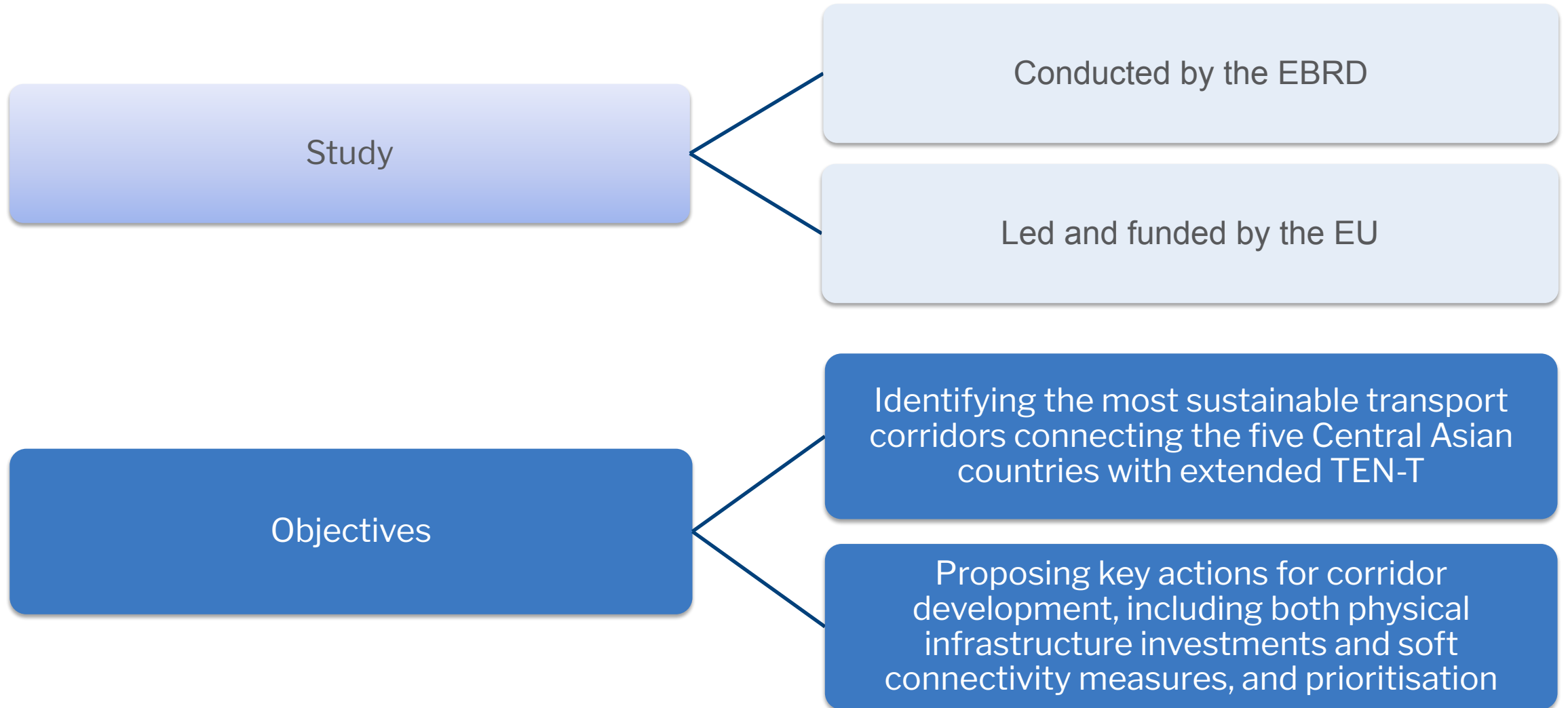


Sustainable Transport Connections between Europe and Central Asia



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The Study on Sustainable Transport Connections between Europe and Central Asia



Three Central Asian routes traverse towards Europe via the Caspian Sea...



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...and these routes have many advantages



Central Asian network can play a more prominent role in Eurasian connectivity



Strategic location



Direct access to main economic and production regions in Central Asia



Direct access to Asia



Stable and viable alternative

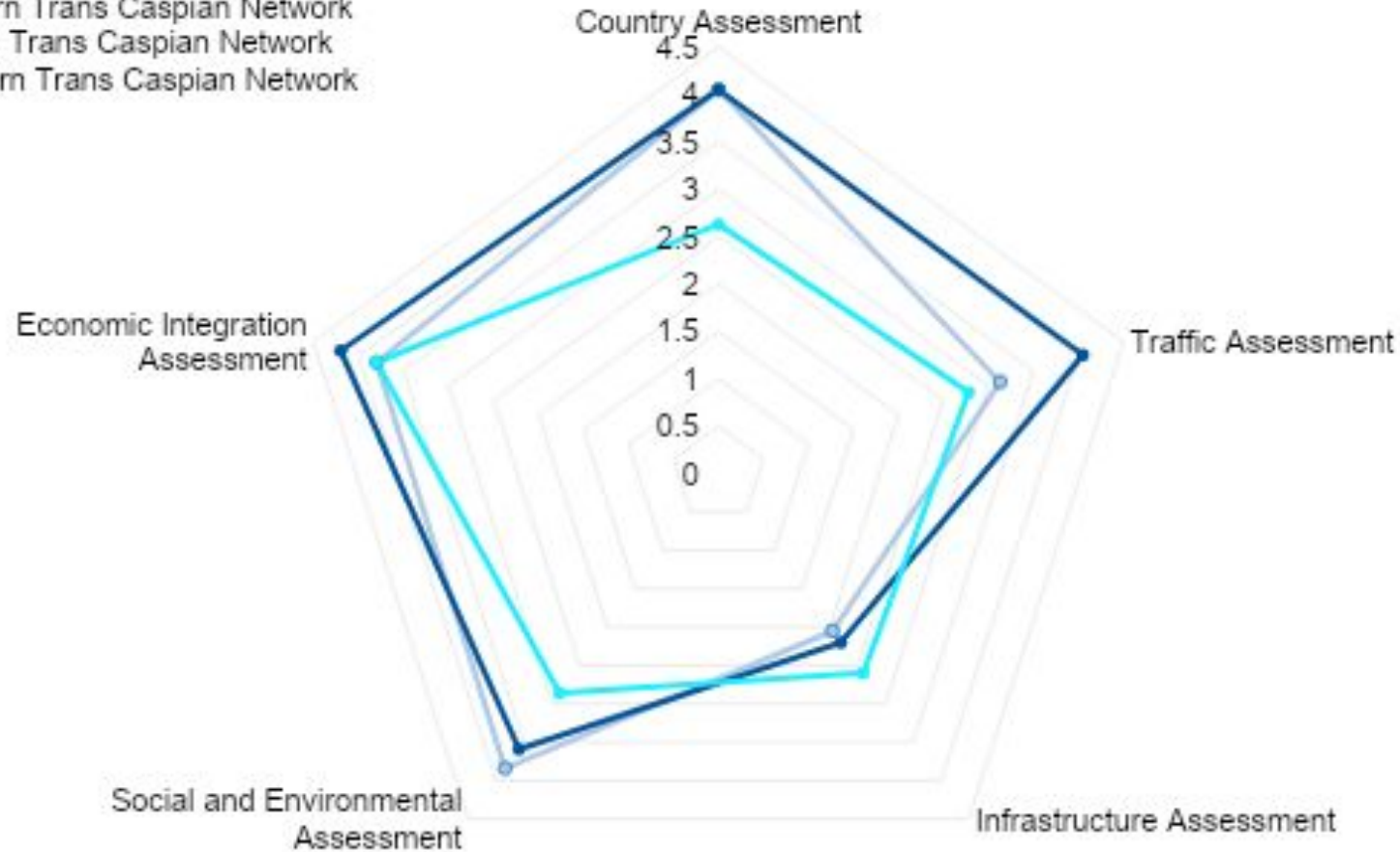
Based on sustainability considerations, Central alternative performs best vis-à-vis other regional alternatives...



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Sustainability Performance of Central Asian Networks

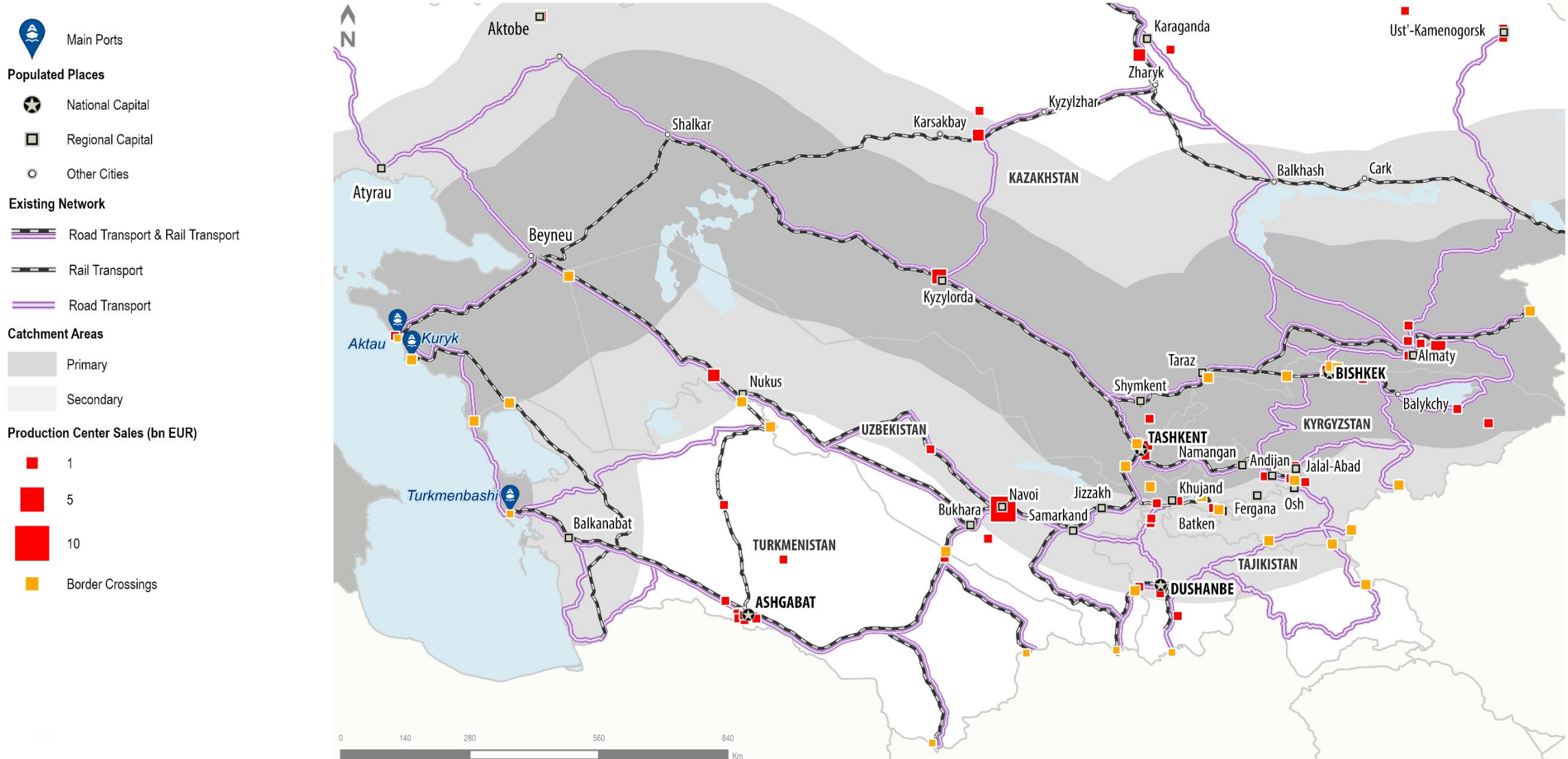
- Northern Trans Caspian Network
- Central Trans Caspian Network
- Southern Trans Caspian Network



...and has the most potential for further development



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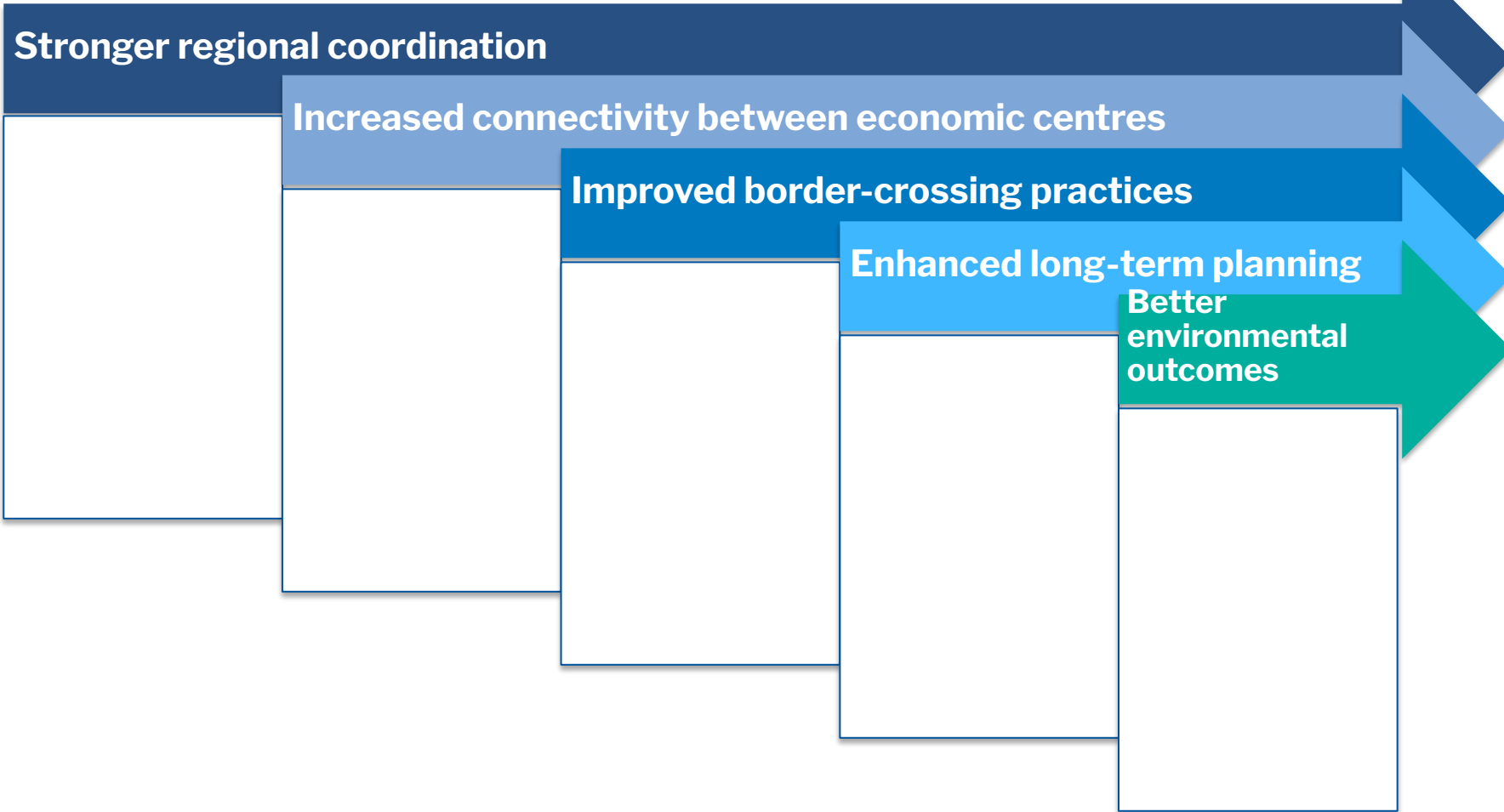


If coordination improves and joint actions materialise, Central Asia would benefit as a region



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Expected Benefits of Developing the Central Trans-Caspian Network



**More than
transport
network
developmen
t**

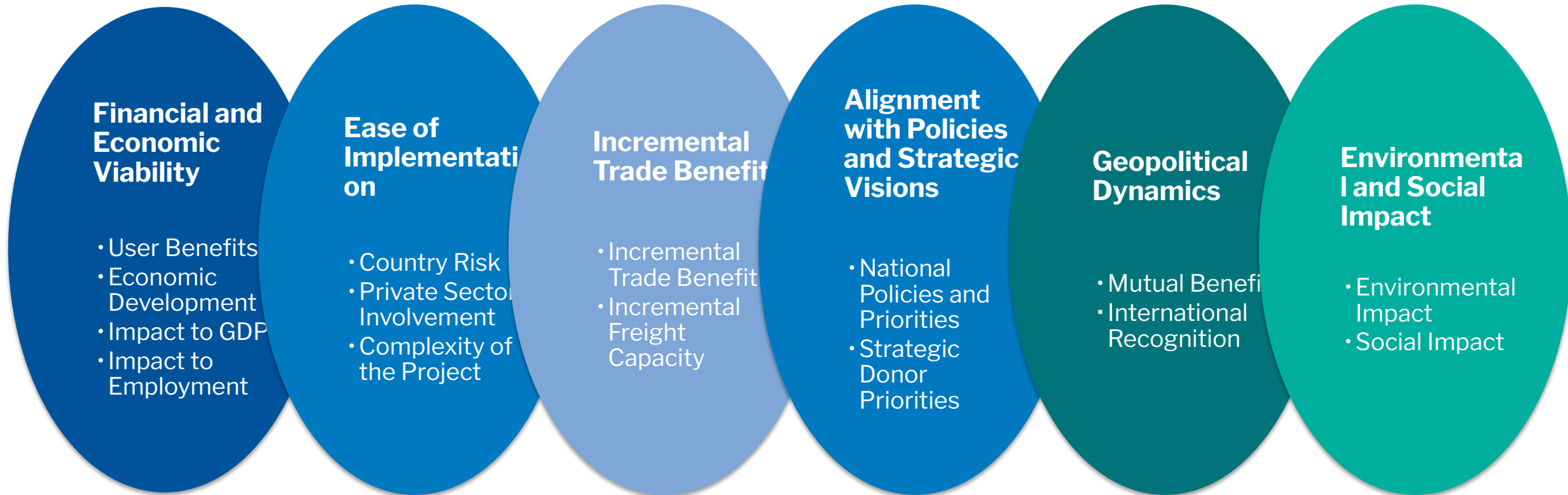
**Rather, a
new
regional
developmen
t
perspective**

Sustainability remains at the core of action identification and prioritisation

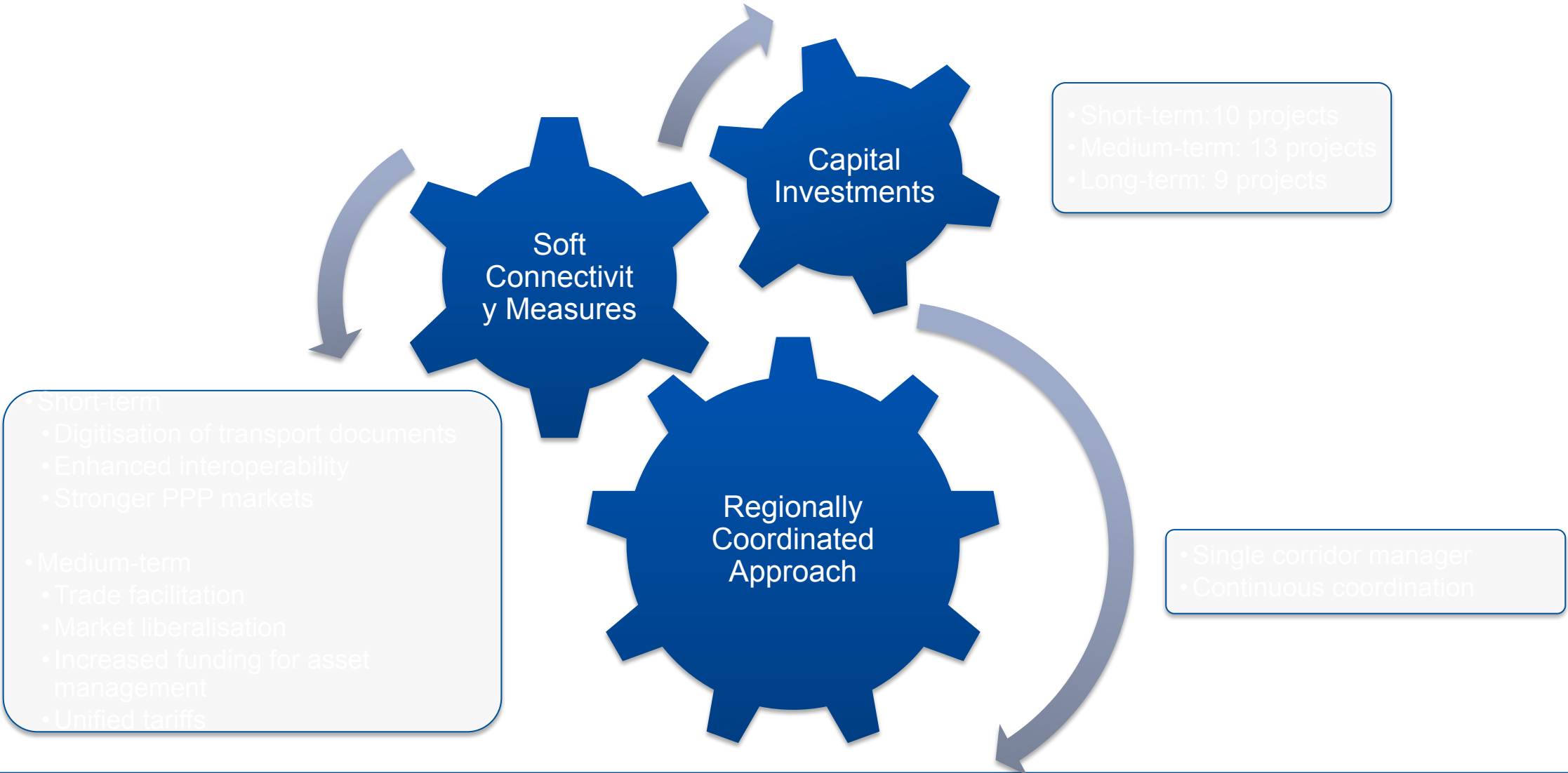


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Multi-Criteria Assessment Approach to Action Prioritisation



Soft connectivity measures and investments of EUR18.5 billion would support development of the network



Low-cost and high-benefit soft connectivity measures would bring significant efficiency to operations



Major Barriers on Trans-Caspian Corridors

Lack of transparent tariffs and fair access to infrastructure

Limited regulatory harmonisation, data sharing, digitalisation

Capacity limitations, non-competitive transport times and costs

Limited opportunities for private sector participation

Lack of a single corridor management approach

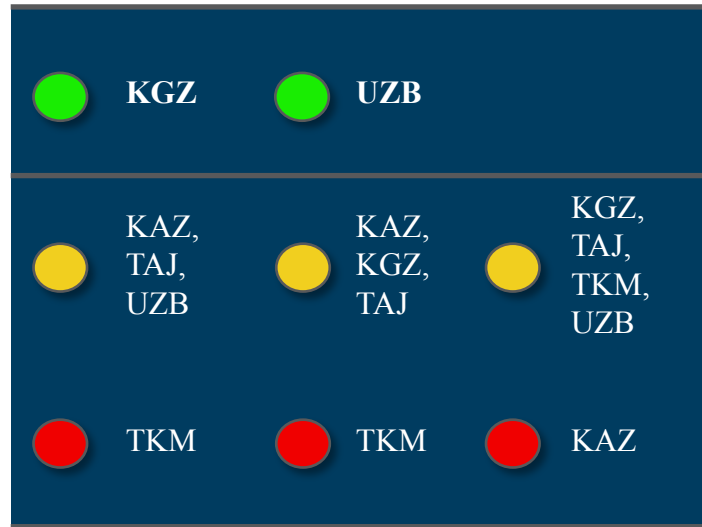
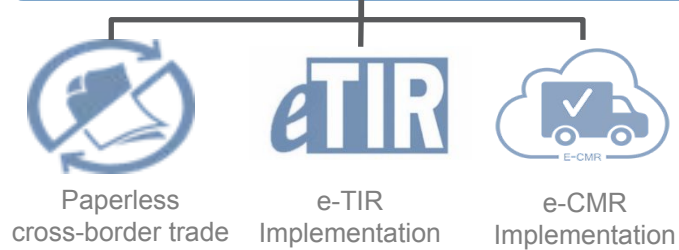
Desired Outcomes from Shippers' Perspective for the Trans-Caspian Corridors

- Improved service levels
- Increased capacity
- Increased competition and options
- Increased network reach
- Enhanced interoperability

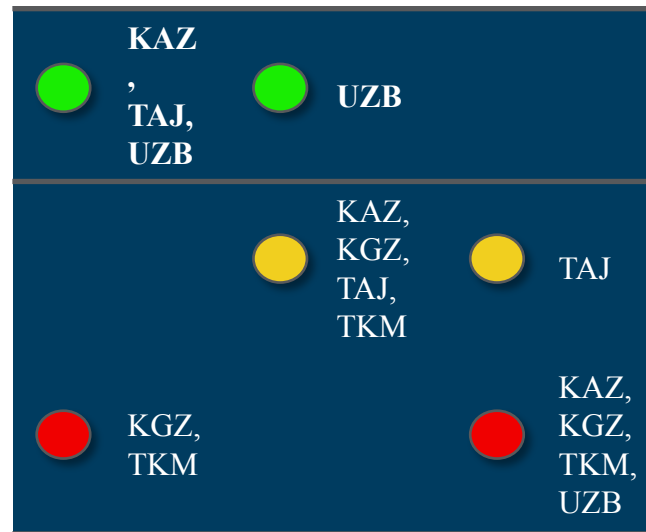
Some soft connectivity measures can be implemented in a relatively short time...



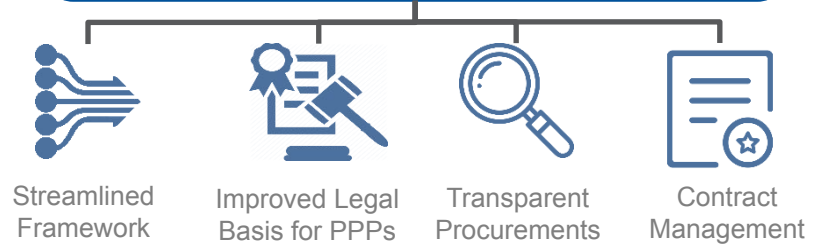
1 Digitisation of transport documents



2 Increased Interoperability



3 Enhanced PPP Environment

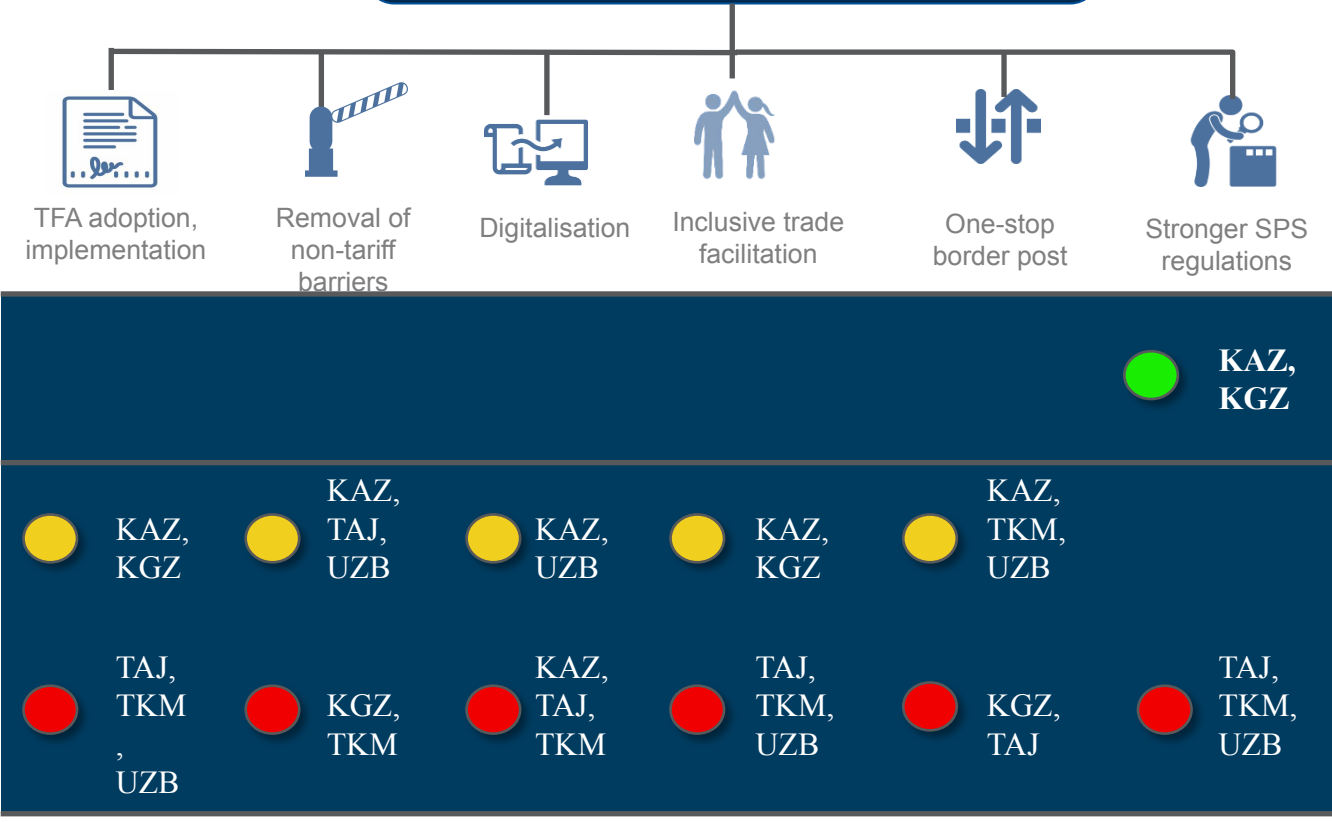


● Advanced progress ● Moderate progress ● Limited progress

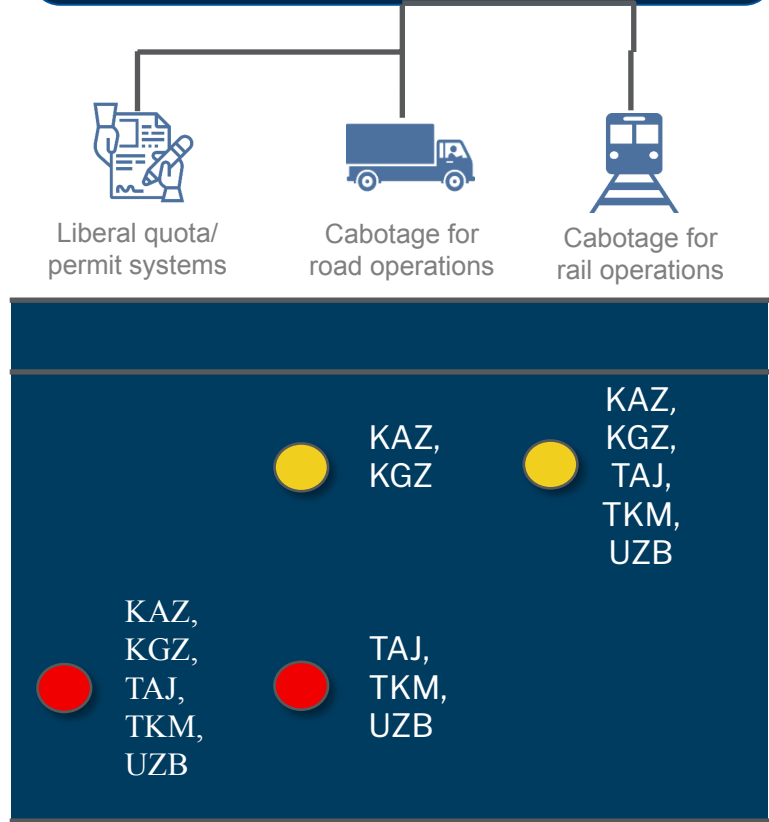
...while soft measures in medium term can increase investment opportunities for private sector...



4 Trade Facilitation



5 Market Liberalisation



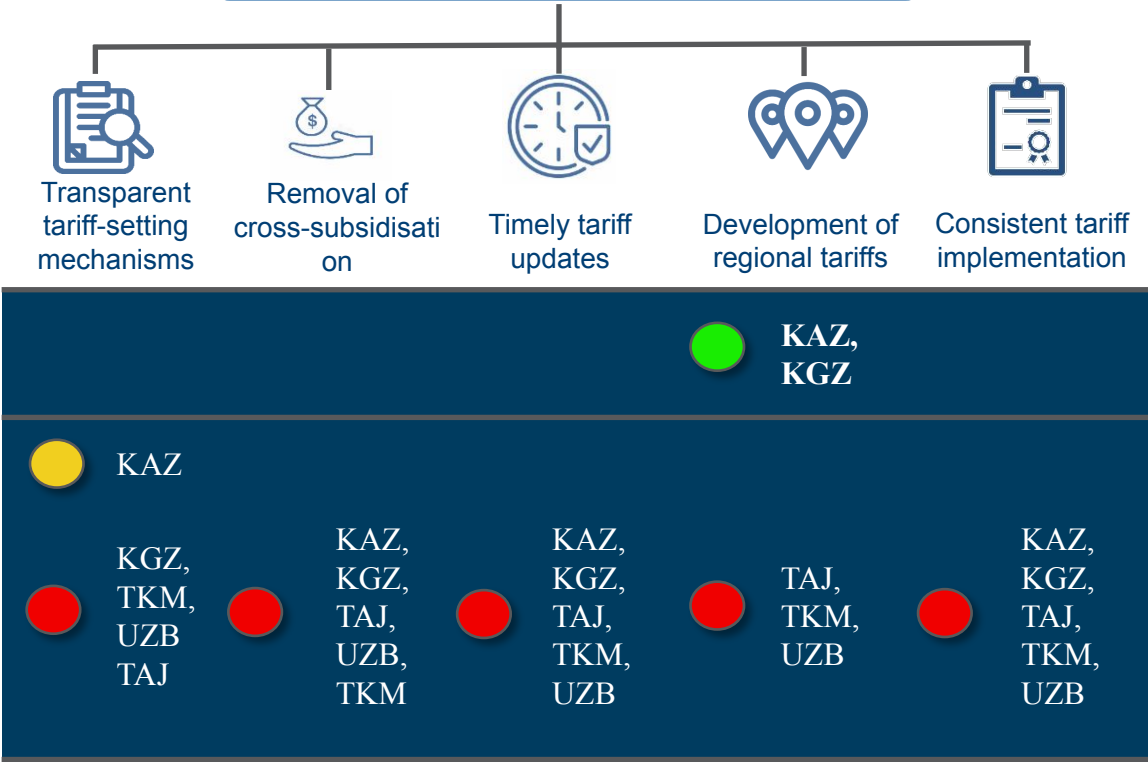
● Advanced progress ● Moderate progress ● Limited progress

...and contribute to development of transport sector with lower pressure on national budgets



6 Improvements to Tariff Setting Mechanism

7 Increased Funding

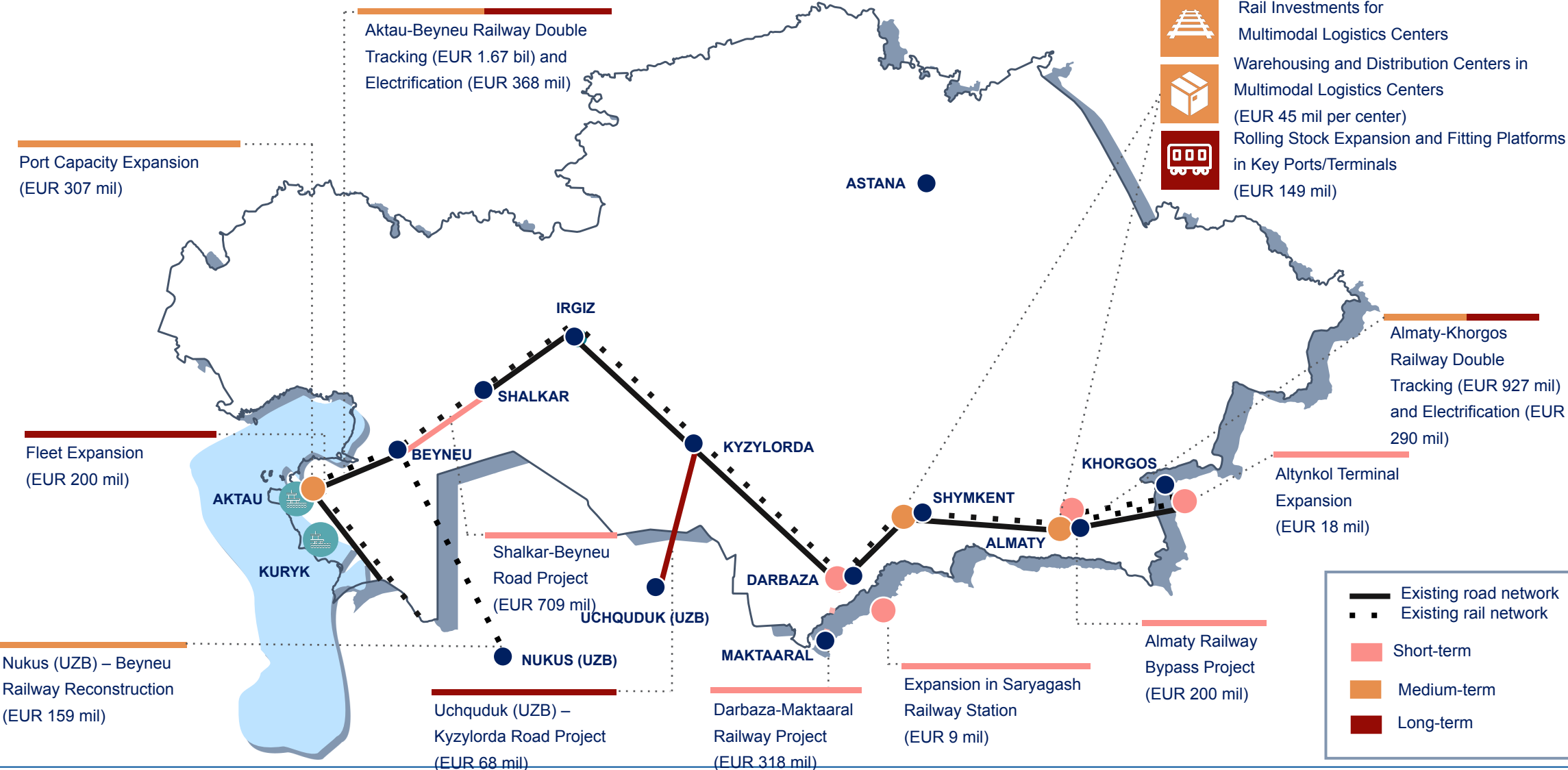


● Advanced progress
 ● Moderate progress
 ● Limited progress

Identified priority investment needs: Kazakhstan



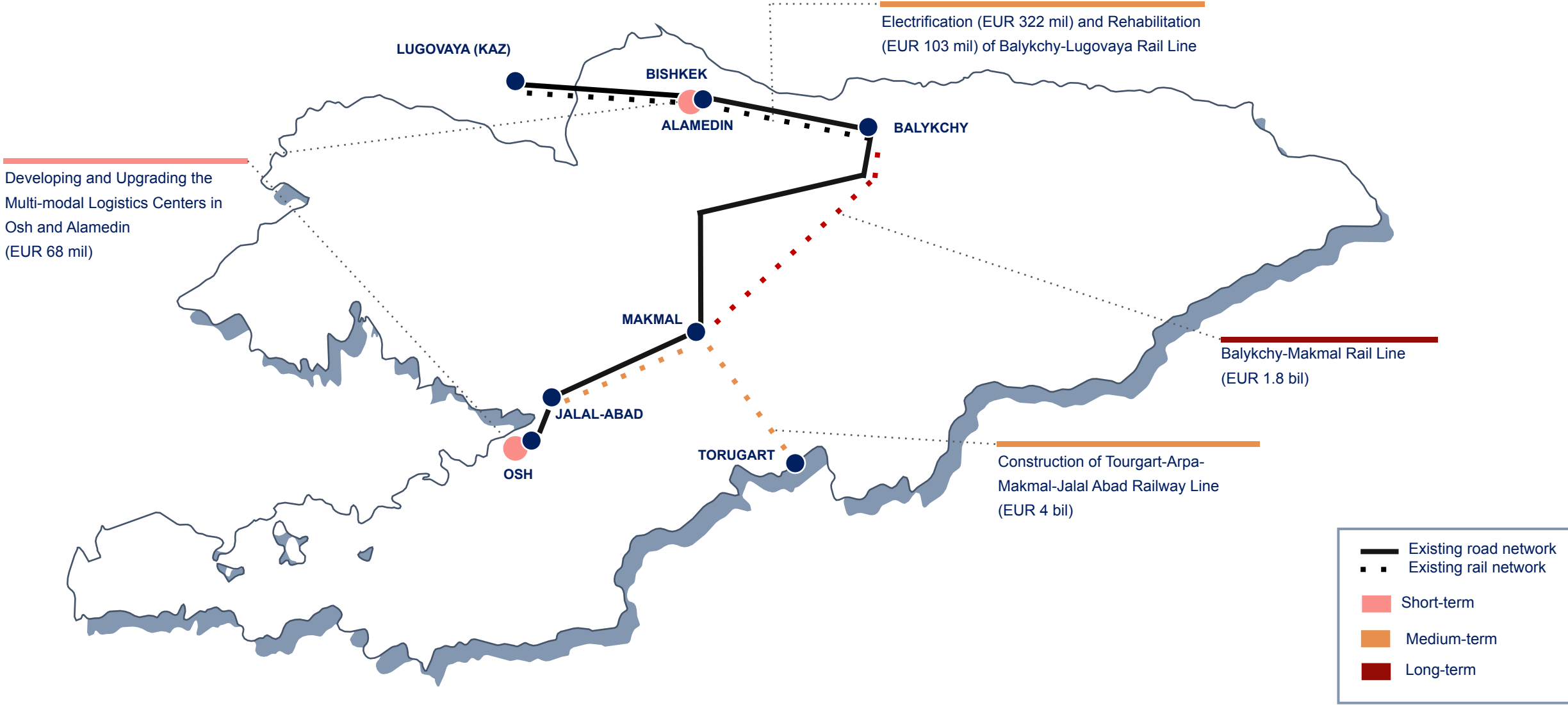
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Identified priority investment needs: Kyrgyzstan



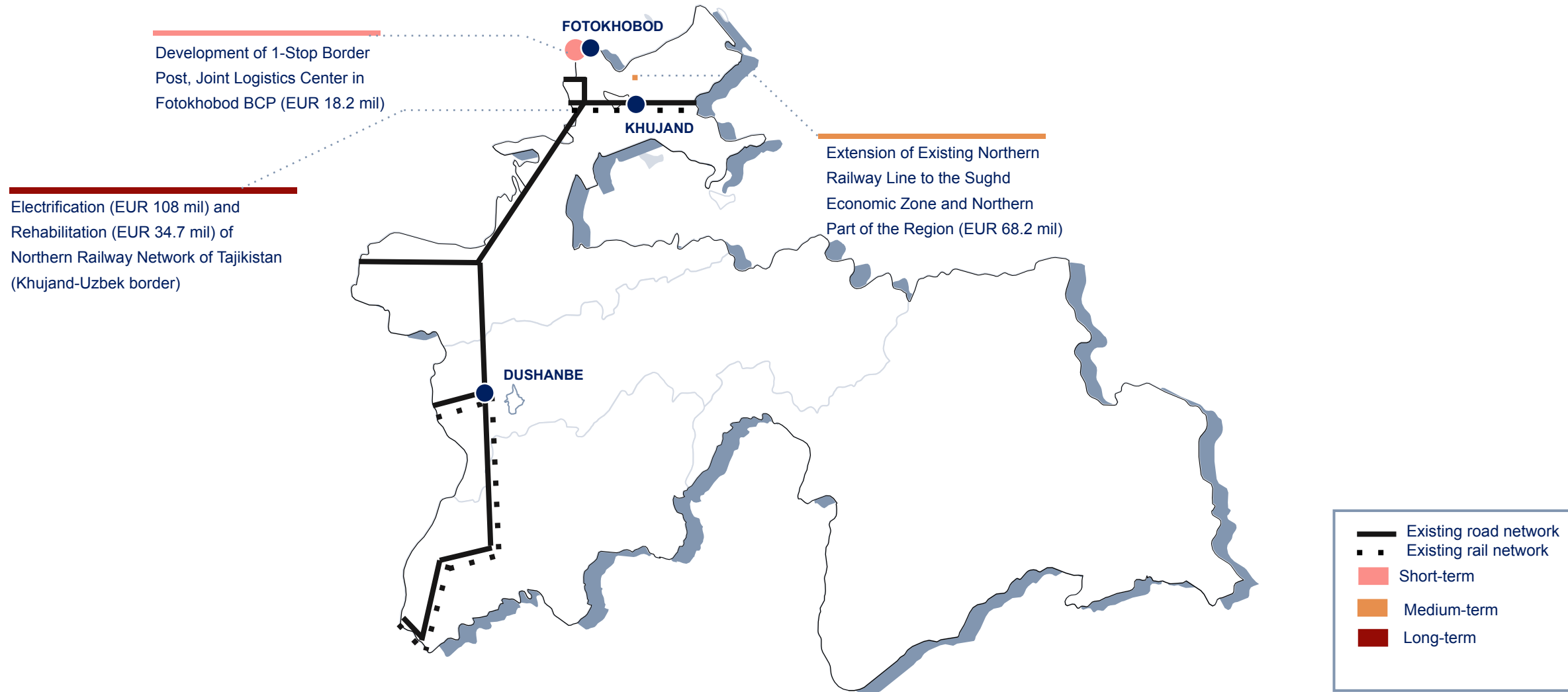
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Identified priority investment needs: Tajikistan



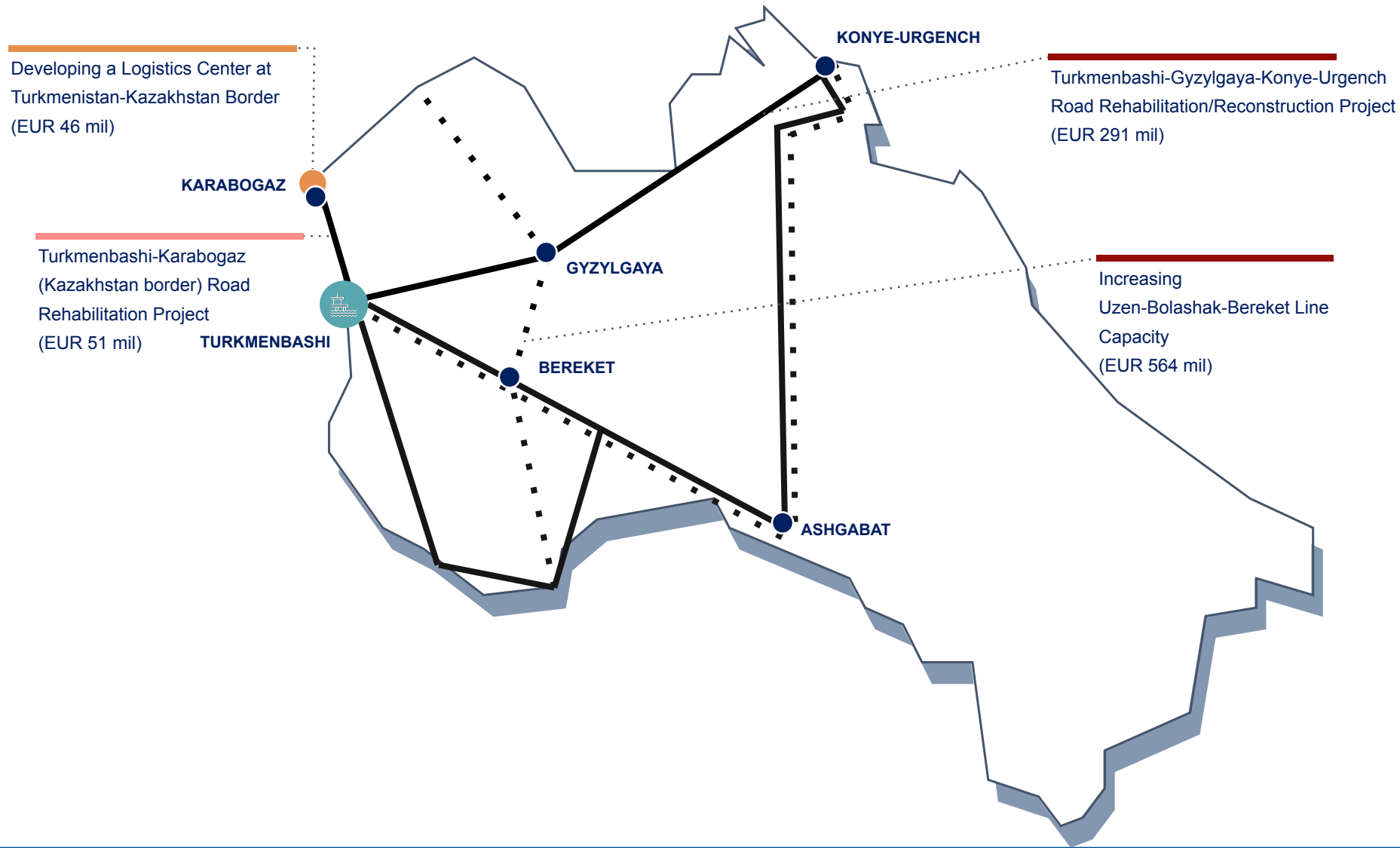
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Identified priority investment needs: Turkmenistan



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Identified priority investment needs: Uzbekistan



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Nukus (UZB) – Beyneu
(KAZ) railway reconstruction
(EUR 159 mil)

Uchkuduk – Kyzylorda
(KAZ) Road Project (EUR
97 mil)

Increased capacity on
Tashkent-Samarkand Railway Line
(EUR 1.1 bil)

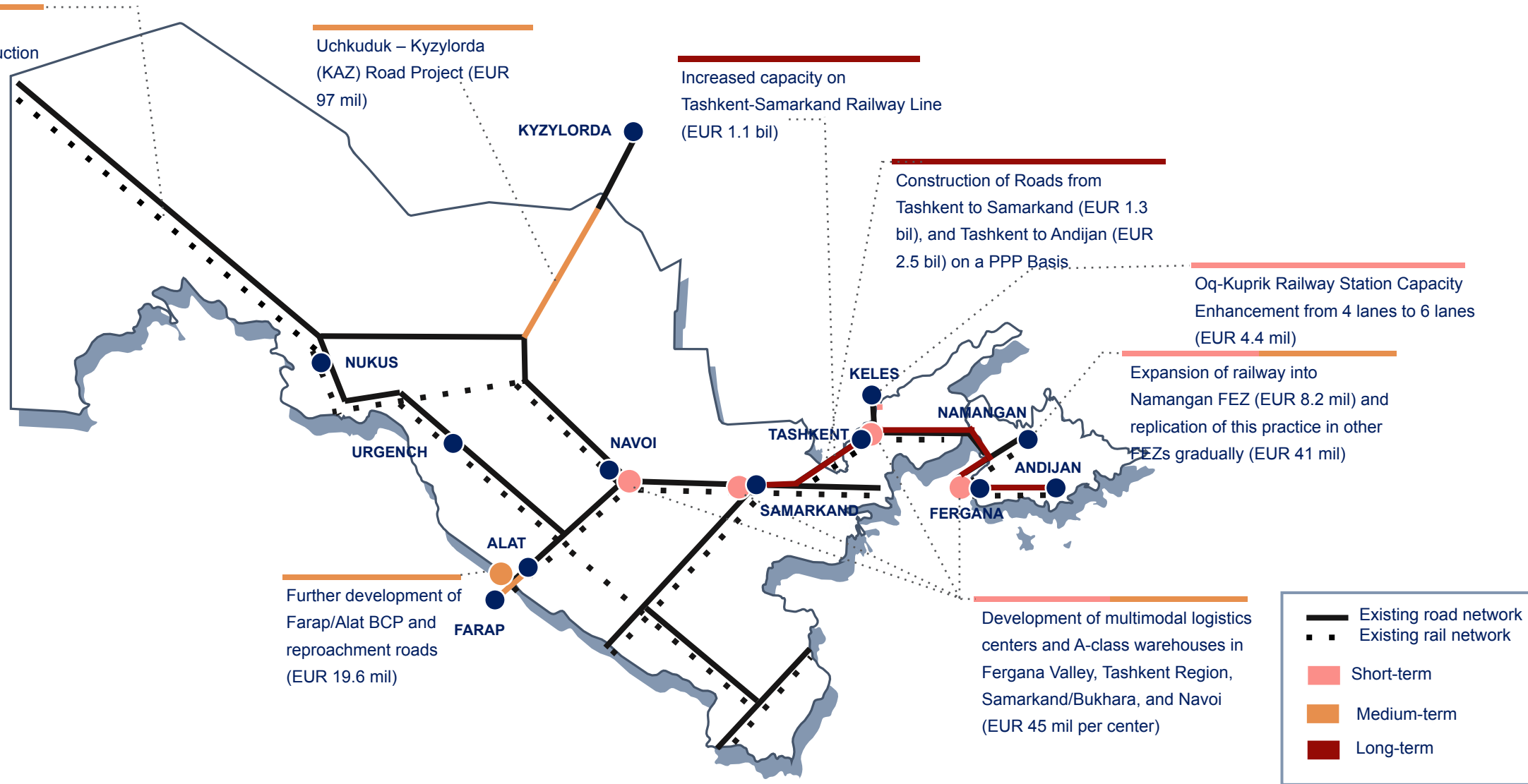
Construction of Roads from
Tashkent to Samarkand (EUR 1.3
bil), and Tashkent to Andijan (EUR
2.5 bil) on a PPP Basis.

Oq-Kuprik Railway Station Capacity
Enhancement from 4 lanes to 6 lanes
(EUR 4.4 mil)

Expansion of railway into
Namangan FEZ (EUR 8.2 mil) and
replication of this practice in other
FEZs gradually (EUR 41 mil)

Further development of
Farap/Alat BCP and
reproachment roads
(EUR 19.6 mil)

Development of multimodal logistics
centers and A-class warehouses in
Fergana Valley, Tashkent Region,
Samarkand/Bukhara, and Navoi
(EUR 45 mil per center)

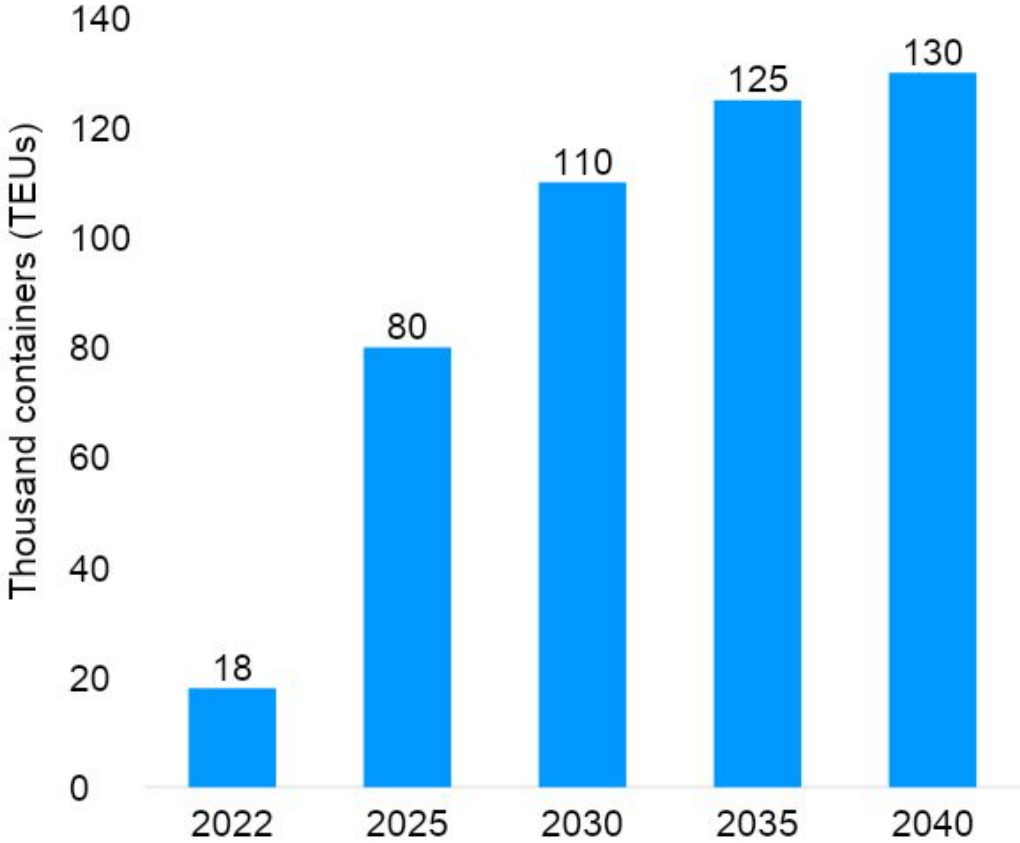


If investments and improvements materialise, transit cargo volume can increase by almost 7-fold

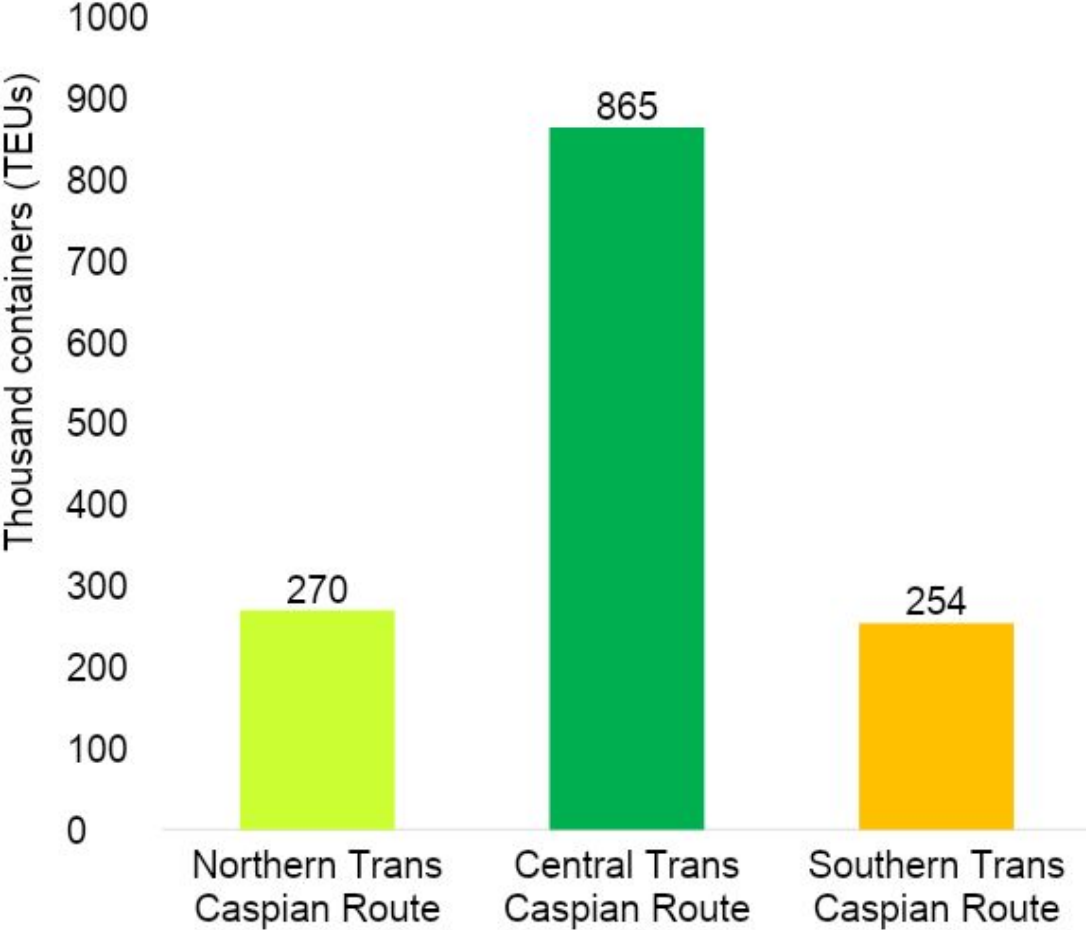


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Container Traffic Estimates on the Central Trans-Caspian Network (2022-2040, business-as-usual scenario)



Container Traffic Estimates on Trans-Caspian Routes (2040, unconstrained scenario)



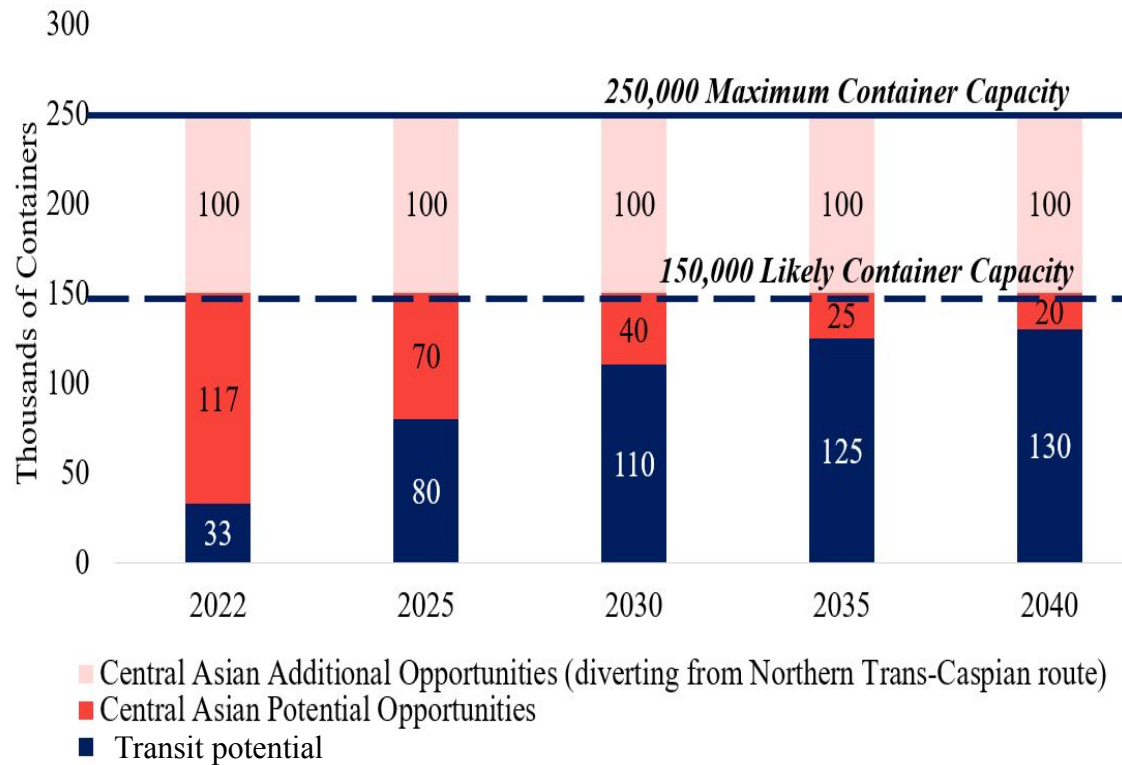
*Total container traffic in Middle Corridor through KAZ in 2022 is approximately 33 thousand TEUs. 18 thousand TEUs is through southern KAZ (CTCN), and 15 thousand TEUs is through northern KAZ.

Enhanced connectivity can also support higher cargo origination and transportation within Central Asia

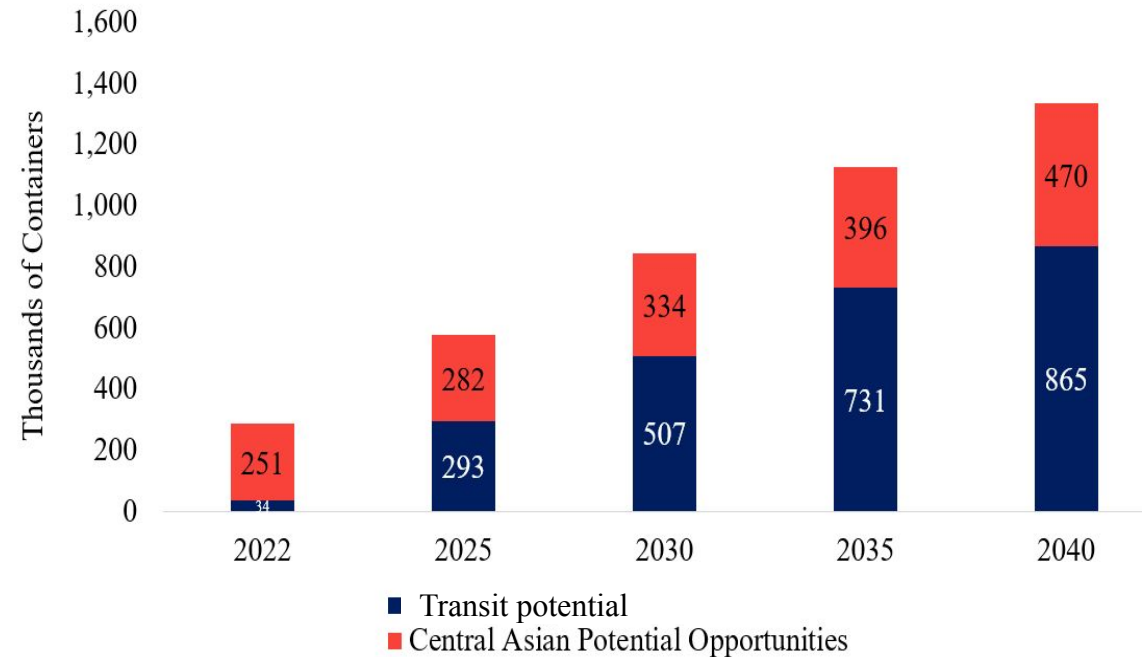


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Regional Traffic Estimates on the Central Trans-Caspian Network (constrained scenario)



Regional Traffic Estimates on the Central Trans-Caspian Network (unconstrained scenario)



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