

**Group of Experts on Euro-Asian Transport Links (WP.5/GE.2),
13th session**

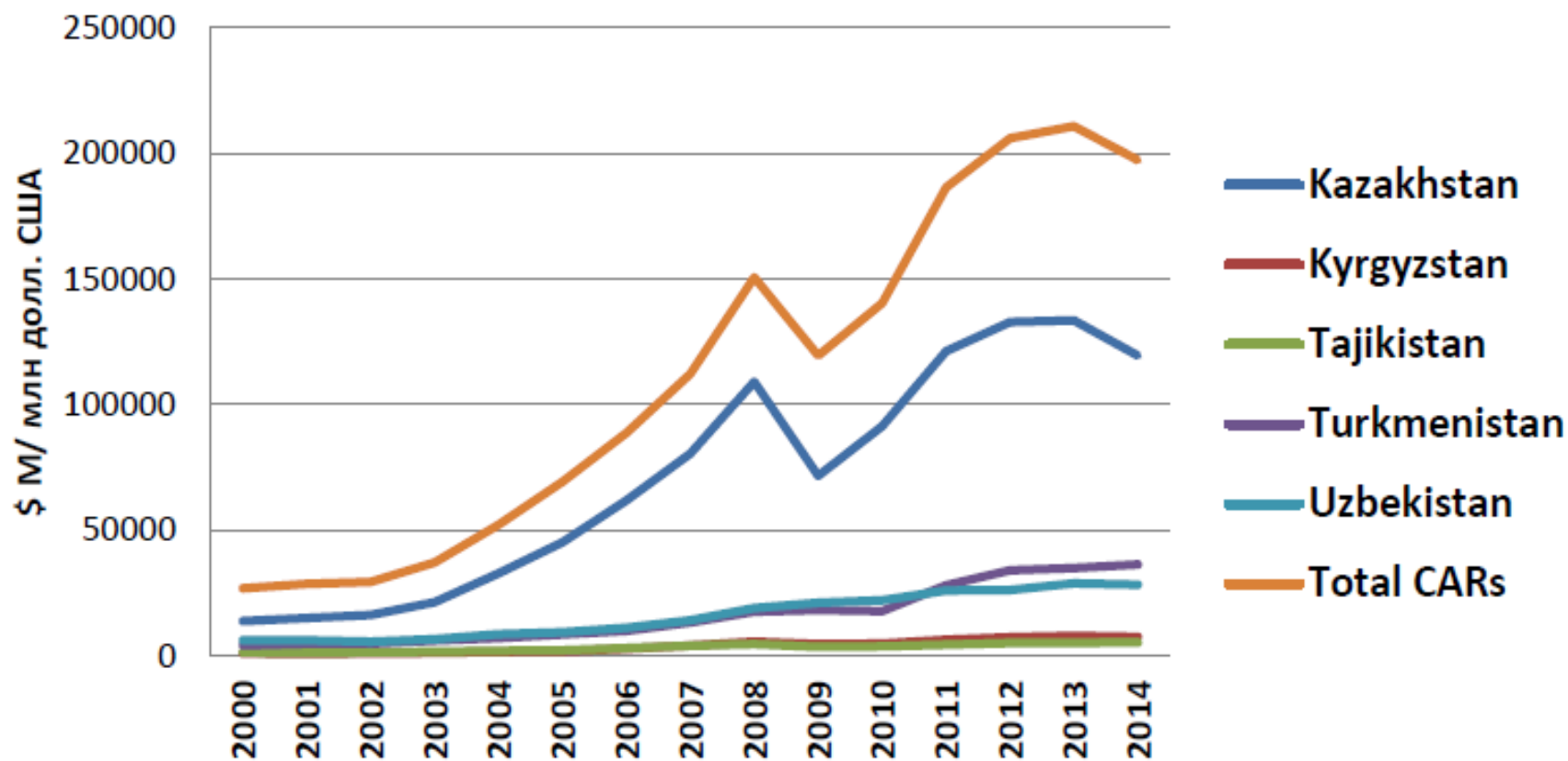
TRANSIT POTENTIAL OF CENTRAL ASIA: CHALLENGES AND OPPORTUNITIES

Mr. Murat BEKMAGAMBETOV

General Director

**Research and Scientific Institute for
Transport and Communications**

Dynamics of international trade
Динамика международной торговли

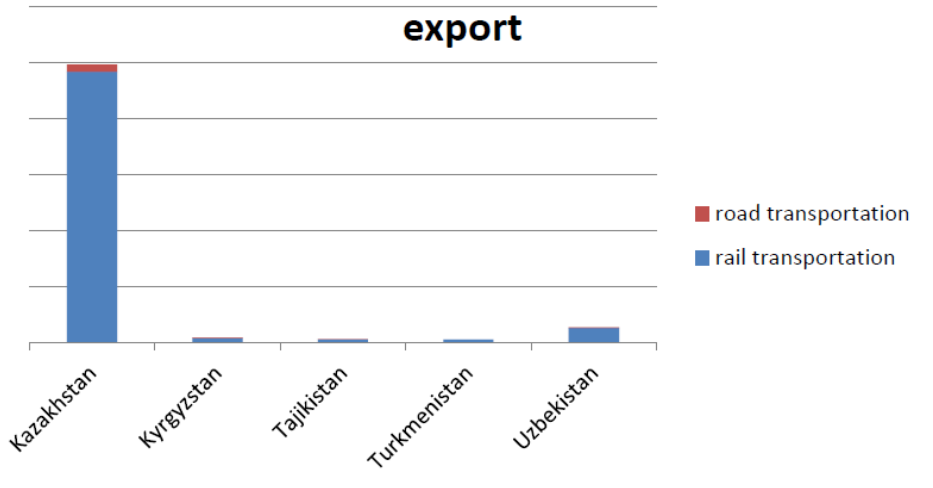


	Export		Import	
	Major Commodities/Goods	Main Trading Partners	Major Commodities/Goods	Main Trading Partners
Kazakhstan, 2014	Fuel and energy products (77.6%), metals and metal products (8.3%)	Italy (20.5%), China (12.5%), the Netherlands (11.2%), Russia (6.6%), France (6%), Switzerland (5.8%)	Machinery, equipment, vehicles (43.7%), chemical products (14%), products of animal and vegetable origin, prepared foodstuffs (10.5%)	Russia (33.3%), China (17.9%), Germany (5.6%), USA (4.8%), Ukraine (2.9%), France and Korea (2.6% each), Uzbekistan, Turkey and Italy (2.5% each)
Kyrgyzstan, 2013	Precious metals and products made of them (42%), mineral products (11.4%), vegetable products (9.4%)	Switzerland (25.4%), Kazakhstan (19.6%), UAE (11%), Uzbekistan (8.1%), Russia (7.6%)	Mineral products (22.2%), means of transportation (13.4%), machinery and equipment (11.6%), metals (9.2%)	Russia (33.6%), China (23.9%), Kazakhstan (9.4%), Japan (4%), Germany (3.8%), USA (3.7%), Turkey (3, 5%)

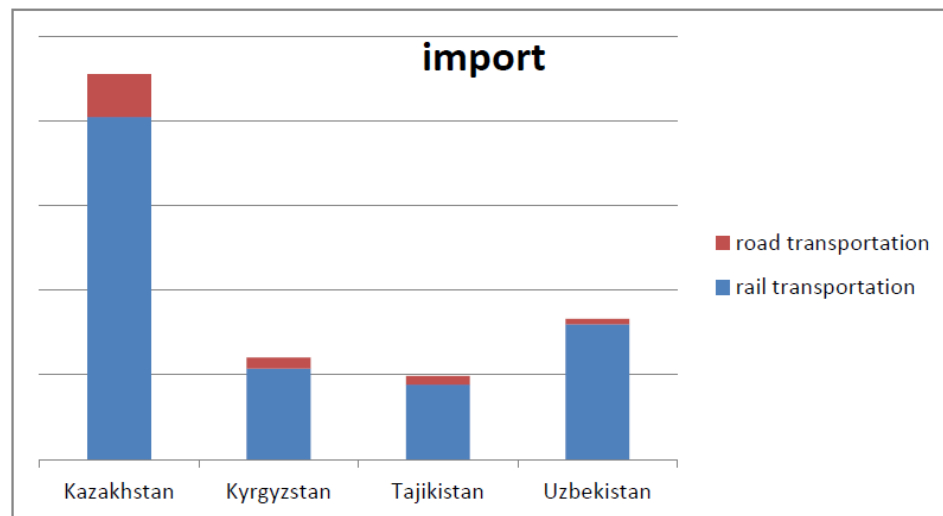
	Export		Import	
	Major Commodities/Goods	Main Trading Partners	Major Commodities/Goods	Main Trading Partners
Tajikistan, 2013	Base metals and products (33.4%), vehicles, machinery and equipment (19.8%), textile materials and products (19.5%)	Turkey (40.7%), Russia (10.6%), Iran (9.9%), Afghanistan (8.7%), China and Kazakhstan (7.4% each), Switzerland (6.6%)	Vehicles, machinery and equipment (30.1%), mineral products (18%), chemical products (10.7%)	Russia (22.0%), Kazakhstan (15.2%), China (14.5%), Lithuania (5.4%), USA (4.7%), Kyrgyzstan and Turkey (4.4% each), Iran (4.3%)
Turkmenistan	Natural gas, oil products, oil	Iran, Russia, China	Machinery, equipment and machinery, basic metals, chemical products	Turkey, China, Russia
Uzbekistan, 2014	Energy and petroleum products (26.9%), services (21.6%), food products (11.9%), cotton fiber (7.4%)	Russia, China / Mongolia, Afghanistan / Pakistan and Turkey	Machinery and equipment (39.7%), chemical products (16.0%), food products (10.9%), metals (8%)	Europe, Russia, the Pacific region, China, Kazakhstan

PARTICIPATION OF ROAD AND RAIL TRANSPORT IN INTERNATIONAL TRANSPORTATION

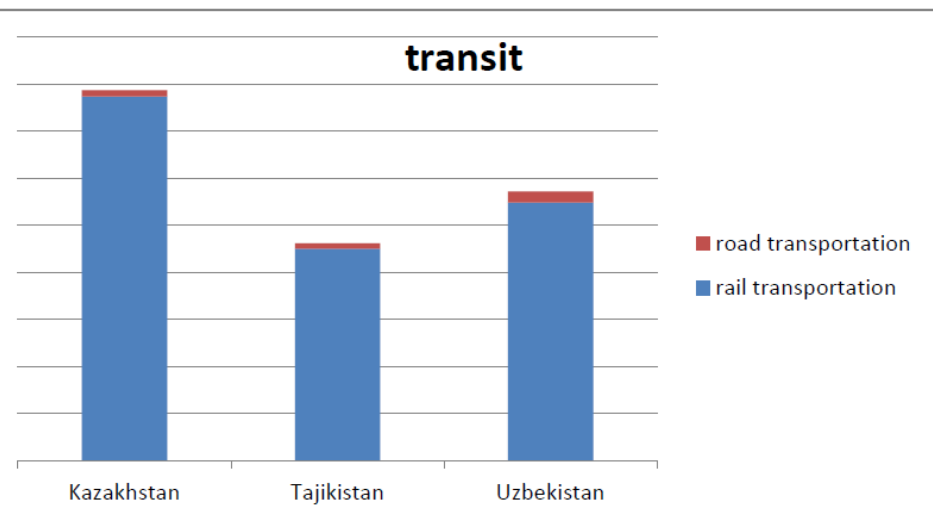
export

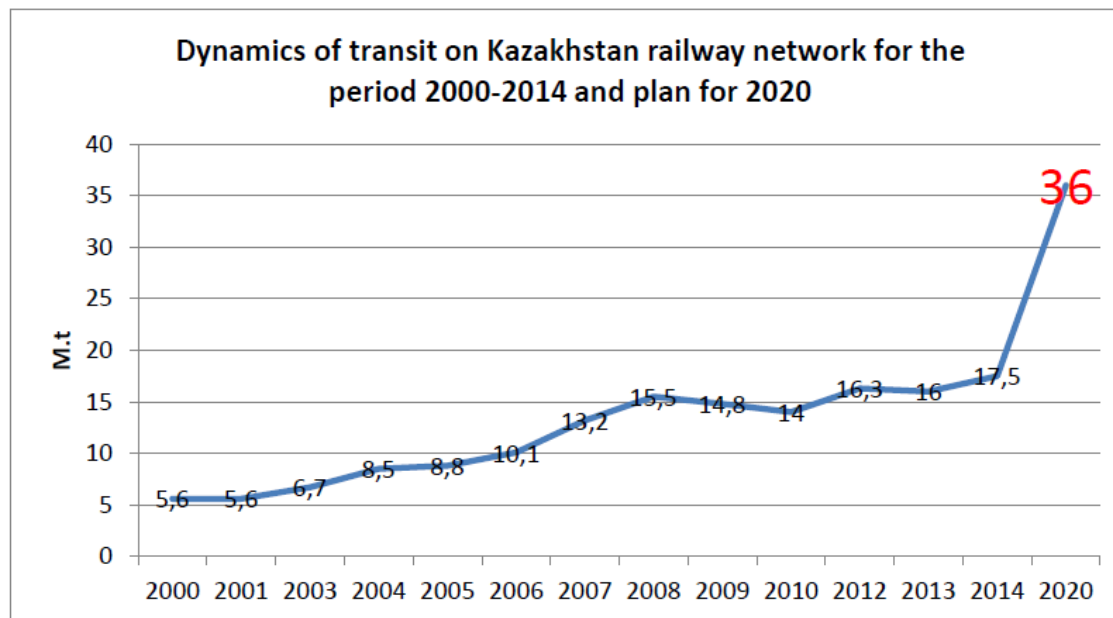


import



transit





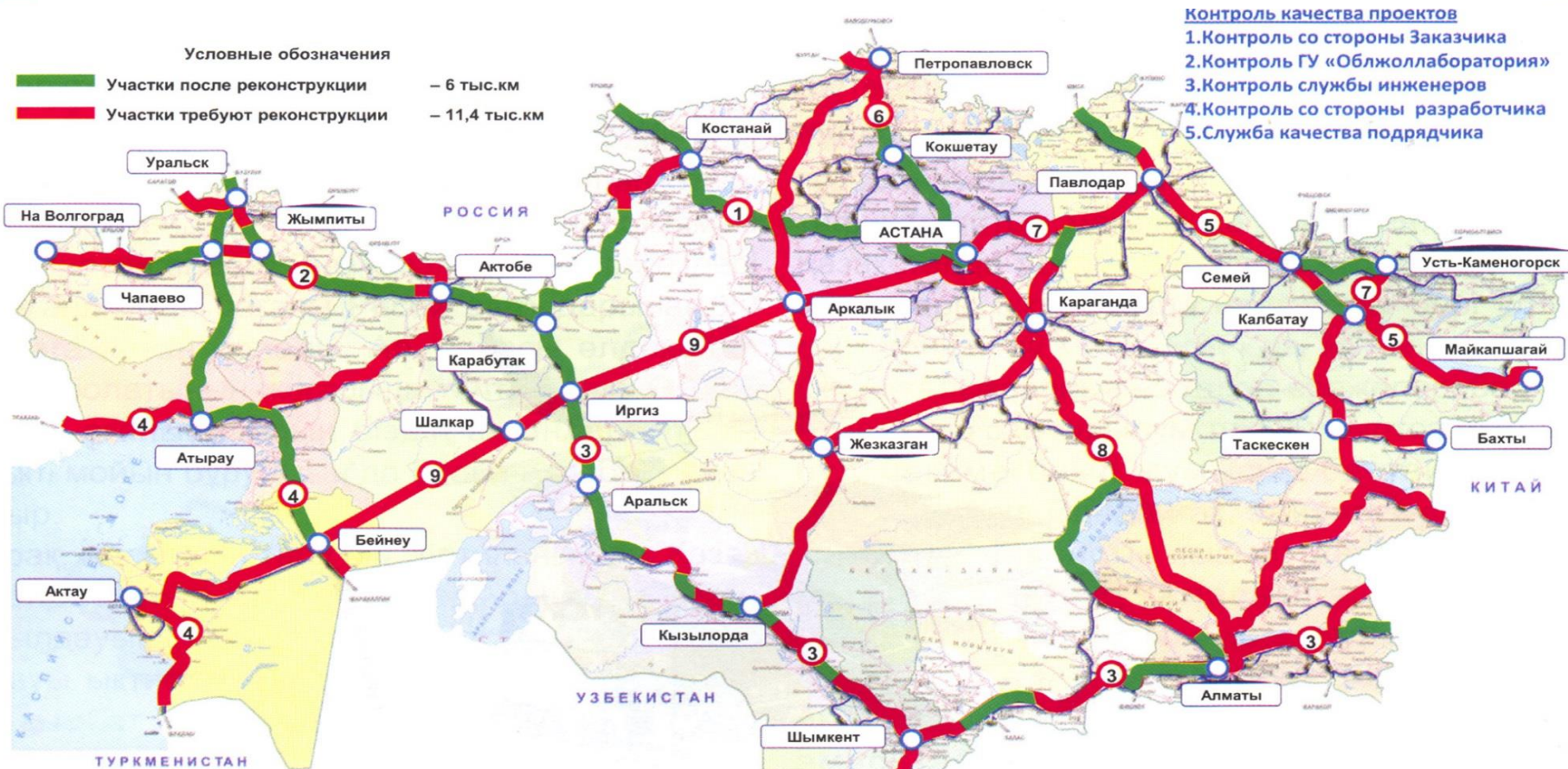
Area of generation	Year	Area of destination				
		Russia	Central Asia	China	Aktau port	<i>Total</i>
Russia	2000	-	2,6	0,1	0,2	2,9
	2012	-	12,0	0,2	-	12,2
Central Asia	2000	2,0	0,3	0,2	-	2,5
	2012	1,1	0,1	0,7	-	1,9
China	2000	-	0,2	-	-	0,2
	2012	0,3	1,8	-	-	2,1
<i>Total</i>	2000	2,0	3,1	0,3	0,2	5,6
	2012	1,4	13,9	0,9	-	16,2

MEASURES TAKEN BY CENTRALASIAN COUNTRIES

Kazakhstan

Targets	Units	including						
		actual		planed				
		2012	2013	2014	2015	2016	2017	2018
Improvement of «Quality of roads» GCI	rank	117	117	116	115	113	109	105
Improvement of «Quality of railroad infrastructure» GCI	rank	29	27	28	27	26	25	25
Improvement of «Quality of port infrastructure» GCI	rank	115	135	123	120	117	114	111
Improvement of «Quality of air transport infrastructure» GCI	rank	95	89	85	83	81	79	77
Improvement of «Available airline seat kilometers» GCI	rank	61	59	57	56	55	54	53
Improvement of «Quality of overall infrastructure» GCI	rank	78	64	62	61	60	59	58
Improvement of LPI (World Bank)	rank	86	-	88	-	60	-	50

THE DEVELOPMENT OF HIGHWAY CORRIDORS



Существующие коридоры:

- | | |
|--|-----------|
| 1. Астана-Костанай-Челябинск (891 км) | – 2013 г. |
| 2. Актобе-Уральск-Самара (517 км) | – 2014 г. |
| 3. Западная Европа-Западный Китай (2 787 км) | – 2015 г. |
| 4. Астрахань-Атырау-Актау-гр. Туркменистана (1 402 км) | – 2017 г. |
| 5. Омск-Павлодар-Семипалатинск-Майкапшагай (1 100 км) | – 2017 г. |
| 6. Алматы-Астана-Петропавловск (1 724 км) | – 2020 г. |

Завершение

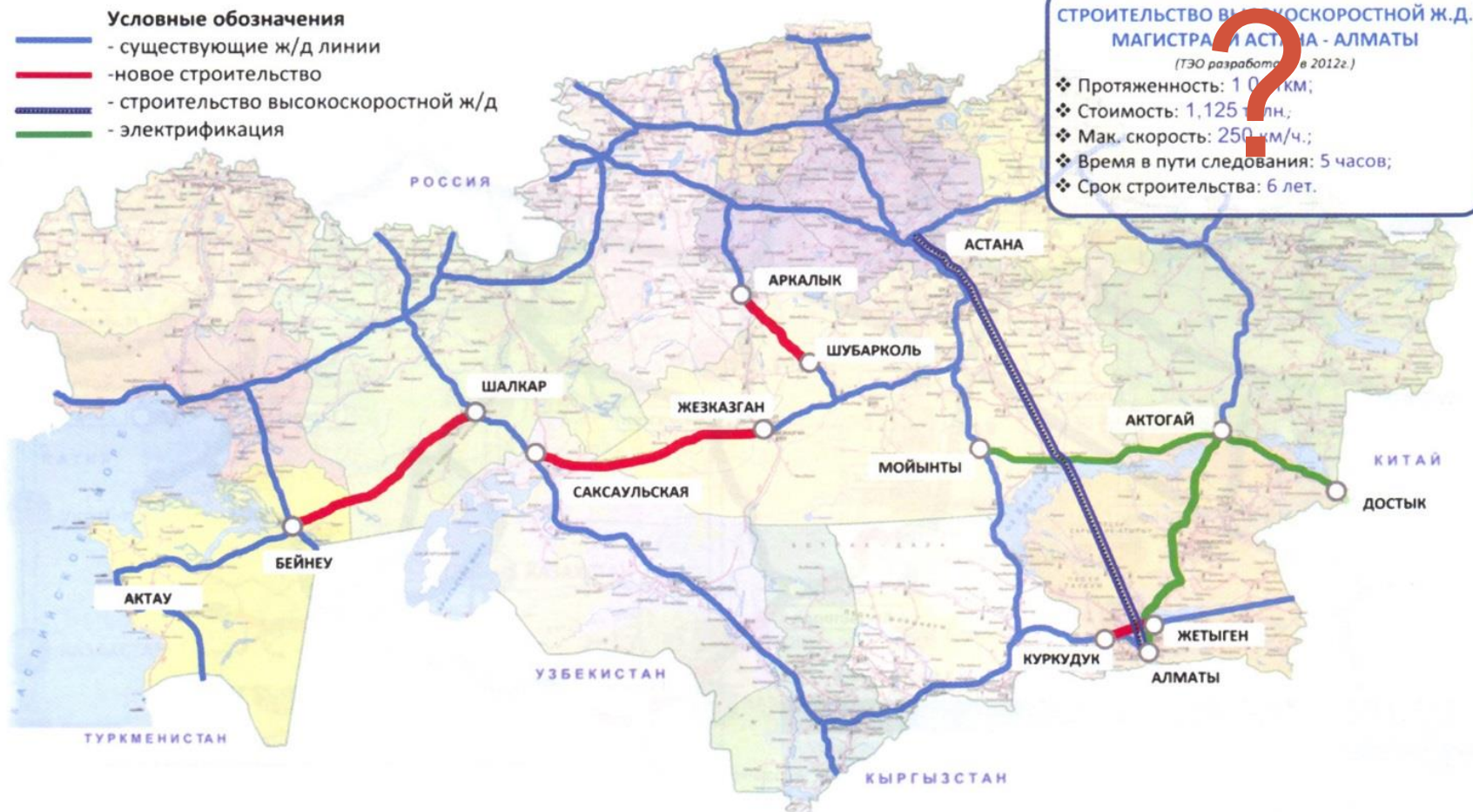
Основные проекты:

7. Астана-Усть-Каменогорск, через города Павлодар, Семей (1003 км)
8. Астана-Алматы, через оз. Балхаш (1 057 км)
9. Астана-Актау, через город Аркалык (1 820 км)

Завершение

- | |
|-----------|
| – 2019 г. |
| – 2017 г. |
| – 2020 г. |

THE DEVELOPMENT OF RAIL CORRIDORS



СТРОИТЕЛЬСТВО НОВЫХ Ж/Д ЛИНИЙ:

1. Жезказган – Бейнеу (988 км) – 2012-2015 г.
2. Аркалык - Шубарколь (214 км) – 2012-2015 г.
3. Жетыген – Куркудук (61 км) – до 2020 года

ЭЛЕКТРИФИКАЦИЯ Ж/Д ЛИНИЙ:

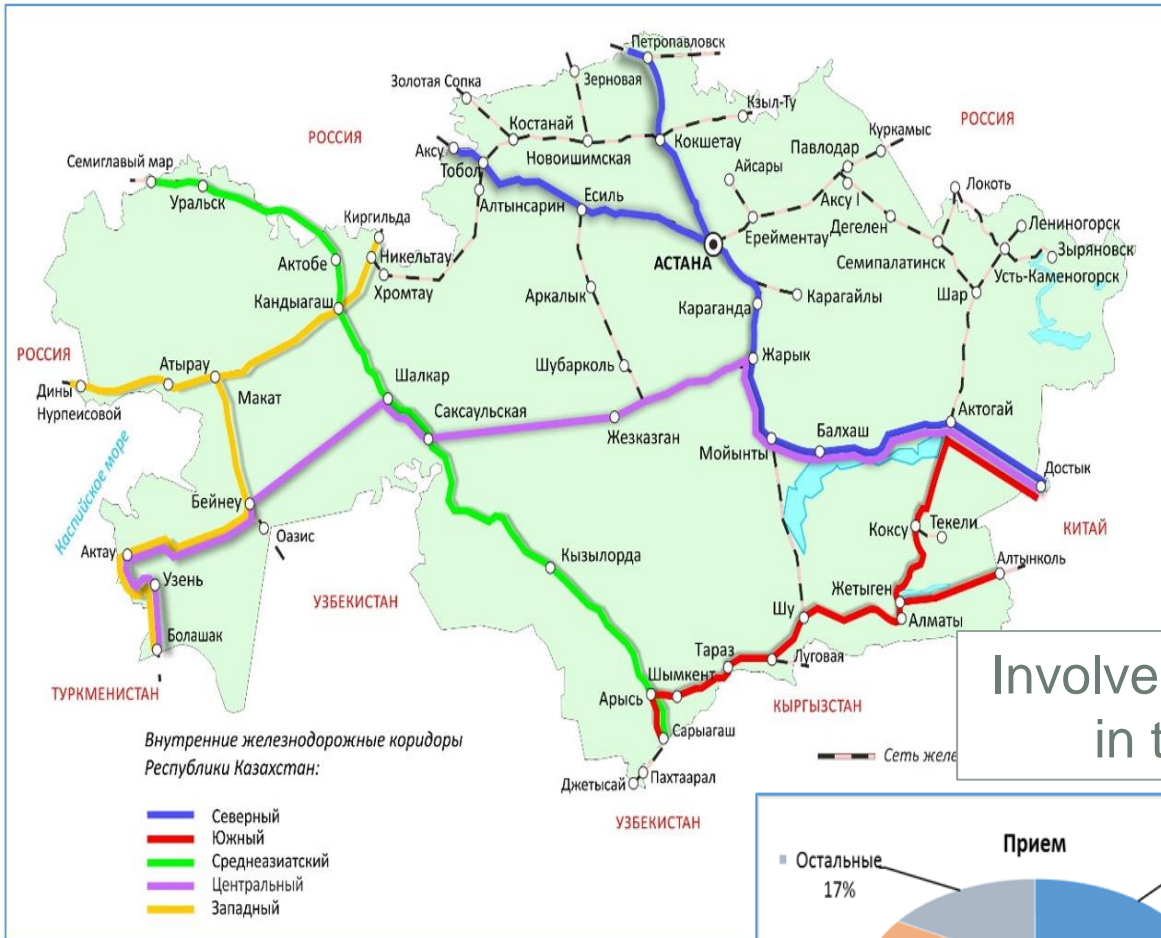
1. Алматы – Актогай (541 км)
 2. Актогай – Моинты (522 км)
 3. Актогай – Достык (310 км)
- } до 2020 года

Строительство **новых** железнодорожных линий охватывает **21** населенных пунктов, с населением **25,7** тыс.чел.

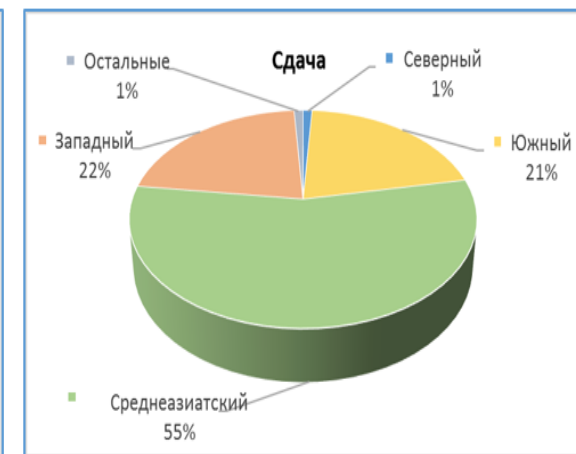
Targets	Units	including						
		actual		planed				
		2012	2013	2014	2015	2016	2017	2018
Increase of Gross Value Added by transport and storage segment in real terms compared to 2008	%	20	28	38	47	57	68	80
Freight transportation	bln.t	3	3,3	3,3	3,5	4,2	4,6	5,2
Passenger transportation	bln.pass.	18,5	20	20,2	21,6	25,5	28,5	31,9
Freight turnover	bln. t-km	368,1	377,1	380	403,5	479,4	527,3	590,7
Passenger turnover	bln. pass-km	211,3	233,7	239	262,4	345,8	401,8	451,8
Growth of transit transportation of freight	M. t	17,9	17,7	18	18,5	21	24,2	26,5
Growth of transit revenue	bln. KZT	157,6	157,8	160	165	190	220	240

Targets	Units	actual		planned				
		2012	2013	2014	2015	2016	2017	2018
National highways in good and fair conditions	%	79	81	83	85	86	86,5	87
	km	18 529	19 031	19 466	19 635	19 872	20 108	20 345
Local roads in good and fair conditions	%	63	66	68	70	72	74	76
	km	44 173	46 276	50 273	51 267	52 732	54 197	55 662
Length of national highways under renovations of all types	km	2 215	1 722	1 726	2 127	2 396	2 554	3 327
Reconstruction of international transit corridors «Western Europe – Western China»	km	820	812	157	430	18	-	-

Internal railway corridors of Kazakhstan



Involvement of railway corridors in transit transportation



Targets	Units	actual		planed				
		2012	2013	2014	2015	2016	2017	2018
Increase of the average speed of freight trains on transit railway section:								
➤ Northern Corridor	km/h	50,06	50,22	51,2	51,83	52,35	52,87	53,4
➤ Southern Corridor	km/h	47,17	46,74	48,69	49,74	50,23	50,7	51,25
➤ Central Asian corridor	km/h	51,07	50,04	51,67	52,23	52,75	53,28	53,81
➤ TRACECA	km/h	48,99	48,45	50,2	51,06	51,57	52,09	52,6
➤ North-South Corridor	km/h	49,16	49,60	50,42	51,18	51,69	52,2	52,7
Increase of the number of transport and logistics centers	number	-	12	14	16	18	20	22

THE VISION OF JSC "NC "KTZ"

The 1-st phase of the project

Active Kazakh-Chinese terminal

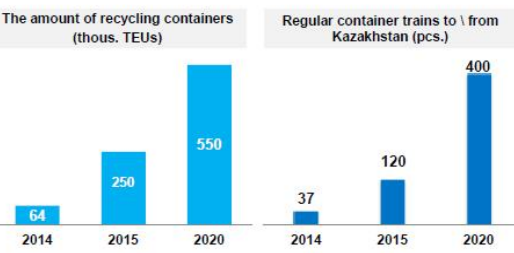


The 2-nd phase of the project

The extension of terminal facilities with the participation in the project of logistics zone of the Shanghai Cooperation Organization



Total investment \$100 mln



Segmentation of the territory of the SCO in the port of Lianyungang

- Transport and logistics area
- Zone of International Trade
- Production area, processing of bulk cargoes, non-ferrous metals

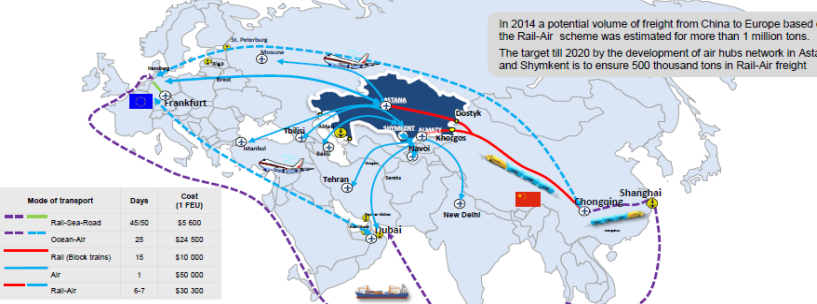
Potential participants
Commercial and industrial, transport and logistics companies of the SCO member countries

The plan of implementation

- Development of FR - 4 q. 2015
- Financial structuring of participants - 1 q. 2016
- The beginning of implementation - 2 q. 2016

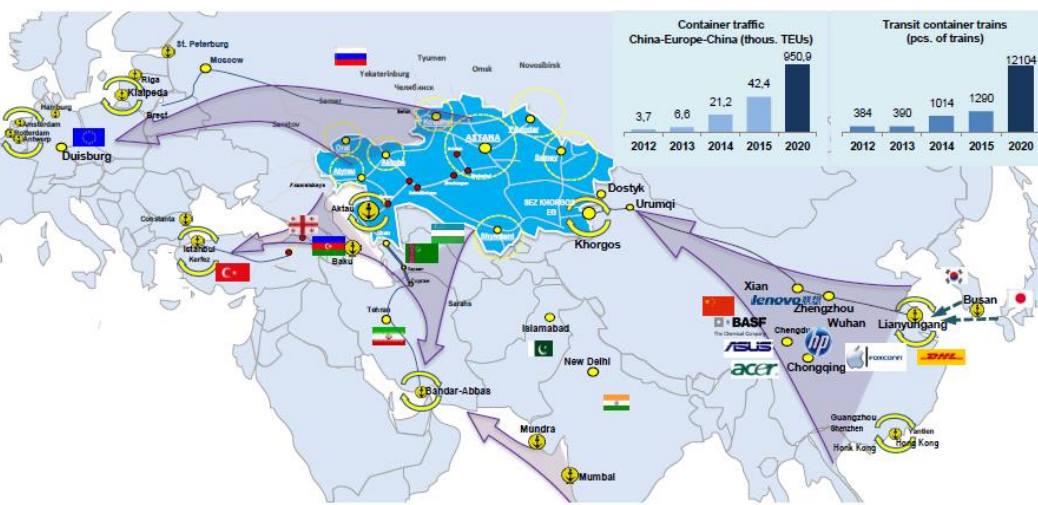
The potential volume of container handling in 2020 will be 2,2 mln. TEUs

- Actions on forming the air hub in Kazakhstan:**
- ✓ Transfer of basic aerodrome "Air Astana" and formation of freight infrastructure at the airport in Astana
 - ✓ Harmonization of the development strategy with "Air Astana" on new routes in major consolidation/deconsolidation centers for freight turnover, including transatlantic directions
 - ✓ Development of multimodal and distribution centers at the airports in Astana, Shymkent, Almaty



In 2014 a potential volume of freight from China to Europe based on the Rail-Air scheme was estimated for more than 1 million tons. The target till 2020 by the development of air hubs network in Astana and Shymkent is to ensure 500 thousand tons in Rail-Air freight

Creation of the center for logistics and trading platform in the port of Lianyungang by SCO member states will contribute to the development of transport in the direction of Kazakhstan, Central Asia, the Gulf Region, Turkey and Europe

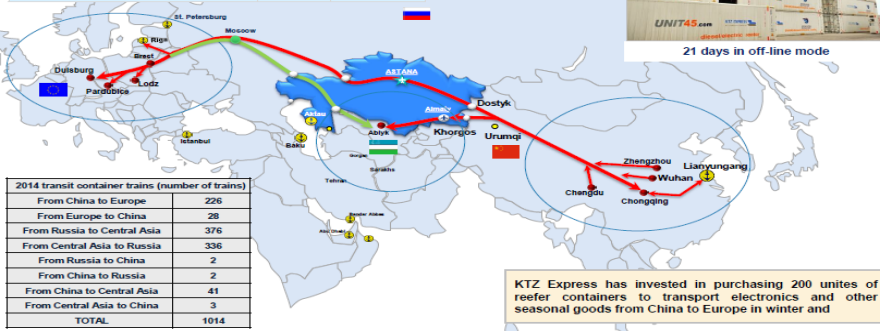


THE VISION OF KTZ EXPRESS MULTIMODAL COMPANY

Regular container trains to/from/via Kazakhstan



Details of high-speed container trains		
	Distance	Delivery time
Liaryungang (China) – Ablyk (Uzbekistan)	~ 6 050 km	5-6 days
Zhengzhou (China) – Hamburg (Europe)	~ 10 500 km	13-14 days
Chengdu-Lodz	~ 10 564 km	14 days
Chongqing-Duisburg	~ 10 769 km	16 days
Chongqing-Duisburg (deep sea)	~ 20 000 km	45-50 days



2014 transit container trains (number of trains)	
From China to Europe	226
From Europe to China	28
From Russia to Central Asia	376
From Central Asia to Russia	336
From Russia to China	2
From China to Russia	2
From China to Central Asia	41
From Central Asia to China	3
TOTAL	1014

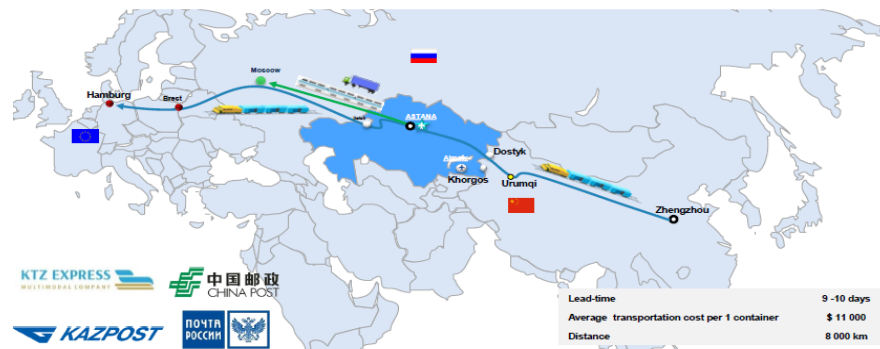
KTZ Express has invested in purchasing 200 unites of reefer containers to transport electronics and other seasonal goods from China to Europe in winter and

Transportation of postal cargo within current regular container trains



Transportation technology:

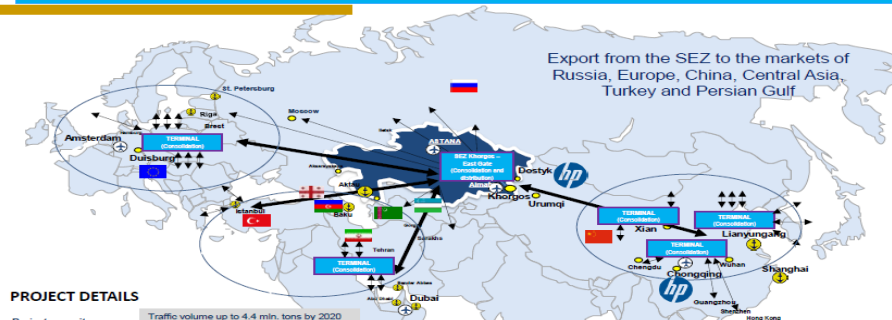
- 2-3 containers with postal cargo to Astana are included in Zhengzhou-Hamburg container train (41 containers long)
- The container is unloaded in the postal terminal of KazPost and the cargo is handled to be transported in a luggage wagon of a passenger train to Moscow or loaded into a truck
- Organization postal distribution through Astana terminal



Lead-time	9 - 10 days
Average transportation cost per 1 container	\$ 11 000
Distance	8 000 km

It is planned to dispatch about 35 containers once a week on a monthly basis (potential transit about 2 mln tons)

Construction of a distribution center in SEZ "Khorgos – Eastern Gate"



PROJECT DETAILS

Project capacity	Traffic volume up to 4.4 mln. tons by 2020 Containers handling capacity 500 k TEUs
Project participants	Government of Kazakhstan (infrastructure) «KTZ Express» JSC (Dry port) Dubai Port World (Management)
Total project cost:	426 mln. US dollars, incl.:
Infrastructure	404 mln. US dollars
Dry port	208 mln. US dollars - Republican budget
Technological equipment	188 mln. US dollars - Kazakhstan 22 mln. US dollars
Realization period	Completion of I phase – December 2014. Dry port completion – July 2015 Logistics and industrial zones – 2 quarter 2016

Creation of regional terminal network



Aktobe, Pavlodar, Kostanay, Aktau and Semey terminals



Each terminal includes warehouses of class A and B, including cooling modes, vegetable stores, indoor and open storage, customs bonded area etc.

Kyrgyzstan

NATIONAL SUSTAINABLE DEVELOPMENT STRATEGY OF THE KYRGYZ REPUBLIC FOR THE PERIOD 2013-2017 YEARS

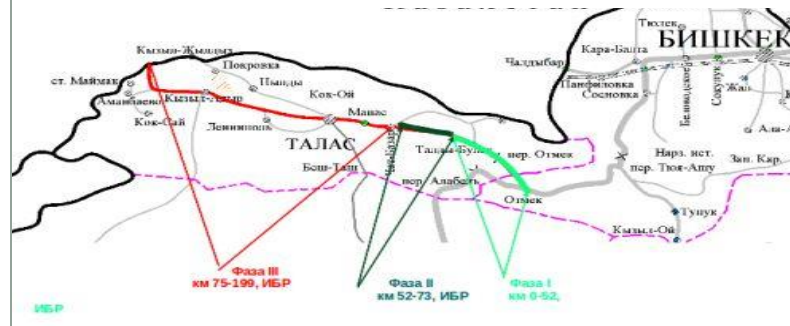
The problem - improving the transit transport potential of the country.

Path:

1. rehabilitation of five highway routes, which are international transport corridors;
2. preservation and improvement of the internal road network;
3. ensuring of transport independence of the country;
4. feasibility study and the start of construction of the railway China-Kyrgyzstan-Uzbekistan and train line connecting the north and south of the country;
5. the creation of an air traffic hub

Suusamir-Talas-Taraz Road Rehabilitation Project (199 km);
 Bishkek-Naryn-Torugart Road Rehabilitation Project (539 km);
 Osh-Batken-Isfana Road Rehabilitation Project (360 km);
 Karakol-Tup-Kegen (76 km);
 Isfana-Sulucta-Khujant Tajikistan border (44 km).

Suusamir-Talas-Taraz Road Rehabilitation Project



Bishkek-Naryn-Torugart Road Rehabilitation Project

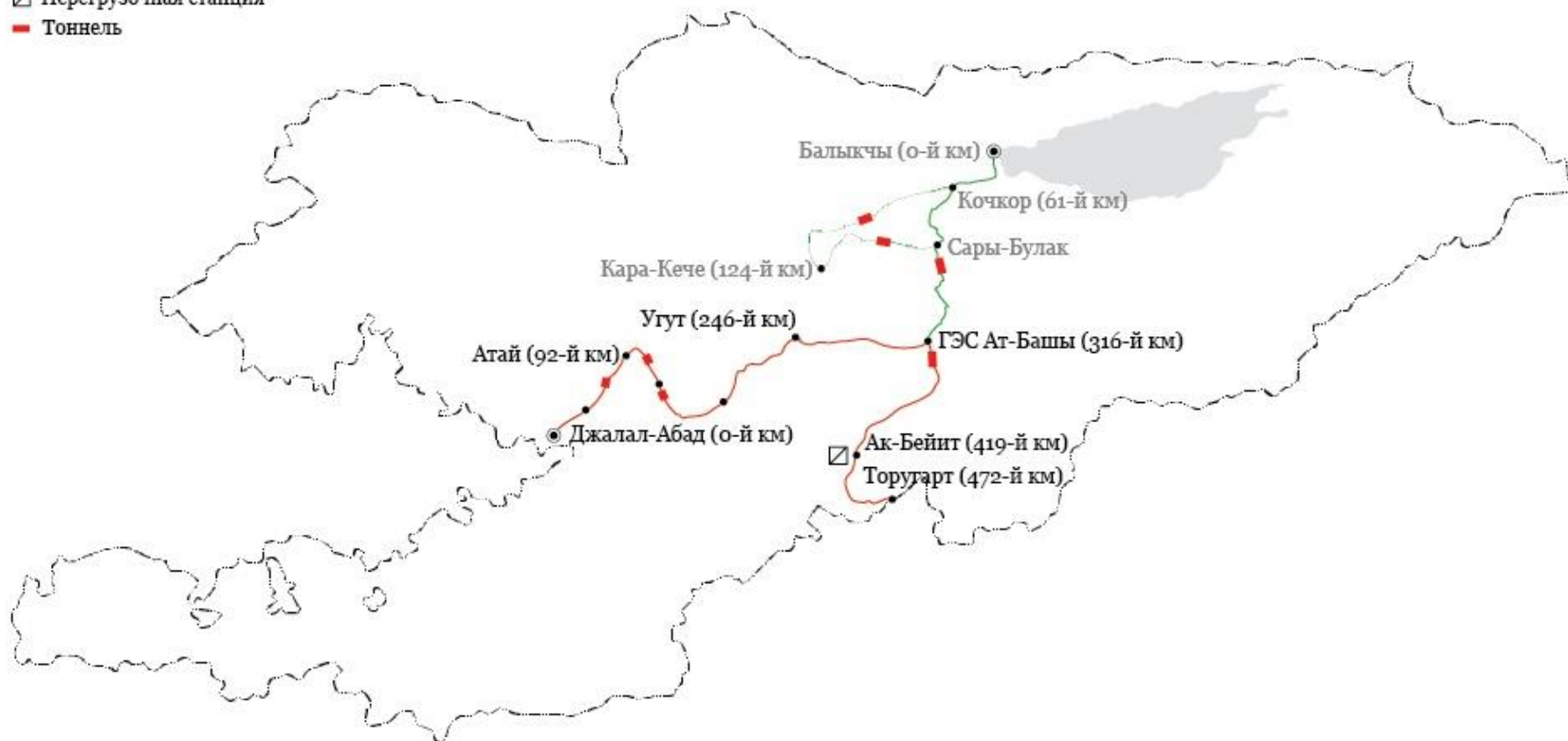


Osh-Batken-Isfana Road Rehabilitation Project



RAILROAD JALAL-ABAD - TORUGART

- ☐ Перегрузочная станция
- Тоннель



Источник: Министерство транспорта и коммуникаций КР

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Авторы: Назгуль Бегалиева, Марина Блинова

KYRGYZSTAN'S ACCESSION TO THE EEU:



1. Permit-free passage of motor vehicles in international traffic;
2. In the future (from 2016 till 2024) - liberalization of "cabotage" transportation;
3. Common approaches to technical regulation;
4. Termination of customs administration on the border with Kazakhstan

Tajikistan

Tajikistan

Реабилитация существующих дорог	ст-сть сумма млн. долл. США
1. Душанбе - Айни - Худжанд - Бустон - Чанак	187,1
2. Душанбе - Вахдат - Дангара	7,5
3. Куляб - Шагон	43,6
4. Айни - Пенджикент	28,9
5. Курган-Тюбе - Дусти-Нижний Пяндж	9,4

№	Наименование основных коридоров	Протяженность, км	
		всего	по РТ
A	Ташкент - Худжанд - Истаравшан - Айни - Душанбе - Дангара-Куляб - Калайум - Хорог - Мурғоб - пер.Кульма - Каракорумское шоссе	1508	1419
B	Ташкент - Ховат - Истаравшан - Айни - Душанбе - Курган-Тюбе - Дусти-Нижний Пяндж - Куддуз - Кабул	1111	525
C	Терmez - Душанбе - Вахдат - Гары - Джиргаталь - г.р.Курган-Тюбе - Сары-Таш	795	464
D	Айни - Пенджикент - Самарканд	149	113
E	Джиззах - Ховат - Бешалт - Худжанд - Камбадан - Коскад	306	139
F	Джиззах - Худжанд - Исфара - Ош - Сары-Таш	612	120
G	Терmez - Айвак - Кабодён - Казалы - Душанбе	305	249
H	Сары-Таш-Мурғоб-Хорог-Нижикан-Файзад	789	604



Душанбе

Куляб

Мурғоб

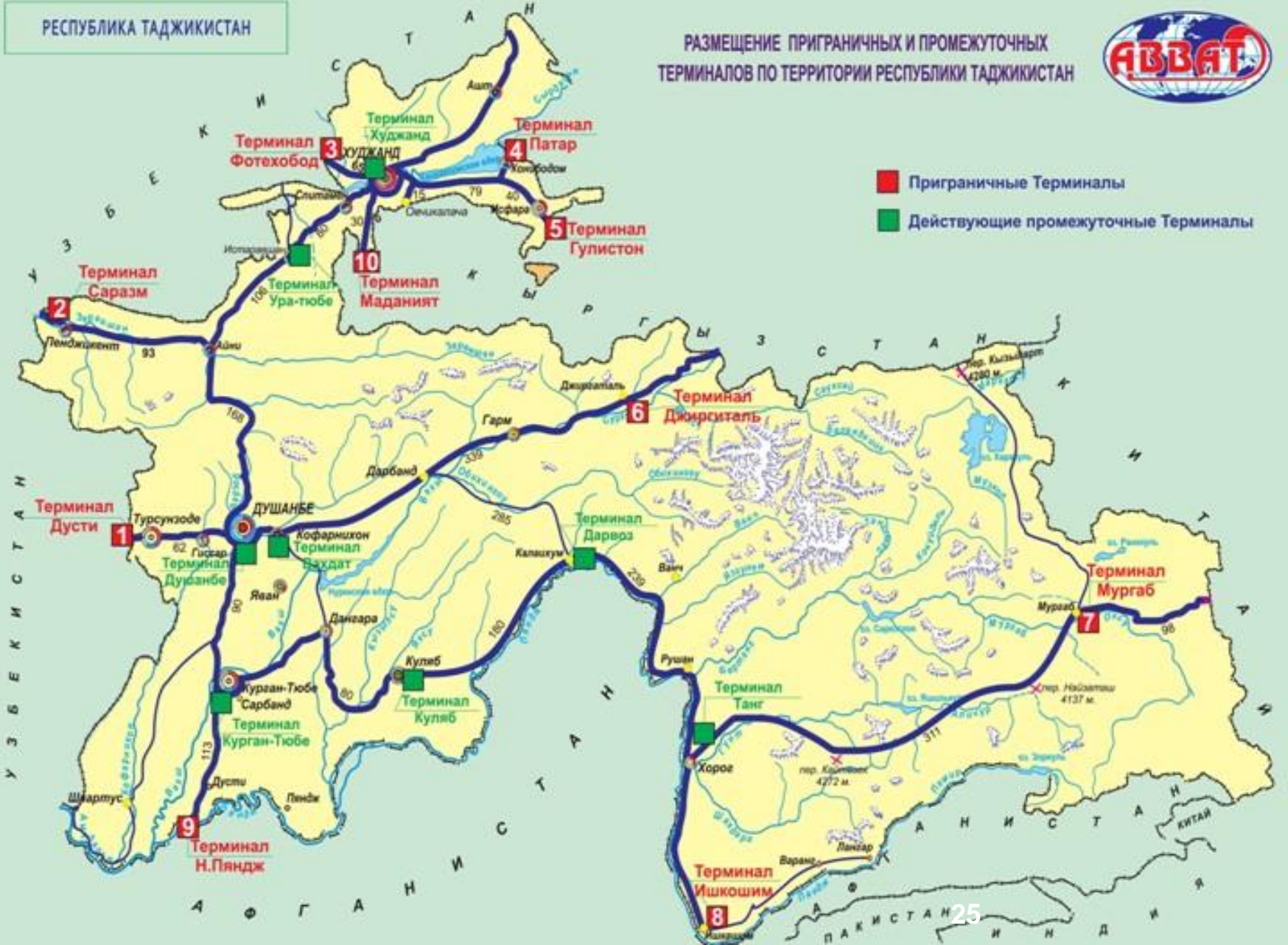
Кульма

Условные обозначения:

- Существующие автодороги
- Автодороги финансируемые международными финансовыми институтами
- - - Автодороги предложенные для финансирования донорами
- - - Существующие железные дороги
- - - Железные дороги наметаемые к строительству и реконструкции
- Местовые переходы через реку Пяндж
- Термины по обслуживанию иностранных перевозчиков
- Железнодорожные станции

▲ - пограничные переходы

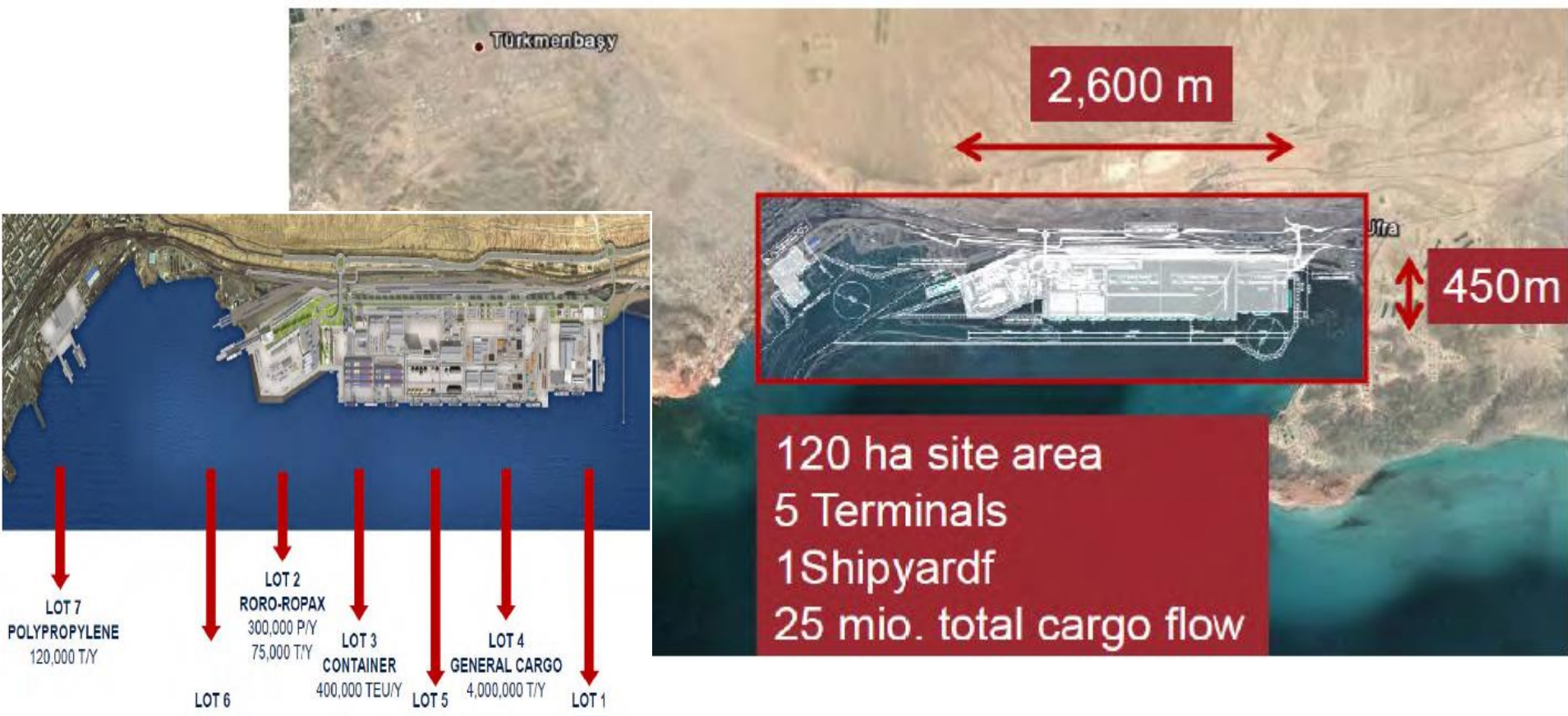
1. Дусти-Нижний Пяндж	9. Челькентаран - Наманган	17. Сопчикулак - Айбод
2. Айвак - Кабодён	10. Пенар - Аксаркан	18. Нижний Пяндж - Шарпан
3. Сары-Таш - Джиргаталь	11. Рават - Шарпан	19. Нижикане - Нижикане
4. Нижикане - Чеп	12. Дамана - Черкук	20. Куляб - Куляб
5. ДУ-58 - Ховат	13. Джиргаталь - Шарпан	21. Хашкани - Шарпан
6. Пяндж - Пяндж	14. Мурғоб - Казалы-Арт	22. Сары-Таш - Зафар
7. Кабодён - Кабодён	15. Бешалт - Каспабод	23. Коскорумская площадка - Шарпан
8. Наманган - Пушанг	16. Машикат - Карган	24. Курган-Тюбе - Рават
		25. Убеис - ошдор - Наманган



Turkmenistan

MASTER PLAN FOR THE INTERNATIONAL SEA PORT OF TURKMENBASHI AND TURKMEN MERCHANT MARINE UNTIL 2020

- The total area of multifunctional port will be more than 120 ha, part of which will be located in the sea area



NEW RAILROAD KAZAKHSTAN-TURKMENISTAN-IRAN



Uzbekistan

TRANSPORT CORRIDORS IN UZBEKISTAN

Route “A”

1. Uzbekistan – Kazakhstan – Russia – Byelorussia – European Countries

Route “B” (TRACECA)

1. Uzbekistan – Kazakhstan – Caspian Sea – Azerbaijan – Georgia – Black Sea – European Countries
2. Uzbekistan – Turkmenistan – Caspian Sea – Azerbaijan – Georgia – Black Sea – European Countries

Route “C”

1. Uzbekistan – Turkmenistan – Iran (Bandar–Abbas);
2. Uzbekistan – Turkey – Black Sea – European Countries

TRANSPORT CORRIDORS IN UZBEKISTAN

Route “D”

1. Uzbekistan – Kazakhstan – Russian Federation
2. Uzbekistan - Kazakhstan – China
3. Uzbekistan – Kyrgyzstan – China

Rout “E”

1. Uzbekistan – Afghanistan – Iran
2. Uzbekistan – Afghanistan – Pakistan
3. Uzbekistan – Afghanistan – Iran – Turkey
4. Uzbekistan – Afghanistan – Iran – India

PRIORITY PROJECTS OF UZBEKISTAN

- **Construction and reconstruction of sections of roads that are part of the Uzbek national highway;**
- **Upgrading of road pavement from axial load 10 tons to axle load 13 tons at road sections forming part of the Uzbek national highway;**
- **Construction of the new railway Angren - Pap 124 km, construction of 19.2 km. tunnel through the pass "Kamchik";**
- **Electrification of railway sectors Marakand - Karshi (140 km), Karshi - Termez (325 km);**
- **Organization of high-speed passenger trains on the railway line Tashkent - Samarkand (Stage 3);**
- **Upgrading, modernization of the fleet of locomotives**

With certain aid of international financial institutions Kazakhstan, Uzbekistan and Turkmenistan are able to implement new road construction and reconstruction projects by themselves.

However, Kyrgyzstan and Tajikistan do not have the necessary financial, technical capacity.

The Central Asians countries are still making a lot of effort in order to avoid the transport dependence on neighboring countries.

PRIORITIES FOR ACTION

- **creation of competitive transport corridors across the Central Asian region;**
- **facilitate efficient movement of people and goods across borders;**
- **development of secure, consumer-oriented transport systems**

PRIORITY AREAS OF COOPERATION

- **improvement of administrative procedures, simplification, standardization and harmonization of trade procedures;**
- **encourage the free movement of goods;**
- **ensuring transparency of laws, regulations, procedures and forms, exchange of information on these and other trade issues**

Thanks for your attention!

- Phone: +7 727-375 65 59
- Fax: +7 727-258 24 49
- Email: muratbek@niitk.kz