



CADGAT

Central Asia Data Gathering and Analysis Team

The Transport Sector in Central Asia

Central Asia Regional Data Review

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In 2009, the Norwegian Institute of International Affairs (NUPI) and the OSCE Academy established the Central Asia Data-Gathering and Analysis Team (CADGAT). The purpose of CADGAT is to produce new cross-regional data on Central Asia that can be freely used by researchers, journalists, NGOs and government employees inside and outside the region. The project is managed and the reports are edited by Kristin Fjaestad and Indra Overland at NUPI. Comments and questions can be sent to: cadgat@nupi.no. The datasets can be found at: www.osce-academy.net/en/cadgat/

Introduction

In recent years, considerable attention has been given to the status and development of the transport sector in Central Asia. The war in Afghanistan has not only created a need for distribution networks for military supplies and personnel, but also accentuated the importance of a viable transport infrastructure that can facilitate cross-border trade and cooperation in the region. This report offers an overview of the transport sector in the five Central Asian republics – Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

The data were collected between February and April 2012 by individual researchers in each of the five countries. Variations in terms of data availability and quality across the countries must be noted. Sources and methods used are listed in footnotes. The report is divided into three main parts: roads, railways and air transport. The countries' transport sector development strategies are briefly introduced; finally, two appendices with details of bilateral and regional transport agreements as well as an overview of road border points are provided.

Key findings

- Roads are the main means of transport in Central Asia. Road development is the focus of strategies for transport sector development in all five countries. Road quality is a huge challenge, especially in mountainous terrain where road building requires not only considerable initial investments, but also funds for continued maintenance and reconstruction. The five Central Asian countries vary significantly in their financial capacity to invest in transport; many major infrastructure development projects are initiated and funded by donors and/or international organizations.
- Rail transport is becoming more important, especially for freight traffic and supplies to Afghanistan. Uzbekistan has a fairly well developed rail network, and Turkmenistan is investing in its rail connections to the north and south.
- Moving people or goods from one Central Asian country to another is complicated by the limited number of direct flights between some of the main cities, few rail connections and time-consuming border procedures.

See also CADGAT report no. 5 (July 2012) on road transport in Central Asia for more data on this topic.

1) National and regional transport strategies: perspectives and problems

Kazakhstan

The major document in the transport sector is the *Transport Development Strategy 2015* adopted in 2006, which is part of the country's *Industrial Innovative Programme*. The investments necessary for infrastructure construction total USD 26 billion:¹ 70% of the funding is to come from private sources and 30% from the state. The strategy is to be implemented in two stages: 2006–2011 and 2011–2015. The Transport Strategy includes upgrading and construction of six major international transit corridors: 1) Tashkent–Shymkent–Taraz–Almaty–Khorogos; 2) Shymkent–Kyzyl–Orda–Aktobe–Uralsk–Samara; 3) Almaty–Karaganda–Astana–Petropavlovsk; 4) Astrakhan–Atirau–Aktau–Turkmenistan border; 5) Omsk–Pavlodar–Semipalatinsk–Maikapchagai; 6) Astana–Kostanay–Chelabinsk–Ekaterinburg.

Transport and communications accounted for 11%² of Kazakhstan's GDP in 2007.³ In 2011, freight transport accounted for 23,076 million tonnes, 21.6% higher than in 2010.⁴ In 2008 motor transport represented 78.3% of total freight market volume; rail transport accounted for 11.6%, air and sea transport a mere 1.6%.⁵ By 2011, the share of motor transport had grown to 82.53%.⁶ In 2010, 99.83% of all passengers in Kazakhstan used road transport: only 0.55% used railways and 0.26% used air transport.⁷ Motorable roads are clearly the most important element in the country's transport system.

Kyrgyzstan

As of February 2012, the key document that outlines the government's understanding of the status quo, problems and goals in the transport sector is *The Development Programme of Sectors of the Ministry of Transport and Communications 2009–2011*, adopted in 2008. Road development is the main focus of this document: due to the poor conditions for other means of transport, like air and railway, transport in Kyrgyzstan depends on roads. According to the *Development Programme*, 2/3 of the automobile roads studied were in poor condition, and 1/5 of the roads were found to be such poor shape that reconstruction of the hard surface was no longer possible. This situation came about mainly as a result of underfinancing of the sector since 1991. The Kyrgyz government is currently finalizing the *Development Strategy for Automobile Transport in the Kyrgyz Republic for 2011–2015*, although this document does not seem to indicate any fundamental new thinking on the issue.

Our review of this and other related documents and materials suggest the following as key issues in the national transport sector of Kyrgyzstan:

1. Improving transit capacity. Kyrgyzstan has been actively promoting construction of the China–Kyrgyzstan–Uzbekistan railroad, as well as the highways connecting Kyrgyzstan to western provinces of China. These projects are heavily dependent on China as the key source of financing. As yet, Kyrgyzstan remains largely in the periphery of key transit paths.⁸

¹ Government of Kazakhstan, *Transport Strategy of the Republic of Kazakhstan, 2012*, available at: <http://en.government.kz/resources/docs/doc5>, accessed 28 February 2012.

² The Agency of Statistics of the Republic of Kazakhstan.

³ In Kazakhstan official statistics on GDP composition usually subsume 'transport' (including road budget) and 'communications' together.

⁴ Samruk Kazyna, *Transport, 2012*. Available at: <http://sk.kz/page/transport>, accessed 03 May 2012.

⁵ Tulendiev, E.E., *Nauchno-metodicheskie Osnovi Razvitiia Sistem Regionalnih Transportno-logisticheskikh Centrov (na Primere Respubliki Kazahstan)*. Moscow. 2009.

⁶ Kazyna, see note 4 above.

⁷ The Agency of Statistics of the Republic of Kazakhstan, 2012. The data include passengers moving *within* Kazakhstan as well as *into* and *from* Kazakhstan.

⁸ <http://www.cacialalyst.org/?q=node/5731>

2. Improving internal road connections. Various parts of the country can be reached only by crossing parts of Uzbek or Tajik territory (especially in southern Kyrgyzstan); moreover, means of transport between various oblasts/towns within Kyrgyzstan are limited.

According to the Transport and Communications Ministry of Kyrgyzstan, road transport accounts for 95% of cargo and 97% of passenger volume.⁹ In 2011, 1.1 billion *soms* (approx. USD 24 mill.) was allocated for road reconstruction, comprising 1.4% of budget expenses. Transport Minister Isakov has suggested that this figure should be increased to 3 or 4%.¹⁰ This would make expenses for road reconstruction about 0.4% of GDP, although 0.9% deemed necessary.

Tajikistan

Tajikistan has developed a national transport sector master plan which serves as a road map for transport sector development in the foreseeable future. As a small, mountainous and landlocked country, Tajikistan is heavily dependent on intra-regional internal trade and external trade. Its population and businesses need fast, reliable and cheap transport networks in order to sustain economic growth and boost connectivity internally and internationally. Today, roads play a key role as the most affordable and convenient domestic mode of transport.¹¹ Railways primarily serve exports and imports, accounting for about 96% of all freight shipment but less than 30% of international passenger travel. Civil aviation caters mostly to long-distance passenger travel; it accounts for about half of international passenger travel and less than 1% of freight shipment. The budget for roads is only 0.3% of GDP: this is not enough for new construction, and falls short of even minimum maintenance requirements of around 0.7% of GDP. According to the Ministry of Transport, most of new road construction is externally financed, through loans and grants from development partners.

Turkmenistan

The development of road infrastructure of Turkmenistan is outlined in the *National Programme of Socio-economic Development of Turkmenistan for 2011–2030*. In accordance with the programme the construction of the highways Turkmenbashi–Ashgabat–Mary–Turkmenabad–Farab and Ashgabat–Karakum–Dashoguz (total length is 1676 kilometers) has now been completed. Further plans include upgrading and repair of roads Serdar–Etrek–Gidrolum, Mary–Serhetabad, Tejen–Sarahs, Turkmenbashi–Bekdash–Kazakhstan border, Turkmenabad–Gerogly–Dashoguz, Gudriolum–Gumdag. A new 200 km ring highway is being constructing around Ashgabat. It is planned to construct road bridges across the river Amu Darya between Atamurat city and Kerkichi settlement (length 1415 m) and near the town of Seydi. Both will be used as transit roads to Uzbekistan.

Turkmenistan saw an increase in key performance transport indicators in 2011 compared to the previous year. The increase in road freight transport was 1.9%, for pipeline transport 35.9%, rail 3.7%, sea 78.3% and air 0.7%. The rise in pipeline transport is connected with the export of energy products (LPG). Passengers using motor roads increased by 1.7%, by rail 3.8%, by sea 2.8%, by air 8%., from the previous year¹² In 2005, 4.5 million passengers were transported by railway, and 600 million by

⁹ Strategy for Automobile Transport Development in Kyrgyz Republic for 2010–2015, available at: <http://www.time.kg/index.php?newsid=19>.

¹⁰ <http://www.for.kg/ru/news/144568/>

¹¹ According to the Ministry of Transport, in 2010, the shares of domestic passengers and freight transported by roads averaged 98% (in number) and 23% (in volume).

¹² www.stat.gov.tm

motor vehicle. Some 2.3 million people sent goods by air freight, and 31.2 thousand used maritime shipment. 18 million tons of cargo were transported by railway, by road 90 million tons, by air 27.1 thousand tons, by sea 300 tons, by river 2.97 million tons, and through pipelines 38 million tons.¹³ In 2011, 4.5% of GDP derived from the transport and communication sphere.¹⁴

Uzbekistan

The *Transport Sector Strategy for Uzbekistan (2006–2020)* prepared by the Asian Development Bank (TA Project NO. 37691–01) in line with the government's vision and aspirations lists out the following policy objectives for the domestic sector: (i) operate efficiently in a competitive and fair environment, while preserving the network in good condition, with due concern for externalities: environmental damage, safety and intrusion; (ii) limit operating subsidies from the public purse to support for social services and to investment in projects of a strategic nature; (iii) finance infrastructure based on the 'user pays' principle, wherever possible; (iv) prioritize infrastructure development based on clear economic and social objectives; (v) coordinate governance at the central level for accountable management; and (vi) foster private operation of infrastructure and services wherever appropriate.

The following policy objectives are listed for international transport: (i) facilitate trade, travel and tourism; (ii) foster good relations within Central Asia; and (iii) promote transit traffic. In many cases domestic and international policy are implemented in parallel: for example, upgrading international corridors tends to benefit domestic traffic as well.

Uzbekistan has completed several significant railway projects, including construction of NavoiUchkuduk–Sultanuizdag railway line (341 km) completed in 2001, and construction of Guzar–Boysun–Kumkurgan railway line (220 km) completed in 2007.

The focus of upcoming projects will be on roads. On 22 April 2009, the Uzbek government adopted the Program on Development of Uzbek National Highways for the period up to 2014. This involves highways with a total length of 1501 km, including:

- Beyneu–Kungrad–Bukhara–Navoi–Samarkand–Tashkent–Andijan ((EE-40) 40)
- Bukhara–Alat ((M-37)
- Bukhara–Karshi–Guzar–Termez and Samarkand–Guzar (M-39).

Details of bilateral and regional transport agreements can be found in Appendix 1.

¹³ *Economics of Turkmenistan: 2002–2005*.

¹⁴ *Neutral Turkmenistan*, 16.06.2012.

2) Railways in Central Asia

Table 2.1. Railways in Central Asia

| | Number of train routes ¹⁵ | Number of train routes between CA states ¹⁶ | Number of railway stations within the country | Total length of railway lines | Number of regional railway border check-points |
|---------------------|--------------------------------------|--|---|-------------------------------|--|
| Kazakhstan | n/a | 3 ¹⁷ | 120 | 15,016 km ¹⁸ | 15 ¹⁹ |
| Kyrgyzstan | 4 | 1 (summer only) | 16 | 424 km | 5 |
| Tajikistan | 1 | n/a | 31 | 943 km | 4 |
| Turkmenistan | 4 | 2 ²⁰ | 86 | 3080 km | 1 (with Iran) |
| Uzbekistan | 9 | 1 | 171 ²¹ | 4400 km | 5 |

¹⁵ For instance, the train route between Almaty and Astana is one domestic route.

¹⁶ For instance, the train route between Almaty and Bishkek is one regional route.

¹⁷ One each to Uzbekistan, to Turkmenistan and to Kyrgyzstan.

¹⁸ 2006–2008: 15,082 km; 2009: 15,079 km.

¹⁹ 11 with Russia, 2 with Uzbekistan, 1 with Kyrgyzstan, and 1 with China.

²⁰ 1991–1996, Turkmenabat–Tashkent; 1991–1996, Atamyrat–Dushanbe).

²¹ According to UZACE (Uzbekistan Association of Consultant Engineers).

3) Air transport in Central Asia

Table 3.1 International and domestic flights²² per week (as of February 2012)²³

| | KAZ | KGZ | TAJ | TUR | UZ | Russia ²⁴ | China | Germany | UAE | Turkey | UK | Iran | India | South Korea |
|---------------------|-------------------|-----|-----|-----|-----|----------------------|-------|---------|-------------------|-------------------|----|------|-------|-------------|
| Kazakhstan | 714 ²⁵ | 5 | 7 | 2 | 12 | 110 | 24 | 27 | 32 | 46 | – | – | – | – |
| Kyrgyzstan | 5 | 58 | 4 | 0 | 6 | 84 | 11 | – | 2 | 11 | 3 | – | – | – |
| Tajikistan | 16 | 12 | 196 | 0 | 0 | 88 | 20 | – | 8 | 12 | – | 16 | – | – |
| Turkmenistan | 2 | 0 | 0 | 116 | 1 | 18 | 8 | – | 16+2 (freight) | 56+2 (freight) | 12 | – | 16 | – |
| Uzbekistan | 12 | 16 | 0 | 1 | 214 | 116 | 6 | 4 | – | 20 | – | – | – | 6 |

²² Both ways are counted as one flight.

²³ There might be discrepancies between the number of flights e.g. from Kazakhstan to Tajikistan (7) and from Tajikistan to Kazakhstan (16), as not all planes return to the same airport and there are certain flights that are more used one way than for round trip.

²⁴ For each of the 5 Central Asian republics, the five countries with the most flights have been selected. All countries have Russia, China and Turkey among the top 5, but otherwise the countries differ.

²⁵ Total number of domestic flights in the country per week.

Table 3.2. Number of airports

| Country | Domestic airports | International Airports | Total |
|--------------|-------------------|------------------------|-------|
| Kazakhstan | 3 | 15 | 18 |
| Kyrgyzstan | 8 | 3 | 11 |
| Tajikistan | 8 | 5 | 13 |
| Turkmenistan | 6 | 2 | 8 |
| Uzbekistan | 6 | 5 | 11 |

4) Travel costs in Central Asia

Table 4.1. Average travel costs between main cities of five Central Asian states, in USD

| | |
|---|--|
| Average flight costs (return flight) | 1) Ashgabat–Tashkent: USD 320 2) Astana–Tashkent : 450 3) Astana–Dushanbe: 500 4) Dushanbe–Bishkek: 280 5) Tashkent–Bishkek: 350 6) Bishkek–Ashgabat: 1351 (via Istanbul) 7) Astana–Ashgabat: no direct flights 8) Dushanbe–Tashkent: no air connection 9) Dushanbe–Ashgabat: no direct flights 10) Astana–Bishkek: no direct flights (via Almaty: 350–400) 11) Dushanbe–Almaty: 300 12) Ashgabat–Almaty a) for local people: 212 b) for foreigners: 402 |
| Average train costs | 1) Tashkent–Astana: 43 one way (UTY train to Yekaterinburg, Russia) 2) Astana–Bishkek: 70 3) Bishkek–Almaty: 25 |
| Average taxi costs | 1) Astana–Bishkek: 30 2) Dushanbe–Tashkent: 100–150 3) Astana–Tashkent: 700 4) Tashkent–Bishkek: 230 5) Tashkent–Ashgabat 500 <i>Remark: Turkmenistan</i> To the Turkmen border: ~ 2 USD From Turkmen border to Urgench or Buhara (Uzbekistan): ~ 10– 5 USD |

Appendix 1

Table 1. Bilateral transport agreements in Central Asia since 1991

| Agreement | Countries | Date of adoption | Implementation problems |
|---|-----------------------------|-------------------------|--|
| 1. Agreement between Governments of Republic of Uzbekistan and Turkmenistan on main principles of relations in the area of transport and communication, Ashgabat | Uzbekistan and Turkmenistan | 14 April 1993 | N/A |
| 2. Agreement between Uzbek State Shareholding Corporation or automobile transport Uzavtotrans and Ministry of Automobile Transport of Turkmenistan on international automobile movement, Tashkent | Uzbekistan and Turkmenistan | 17 August 1993 | N/A |
| 3. Agreement on Air Traffic | Kazakhstan and Uzbekistan | 25 April 1994 | N/A |
| 4. Agreement between Governments of the Republic of Uzbekistan and Turkmenistan on international automobile passenger and cargo movement. Chardjou | Uzbekistan and Turkmenistan | 16 January 1996 | N/A |
| 5. Agreement between the Governments of the Republic of Uzbekistan and Kyrgyzstan on international automobile movement. Tashkent, | Uzbekistan and Kyrgyzstan | 4 September 1996 | Agreement entails that motor vehicles do not need particular permits to travel between the two countries. Limited scope. |
| 6. Agreement between Governments of Republics of Uzbekistan and Kyrgyzstan on design, reconstruction, and exploitation of the automobile road Tashkent–Andijan–Osh–Sarytash–Irkeshtam, Tashkent | Uzbekistan and Kyrgyzstan | 25 April 1997 | Updated by a later multilateral agreement including China |

| | | | |
|--|---------------------------|-----------------------|-----------------------|
| 7. Agreement between the Governments of Uzbekistan and Kazakhstan transit transportation of passengers, cargo, and luggage, securing their preservation and security during their movement on automobile and railway roads of the Republics of Uzbekistan and Kazakhstan, Tashkent | Uzbekistan and Kazakhstan | 27 March 1998 | Validity is uncertain |
| 8. Agreement on International Motor Traffic. It implies free entry of international motor transport of freight, excluding transport of freight from third countries | Kazakhstan–Uzbekistan | 20 March 2006 | N/A |
| 9. Agreement on Cross-border Movement of People, Transport and Goods | Tajikistan–Kyrgyzstan | Since 2 December 2010 | N/A |

Table 2. Regional transport agreements since 1991

| Agreement | Countries / International organizations | Date of adoption | Implementation problems | Remarks |
|--|--|------------------|---|--|
| 1. UN ESCAP resolution 48/11 on road and rail transport modes in relation to facilitation measures | More than 50 countries have acceded to at least one of the 8 conventions stipulated under UNESCAP resolution 48/11/UNESCAP | 23 April 1992 | These multilateral agreements act mostly as framework statements. Their implementation mechanisms have never been effective. All cross-border and transit road transport in the region is conducted under bilateral agreements, and unilateral decisions on their implementation. | Uzbekistan has acceded to all 8 conventions. ²⁶ Other Central Asian countries have acceded to several of the conventions. |
| 2. Agreement among Governments of Republic of Kazakhstan, Kyrgyz Republic, and Republic of Uzbekistan on conducting coordinated policy in the area of transport and communications | Kazakhstan, Kyrgyzstan, and Uzbekistan | 5 April 1996 | These multilateral agreements act mostly as framework statements. | N/A |
| 3. Agreement on cooperation in transit regulation transportation | Uzbekistan, Azerbaijan, | | The multilateral agreements act mostly as | |

²⁶ The conventions are: 1) Convention on Facilitation of International Maritime Traffic (FAL 1965) (1998 edition); 2) Convention on Road Traffic (Vienna, 8 November 1968); 3) Convention on Road Signs and Signals (Vienna, 8 November 1968); 4) Customs Convention on the International Transport of Goods under Cover of TIR Carnets (TIR Convention) (Geneva, 14 November 1975); 5) Customs Convention on the Temporary Importation of Commercial Road Vehicles (Geneva, 18 May 1956); 6) Customs Convention on Containers (Geneva, 2 December 1972); 7) International Convention on the Harmonization of Frontier Controls of Goods (Geneva, 21 October 1982); and 8) Convention on the Contract for the International Carriage of Goods by Road (CMR) (Geneva, 19 May 1956). Azerbaijan, Kyrgyzstan and Uzbekistan have acceded to all eight conventions. Georgia and Kazakhstan have each acceded to six conventions, Armenia and Mongolia five conventions and Tajikistan and Turkmenistan four conventions.

| | | | | |
|---|-----------------------|----------------|---|-----|
| among Republics of Uzbekistan, Azerbaijan, Georgia, and Turkmenistan, Serakhs | Georgia, Turkmenistan | 3 May 1996 | framework statements. | N/A |
| 4. Agreement on Principles of Formation of Common Transport Area and Cooperation of CIS Member States in the Field of Transport Policy, Bishkek | CIS countries | 9 October 1997 | The multilateral agreements act mostly as framework statements. | N/A |

| | | | | |
|--|--|------------------|---|-----|
| 5. CAREC (Central Asia Regional Economic Cooperation) | China, Russia, Uzbekistan, Tajikistan, Kyrgyzstan, Azergaijan, Afghanistan, Mongolia | Since 1997 | High competition from other projects (e.g. TRACECA, see below) | N/A |
| 6. Agreement among Governments of Republic of Uzbekistan, Kyrgyz Republic, and People's Republic of China on international motor traffic, Tashkent | China, Kyrgyz Republic, Uzbekistan | 19 February 1998 | The agreement is related to construction/renovation of the road Andijan–Osh–Irkeshtam. However, the condition of the existing road varied from country to country. | N/A |
| 7. TRACECA (Transport Corridor Europe–Asia) | Armenia, Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Romania, Tajikistan, Turkey, Ukraine and Uzbekistan | 9 September 1998 | Even though well-funded, TRACECA has not had any noteworthy effect in establishing agreements that provide working rules for government officials and transport operators; too many involved; institutionalization processes are too complex; geographic obstacles – the route is intended to go through the Caucasus and Tian Shan mountain ranges | N/A |

| | | | | |
|---|--|----------------|--|-----|
| 8. Minsk Agreement (MA99) on weights and dimensions of vehicles, Minsk | CIS countries | 4 June 1999 | This multilateral agreement, dealing with a purely technical matter has had some effect at national level, but less in creating a uniform regional regulatory environment for operators. | N/A |
| 9. Transport corridor 'North-South' | Russia, India, Belarus, Iran, Kazakhstan, Tajikistan, Azerbaijan, Armenia, Kyrgyzstan, Ukraine, Bulgaria, Turkey, Oman and Syria | September 2000 | Unstable situation in the Middle East | N/A |
| 10. Agreement between Shanghai Cooperation Organization Member-States on Creation of Favourable Conditions for International Motor Transportation | SCO member states | From 2008 | The various aspects are still being harmonized | N/A |
| 11. Transport corridor 'Central Asia-The Gulf' | Iran, Oman, Qatar, Turkmenistan and Uzbekistan | 25 April 2011 | Unstable situation in the Middle East | N/A |

