on scale.

3. Competitive pricing dynamics

Multiple parallel routes introduce competition at every node—from Red Sea ports to Mediterranean entry points in southern Europe—driving down transit costs and preventing monopolistic bottlenecks.

4. Distributed political risks

The model reduces dependence on any single diplomatic breakthrough and the vulnerability to the instability that continues to plague the Middle East. This distributed system allows different segments to operate independently. By spreading political exposure across jurisdictions, it ensures that setbacks in one corridor do not immobilize the entire architecture, strengthening long-term viability for stakeholders including the United States, Gulf states, and the European Union.

Network-level constraints

The corridor’s primary constraint is not infrastructure but fragmentation across political, regulatory, and security domains along the transit chain. While no single node is prohibitive, misalignment across nodes creates cumulative friction that undermines corridor reliability. A detailed country-by-function constraint matrix is provided in Appendix 1.

- **Oman:** The corridor is operationally ready with low regulatory and security risk; remaining constraints are technical, centered on rail completion and port integration. This positions Oman as an immediate activation node for early IMEC flows.
- **Saudi Arabia:** There is strong financing capacity and infrastructure momentum, but political constraints—particularly normalization with Israel—continue to block the original northern route. Alternative alignments remain viable but require sustained Saudi strategic commitment.

- **Egypt:** The corridor is politically stable and commercially active, but regulatory fragmentation across ports and lack of customs harmonization with Saudi Arabia limit seamless throughput. Unlocking interoperability is the primary near-term lever.
- **Jordan:** Regulatory bottlenecks and missing rail infrastructure, and security concerns with political sensitivities, are functional constraints. Corridor viability depends on resolving third-country transit protocols and closing key rail gaps.
- **Syria:** This is the highest-risk, highest-impact node, with constraints across all domains—political, regulatory, infrastructure, and security. Corridor integration is contingent on sustained stabilization and phased reconstruction supported by external financing.

Recommendations

IMEC’s existing governance structure—an MOU among eight signatories—was designed for a single corridor. The MOU needs to be updated to address the inclusion of additional members and an expansion strategy for a network of corridors. Many of the same implementation imperatives that applied to a single trade corridor apply to a network approach, but the addition of new routes further underscores the importance of coordination both between the relevant governments and between the governments and the private sector. An updated MOU should also establish mechanisms for coordinating route priorities, resolving cross-border transit disputes, and aligning investment timelines across a corridor network that has the potential to expand well beyond the original single-line architecture.

The suggestions that follow are organized in two parts: functional recommendations that apply across the network and a stakeholder matrix that assigns specific actions and timelines. Recommendations are calibrated to what can be activated now, what requires deliberate sequencing, and what depends on political conditions that remain fluid.

1. Establish a network coordination mechanism toward harmonized protocols.

Governments should establish a lean IMEC Network Secretariat to coordinate cross-border logistics standards, maintain a live infrastructure status dashboard, and act as the main interface for private-sector operators handling multi-country freight movements. Egypt, Jordan, Israel, and Oman should be admitted as

formal participants, with Syria on observer status pending reconstruction progress.

Reforms to facilitate trade along the corridor will require careful planning focused on practical implementation. Concrete action plans should clearly define measures, responsibilities, and timelines at both country and corridor levels. Each corridor should have a dedicated transit regime plan. Lessons from the TIR (Transit International Routier) Convention and the BBIN (Bangladesh Bhutan India Nepal) Motor Vehicles Agreement on seamless cross-border road transport should serve as early priorities for these action plans.

The plans must reflect the unique conditions of each country and corridor, avoiding one-size-fits-all solutions. The secretariat should use proven diagnostic tools such as the World Bank Trade and Transport Corridor Management Toolkit and the World Customs Organization Time Release Study to prioritize and sequence reforms, while serving as the central platform for collaboration among participating countries.

2. Build private-sector confidence.

Private-sector interest in IMEC is visible through framework agreements such as the Adani Ports Special Economic Zone (APSEZ)–Marseille Fos MOU (February 2026), CMA CGM’s engagement (May 2025), and DP World’s announced investments. Participation has two sides: companies ready to invest in infrastructure development and operators who will use the completed routes for freight and logistics.

Both sides require trust and resilience in the project and supporting governments. To build confidence, governments should demonstrate commitment through visible public investments and early progress on key segments. In parallel, stress testing of routes via pilot shipments, simulated disruptions, and initial trials is essential to prove reliability and reduce perceived risks. Only when physical security guarantees, harmonized regulations, and sustained cargo demand are in place will private players move from preparatory agreements and feasibility studies to large-scale capital commitments and operational usage.

Involvement of the private sector as a key stakeholder in the discussions will be useful.

3. Coordinate infrastructure development among the countries.

Infrastructure developed for IMEC must form part of an integrated corridor-wide network rather than isolated national projects. To ensure seamless connectivity and efficiency, each segment—ports, rail lines, and digital systems—should be planned according to its specific role in the overall route. Rail gauge standards, port configurations and digital platforms must align across borders. The coordination should be formally structured through a secretariat/sherpa process at the time of project planning with the goal of developing an IMEC-wide mapping of infrastructural projects. Strengthened coordination will enable national infrastructure planning to be guided by regional and cross-jurisdictional projects like IMEC—preventing fragmented development and maximizing the corridor’s potential.

4. Upgrade key railway linkages.

The highest-priority infrastructure gap remains Jordan’s rail connection. Saudi Arabia’s North–South Railway reaches the Jordanian border, while Syrian coastal lines are operational. Restoring the short Hejaz Railway segment in Jordan would create a continuous rail spine linking Dammam and Riyadh through Jordan to Damascus and Mediterranean ports at Tartus and Latakia. Saudi Arabia is best placed to lead financing for this modest but high-impact link.

Complementing this, Saudi Arabia’s proposed east–west rail line (approximately 950 km connecting Riyadh to Jeddah and key hubs) would shift the kingdom from road-heavy transit to an efficient integrated rail network. With potential transit times of less than ten hours—compared to 22–24 hours by truck—it would reduce cost and improve speed. This link would connect seamlessly with Etihad Rail in the east and Red Sea ports (including Jeddah Islamic Port and Neom) in the west, enabling smoother flow of Indian Ocean trade through the Gulf toward Egypt and Europe.

Table 6. Network activation stakeholder action matrix

Timeline: Now (zero to eighteen months), medium term (eighteen months to four years), enabling condition

Stakeholder	Governance	Transit protocols	Investment sequencing	Reconstruction integration
US government (State Department/Development Finance Corporation DFC)	Now Champion IMEC secretariat at the Group of Twenty and Group of Seven (G20/G7); designate senior IMEC envoy with network mandate. Current IMEC envoy role focused on original corridor only.	Medium term Support Egypt–Saudi transit protocol harmonization through bilateral trade frameworks.	Now DFC to designate IMEC-affiliated projects as a priority for investment.	Enabling condition Sustain Syria sanctions relief trajectory. Condition reconstruction support on IMEC-compatible infrastructure design.

Table 6. Network activation stakeholder action matrix *(continued)*

Timeline: **Now** (zero to eighteen months), **medium term** (eighteen months to four years), **enabling condition**

Oman	Now Seek formal IMEC network participant status. Designate IMEC corridor focal point within Ministry of Transport and the Oman Authority for Partnership for Development.	Now Extend Transit Cargo Facilitation Package to cover third-country corridor cargo. Initiate bilateral protocol harmonization with Saudi Arabia on bonding and documentation standards for through-corridor freight.	Now Accelerate Hafeet Rail completion timeline and confirm phased commissioning schedule. Prioritize rail-port integration at Sohar to close the Oman–UAE–Saudi rail loop.	Medium term Position Salalah and Duqm as relief valves for corridor cargo during Syrian reconstruction phase. Develop contingency routing frameworks with Saudi Arabia for Arabian Sea–Red Sea diversion scenarios.
Saudi Arabia	Now Co-chair IMEC secretariat founding process alongside UAE. Formally extend corridor mandate beyond Jordan to Egypt, Oman, and Syria nodes.	Now Extend GCC transit bond framework to Egypt bilaterally. Initiate gauge harmonization dialogue with Egypt and Jordan.	Now Lead finance Jordan rail gaps, including Hejaz Railway revival (100 km gap). Advance Moses Bridge to regulatory clearance stage.	Medium term Anchor Gulf-led Syria infrastructure facility. Align reconstruction financing with M5 corridor and port-to-rail specification.
Egypt	Now Seek formal IMEC signatory status. Designate IMEC corridor focal point within Ministry of Transport.	Now Digitize Ain Sokhna customs documentation. Harmonize Suez Canal Economic Zone (SCZONE) logistics protocols with Saudi transit bond framework.	Now Advance Ain Sokhna–Suez City rail extension from study to design phase. Prioritize rail-port integration investment within SCZONE.	Enabling condition Position Egyptian port cluster as transshipment feeder for Syria post-reconstruction. Develop Damietta–Latakia feeder service framework.
Jordan	Now Seek formal IMEC network participant status. Engage Aqaba Railway Corporation in secretariat technical working group.	Now Extend March 2026 truck-crossing policy to third-country cargo. Negotiate full transit harmonization with Syria.	Now Advance Hejaz Railway feasibility to bankable project stage. Engage Saudi Arabia and Islamic Development Bank on financing structure.	Medium term Develop Nasib–Jaber crossing to full multimodal capacity as Syrian reconstruction accelerates.
Syria	Enabling condition Establish a dedicated IMEC liaison within the Ministry of Transport once governance stabilization allows. Engage as observer in IMEC secretariat pending reconstruction progress and sustained sanctions relief.	Enabling condition Extend March 2026 bilateral truck-crossing policy to third-country cargo in coordination with Jordan. Develop harmonized customs documentation framework aligned with Jordanian and Saudi transit bond standards.	Enabling condition Anchor DP World and CMA CGM port concessions as the base layer for broader corridor investment. Sequence M5 highway rehabilitation and Damascus–Amman rail restoration as priority infrastructure ahead of wider port expansion.	Medium term Develop Tartus and Latakia as IMEC-compatible Mediterranean exit points in coordination with Jordan and Egypt. Align port-to-rail specifications with corridor standards as reconstruction financing materializes.



A container ship crosses the Gulf of Suez towards the Red Sea before entering the Suez Canal at Al-Ain al-Sokhna. Reuters

Appendixes

Appendix 1: Country and functional constraint matrix

Constraint severity: **High**, **medium**, **low/resolved**

Node	Political/ diplomatic	Regulatory/ customs	Commercial/ financing	Infrastructure/ technical	Security/stability
Oman	Low Stable bilateral relations with all corridor states. BRI membership creates optics risk for IMEC branding.	Low Transit bond mechanism operational; e-gate exit under ten minutes. Standards align with GCC framework.	Low Port operators (APM, DP World, AD Ports) commercially active. Hafeet Rail financing confirmed at \$3 billion.	Medium Hafeet Rail under construction; Oman National Railway nine-phase plan unfunded in full. Rail-port integration at Duqm early stage	Low Outside both Hormuz and Red Sea choke-points. No active conflict exposure.
Saudi Arabia	High Political sensitivities with Israel stalling northern route; Egypt and Syria routes add to the architecture but require sustained Saudi commitment.	Medium GCC transit bond covers intra-Gulf. No harmonized framework with Egypt, Syria, or Jordan for through-corridor cargo.	Low Saudi landbridge under construction (Public Investment Fund -backed). Neom port \$4 billion committed. Strong sovereign financing capacity.	High Saudi Landbridge not yet operational; corridor remains road dependent. Rail link to Jordan absent. Moses Bridge has eight-year timeline and faces practical impediments.	Medium No active conflict, but Houthis continue to present a potential threat to Red Sea shipping.

Appendix 1: Country and functional constraint matrix *(continued)*

Constraint severity: **High**, **medium**, **low/resolved**

Egypt	Low Strong bilateral relations with Saudi Arabia and UAE.	High Customs interoperability between Ain Sokhna, SCZONE, and Mediterranean port cluster not harmonized. No unified transit documentation with Saudi Arabia.	Medium Port concessions commercially active (DP World, Hutchison, CMA CGM). Rail spine under contract. Marginal integration investment unfunded.	Medium High-speed rail in trial operations (November 2025); full freight operations pending. Ain Sokhna–Suez City extension under study only. Sinai rail phase 1 only.	Low Stable. Suez Canal disruption risk is financial, not security.
Jordan	Medium Domestic political sensitivity to Israel limits original IMEC route. Syrian corridor politically viable but Jordan requires assurances on third-country cargo protocols.	High Third-country trucks still subject to transshipment at Nasib–Jaber. March 2026 policy shift covers Jordanian and Syrian goods only. Full transit harmonization outstanding.	High No committed rail financing and no sovereign financing vehicle. Port of Aqaba underutilized for corridor purposes. Hejaz Railway revival at feasibility stage with no funding structure.	High No functional national railway. Highway 35 sole land artery northward; 100 km Hejaz gap blocks continuous rail spine to Syria.	Low Stable. Increased truck volumes at Nasib–Jaber manageable with crossing expansion agreed to in November 2025.
Syria	High Post-transition governance credibility still being established. Sanctions relief partial; US, EU frameworks still contain restrictions. Political continuity of new administration unverified over medium term.	High Customs system requires full rebuild. No harmonized documentation with Jordan for third-country cargo. Syrian transit fees waived for Jordan only. Broader framework absent.	High DP World and CMA CGM concessions anchored but dependent on reconstruction pace. Broader port and road financing requires multilateral commitments not yet in place.	High M5 highway corridor damaged. Homs–Damascus rail partial restoration. Damascus–Amman passenger rail targeted end-2026; freight 3–5 years. Port capacity currently limited.	High Post-conflict security environment. Risk of instability relapse. Infrastructure investment exposed to security deterioration. Corridor viability contingent on sustained stabilization.

Appendix 2: Trade data notes

The \$331 billion figure represents the estimated annual non-oil trade value that could potentially move through the extended IMEC network, based on author calculations using bilateral trade data from the World Integrated Trade Solution (WITS) database. The estimate reflects average annual trade values for the period 2020–2024, using the most recent available data for country pairs where complete annual series were unavailable.

What the figure includes

The calculation aggregates bilateral non-oil trade across three categories of country pairs, including

- core Middle East to core Middle East (UAE, Saudi Arabia, Jordan, Israel, Bahrain, Kuwait, Oman, and Qatar);
- core Middle East to extended West Asia (Egypt, Turkey, Syria, and Iraq); and
- India to core Middle East, extended West Asia, and Europe (Greece, Italy, France, Germany, Switzerland, Austria, Slovenia, Albania, North Macedonia, Bulgaria, and Croatia).

Selected bilateral pairs from Appendix 3 illustrate the composition: UAE–Turkey (\$22.85 billion), India–Germany (\$26.69 billion), India–Switzerland (\$20.02 billion), and UAE–Switzerland (\$17.68 billion) are among the larger contributors.

What the figure excludes

Three direct maritime pairs—India–UAE, India–Saudi Arabia, and India–Oman—are excluded because these trade flows move via direct sea lanes that do not engage the corridor’s overland rail and road leg. Oil and refined petroleum products are excluded throughout, as the corridor’s transportation model applies to containerized and bulk dry goods only.

What the figure does not claim

The \$331 billion represents trade that could potentially use the corridor, not a forecast of traffic the corridor will capture. Actual utilization would depend on competitiveness with alternative routes, corridor completion timelines, and commercial uptake by shippers and logistics operators.

Appendix 3: Selected combinations of bilateral trade that could potentially use the extended IMEC network (based on author calculations shown in Appendix 2)

Countries	Bilateral trade (non-oil) (US \$ billion)
India–Jordan	2.73
India–Israel	4.35
India–Egypt	3.80
India–Italy	14.04
India–Germany	26.69
India–Switzerland	20.02
Saudi Arabia–UAE	16.14
Jordan–UAE	2.07
UAE–Egypt	4.17
UAE–Italy	10.32
France–UAE	8.08
Iraq–UAE	5.19
UAE–Turkey	22.85
UAE–Germany	10.29
Switzerland–UAE	17.68

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Afaq Hussain is a nonresident senior fellow with the Project for Middle East Integration within the Atlantic Council's Middle East Programs. In this role, much of his work focuses on the economic aspects of India-Middle East-Europe Corridor. A policy researcher with over twenty years of experience, Hussain's expertise spans logistics infrastructure, trade facilitation, regional connectivity, and related regulatory policy.

He is the co-founder and director of the Bureau of Research on Industry and Economic Fundamentals (BRIEF) in New Delhi. Under his leadership, BRIEF has collaborated with the Ministry of Ports Shipping and Waterways, Indian Ports Association, Land Ports Authority of India, Ministry of Commerce, NITI Aayog, and the National Committee for Trade Facilitation. In this role, Hussain's work focuses on identifying infrastructural and regulatory gaps, streamlining regulatory processes, and advocating for policy reforms. Hussain has also been working on expanding BRIEF's research areas into the Middle East through collaborations with the Emirates Policy Center and the University of Dubai.



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