Discover the corridor potential
Turkmenistan and its corridor connections

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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 transhipment)
- 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:
- Kyrgyzstan-China connection
Existing – traffic flow
Turkmenistan in middle of biggest tradeflows in the world

Corridor connects important networks

Source data: Panteia
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

Source data: Panteia
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

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<tr>
<th>Price</th>
<th>Transit time</th>
<th>Reliability</th>
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• 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 transhipment 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
  • Polymers
• 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

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