

Discover the corridor potential Turkmenistan and its corridor connections

Menno Menist - Director International, Transport and Mobility

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United Nations High Level Advisory Group on Sustainable Transport

Recommendations for governments, businesses, and civil society

Some important action points:

- Base transport planning and investment on prospects for economic growth, social development and environmental impact
- Integrate transport over modes, territories and sectors
- Create supportive institutional and regulatory frameworks
- Promote sustainable transport technologies

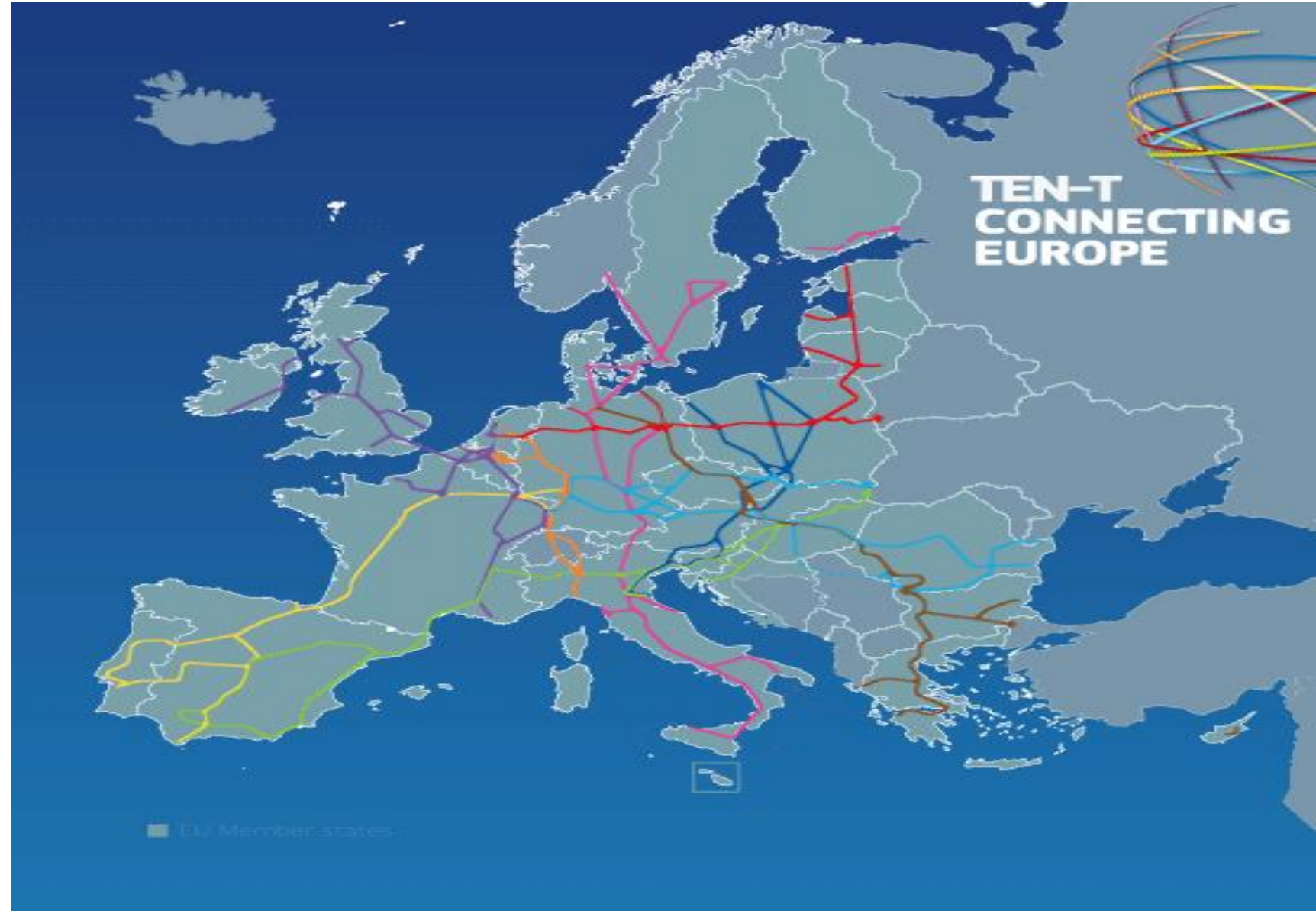
Overlapping goals with EU's Trans-European Transport Network (TEN-T) policy.

European Union Trans-European Transport Network (TEN-T) corridors

Functioning of the internal market and climate change mitigation

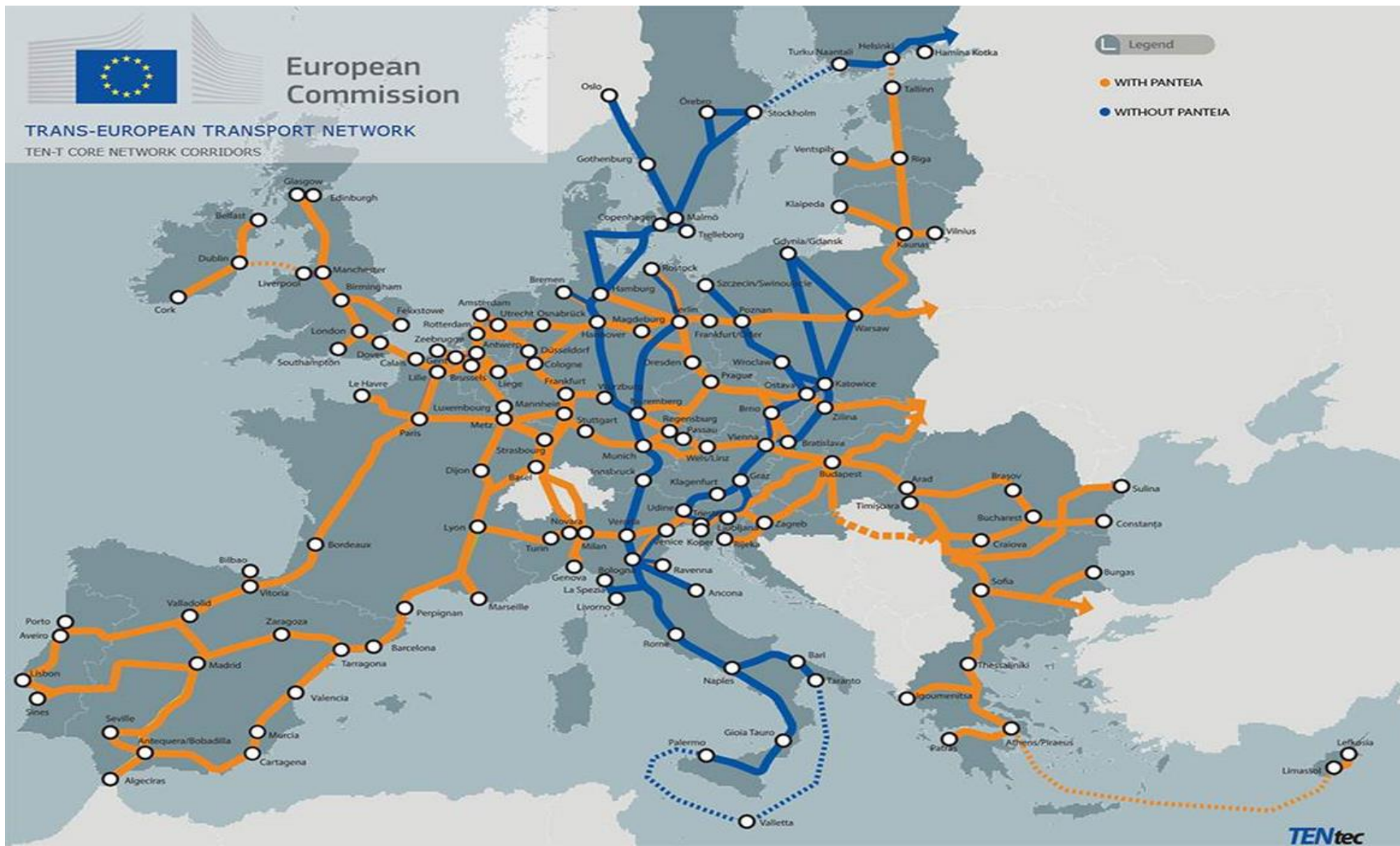
Key words:

- Multimodality
- Cross-border
- Interoperability
- Decarbonization
- Resilience



TEN-T corridor studies

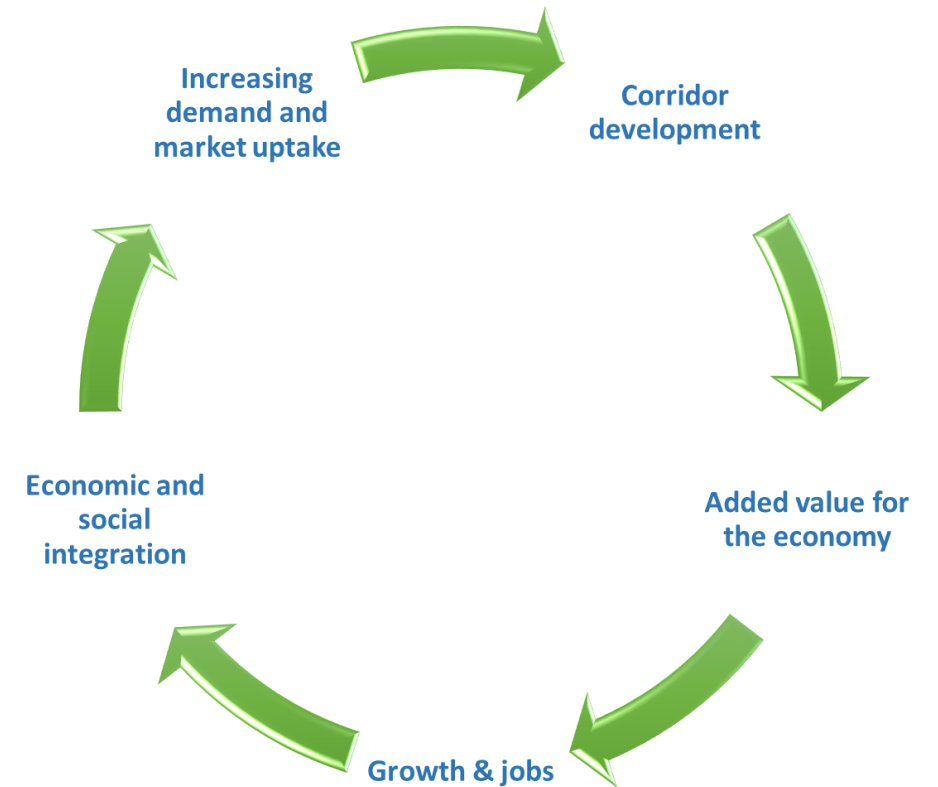
Panteia is involved in 7 out of 9 EU corridor studies



Lessons learned from TEN-T Corridor approach

Creating the conditions for economic growth

- Corridor approach as an infrastructure and economic concept
 - Connecting Networks
 - Investing in infrastructure augments economic growth and job creation
- Hinterland connections to ports
- International cooperation
- Last mile approach (smooth and efficient pre- and end haulage and transshipment)
- Infrastructure should be used in an optimal way
- Sufficient capacity and sufficient demand



Turkmenistan in a corridor perspective

Growth potential and infrastructure should reinforce each other

Key to Turkmenistan's Development Strategy

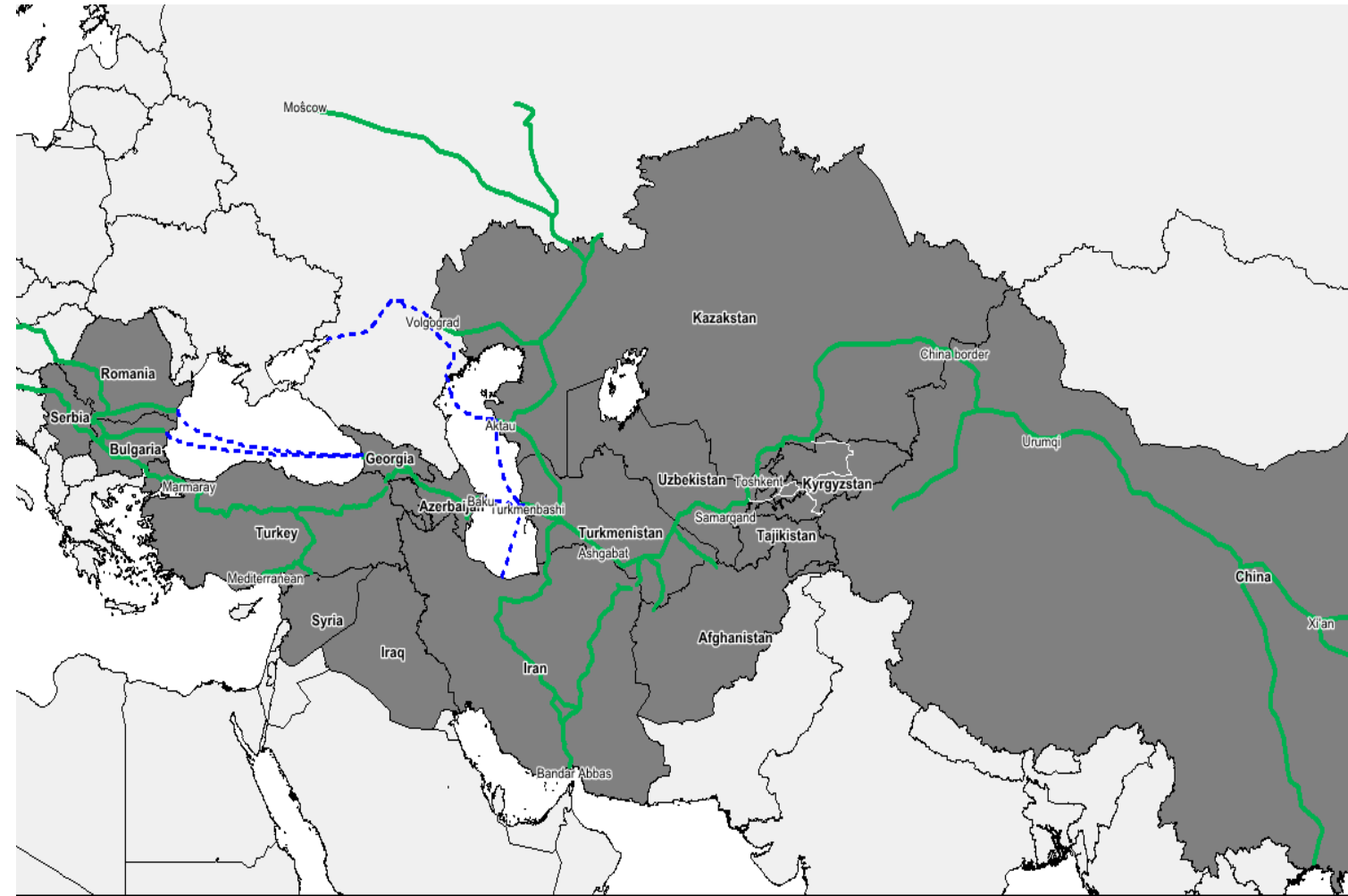
- Trans-Caspian Corridor in the Silk Road Economic Belt/One Belt One Road (OBOR) strategy
- Natural Gas Corridors
- Turkmenistan invests heavily in infrastructure

Linking up to current developments:

- Kars (Turkey)-Tiflis (Georgia)-Baku (Azerbaijan) Railway Project
- Marmaray Tunnel under Bosphorus
- North-South Corridor
- Rail connections with Iran, Afghanistan
- Viking Train project (directly connecting the Black and Baltic Seas)
- Volga-Don River
- New motorways and bridges
- New Ashgabat Airport

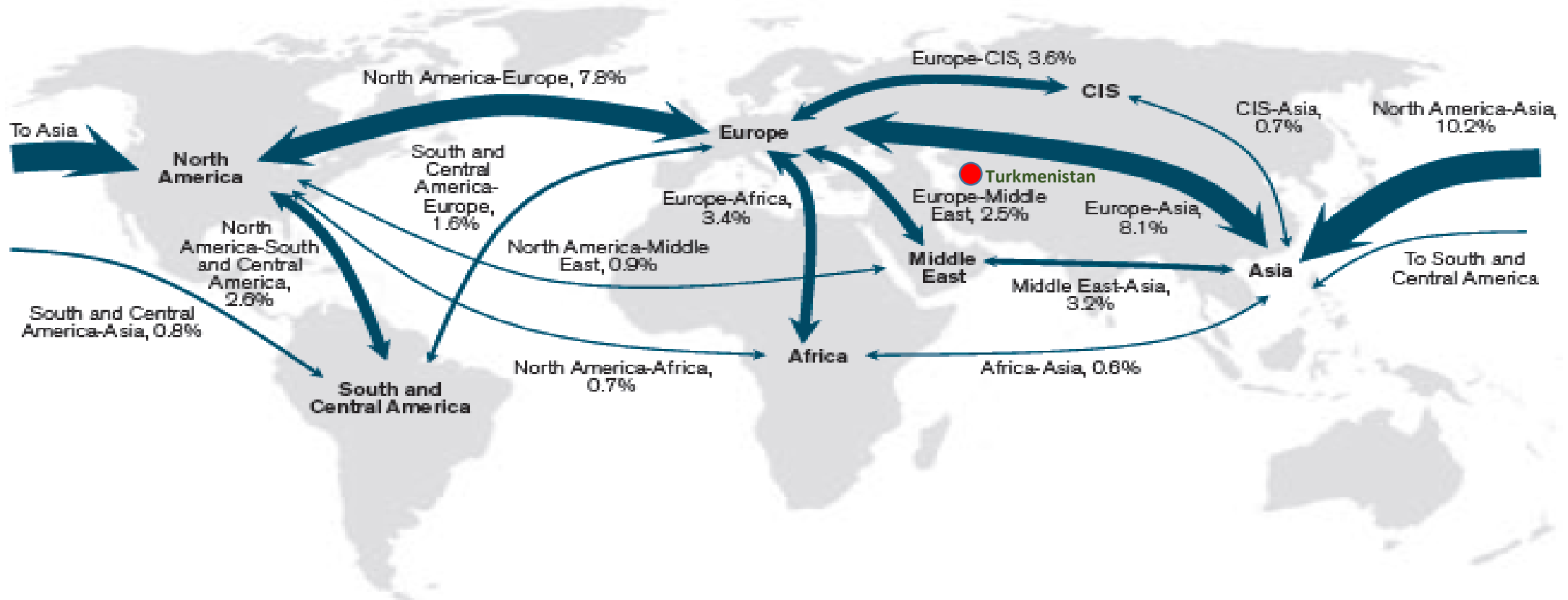
Future project:

- Kyrgystan-China connection



Existing – traffic flow

Turkmenistan in middle of biggest tradeflows in the world

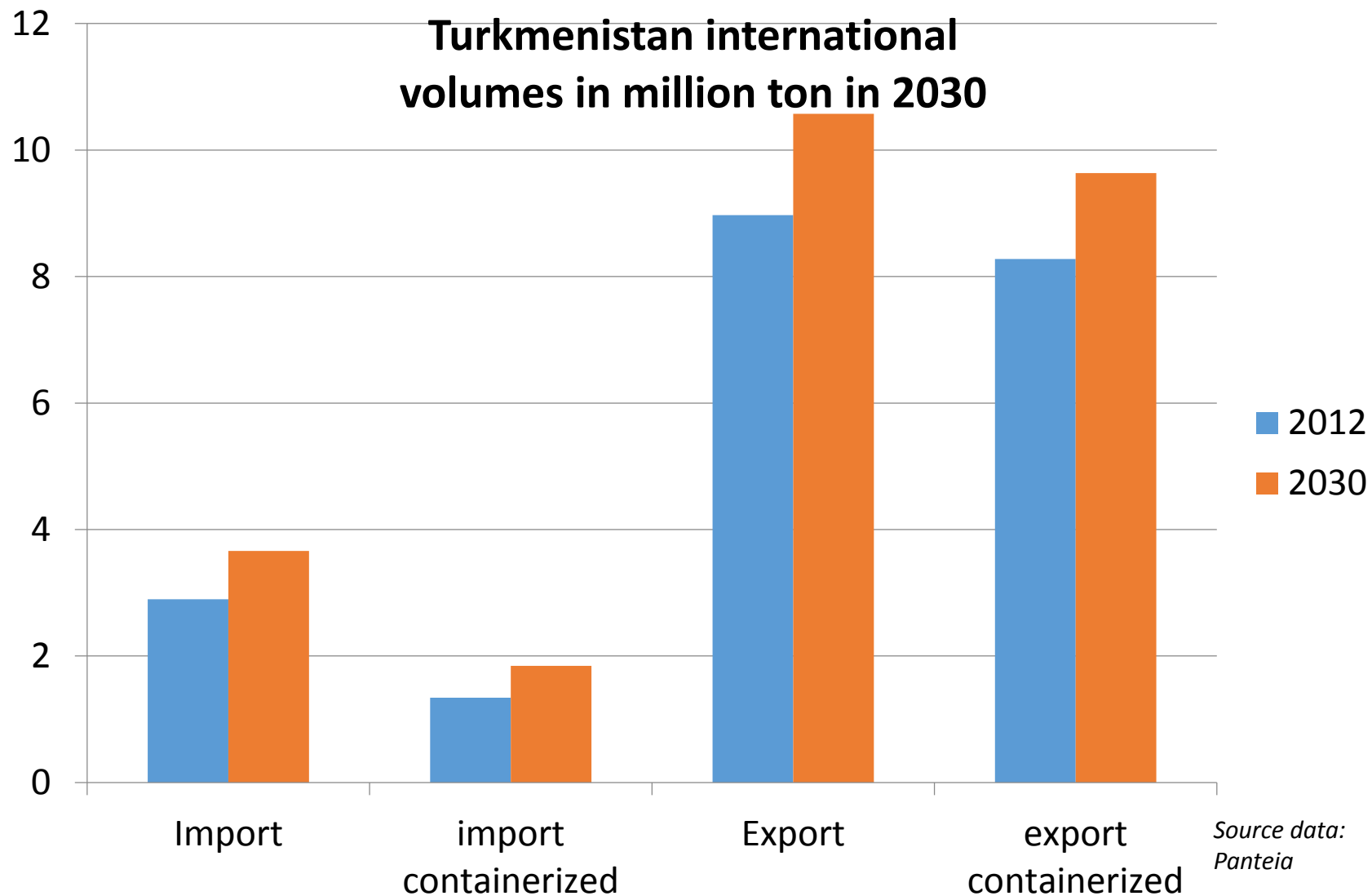


Corridor connects important networks

2030 - Scenario – International volumes

Future growth scenario:

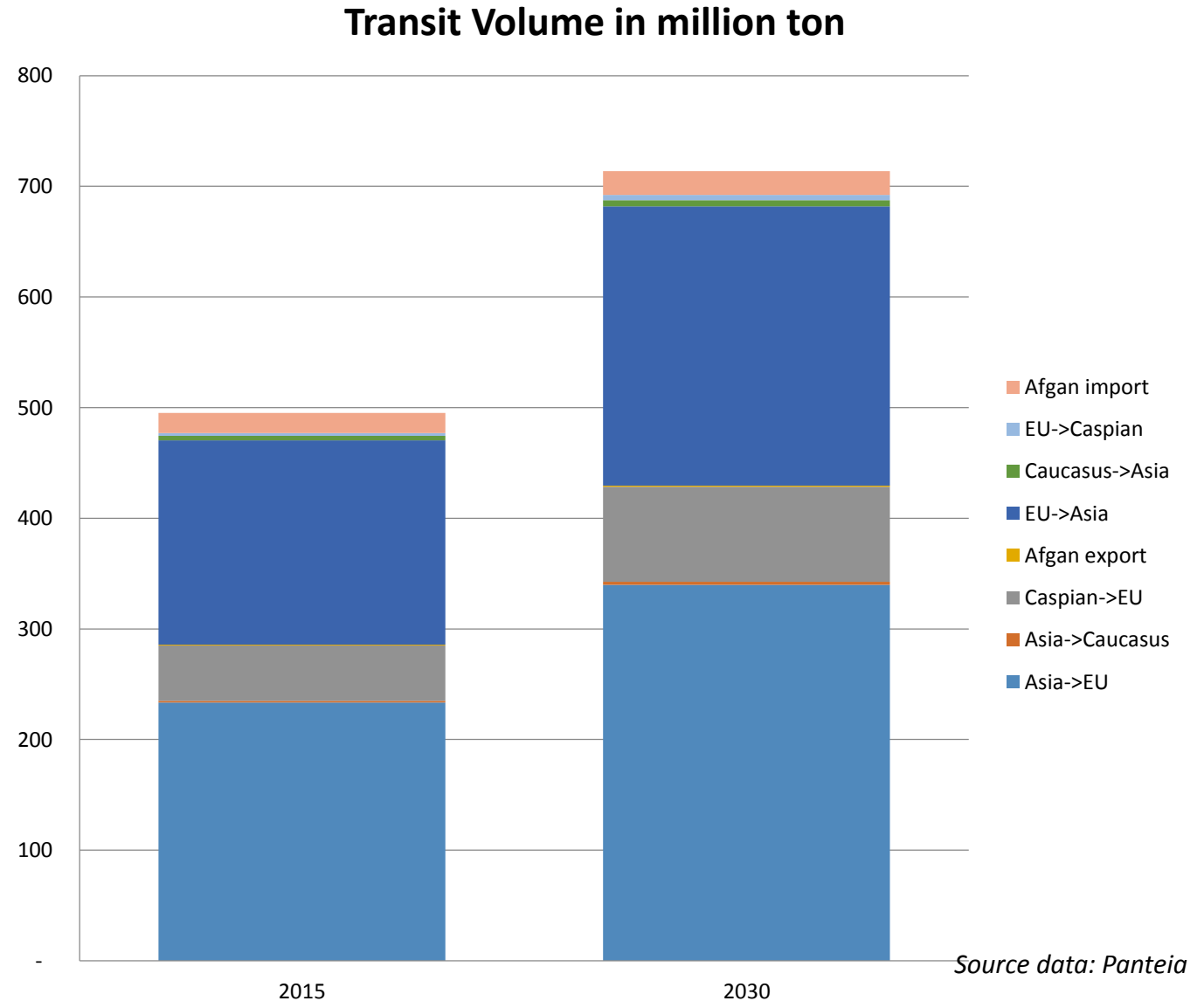
- Turkmenistan import volumes grow. Largest growth in high value & containerized goods
- Turkmenistan export volumes grow.
- Petrochemical promising prospects
- Trade balance is favorable for Turkmenistan



2030 - Scenario –Transit volumes

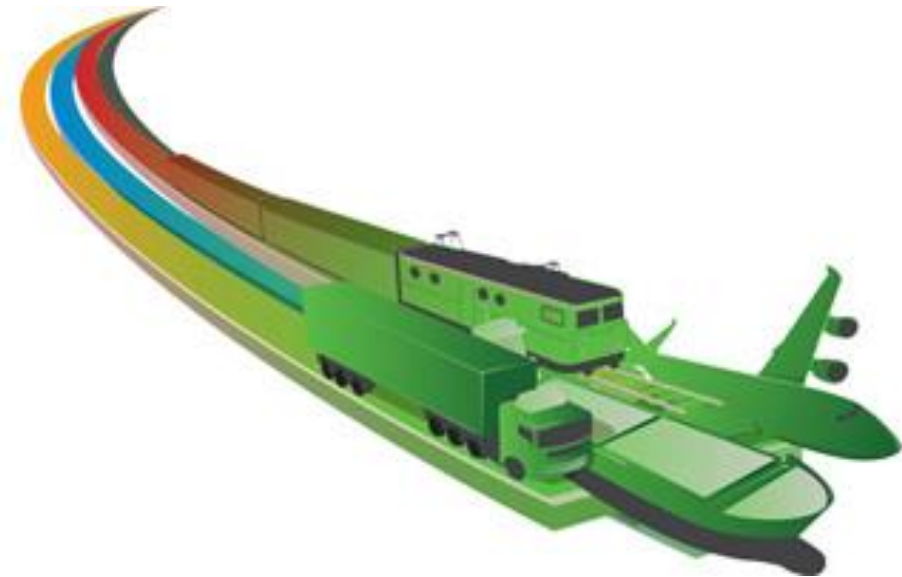
World economic developments generate more transit traffic:

- 220 million ton growth in total transit traffic
- Annual growth 3.3%, above global average, especially containerized goods, oil & gas, chemicals and building materials



Making the corridor attractive

- ✓ **Hinterland connections**
- ✓ **Competitive transport**
- ✓ **Added value for the Turkmenistan economy**
- ✓ **Sustainability**



Hinterland connections

corridor cooperation makes even more attractive corridor

Coordinating infrastructure works in all corridor countries favors the corridor.

- Heavy investment in Turkmenistan rail infrastructure
- Developing intermodal terminals
- Missing links (including last-mile connections)
- Harmonizing border crossing procedures

Competitive transport

Optimal use and quality transport services

Price

Transit time

Reliability

- Complexity of tax systems (state borders)
- Information exchange between the parties
- Regulatory issues with regard to multimodal transport
- Smooth customs procedures
- Fast and efficient last mile haulage (such as in port area)
- Efficiency of transshipment points (such as ports and breaks-of-gauge).

Focus moves from infrastructure and border management to quality logistics services.

Turkmenbasy International Sea Port Project



Added value for the Turkmenistan economy

Local economic spin-off

Strategy of Economical, Political and Cultural Development of Turkmenistan up to 2020

- Agriculture
 - Textile
 - Cotton
- (Petro)chemical products
 - Mineral Fertilizers
 - Methanol
 - Polymeres
- Turkmenbasy Port opportunities
 - Shipyard
 - Passenger terminal



Infrastructure investment of 1.- \$ brings return on investment of 1.50 \$
(Frauenhofer institute – 2015)

Sustainability as a must-have:

*Next to acknowledging **People** and **Planet**, sustainability strengthens the **business case**.*

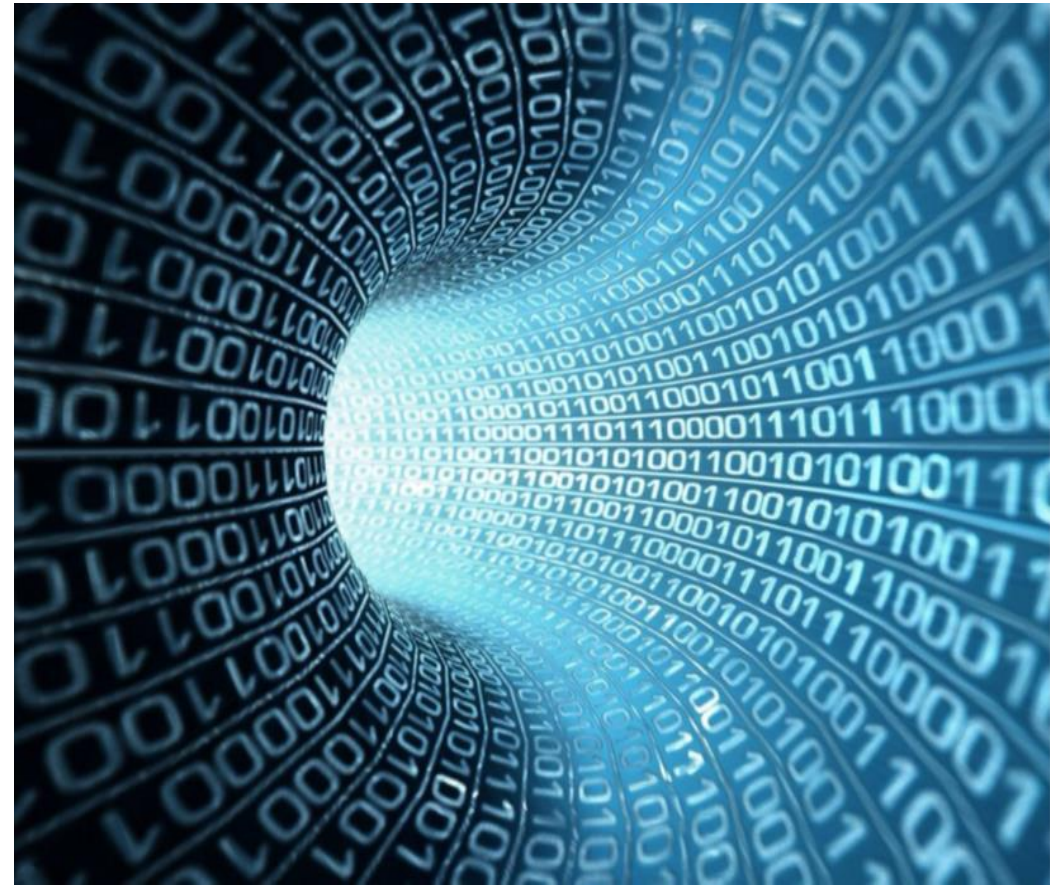
- Legal norms (air quality, water quality, etc.)

Next phase of corridor development:

- Optimal use of infrastructure
- Better load factors through smart use of data
- Enables highly efficient **multimodal** transport

...leading to:

- Excellent service towards the customer
- Competitiveness
- Greening



Conclusion: discover the corridor potential

Investments make the corridor work

The corridor will have the potential to:

- enhance economic development in Turkmenistan
- increase sustainable economic growth
- enhance regional and international economic cooperation

Menno Menist - Director International, Transport and Mobility
m.menist@panteia.nl