6 STRATEGIC CHALLENGES

6.1 Market Challenges

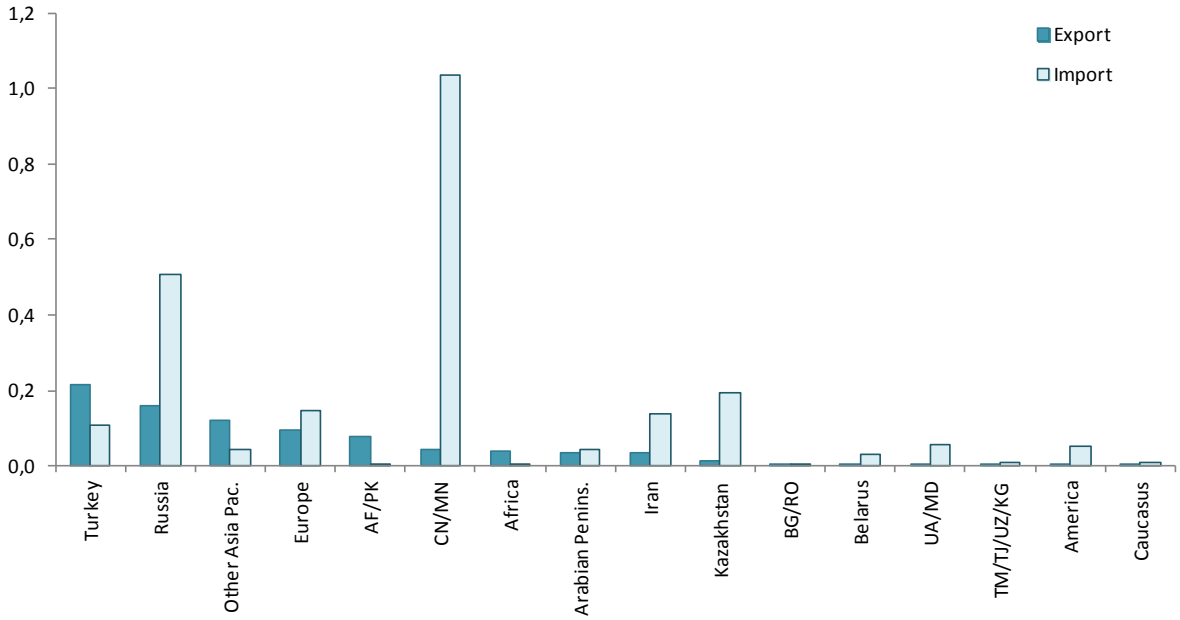
6.1.1 National Trade: Exports and Imports

World Trade Partners

Tajikistan is one of key countries located in South East of TRACECA region. The country is landlocked; therefore, the establishment of sustainable trade relations with neighboring countries is important for promoting the trade between Tajikistan and the rest of the world.

Based on mirror data obtained from trade partners of Tajikistan, which are reporting to UN Comtrade and Eurostat, in 2010 the value of total imports to Tajikistan exceeded that for total exports by an equivalent of 1.54 bn euro. Among key trade partners of Tajikistan are China and Mongolia (33% of trade exchange), Russia (21%), Turkey (10%), Europe (8%) and Kazakhstan (6%). Almost all these countries trade with Tajikistan in non-bulk goods (see Figure 2 below); only 40% of trade between Tajikistan and Russia are in bulk goods.

Figure 2: Tajikistan Trade Partners, 2010, bn euros

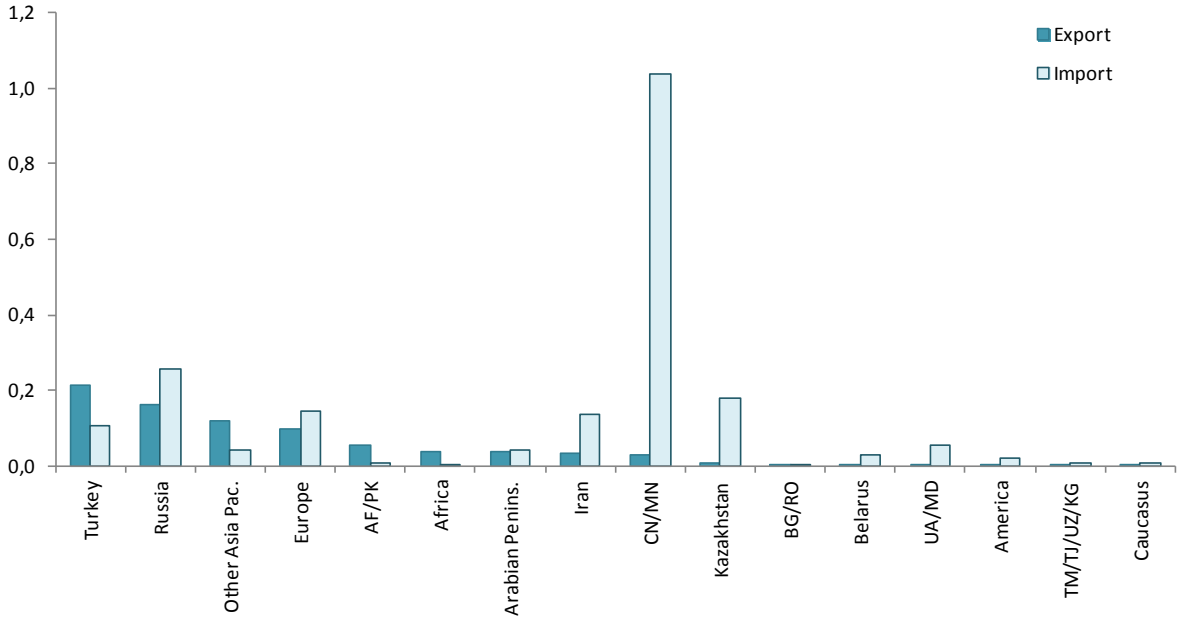


Source: Computation based on Eurostat and UN Comtrade databases

Therefore, as for the perspectives for LOGMOS development in Tajikistan, it is important to stress that:

- the trade consists mostly in goods which are either completely or partially containerizable;
- this trade focuses on mainly the neighboring (close neighbor) countries, e.g., China-Mongolia, Russia and Kazakhstan;
- trade with Europe contributes up to 8% of trade in potentially containerizable goods. The remaining TRACECA countries contribute collectively to 14% of potential trade.

Figure 3: Tajikistan Trade Partners, Potential Trade, 2010, bn euros



Source: Computation based on Eurostat and UN Comtrade databases

Table 5: Distribution of Tajikistan Potential Trade Partners, 2010, % in trade value

Zones	All products		Total all products	No min. fuel & ores		Total no min. fuel & ores
	Import	Export		Import	Export	
Afghanistan-Pakistan	9%	0%	3%	7%	0%	2%
Africa	5%	0%	1%	5%	0%	1%
America	0%	2%	2%	0%	1%	1%
Arabian Peninsula	4%	2%	2%	4%	2%	3%
Area Nes						
Belarus	0%	1%	1%	1%	1%	1%
Bulgaria-Romania	1%	0%	0%	1%	0%	0%
Caucasus	0%	0%	0%	0%	0%	0%
China-Mongolia	5%	43%	33%	3%	50%	37%
Europe	11%	6%	8%	12%	7%	8%
Iran	4%	6%	5%	4%	6%	6%
Kazakhstan	1%	8%	6%	1%	9%	6%
KY-TM-UZ	0%	0%	0%	0%	0%	0%
Other Asia Pacific	14%	2%	5%	15%	2%	6%
Russia	19%	21%	21%	20%	12%	15%
Syria-Iraq						
Turkey	25%	5%	10%	27%	5%	11%
Ukraine-Moldova	0%	2%	2%	0%	3%	2%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: Computation based on Eurostat and UN Comtrade databases

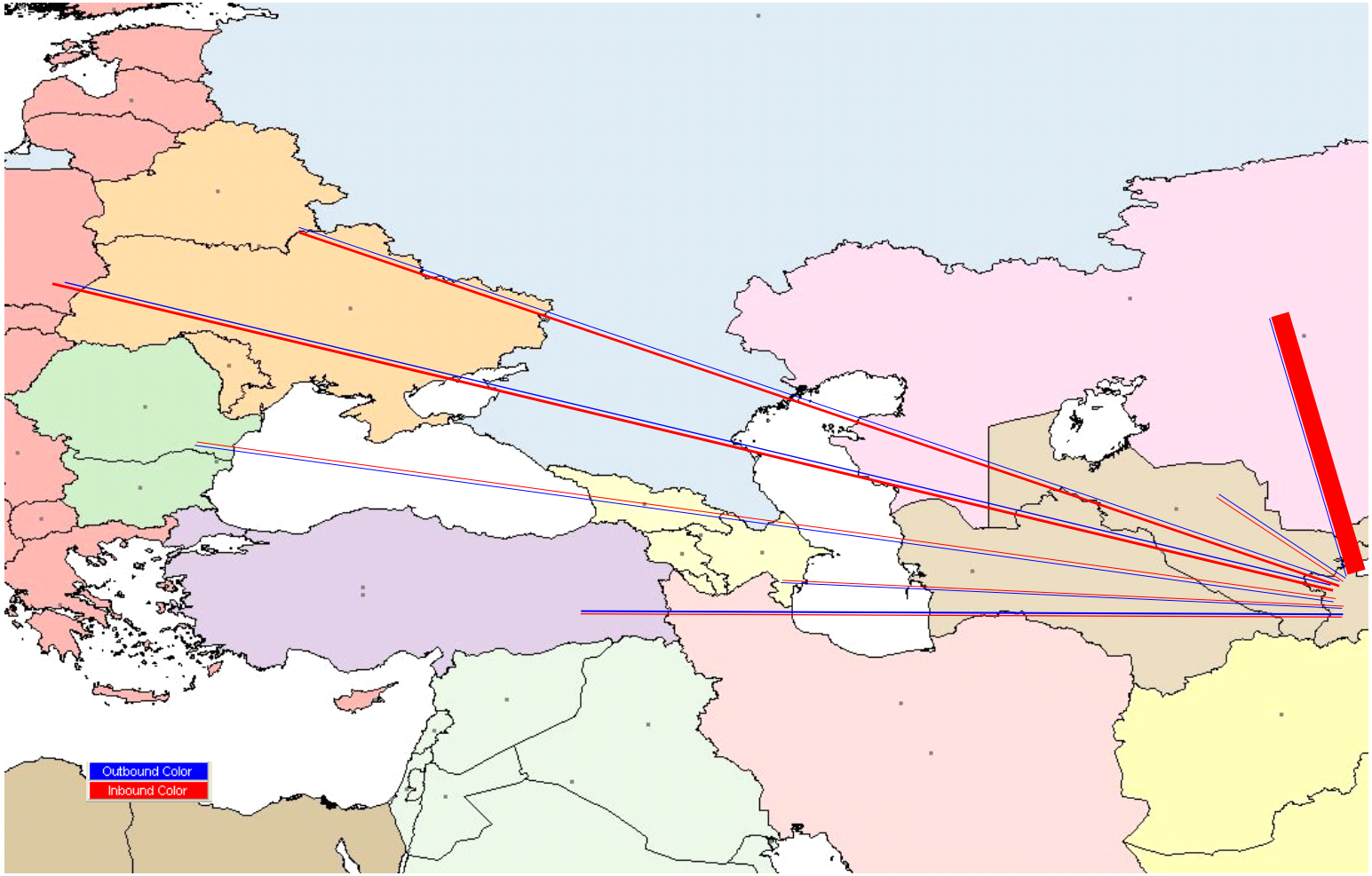
The trade between Tajikistan and TRACECA countries is quite unbalanced (see Table 6 below). In 2010 the estimated volumes of potential exports from Tajikistan constituted up to 12% of potential imports. About 60% of non-bulk goods imported to Tajikistan from TRACECA countries originated in Kazakhstan. Since the trade between Kazakhstan and Tajikistan, most probably, happens along the North-South land corridor, it might be outside of potential interest for TRACECA. However, the trade with Europe and Turkey, which is the most significant in terms of Tajik exports, while added to trade exchange with Bulgaria/Romania and Caucasus, could potentially form a core service area along TRACECA. Based on figures for 2010, the trade of Tajikistan with these countries was quite balanced: 133.8 and 171.5 th tones in exports and imports respectively.

Table 6: Tajikistan Potential Trade with TRACECA Countries and Europe, 2010, in tons and %

Zones	Tonnage		Share in trade with TRACECA countries and Europe	
	Export	Import	Export	Import
Bulgaria-Romania	2 608.7	199.4	0.6%	0.77%
Caucasus	817.0	9 771.0	0.52%	0.75%
Europe	51 621.9	112 639.5	32.88%	8.69%
Kazakhstan	6 056.8	778 472.0	3.86%	60.07%
KY-TM-UZ	934.3	9 961.2	50.19%	3.77%
Turkey	78 792.5	48 888.5	1.01%	4.82%
Ukraine-Moldova	1 580.7	62 479.1	1.66%	0.02%
Total	**156 992.5**	**1 295 992.5**	**100%**	**100%**

Source: Computation based on Eurostat and UN Comtrade databases

Figure 4: Tajikistan Potential Trade with TRACECA Countries and Europe, 2010, in tons



Source: Computation based on Eurostat and UN Comtrade databases

6.1.2 Regional TRACECA Trade

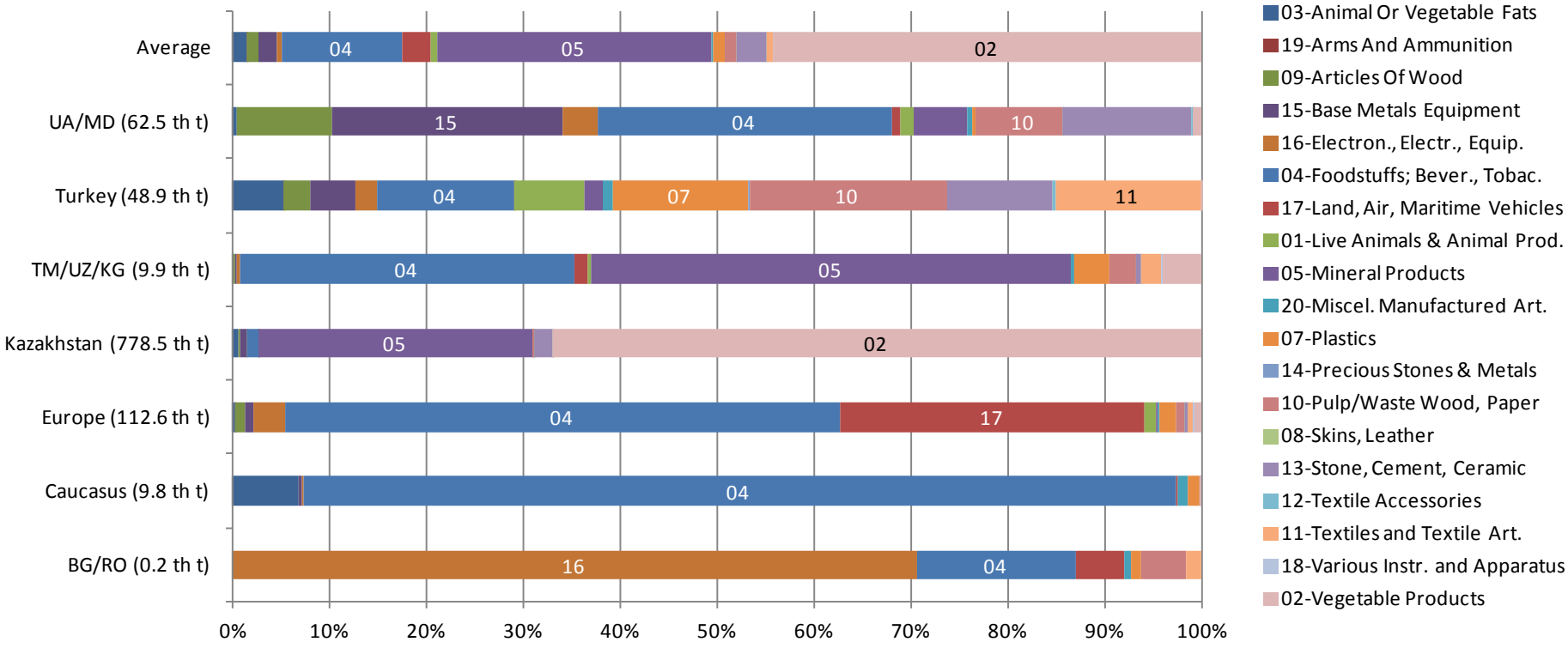
As mentioned above, the potential trade of Tajikistan with Europe and other TRACECA countries is considerably unbalanced. The imports from TRACECA and Europe to Tajikistan are much more significant in volume – according to project estimates in 2010 the amount of potential imports should exceeded 1.3 M tons, – but also more diverse both in terms of commodity structure and countries concerned (see Figure 5 and Table 6 below):

- vegetable products (41%), namely cereals and milling products, are coming from Kazakhstan;
- mineral products (26%), including salt, sulphur, etc., which are mainly imported from Kazakhstan and other Central Asia countries;
- Foodstuff, beverages, tobacco (11%) consist of sugar and confectionary products imported from Europe, Ukraine/Moldova and Caucasus.

According to project estimates, in 2010 Tajikistan exported about 0.16 M tons to TRACECA region and Europe Its exports included two key categories of potentially containerizable goods (see Figure 6 and Table 7 below):

- Base metals and equipment (77%). This group included mainly aluminum and articles that were destined to Europe, Bulgaria/Romania and Turkey, but also iron and steel transported to Caucasus; and
- Textiles (16%), namely cotton, meant for Europe, Turkey, Ukraine-Moldova.

Figure 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Tajikistan, 2010, in tons and %



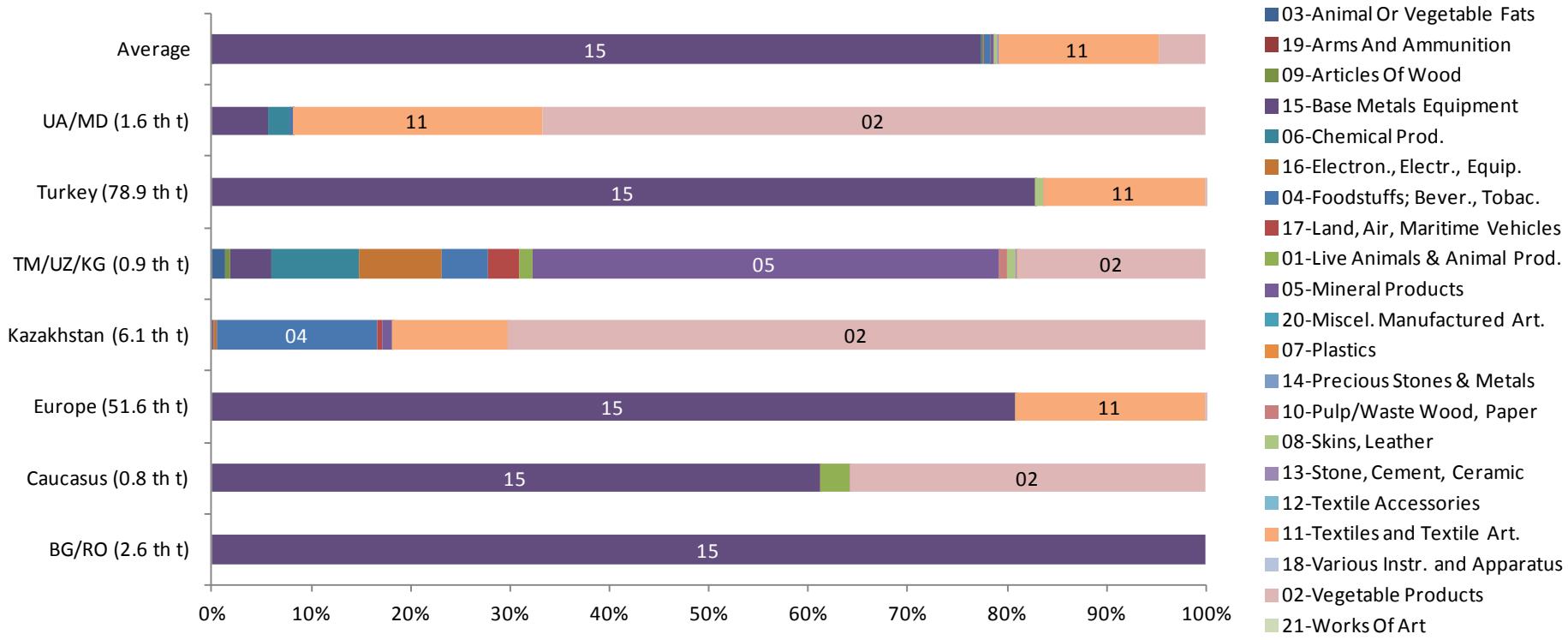
Source: Computation based on Eurostat and UN Comtrade databases

Table 7: Potential Trade with TRACECA Region – Commodity Structure of Imports to Tajikistan, 2010, in tons

Commodity Groups	Bulgaria-Romania	Caucasus	Europe	Kazakhstan	KY-TM-UZ	Turkey	Ukraine-Moldova
Animal Or Vegetable Fats	n/a	669.4	272.1	5 533.9	n/a	2 249.0	111.5
Arms And Ammunition	n/a	n/a	3.5	n/a	n/a	0.3	n/a
Articles Of Wood	n/a	n/a	1 156.0	31.7	22.3	1 184.2	2 074.0
Base Metals Equipment	0.0	32.9	894.9	5 505.1	17.8	1 976.7	5 124.4
Chemical Prod.	63.0	20.4	5 222.0	3 839.2	105.1	6 404.7	41 067.5
Electron., Electr., Equip.	96.4	9.9	3 502.1	395.7	36.2	948.7	770.9
Foodstuffs; Bever., Tobac.	22.3	8 775.3	61 617.0	9 535.7	3 407.4	6 017.3	6 489.3
Land, Air, Maritime Vehicles	6.9	19.0	33 701.7	37.5	137.4	11.3	195.3
Live Animals & Animal Prod.	n/a	n/a	1 217.7	215.8	31.6	3 017.4	288.9
Mineral Products	n/a	n/a	178.0	218 704.5	4 881.8	852.4	1 172.8
Miscel. Manufactured Art.	0.9	98.4	268.2	10.8	26.8	414.1	100.7
Plastics	1.3	130.2	1 828.9	487.9	356.1	5 956.8	109.5
Precious Stones & Metals	n/a	n/a	0.0	n/a	n/a	26.3	n/a
Pulp/Waste Wood, Paper	6.4	0.0	923.5	745.3	275.3	8 655.2	1 896.5
Skins, Leather	n/a	n/a	1.0	0.3	0.1	2.5	0.0
Stone, Cement, Ceramic	n/a	n/a	274.1	14 728.3	44.8	4 627.6	2 867.0
Textile Accessories	n/a	n/a	3.0	8.4	4.4	139.3	16.7
Textiles and Textile Art.	2.2	n/a	682.9	20.3	209.9	6 365.5	15.2
Various Instr. and Apparatus	n/a	2.6	73.0	0.6	5.3	5.2	2.6
Vegetable Products	n/a	13.0	819.9	518 671.1	398.9	33.9	176.1
Works Of Art	n/a	n/a	0.0	n/a	n/a	n/a	n/a
Total imports	**199.4**	**9 771.0**	**112 639.5**	**778 472.0**	**9 961.2**	**48 888.5**	**62 479.1**

Source: Computation based on Eurostat and UN Comtrade databases

Figure 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Tajikistan, 2010, in tons and %



Source: Computation based on Eurostat and UN Comtrade databases

Table 8: Potential Trade with TRACECA Region – Commodity Structure of Exports from Tajikistan, 2010, in tons

Commodity Groups	Bulgaria-Romania	Caucasus	Europe	Kazakhstan	KY-TM-UZ	Turkey	Ukraine-Moldova
Animal Or Vegetable Fats	n/a	n/a	n/a	n/a	13.0	n/a	n/a
Arms And Ammunition	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Articles Of Wood	n/a	n/a	n/a	n/a	4.1	n/a	n/a
Base Metals Equipment	2 608.7	499.8	41 702.9	11.5	39.0	65 277.7	90.3
Chemical Prod.	n/a	n/a	15.0	n/a	81.6	n/a	34.1
Electron., Electr., Equip.	n/a	0.0	16.9	24.0	77.7	3.0	0.1
Foodstuffs; Bever., Tobac.	n/a	n/a	n/a	975.4	43.8	1.1	4.0
Land, Air, Maritime Vehicles	n/a	n/a	7.0	31.9	29.5	n/a	0.1
Live Animals & Animal Prod.	n/a	25.2	0.0	n/a	12.1	n/a	n/a
Mineral Products	n/a	n/a	n/a	53.4	438.2	n/a	n/a
Miscel. Manufactured Art.	n/a	0.0	0.2	0.3	0.0	n/a	0.6
Plastics	n/a	n/a	0.6	0.9	n/a	1.0	0.0
Precious Stones & Metals	n/a	n/a	0.3	n/a	n/a	n/a	0.0
Pulp/Waste Wood, Paper	n/a	0.0	0.0	n/a	8.1	n/a	0.6
Skins, Leather	n/a	0.0	0.0	n/a	7.6	589.1	n/a
Stone, Cement, Ceramic	n/a	0.0	0.2	n/a	1.2	0.3	0.5
Textile Accessories	n/a	n/a	0.0	n/a	0.0	n/a	n/a
Textiles and Textile Art.	n/a	0.1	9 832.3	703.9	1.8	12 881.3	394.9
Various Instr. and Apparatus	n/a	n/a	0.2	0.1	0.2	0.0	0.0
Vegetable Products	n/a	291.9	46.4	4 255.4	176.2	38.9	1 055.6
Works Of Art	n/a	n/a	0.0	n/a	n/a	n/a	n/a
Total exports	**2 608.7**	**817.0**	**51 621.9**	**6 056.8**	**934.3**	**78 792.5**	**1 580.7**

Source: Computation based on Eurostat and UN Comtrade databases

Based on above observations, it can be concluded that:

- Tajikistan is an important value attractor in Central Asia. It has well established trade relations with the neighboring countries, e.g. China and Mongolia, Kazakhstan, Russia;
- Tajikistan actively trades in non-bulk commodities (about 90% of total trade exchange) and therefore has considerable potential for developing LOGMOS services. However, provided that the trade volumes in eastbound direction dominate that in the westbound, it is important to attract additional transit trade to make this service sustainable in the longer term;
- the trade of Tajikistan with Europe and TRACECA countries contribute to 21% in the potential trade exchange. The trade flows are close to balance (133.8 and 171.5 th tons for exports and imports, respectively) and include a considerable share of potentially containerizable goods.

6.2 Intermodal Maritime Based Transport Challenges

LOGMOS aiming at developing seamless door-to-door intermodal services, all components of the transport chain may be considered as possible segments of LOGMOS projects, depending on their relevance for potential LOGMOS trade flows.

Port interfaces for operations, services, procedures etc. between land and sea are among the most critical points.

6.2.1 Port System and Maritime Links

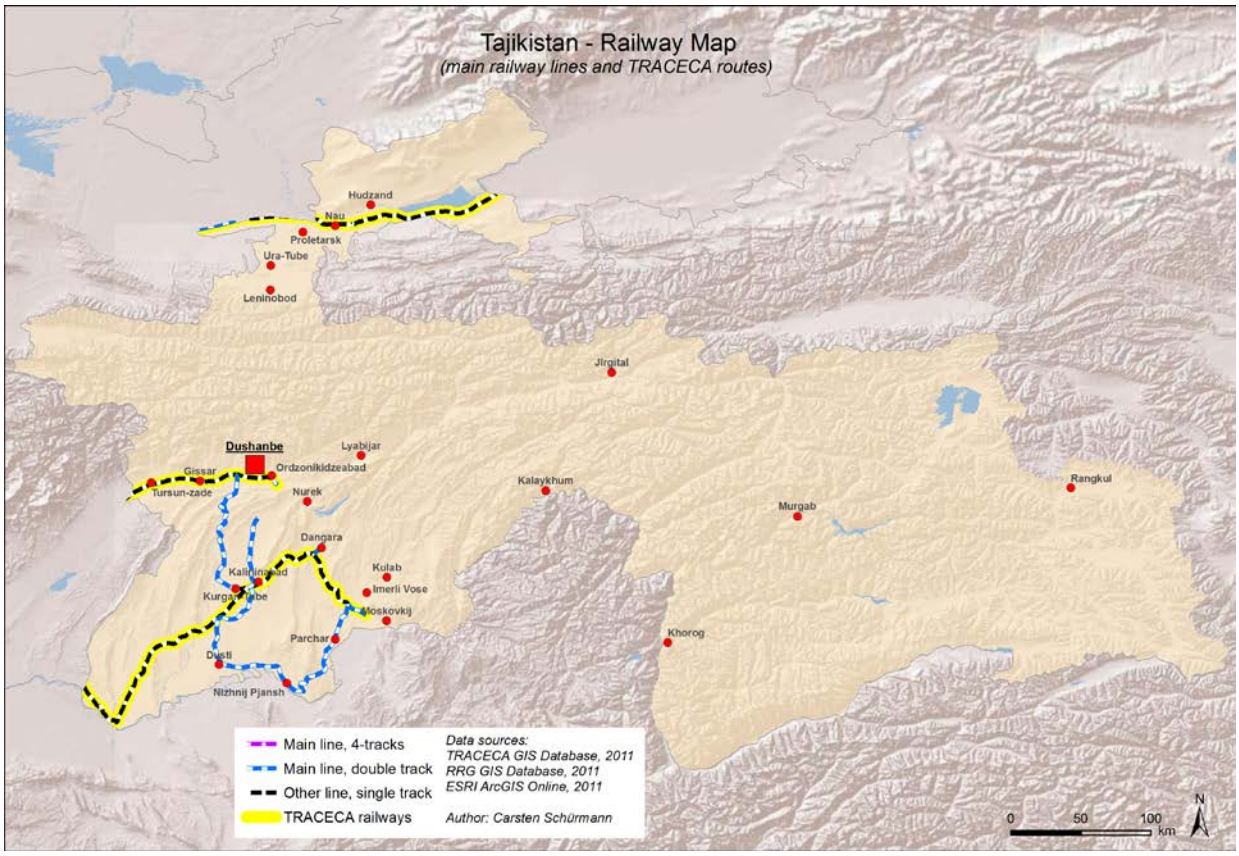
Tajikistan is a landlocked country. The development of the multimodal and intermodal transportation in the country is weak. The transportation potential of Tajikistan and adjacent countries, especially as transit markets, is among key factors that will determine the region's success in increasing its importance and prominence. The region is ideally located on the crossroads of the European and Asian trunk railways with the access to the Persian Gulf via Iran, to the Indian Ocean via Afghanistan and Pakistan, and the rest of the Asia and Pacific Region via China. Tajikistan can expect real benefits from the international transit potential, but the utilisation of this potential would require joint co-ordinated and long-term effort on the part of all countries in terms of expanding the existing networks of motor and rail roads, the construction of new logistics and transportation centres in key locations, and, afterwards, the development of efficient and improved transportation corridors.

There are plans of the establishment of a logistics centre in Nizhny Pyanj. Nizhny Pyanj, is on the Tajik/Afghan border, the single most important road border crossing for Tajikistan. The Nizhniy Pyanj Logistics Centre will provide a modern logistics terminal, initially for single-modal truck delivery, but eventually allowing multi-modal shipment by truck and rail, and multi-functions such as trans-shipment, storage and processing goods for general container cargo. The logistics centre will be a gateway for international export, import and transit container cargo, and will also store and process consumer goods needed by local people in the Khatlon region.

The objective of the project is to support international trade and foster the traffic of goods within the TRACECA corridor on the basis of the expansion of logistical opportunities, the interaction of networks and multimodal transportation facilities.

6.2.2 Inland Transport Mode: Railways

Figure 7: Tajikistan Railway Map



Source: TRACECA (2011)

The railways network of Tajikistan comprises 960.6 km of tracks, out of which 684.8 km of main tracks, 75.6 km of access tracks and 200.2 km of station tracks . Only 61.5 km are double tracks.

Table 9: Features of Tajikistan Railway Network

Total route length (km)	Gauge (mm)
960.6	1,520
Electrified lines (km)	**Electrification system**

As shown in the above map: the network is not unified. It is composed of three distinct sections which were formerly part of the Soviet Central Asian railway network. The track gauges applied are 1520 mm. The three sections are:

- Northern section: the 109 km line links the provinces of Ferghana and Andijan to the provinces of Jizzakh and Samarkand in Uzbekistan. 66.7 % of the total railway cargo volume and 100% of the railway transit volume use the northern section.
- The 89 km central section links Vahdat and Dushanbe to Pakhtaabad and the Sourkhan-Daria province in Uzbekistan.

- Southern section: In 1999 was built the railway line Khoshchadi – Kulab of a total length of 296 km.

Today, all three sections are connected together in Uzbekistan.

The 960 km railways network consists of three independant lines which are connected to each other only through Uzbekistan Railways play a crucial role regarding international transport and transit for Uzbekistan national market. From 1991 to 1996, freight turnover was divided by 3,7 times, goods transport by all means of transport by 2,7 times. From 2000 to 2008, thanks to a boom in the construction and industrial production sectors, the demand for freight transport service increased by 2,5% / 3%.

The state owned company, the Tajik Railways which were created in 1994 after the division of Central Asian railways, is the only company operating into the network. They have ownership of 2 100 freight wagons. The Tajik railways are under a process of self-restructuration. The policy of the state is to liberalize the market and create the conditions for the emergence of private operators.

In 2010, 10 439 900 tons of goods were transported throughout the network. 47.2% of the volume were destined to transit (4 927 100 tons). 95.9% of international cargo transport is ensured by rail.

The national transport plan forecasts an ambitious development of the railway sector in Tajikistan. The major investments programmed concern:

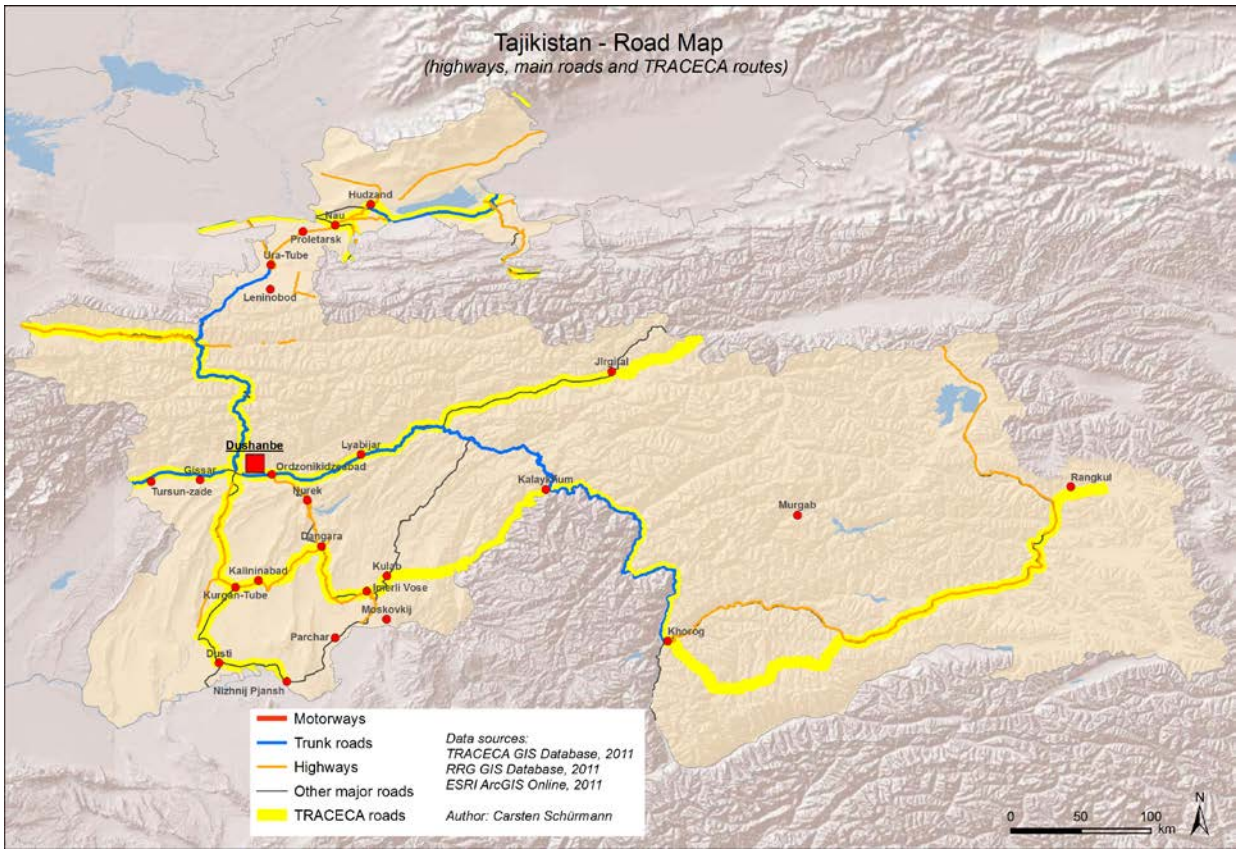
- Renewal of old tracks and shunts of the whole network;
- Improvement of the heads of the rail tracks on three sections (142 km);
- Reconstruction and maintenance of railway bridges (sections on rivers Khonako, Vahdat and Kafernigan);
- acquisition of modern rolling stock as 50 to 70% of rolling stock are declared in poor state;
- completion of feasibility studies for new routes:
  - Kolkhozabad – Nizhny Pyanj – Border with Afghanistan
  - Vahdat – Karamyk (border with Kyrgyzstan): 296 km
  - Dushanbe – Kurgantube, on the section Vahdat – Yavan
- Construction of a railway, connecting the Republic of Tajikistan with Turkmenistan via the Islamic Republic of Afghanistan (Ayvadj – Khulm section);
- Construction of a regional railway, connecting the Islamic Republic of Iran, the Islamic Republic of Afghanistan, the Republic of Tajikistan, the Kyrgyz Republic and the People's Republic of China.

The central and the southern part will be connected when the railway line Vakhat – Kurgan-Tube will be completed. The works started in 2009 and should last 10 years. The distance for traffic between Vakhdat and Yavan becomes 469.7 km shorter as compared with the existing route via the territory of Uzbekistan, thus reducing transportation costs.

The long term railway development perspective as presented in the national transport strategy foresee to link the independent sections, creating thus a unified and coherent railway network for Tajikistan.

6.2.3 Inland Transport Mode: Roads

Figure 8: Tajikistan Road Map



Source: TRACECA (2011)

Due to predominancy of mountains, road transport plays a major role for Tajikistan's economy. About 95 % of cargo and 97 % of passengers are transported by road transport.

The network consists in 14 074 km of public roads (2012) which are divided between:

- 5 351 km of republican roads (38 %)
- 8 723 km of local roads (62v%).

There are another 12 791 km of non public roads (industrial, private… financed by other means than the budget of the Ministry of transport). 28% of roads are covered with asphalt, 45% are covered with gravel bitumen, 27% - gravel.

Tajikistan possesses 19 international roads and 91 republican roads. 1 907 km of routes crossing the territory of the Republic of Tajikistan are part of the Asian Highways network, a project created by UN ESCAP (see table 10 below).

Table 10: Asian Highway Routes in Tajikistan

AH No.	Route	Kilometer
AH 7	Nizhniy Panj – Chanok	550
AH 65	Karamyk – Tursunzade	414.3
AH 66	Kulma Pass – Dushanbe	1023.1

Source: UNESCAP, 2003, Asian Highway Handbook

According to national statistics, 70% of freight transport bound to national economy arrives by road. From 2008 to 2010, road freight transport increased by 21.7%.

The main problem related to road transport in Tajikistan is the insufficient level of infrastructure maintenance due to hard climatic conditions in winter. The global state of roads is unsatisfactory. Up to 2008, 75% of republican roads lost entirely or partially their asphalt cover. As a result , the average speed for 48% of all roads in Tajikistan is not higher than 35 km/h. Regarding the rolling stocks, in 2010, 50% to 70% of Tajikistan 42 000 trucks is in poor state and 80% is 10 years old and more.

Over the past 20 years, 24 road projects were completed, bringing the overall network to 1643 km of republican importance roads. Major road projects included reconstruction of following roads:

- Dushanbe – Khodjent – Chanak (border with Uzbekistan)
- Vahdat – Rasht – Djirgital (border with Kyrgyztan)
- Dushanbe – Kulab – Khorog – Kul'ma (border with China)
- Dushanbe – Kurgan –Tube – Nyzhny Pyanj (border with Afghanistan)

Future investments in road transport detailed in the National Transport Strategy include rehabilitation of international roads, bridges and tunnels. In total, 4 165 km of roads (2 423 km of international roads) are to be constructed until 2025, which represents a total investment of 898 M USD.

Most notable projects concerning international roads (IR) are listed below:

- Short term (2011-2015):
  - IR2: Dushanbe – Hisor – Border with Uzbekistan: 56 km
  - IR4: Vahat – Nourek – Dangara – Gulistan – Kulob – Kalai-Khum: 299 km
  - IR9: Kizil – Kala – Kabadyan: 47 km
  - IR11: Kurgan-Tube – Nizhny Pyanj: 94 km
  - IR12: Ayni – Pendjikent – Border with Uzbekistan: 113 km
- Mid term (2015-2020):
  - IR3: Labi-Djar – Kamai-Khum: 135 km
  - IR4: Kalay-Khum – Rushan: 240 km
  - IR8: Gulistan – Dusti: 132 km
  - IR9: Kabadyan: Aiwanj: 85 km
  - IR10: Aiwanj – Border with Uzbekistan: 33 km
  - IR 13: Kanibadam – Spitamen: 70 km
  - IR 16: Isfara – Border with Kyrgyztan: 44 km
- Long term (2020-2025):
  - IR4: Khorog – Tuzkul' – Murgab – Kul'ma: 401 km
  - IR6: Khorog – Ishkashim – Tuzkul': 315 km
  - IR9: Dushanbe – Obi- Kiik – Kizil – Kala: 78 km

- IR13: Spitamen – Border with Uzbekistan: 65 km
- IR15: Isfara – border with Kyrgyztan: 10 km
- IR17: Isfara – border with Uzbekistan: 24 km

6.3 Trade and Transit Facilitation

6.3.1 General Presentation

- **Procedures and formalities** are among the **main barriers** that are hampering the development of Motorways of the Sea:
  - several **border points** must be crossed, mostly in ports but also on land routes f.i. along the central land corridors: minimum 2 points in a single / one sea service, up to 5 points in inter-seas services linking western Black Sea Countries and Eastern Caspian Sea Countries, and possibly more in the case of longer multicountry transit and transshipments trades;
  - several physical mode transfers, handling movements and intermediate storage are taking place along the sea based transport chains: commonly 3 transfers and minimum 6 handling plus 2 storage in the case of a single sea leg, and several more handling operations in the inter-seas services
  - previous and ongoing experiences of Motorways of the Sea in other regions as well as the global worldwide transport system of containers have demonstrated that the resolution of difficulties in this field is an essential success factor.
- The procedural process in ports and at other border crossing point are **dominantly related to Trade Laws and Regulations**, but actors of the transport and transit chain are responsible for their fulfillment. A significant part of their activities is to deal with these complex issues and they are drawing the corresponding revenues out of their capacities.
  Relationships between institutions on one side, - Customs first, but also other Ministries and inspection bodies - operators and users on the other side, are affected by these functions which are mixing with the physical transit and transport operations.
- The **impacts of administrative and regulatory barriers** are generally more important when there is a sea leg since:
  - maritime transport and port transits require more formalities than land transport modes, including specific exchange of information, paper documentation etc. which are rightly perceived as a factor of complexity
  - this adds to the weakness of intermodal sea based transport, particularly when compared to the most simple unimodal road transport
  - transit times are increased if and when formalities and operations are mismatching, f.i. when the transport means of one mode is not coordinated with those of the next mode, which is a frequent situation between the maritime and railways legs in the TRACECA Region
  - costs are not only direct but also indirect, and not only formal but also informal, and unofficial transit levies and other transaction costs are adding to the sum of official tariffs, taxes and dues.

- **Common Weaknesses / barriers** have been identified in all LOGMOS project Countries to various extents and at different degrees. This diagnosis has been shared under the key word "Facilitation" by Country stakeholders and at bilateral and regional levels. Barriers in this field are referred to in the "W" (Weaknesses) list of the various SWOT analyses summarized in the following project documents:
  - Country profiles, as synthesized hereafter
  - Presentations for workshops and meetings
- Among the **solutions** discussed in the diagnosis phase, the following is a series of common **recommendations and targets** that are partly implemented, planned, or contemplated for the future LOGMOS projects and more generally for the development of intermodal transport including port / border crossing points:
  - I.T. systems and solutions electronic solutions / EDI for:
    - information (for users and operators)
    - declarations
    - pre-alert (for Customs and other)
    - duties, taxes and fees
  - One stop stop scheme and extension to Single Window System (SWS)
  - Risk management system and methods
  - IT interchange solutions between MoS port / communities
  - Tracking and Tracing (in coordination with operators)
  - Upgrading / redesigning border points layouts
  - Training (management, IT organization…)

6.3.2 SWOT Analysis

The following table summarizes key-finding for national SWOT analysis in trade and transit facilitation procedures that have been adopted in Tajikistan.

Table 11: SWOT Analysis in Trade and Transit Facilitation Procedures

STRENGHTS	• Member of several international organisations (CIS, ECO, OSJD, UNECE, UNESCAP, EurAsEC, SCO) • Adoption of Law on Modification and Amendments of the Customs Code of the Republic of Tajikistan • Comprehensive reform process (second wave under implementation) • Adoption of SAD (2010) • Bilateral agreements with China, Kyrgyzstan, Uzbekistan, and Afghanistan on border crossing points • Accession of the Republic of Tajikistan to the World Trade Organization (11.12.2012)
WEAKNESSES (BARRIERS)	• Few bilateral agreements signed on transport and customs issues with LOGMOS beneficiary countries

	• Slow Identification of follow up TA project to the completed ADB project • Slow implementation of recomendations of the ADB project
OPPORTUNITIES	• New Customs code provides sound legal basis for modern customs concepts (single window, etc) • Recomendations from ADB project and LOGMOS provide basis for new TA projects
THREATS	• Slow mobilisation of TA, for example SUE Single Window Centre needs support • Administrative culture in Tajikisan (resistance to change)