

ENPI 2011 / 264 459

Logistics Processes and Motorways of the Sea II

Country Profile

TAJIKISTAN

April 2013



This project is funded by
the European Union

 egis International

DORNIER
CONSULTING

A project implemented by
Egis International / Dornier Consulting



TABLE OF CONTENTS

1	INTRODUCTION	4
2	NATIONAL TRANSPORT POLICY	5
3	LEGAL ENVIRONMENT IN THE FIELD OF TRANSPORT	6
4	NATIONAL POLICY AND LEGISLATION IN TRADE AND TRANSIT	9
5	INVESTMENTS IN TRANSPORT AND LOGISTICS SECTOR IN TAJIKISTAN.....	12
6	STRATEGIC CHALLENGES	13
6.1	MARKET CHALLENGES	13
6.1.1	<i>National Trade: Exports and Imports</i>	<i>13</i>
6.1.2	<i>Regional TRACECA Trade</i>	<i>17</i>
6.2	INTERMODAL MARITIME BASED TRANSPORT CHALLENGES.....	22
6.2.1	<i>Port System and Maritime Links</i>	<i>22</i>
6.2.2	<i>Inland Transport Mode: Railways</i>	<i>23</i>
6.2.3	<i>Inland Transport Mode: Roads</i>	<i>25</i>
6.3	TRADE AND TRANSIT FACILITATION.....	27
6.3.1	<i>General Presentation</i>	<i>27</i>
6.3.2	<i>SWOT Analysis</i>	<i>28</i>
7	PILOT PROJECTS SELECTED FOR MOS I AND ILC PROJECTS	30

LIST OF TABLES

Table 1: Bilateral Agreements with LOGMOS Beneficiary Countries.....	6
Table 2: Bilateral Agreements with Non TRACECA Neighbouring Countries	8
Table 3: Multilateral Agreements with LOGMOS Beneficiary Countries	8
Table 4: IFI Supported Projects in Tajikistan	12
Table 5: Distribution of Tajikistan Potential Trade Partners	14
Table 6: Tajikistan Potential Trade with TRACECA Countries and Europe	15
Table 7: Potential Trade with TRACECA Region – Commodity Structure of Imports to Tajikistan	19
Table 8: Potential Trade with TRACECA Region – Commodity Structure of Exports from Tajikistan	21
Table 9: Features of Tajikistan Railway Network.....	23
Table 10: Asian Highway Routes in Tajikistan.....	25
Table 11: SWOT Analysis in Trade and Transit Facilitation Procedures.....	28
Table 12: Selected Pilot Projects in Tajikistan.....	30

LIST OF FIGURES

Figure 1: General Map of Tajikistan.....	3
Figure 2: Tajikistan Trade Partners, 2010, bn euros	13
Figure 3: Tajikistan Trade Partners, Potential Trade	14
Figure 4: Tajikistan Potential Trade with TRACECA Countries and Europe	16
Figure 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Tajikistan.....	18
Figure 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Tajikistan	20
Figure 7: Tajikistan Railway Map	23
Figure 8: Tajikistan Road Map	25



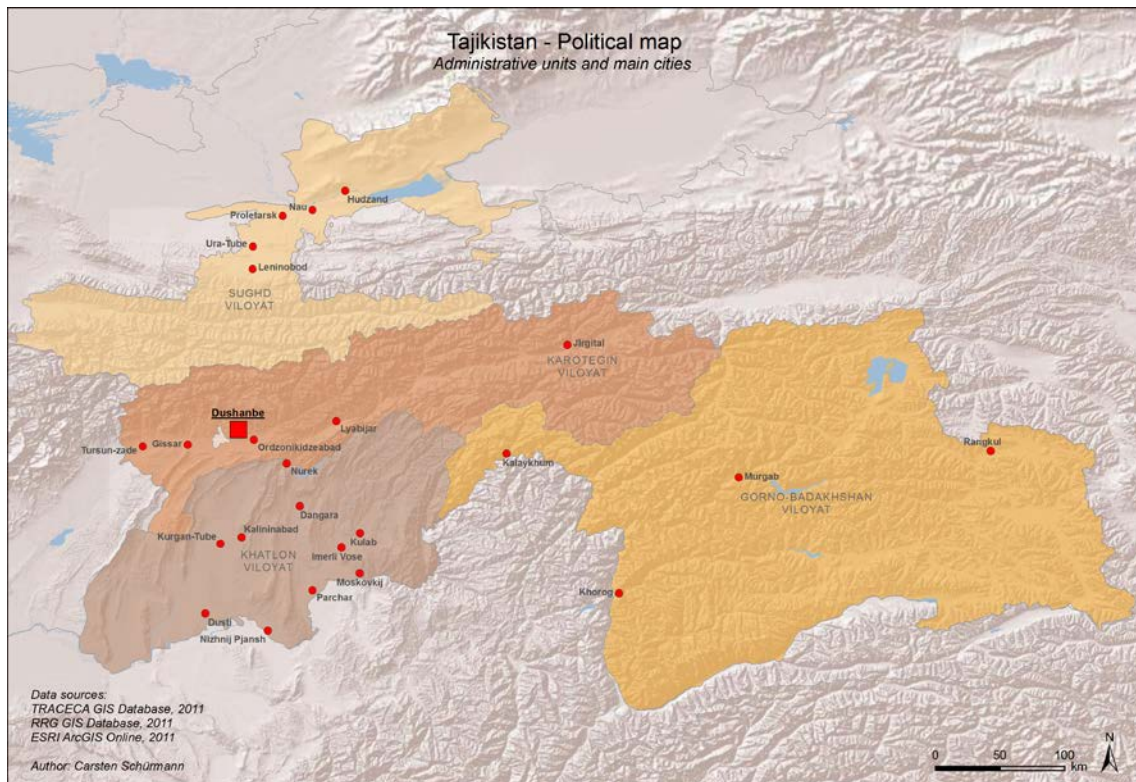
LIST OF ABBREVIATIONS

ADR	European Agreement on the International Carriage of Dangerous Goods by Road
AETR	European Agreement concerning the Work of Crews of Vehicles engaged in International Road Transport
ATP	Agreement on International Carriage of Perishable Foodstuffs
CAREC	Central Asia Regional Economic Cooperation
CBTA	Cross Border Transport Agreement
CIS	Commonwealth of Independent States
CMR	Convention on the Contract for the International Carriage of Goods by Road
ECO	Economic Cooperation Organisation
EDI	Electronic Data Interchange
EU	European Union
EurAsEC	Eurasian Economic Community
ICT	Information and Communications Technology
IFI	International Financing Institution
ILC	International Logistics Center
MOS	Motorways of the Sea
LOGMOS	Logistics Processes and Motorways of the Sea
OPEC	Organization of the Petroleum Exporting Countries
OSJD	Organisation for Cooperation of Railway
SAD	Single Administrative Document
SCO	Shanghai Cooperation Organisation
SWS	Single Window System
TRACECA	Transport Corridor Europe Caucasus Asia
UN	United Nations
UNECE	United Nations Economic Commission for Europe
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
USD	United States Dollar
USSR	Union of Soviet and Socialist Republics
WTO	World Trade Organisation





Figure 1: General Map of Tajikistan



Source: TRACECA (2011)



1 INTRODUCTION

The Republic of Tajikistan is a mountainous country situated on the South-Eastern part of Central Asia, bordering Kyrgyzstan to the North, Uzbekistan to the West, Afghanistan to the South and the People's Republic of China to the East.

As a landlocked a country, Tajikistan does not possess any maritime façade and relies on international road and rail routes to access the World market. Tajikistan is also located in the heart of major transport corridors between CIS countries, China, Pakistan, Afghanistan and India.

The transport sector is composed of rail, road and air transportation. As 93 % of territory of the Republic of Tajikistan is mountainous, road transport is vital for the national economy and its development. Tajikistan's transport network dates back from the 60's – 80's. It was developed as part of the soviet transport regional plan. Since the fall of USSR, the network suffered from poor maintenance and lacked sufficient investment.

TRACECA Framework

Tajikistan has also been an active member of TRACECA since the Brussels Conference in May 1993 which gave birth to the TRACECA program

The ten direct beneficiary countries under review by LOGMOS Project share a globally common legal and regulatory background for the transport sector, but also have different laws and rules resulting from different contexts and policies.

International Conventions and regional or bilateral agreements are completing the framework, and there are expected moves at both national and regional (TRACECA and other groups) levels.

The approach of legal issues related to the LOGMOS Project is focusing on the transport laws and regulations as well as on the afore-mentioned national, international, regional and bilateral conventions and agreements which have a direct or indirect impact on surface transport modes with a priority for maritime and intermodal transport¹.

The TRACECA program started in 1993 as one of the components of the intergovernmental TACIS program. The active participation of Tajikistan started in September 1998, when it signed without any restriction the Multilateral Agreement (MLA) on the development of the transport corridor Europe – Caucasus – Asia which was also signed by Azerbaijan, Armenia, Bulgaria, Georgia, Kyrgyzstan, Kazakhstan, Moldova, Romania, Turkey, Ukraine and Uzbekistan.

After the Intergovernmental Committee and Permanent Secretariat of TRACECA were established in 2000, Tajikistan set up a TRACECA National Commission headed by a National Secretary.

Tajik representatives take an active part in all conferences and Working group's meetings organized by IGC TRACECA.

¹ The Annex 3, Introduction to Legal Case Study of the Progress Report 2, analyzed by the LOGMOS project, can be downloaded here: [Progress Report 2, Annex 3 - Introduction to Legal Case Study](#).