GREEN Action Task Force

Sustainable Infrastructure Development for a Low-Carbon Transition in Central Asia and the Caucasus: Mapping of Potentially High-impact Infrastructure Projects and Needs Assessment

Strategic Infrastructure Planning for Sustainable Development in Tajikistan

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7. Strategic infrastructure planning for sustainable development in Tajikistan

Overview

Tajikistan is the only low-income country in the former Soviet Union. Its population is predominantly rural, with the lowest urbanisation rate of Central Asia at 27%. Over the next 15 years, the government faces the challenge of providing adequate infrastructure and employment opportunities for the over 45% of the population who were under the age of 20 in 2015. Agriculture remains an important pillar of the economy accounting for 21% of GDP, but climate change poses major threats to the sector. The country has lost 20% of its glacier cover since 1950, and certain parts of the country (the south, western Pamir and the mountains of central Tajikistan) could face up to 5°C of warming by the end of the century.

While Tajikistan has a relatively well-developed regulatory framework for investment, the poor implementation of these regulations has led to an unpredictable and non-transparent regulatory environment for investors to operate (weak rule of law and judiciary system, corruption). The country ranks 126th in the World Bank’s Ease of Doing Business index, and the country lacks capacity at all levels of government. Tajikistan’s strategy to attract FDI flows, mainly in metal extraction, coal oil and gas and renewable energy, has resulted in a high risk of debt stress. The country’s debt equalled 50% of GDP in 2017 compared to 30% in 2015, and 80% of the debt is to one single creditor, China’s Export-Import Bank. Payment defaults have led to debt settlements including licenses for mineral extraction and even the transfer of sovereignty over disputed territory.

Tajikistan’s infrastructure is poor, contributing to very high trade costs that restrict the country’s access to nearby markets such as the People’s Republic of China and Afghanistan. Deteriorating Soviet-era infrastructure assets such as irrigation channels, roads, dams, bridges and river embankments have increased the population’s exposure to risks associated with extreme weather events and earthquakes. 83% of the roads are unpaved, and would need upgrading to anticipate the increase freight and passenger traffic linked to the CAREC Corridors and the BRI. Planned rail projects aim to improve the connectivity of the country with neighbouring markets, through the construction of long-distance rail lines (e.g. the Russia-Kazakhstan-Kyrgyz Republic-Tajikistan railway and the China-Kyrgyz Republic-Tajikistan-Afghanistan-Iran railway). The overall quality of Tajikistan’s energy infrastructure is poor. Although the country has achieved universal access to electricity, existing systems function inefficiently and improved energy security is one of the government’s top priorities for future development through the development of renewable energy sources (hydropower, representing 94% of planned energy projects, and coal-fired power plants representing 6%).

While Tajikistan has development strategies to 2030 – such as the National Development Strategy for the period to 2030 and the Sustainable Development Transition Concept -, the country currently lacks a mid-century strategy, against which shorter-term documents could be benchmarked. The country does not adequately account for environmental concerns in policy-making, and its government body in charge of environmental protection, the Committee on Environmental Protection, lacks
influence. Without a system of intermediate and final evaluation for investment projects and mechanisms for screening investment projects against national development and environmental goals, Tajikistan has not been sufficiently selective in its approach to foreign investments.

7.1. State of play: economy, investment and climate change in Tajikistan

Economy and trade

Table 7.1. Key indicators on Tajikistan’s economy

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2018)</td>
<td>9,100,837</td>
</tr>
<tr>
<td>Urbanisation rate (2018)</td>
<td>27%</td>
</tr>
<tr>
<td>Annual population growth (2018)</td>
<td>2.5%</td>
</tr>
<tr>
<td>Surface area</td>
<td>141,380 km²</td>
</tr>
<tr>
<td>GDP (USD, current price, 2018)</td>
<td>7,523 million</td>
</tr>
<tr>
<td>GDP per capita (USD, current price, 2018)</td>
<td>827</td>
</tr>
<tr>
<td>Real GDP growth (year-on-year change, 2019)</td>
<td>5%</td>
</tr>
<tr>
<td>Inflation (average consumer price, y-o-y change, 2016)</td>
<td>6.0%</td>
</tr>
<tr>
<td>Exports of goods and services (% of GDP, 2017)</td>
<td>15.7%</td>
</tr>
<tr>
<td>Imports of goods and services (% of GDP, 2017)</td>
<td>40.9%</td>
</tr>
<tr>
<td>FDI, net inflows (% of GDP, 2018)</td>
<td>2.9%</td>
</tr>
<tr>
<td>General government net lending/borrowing (% of GDP, 2019)</td>
<td>-4.7%</td>
</tr>
<tr>
<td>Unemployment (% of total labour force, 2018)</td>
<td>10.9%</td>
</tr>
<tr>
<td>Remittances (% of GDP, 2018)</td>
<td>29.0%</td>
</tr>
<tr>
<td>Transparency, accountability and corruption in the public sector rating (1= most corrupt, 6 = least corrupt, 2017)</td>
<td>2.5</td>
</tr>
</tbody>
</table>


Economy and demographics

Tajikistan has the lowest GDP per capita in the region and is the only low-income country in the former Soviet Union. Tajikistan’s population is predominantly rural; it has the lowest urbanisation rate of any country in Central Asia at 27% (see Table 7.1). Tajikistan’s government has referred to the next fifteen years as the ‘demographic window of opportunity’, during which the government faces a challenge of providing adequate infrastructure and employment opportunities for the over 45% of the population who were under the age of 20 in 2015 and many of whom will enter the work force by 2030 (Ministry of Economic Development and Trade of the Republic of Tajikistan, 2016[3]).

Tajikistan’s GDP plummeted in the 1990s following the breakup of the Soviet Union, falling from USD 6.8 billion in 1990 to USD 2.1 billion in 1996 before recovering. It

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1 The World Bank classified Tajikistan as a lower-middle income country from 2014 to 2016, but it was reclassified as a low-income country in 2017.
did not surpass its pre-independence levels until 2013. The service sector accounts for the largest portion of Tajikistan’s economy at 41%, but industry (27%) and agriculture (21%) remain important. Agriculture’s share of GDP is the largest in the region (World Bank, 2019[1]).

**Trade**

Tajikistan became a member of the World Trade Organisation in 2013. It is not a member of the Eurasian Economic Union.

Tajikistan’s exports are primarily extractives and, to a lesser extent, cotton textiles (see Figure 7.1(c)). Mineral products (mostly zinc ore and lead ore) account for 35% of Tajikistan’s exports by value, while metals and precious metals make up 23% and 17% respectively. Raw aluminium is Tajikistan’s single most important export (18% of total export value), and gold is a close second (17%). Most of Tajikistan’s exports classified as ‘textiles’ (13%) are raw or minimally refined cotton products, the two most important being raw cotton (6.7%) and non-retail pure cotton yarn (4.3%). Tajikistan’s imports are more diverse but concentrated in consumer goods, specifically textiles and machines (see Figure 7.1(d)). Lacking the domestic oil and gas industry of some of its neighbours, Tajikistan relies on hydrocarbon imports to meet demand. Refined petroleum accounts for 6.2% of total imports by value.

Kazakhstan is one of Tajikistan’s main trading partners: It is the destination of 32% of its exports and the origin of 15% of its imports (see Figure 7.1(a) and (b)). Chinese and Russian imports make up two thirds of Tajikistan’s total imports (43% and 23% respectively), but exports to these countries are far more modest (5% and 2% respectively). Similarly, Turkey and Switzerland are important export destinations (21% and 17%), but feature less prominently in Tajikistan’s imports (5% and 0.16%).

**Figure 7.1. Trade of Tajikistan**

<table>
<thead>
<tr>
<th>(a) Export destinations (2017)</th>
<th>(b) Import origins (2017)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kazakhstan</strong> 32%</td>
<td><strong>China</strong> 43%</td>
</tr>
<tr>
<td><strong>Turkey</strong> 21%</td>
<td><strong>Russia</strong> 23%</td>
</tr>
<tr>
<td><strong>Switzerland</strong> 17%</td>
<td><strong>Turkey</strong> 5%</td>
</tr>
<tr>
<td><strong>India</strong> 5%</td>
<td><strong>Germany</strong> 2%</td>
</tr>
<tr>
<td><strong>Algeria</strong> 9%</td>
<td><strong>Lithuania</strong> 1%</td>
</tr>
<tr>
<td><strong>Other</strong> 9%</td>
<td><strong>Other</strong> 11%</td>
</tr>
<tr>
<td><strong>China</strong> 5%</td>
<td></td>
</tr>
<tr>
<td><strong>Russia</strong> 2%</td>
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<tr>
<td><strong>India</strong> 5%</td>
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<td><strong>Algeria</strong> 9%</td>
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<tr>
<td><strong>Other</strong> 9%</td>
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<tr>
<td><strong>Switzerland</strong> 17%</td>
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<td><strong>Kazakhstan</strong> 32%</td>
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<tr>
<td><strong>Other</strong> 9%</td>
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<tr>
<td><strong>China</strong> 5%</td>
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<td><strong>Russia</strong> 2%</td>
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<td></td>
</tr>
<tr>
<td><strong>Kazakhstan</strong> 32%</td>
<td></td>
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</tbody>
</table>
Investment climate

While Tajikistan has a relatively well-developed regulatory framework for investment, the poor implementation of these regulations has led to an unpredictable and non-transparent regulatory environment for investors to operate. Currently, there is an open investment regime where all forms of investment are welcome. Steps have been taken to simplify business registration, improve licencing and taxation as well as competition laws (UNCTAD, 2016). However, many of these reforms are not implemented on the ground due to a weak rule of law and judiciary system, as well as corruption and a lack of correct interpretation of these laws. For example, businesses are required to make irregular advance tax payments, and are often fined through retroactive tax audits (World Bank, 2018). The informal sector is large and very few new businesses are registered. According to the World Bank’s ‘Ease of Doing Business 2019’, Tajikistan currently ranks 126th, comparing unfavourably with its neighbours such as the Kyrgyz Republic (70th) or Kazakhstan (28th).

At the institutional level, the government has put in place structures to deal with investment policy and to promote investments, but further capacity is needed for these institutions to be more effective. The responsible body for investment policies is the Committee on Investment and State Property Management, while TajInvest is the investment promotion agency in charge of the promotion agenda. The Ministry of Economic Development and Trade, which is in charge of the development of free economic zones, also designs policies to attract investments in these zones. At the Presidential level, a public-private dialogue mechanism in the form of a Consultative Council on Improvement of Investment Climate has been established since 2007 to promote reforms to improve the climate for investments and entrepreneurship. Many of these institutions however need further capacity building, including TajInvest, which is not fully equipped to carry out its investment promotion activities (UNCTAD, 2016).

The People’s Republic of China and the Russian Federation are the two most important sources of FDI in Tajikistan, accounting for 22% and 21% respectively (see Figure 7.2). Other important FDI sources include Kazakhstan (8%), the United Kingdom (7%), the United States (6%) and the Philippines (5%).
The approach Tajikistan has taken in regards to large-scale investments is resulting in a considerable risk of debt stress. Gross government debt amounted to a third of Tajikistan’s GDP in 2015, then rose to 44.8% in 2016 and surpassed 50% of GDP in 2017. Over 80% of this debt is to a single creditor, China’s Export-Import Bank, which is linked to the Belt and Road Initiative (BRI) (Hurley, Morris and Portelance, 2018[7]). With existing mechanisms, the government has accepted loans for large-scale projects (notably Dushanbe’s Chinese-financed coal-fired power plant) that it was then unable to repay. Such defaults led to debt settlements that have included licenses for mineral deposit extraction (Emerging Markets Forum, 2019[8]) and even transfer of sovereignty over disputed territory to China (Hurley, Morris and Portelance, 2018[7]). Its debt levels are considered unsustainable and both the IMF and the World Bank assess Tajikistan as having a ‘high risk’ of debt distress (Hurley, Morris and Portelance, 2018[7]).

Figure 7.2. FDI in Tajikistan by source country, 2007-2015

USD million


Tajikistan has been able to attract limited cross-border greenfield FDI projects totalling around USD 7 billion between 2003 and 2017, second-lowest in Central Asia after the Kyrgyz Republic’s USD 6.3 billion and significantly lower than other regional peers. Foreign investors in Tajikistan have been mainly investing in metals projects (28%), alternative and renewable energy (24%), and coal, oil and natural gas (18%) (see Figure 7.3). Infrastructure related investments have been rather limited. For example, investments into construction materials reached USD 600 million (or 9%) while the transport sector received the least investments of only USD 70 million (or 1%) of the total announced greenfield FDI projects in Tajikistan. Recognising the important role of foreign investors to achieve sustainable growth, the National Development Strategy 2016-2030 (see section 7.3 on the Tajikistan’s key strategic documents) aims to attract...
as much as USD 55 billion in FDI by 2030. Such investments are aimed to increase the gross fixed capital formation to GDP by the private sector, which has averaged only 4.4% since 2000, which is much lower than the 21% average investment rate in the CIS countries (World Bank, 2018[6]).

Figure 7.3. Greenfield FDI in Tajikistan by economic activity, 2003-2017
Cumulated greenfield FDI capital between January 2003 and September 2017 in USD million

Note: Other includes: Automotive OEM; Software & IT services; Textiles; Automotive Components; Minerals; Food & Tobacco.

Climate change
Tajikistan’s contribution to global greenhouse gas emissions is miniscule at 0.0003% (World Bank, 2019[1]), and its per capita GHG emissions are the lowest in the region at 1.9 tCO₂e per capita, having contracted since 1990 (4.1 tCO₂e per capita). Tajikistan’s greenhouse gas (GHG) emissions intensity (emissions per unit of GDP) has also reduced from 3.2 kg of CO₂e per USD of GDP in 1990 to 2.4 kgCO₂e by 2012. However, this is still considerably higher than the OECD average of 0.4 kg of CO₂e.

Tajikistan’s greenhouse gas emissions dipped sharply immediately following independence and have only reached about three quarters of their pre-independence peak. Over the same period, the economy shrank over the 1990s to less than a third of its original size, then began steadily recovering in 1997 and surpassed its Soviet-era peak in 2013 (see Figure 7.4).
In 1990, the sectoral breakdown of Tajikistan’s emissions more closely resembled its neighbours’: 67% of emissions came from the energy sector, while agriculture (20%), industry (10%) and waste (3%) accounted for the rest. By 2010, the agriculture sector’s share grew to 60%, while the energy’s share had dropped to 15% (Government of the Republic of Tajikistan, 2014[11]).

Tajikistan is particularly vulnerable to the effects of climate change. From 1950 to the present day, Tajikistan has lost about 20% of its glacier cover, and current melt rates will lead to average losses of about 2 km³ per year. Certain parts of the country (the south, western Pamir and the mountains of central Tajikistan) could face up to 5°C of warming by the end of the century, leading to increased incidence of heat waves and droughts. Altered precipitation patterns combined with rising temperatures pose major threats to Tajikistan’s sizeable agriculture sector as well as future energy and food security (Government of the Republic of Tajikistan, 2014[11]).

7.2. Tajikistan’s infrastructure needs and current plans

Tajikistan’s infrastructure is substandard, despite gradual improvements (see Figure 7.5). Inadequate infrastructure, particularly in energy and transport, contributes to the high trade costs that restrict the country’s access to nearby markets like that of China and Afghanistan. Deteriorating Soviet-era infrastructure such as irrigation channels, roads, dams, bridges and river embankments has increased the population’s exposure to risks associated with extreme weather events and earthquakes (World Bank, 2018[6]).
Out of the USD 33.3 billion of under construction and planned investments tracked, energy projects account for over 58% (USD 21.6 billion) of projects while transport and mining and quarrying make up 18% and 13% respectively. Finally, manufacturing and water supply and sanitation only account for 3% (USD 945 million) and 1% (USD 358 million) respectively of planned and under construction investment projects. The energy investments are divided into electricity generation projects (over 49% or USD 16.3 billion) and electric power transmission and distribution (7% or USD 2.3 billion) (see Figure 7.6). Such strong focus on hydroelectric power plants is in line with the government’s objective to develop its capacity to sell excess power to neighbouring countries, particularly Afghanistan and Pakistan. One of the most significant sources of financing for large infrastructure projects such as transport and energy facilities, as well as power plants and power lines is China’s BRI, which the government considers as a tool to finance its national development projects as part of the National Development Strategy until 2030. In fact, the BRI is expected to have a significant impact for Tajikistan, as it is considered the geographic starting point for a number of BRI projects.
Figure 7.6. Infrastructure projects in Tajikistan by sector

Planned and under construction

<table>
<thead>
<tr>
<th>Sector</th>
<th>USD million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oil and gas pipelines</td>
<td>3,000</td>
</tr>
<tr>
<td>Electric power transmission</td>
<td>2,903</td>
</tr>
<tr>
<td>Mine and quarrying</td>
<td>4,218</td>
</tr>
<tr>
<td>Transport</td>
<td>6,163</td>
</tr>
<tr>
<td>Electricity generation</td>
<td>16,332</td>
</tr>
<tr>
<td>Water supply and sanitation</td>
<td>358</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>945</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>945</td>
</tr>
</tbody>
</table>


**Transport**

Tajikistan ranks 147th out of 167 countries in the World Bank’s Logistics Performance Index with a score of 2.29 (out of 5), the lowest in the region. Its infrastructure (2.17) and customs (2.02) are particularly weak (World Bank, 2018[13]).

Most of Tajikistan’s cargo and passengers travel by road. 96% of freight turnover and 99% of overland passenger turnover in Tajikistan occurred by motorway in 2016. Motor transport accounted for 74.5% of total passenger turnover, while air transport made up the majority of the remaining passenger turnover (24.7%) (Agency for Statistics under the President of the Republic of Tajikistan, 2017[14]). Tajikistan’s rail network, originally conceived as a part of the wider Soviet system, consists of two unconnected lines (one running from Tashkent to the Fergana valley through Tajikistan in the north, the other linking Dushanbe to southern Uzbekistan). This particularity explains in part the small modal share of rail in both freight and passenger transport (ITF, 2019[15]).

With no access to the sea, Tajikistan relies mainly on road transportation for its trade. Its road infrastructure capacity has to increase by 191% by 2030 and by 516% by 2050 to maintain network performance. Several international roads forming parts of CAREC corridors that pass through Tajikistan have been identified as requiring particular attention for capacity increases, such as the roads between Samarkand in Uzbekistan and Tajikistan’s capital Dushanbe or between Tashkent and Khujand, a city in northern Tajikistan. In Tajikistan, 83% of the roads are unpaved because the traffic currently passing through them does not justify paving them, but projected increases to passenger and freight traffic may surpass the economic threshold to warrant paving (ITF, 2019[15]).

Lack of connectivity, both domestically and internationally, is a major barrier to Tajikistan’s integration into regional and global value chains. Currently, all of
Tajikistan’s international rail links run through Uzbekistan, and tensions between Tajikistan and Uzbekistan have led to border closures in the past. To circumvent Uzbekistan and diversify its rail links, Tajikistan announced that it will build international rail links to Afghanistan as part of the Turkmenistan-Afghanistan-Tajikistan (TAT) railway, but improved relations with Uzbekistan seem to have reduced Tajikistan’s appetite for the project (Putz, 2018[16]). Benchmarked against Germany, a global leader in transport and logistics, Tajikistan is only 53% as well connected, several percentage points below its neighbours. It costs about USD 245 for one tonne of goods to reach 20% of global GDP from Tajikistan, meanwhile in Germany the same access can be attained at a smaller cost of around USD 30 (ITF, 2019[15]).

Tajikistan’s planned and current transport infrastructure projects account for around USD 5.9 billion, and consist primarily of railway projects (80% or around USD 4.7 billion) (see Figure 7.7). Although at a much lower level, investments in the road sector come second at around USD 1 billion (or 17%), followed by limited investments in airports (USD 194 million or 3%). Tajikistan has also been investing in logistics centres to increase the efficiency of transit transport in the country and the region but so far, very limited amounts have been allocated. The projects under construction are mainly brownfield investments that aim to upgrade sections of roads linking different economic centres in Tajikistan as well as connecting the country with neighbouring states (Table 7.2) such as for example the Dushanbe-Uzbekistan Border Road Improvement Project, which will connect Dushanbe to the Tajikistan-Uzbekistan border.

While projects under construction are mainly focusing on roads, the planned projects instead have a focus on railways. As shown in Table 7.2, these are mostly large-scale, often cross-border investments that aim to increase the connectivity of the country with neighbouring markets. This includes the construction of the Russia-Kazakhstan-Kyrgyz Republic-Tajikistan railway and the China-Kyrgyz Republic-Tajikistan-Afghanistan-Iran railways. Such investment on improving regional transport are considered to be the main sources of broad-based economic growth as they will increase the movement of goods, people and services in the region, and will allow Tajikistan to better include itself in regional and global value chains (TRACECA, n.d.[17]).
Figure 7.7. Transport projects in Tajikistan by sub-sector

Planned and under construction

In USD million


Table 7.2. Hotspot projects in the transport sector in Tajikistan

(a) Under construction

<table>
<thead>
<tr>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kulyab-Kalaikhumb Road Project (Sections A and F)</td>
<td>Road</td>
<td>The project will upgrade two sections of road linking the southwestern region of Khafion with the eastern Gorno-Badakhshan Autonomous Region. Such a project will also increase trade with neighbouring countries.</td>
<td>116</td>
<td>ABUDF; IsDB; KFAED; SFD; Government of Tajikistan; OFID</td>
<td>Brownfield</td>
</tr>
<tr>
<td>Dushanbe-Uzbekistan Border Road Improvement Project</td>
<td>Road</td>
<td>The project will rehabilitate a 5 km road connecting Dushanbe to the border with Uzbekistan. It is considered as the last missing road of the Asian Highway Network and the CAREC Corridor 3, which is old and in poor condition.</td>
<td>106</td>
<td>EBRD; AIIB</td>
<td>Brownfield</td>
</tr>
</tbody>
</table>

(b) Planned

<table>
<thead>
<tr>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karamika-Vahdat Section of Russia-Kazakhstan-Kyrgyz Republic-Tajikistan Railway</td>
<td>Railways</td>
<td>The project will have a total length of 1 181 km, including 296 km in the territory of Tajikistan from Karamik to Vakhdat. The railway link is expected to link Tajikistan to other countries and strengthen the movement of goods, services and people in the region. A preliminary feasibility study has already been completed in 2015 and the</td>
<td>2 500</td>
<td>Implementer of the project; SOE Rohi ohani Tojikiston (Tajik Railways)</td>
<td>Greenfield</td>
</tr>
</tbody>
</table>
Energy

The overall quality of Tajikistan’s energy infrastructure is poor. Although the country has achieved universal access to electricity, existing systems function inefficiently. The quality of transmission and distribution systems lead to losses of 17.1% (World Economic Forum, 2017[12]) and firms experience upwards of 6 power outages per month on average (World Bank, 2019[11]).

Tajikistan is a net importer of oil and natural gas, importing 0.97 Mt of oil in 2016 and 0.14 Mtoe of natural gas in 2010 (the last year of available data). Although historically an importer of electricity as well, it has begun exporting electricity (0.11 Mtoe in both 2015 and 2016). Given its connectivity shortcomings and dependence on imports of both oil and gas, Tajikistan faces major energy security concerns. The President has referred to ‘energy independence’ as one of the government’s top priorities for the future development of Tajikistan (President of the Republic of Tajikistan, 2018[22]). In particular, Tajikistan aims to increase its electricity generation capacity to power industrial development (particularly energy-intensive aluminium production) and increase exports. It also aims to diversify its sources of electricity away from

Note: Refer to the Preamble for the present report’s definition of ‘hotspot’ and other information on how the projects above were selected and prioritised. ABUDF = Abu Dhabi Fund for Development; ADB = Asian Development Bank; AIIB = Asian Infrastructure Investment Bank; EBRD = European Bank of Reconstruction and Development; IsDB = Islamic Development Bank; KFAED = Kuwait Fund for Arab Economic Development; MTC = Ministry of Transport and Communications (of Tajikistan); OFID = OPEC Fund for International Development; OJSC = open joint-stock company; SFD = Saudi Fund for Development


<table>
<thead>
<tr>
<th>Project Description</th>
<th>Type</th>
<th>Source</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karamyk - Vakhdat - Kurgan Tyube - Kalkhazabad - Nizhny Pyanj Railway Construction Section of China – Kyrgyz Republic-Tajikistan - Afghanistan-Iran Railway</td>
<td>Railways</td>
<td>Bank of China, Kyrgyz Republic, Tajikistan, Afghanistan, Iran, World Bank, ADB, USA (unspecifiekd)</td>
<td>Greenfield</td>
</tr>
<tr>
<td>Dushanbe-Osh-Kashgar Railway Construction Section of Railway section of China – Kyrgyzstan-Tajikistan - Afghanistan-Iran Railway</td>
<td>Railways</td>
<td>MTC of Tajikistan</td>
<td>Greenfield</td>
</tr>
<tr>
<td>Reconstruction and rehabilitation Kalaikhum-Khorog-Murghab – Tokhtamysh road</td>
<td>Road</td>
<td>MTC of Tajikistan</td>
<td>Brownfield</td>
</tr>
<tr>
<td>Construction of Danghara Airport</td>
<td>Airport</td>
<td>OJSC Dhangara Airport</td>
<td>Greenfield</td>
</tr>
</tbody>
</table>

The project is one of the planned new railway constructions that will link China with Iran crossing Tajikistan, Kyrgyz Republic and Afghanistan.

The project is one of the planned new railway constructions that will link China with Iran crossing Tajikistan, Kyrgyz Republic and Afghanistan.

The project entails the reconstruction and rehabilitation of a 80 km section between Kalaikhum and Vanj. It will significantly reduce travel time and the freight cost by 20%. A preliminary feasibility study was already conducted by the China Roads and Bridges construction Corporation in 2014.

The project is part of the National Development Strategy to 2030 and the State Target Program on Development of Transport Complex until 2025 to promote infrastructure and strengthen material and technical upgrades.

The estimated cost of construction for the Tajikistan section is USD 2.5 billion.

The total expected construction period is ten years. The estimated cost of construction for the Tajikistan section is USD 2.5 billion.

The project is one of the planned new railway constructions that will link China with Iran crossing Tajikistan, Kyrgyz Republic and Afghanistan.
hydroelectric dams, which currently generate 97% of the country’s electricity (see Figure 7.8). Tajikistan’s National Development Strategy to 2030 names both renewables (wind, solar) and coal-fired power plants as possibilities for increased capacity.

Tajikistan’s focus on coal derives from energy security concerns and considerable unexploited domestic reserves. The country’s dependence on electricity generation from hydroelectric dams leads to seasonal electricity shortages in the winter, leaving an estimated 1 million people without a reliable supply of electricity (UNECE, 2017[23]). Given the availability of domestic coal deposits, Tajikistan has turned towards coal. Tajikistan mined 1.05 million tonnes of coal in 2015, and the National Development Strategy sets ambitious production targets for the future: 4.05-5.3 Mt by 2020, 6.9-10.3 Mt by 2025 and 10.4-15.1 Mt by 2030. Although coal currently generates only 3% of electricity, all of Tajikistan’s coal-fired generation units came online in the past ten years, and further projects have been announced (End Coal, n.d.[24]).

Figure 7.8. Electricity generation by fuel (GWh, 2016)


Tajikistan’s current and planned energy investments are in line with the government’s strategies to increase the capacity of renewables for electricity generation. For instance, Figure 7.9 shows that 94% of electricity generation projects are in hydropower (or 9.2 GW), while coal-fired electric power plants only account for 6% of the total electricity generation projects. Tajikistan has the eighth highest hydropower potential in the world with some 220 terawatt-hours technically recoverable, however many plants require rehabilitation given that they were built during the Soviet era. Currently, hydropower potential is only exploited at 4-5%. Such projects would therefore help to address the winter crisis and reduce the imbalance of excess energy supply during the summer months and the energy deficit during the winter. They would also contribute to the National Development Strategy to 2030 to increase electricity generation from 17.1 billion kWh in 2015 to 26.2 in 2020, and ultimately to 40.7-45 in 2030. Besides
hydropower, there are no other renewables projects under construction or being planned, although other renewable energy sources do exist compromising 3% of Tajikistan’s energy profile.

**Figure 7.9. Electricity generation projects in Tajikistan, by fuel**

![Diagram showing electricity generation projects in Tajikistan by fuel type.](image)

*Source: OECD based on accessed databases as of June 2019.*

A further analysis of the hotspot energy projects under construction and planned (see Table 7.3) also shows that most important projects are in hydropower, but there are also a number of large-scale regional projects where Tajikistan is a participant country. One of the most significant projects currently under construction is the Roghun Hydropower Plant, which is the main pillar of the *National Development Strategy of Tajikistan to 2030*. Construction of the 3 600 MW plant will cost almost USD 4 billion and is expected to be finished by 2032 when it will be commissioned. The project will contribute to the objectives of the strategy of poverty reduction and growth, by boosting exports of hydropower and reducing energy shortages in the country. At the same time, such construction also entails social and economic risks, which will have to be managed by the government in order to avoid instability (World Bank, 2018).

At the regional level, Tajikistan is participating in oil and gas pipeline and electricity transmission projects. For example, Line D of the Central Asia-China gas pipeline is one of the largest natural-gas mega projects in the country that will cost around USD 3 billion, with major financing from China. Another significant project is the World Bank-funded Central Asia-South Asia Electricity Transmission and Trade Project (CASA-1000), which will help Tajikistan and the Kyrgyz Republic to export summer surplus electricity to neighbouring Kazakhstan, Uzbekistan, Afghanistan and Pakistan. When realised, the project is expected to integrate the electrical networks of Central and South Asia. Tajikistan is poised to benefit considerably from this project with increased electricity exports, spurring additional development in the country.
Table 7.3. Hotspot projects in the energy sector in Tajikistan

(a) Under construction

<table>
<thead>
<tr>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Capacity (MW)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rogun Hydropower Dam Project</td>
<td>Hydro</td>
<td>The project is expected to boost hydropower exports and limit energy shortages, therefore contributing to growth and reduction of poverty across the country. The project is expected to be fully commissioned in 2032.</td>
<td>3 900</td>
<td>3 600</td>
<td>Salini Impregilo SpA and OJSC Rogun HPP</td>
<td>Greenfield</td>
</tr>
<tr>
<td>Line D of Central Asia-China gas pipeline (Tajikistan Section)</td>
<td>Oil and gas pipeline</td>
<td>The existing three lines of the pipeline run 1830 km from Turkmenistan to China through Uzbekistan and Kazakhstan. The fourth line, Line D, whose construction started in 2014 and is expected to be completed in 2020, will run 1 000 km from Turkmenistan to China via Uzbekistan, Tajikistan and the Kyrgyz Republic.</td>
<td>3 000</td>
<td>N/A</td>
<td>China (unspecified)</td>
<td>Greenfield</td>
</tr>
<tr>
<td>CASA-100</td>
<td>Electric power transmission and distribution</td>
<td>CASA-100 is a regional project for the construction of a power transmission line between - Tajikistan, Afghanistan, Pakistan and the Kyrgyz Republic. The Tajikistan portion of CASA-100 is a 170-km transmission line from north to south covering some 60 villages.</td>
<td>1 170</td>
<td>1 000</td>
<td>Governments of Kyrgyz Republic, Tajikistan (Ministry of Energy &amp; Industry), Afghanistan, Pakistan</td>
<td>Greenfield</td>
</tr>
<tr>
<td>Nurek Hydropower Rehabilitation Project Phase I</td>
<td>Hydropower</td>
<td>The objectives of the First Phase of Nurek Hydropower Rehabilitation Project for Tajikistan are to rehabilitate and restore the generating capacity of three power generating units of Nurek hydropower plant, improve their efficiency, and strengthen the safety of the Nurek dam.</td>
<td>350</td>
<td>3 000</td>
<td>World Bank; AIIB; EDB; Other sources</td>
<td>Brownfield</td>
</tr>
<tr>
<td>Cross Regional Power Trade</td>
<td>Electric power transmission and distribution</td>
<td>The project aims to facilitate cross-border trade of electricity of summertime hydropower surplus in Kyrgyz Republic and Tajikistan. As part of the project, the high voltage transmission infrastructure will be constructed and reinforced.</td>
<td>301</td>
<td>N/A</td>
<td>EBRD; World Bank; EIB</td>
<td>Brownfield</td>
</tr>
</tbody>
</table>

(b) Planned

<table>
<thead>
<tr>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Capacity (MW)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fon-Yagnob</td>
<td>Coal-fired power plant</td>
<td>The project is promoted by the Investment Promotion Agency of Tajikistan as one of the priority projects to ensure reliable electricity supply during the winter period.</td>
<td>600</td>
<td>600</td>
<td>N/A</td>
<td>Greenfield</td>
</tr>
</tbody>
</table>
Note: Refer to the Preamble for the present report’s definition of ‘hotspot’ and other information on how the projects above were selected and prioritised. AIIB = Asian Infrastructure Investment Bank; EBRD = European Bank of Reconstruction and Development; EDB = Eurasian Development Bank; EIB = European Investment Bank OJSC = open joint-stock company


Industry and mining

The National Development Strategy for the period up to 2030 aims to increase the share of industry in Tajikistan’s GDP from 12.3% in 2015 to 12.5-13.5% by 2020, 16-16.5% by 2025 and 20-21% by 2030. It also aims to decrease the role of extractives in favour of production further up value chains. Extractives have, however, played a large and increasing role in Tajikistan’s recent industrial output, while light industry (textiles) has declined and machinery’s already small share has shrunk (see Figure 7.10).
Figure 7.10. Mining and industrial production of Tajikistan, 2011-2015

In thousand TJS (Tajik somoni 1998 prices)


Tajikistan’s planned and under construction manufacturing projects are mainly focusing on the metallurgical plants (53%) out of a total of USD 944 million, followed by aluminium plants (22% or USD 204 million), cement manufacturing (19% or USD 175 million) and basalt fiber production (7% or USD 65.8). Such projects reflect Tajikistan’s leading position in the Central Asian smelting industry, and are in line with the government’s priority to develop heavy industry (World Bank, 2018[6]). Progress in other industries however, is rather limited reflecting Tajikistan’s narrow economic base and limited progress towards diversification.

A closer analysis of planned and under construction projects also demonstrate Tajikistan’s reliance on heavy industries and the mining sector (Table 7.4). Such projects have been mainly promoted by Tajikistan’s Investment Promotion Agency as priority investments. One of the largest projects currently under construction is the Istiqlol Metallurgical Plant, the construction of which started in 2014 and which is expected to produce 50 000 tons of lead and 50 000 tons of zinc per year. Upon commissioning, the project would create over 2 500 jobs, with domestic workers constituting 90% of the labour.
Figure 7.11. Industry and mining projects in Tajikistan by sub-sector

Planned and under construction

In USD million

![Diagram showing sector distribution](image)


Table 7.4. Hotspot projects in the industry and mining sectors in Tajikistan

<table>
<thead>
<tr>
<th>(a) Under construction</th>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Istiqol Metallurgical Plant</td>
<td>Fabricated metal products</td>
<td>Production started in 2014 and it will produce 50,000 tonnes of lead and 50,000 tons of zinc per year. It is expected that once the project will be commissioned, it will create 2,500 new jobs for Tajik nationals.</td>
<td>500</td>
<td>ADB</td>
<td>Greenfield</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(b) Planned</th>
<th>Name</th>
<th>Sub-sector</th>
<th>Description</th>
<th>Project value (USD million)</th>
<th>Funding source</th>
<th>Type of investment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mining of Silver at the Koni Mansuri Kalon Deposit</td>
<td>Mining of silver</td>
<td>The project is for the development of a silver deposit containing 1 Mt of ore. It aims to boost the country’s export potential and create new jobs.</td>
<td>4,000</td>
<td>SOE</td>
<td>Greenfield</td>
</tr>
<tr>
<td></td>
<td>Talco Energy-Metallurgical Company (Talco)</td>
<td>Basic metals</td>
<td>The project aims to increase aluminium production up to 200,000 tonnes per year and reduce aluminium cost price.</td>
<td>204</td>
<td>Tajik Aluminum Company (TALCO)</td>
<td>Greenfield</td>
</tr>
</tbody>
</table>
Tajikistan has abundant water resources, where the largest rivers of Central Asia originate, providing over 70% of all drinking water resources of the region. The use of transboundary rivers by the countries in the region makes them economically dependent on water. This has often led to low-level frictions between Tajikistan and the Kyrgyz Republic over water access and pasturage in the Fergana. Despite the abundant water resources, Tajikistan uses only 20% of the available water potential (The State Committee on Investment and State Property Management of the Republic of Tajikistan, 2018[32]) and only three out of four people have access to a clean water source (World Bank, 2018[6]). Moreover, the irrigation infrastructure is also largely deficient. For instance, some 50% of the water distribution system and approximately 65% of the drainage system is considered dysfunctional (European Commission, 2014[33]).

Current and planned water projects amount for around USD 258 million, and they are mostly focused on water supply and irrigation (81% or USD 210 million) and irrigation and water management (19% or USD 49) (see Figure 7.12). Relevant investments include projects to build climate resilience such as climate proofing flood and mudflow protection infrastructure, as well as irrigation and drainage infrastructure. For example, the Zarafshon Irrigation Rehabilitation and Management Improvement Project financed by the World Bank aims to improve the management of water resources and irrigation in the northern part of the country. Such a project is expected to boost crop yields and increase food security for the local inhabitants.
7.3. Strengths and weaknesses of existing institutional set-up for sustainable infrastructure planning

**Strategic planning and links between long-term goals, infrastructure plans and environmental considerations**

Tajikistan has two main development strategies, the *National Development Strategy for the period to 2030* and the *Sustainable Development Transition Concept (2007-2030)* (see Tables 7.5 and 7.6). Tajikistan could benefit from an overarching strategy defining the country’s development objectives to 2050 in the context of the Paris Agreement, which Tajikistan ratified in 2017. A mid-century strategy, against which shorter-term documents would benchmark their own objectives, could help Tajikistan avoid costly lock-in to unsustainable development pathways, such as the recent pivot towards coal-fired power plants to diversify its electricity generation capacity. A longer-term vision could help the government weigh the costs and benefits of policy decisions and infrastructure development options.

The *Law on State Forecasts, Concepts, Strategies and Programmes of Socioeconomic Development* (2003) defines a hierarchy of documents from long-term “concepts” of socioeconomic development (15 years, adjusted every 5), strategies (10 years, adjusted halfway) and programmes (3-5 years) (UNECE, 2017[23]).

In practice, however, the terms ‘concept’, ‘strategy’ and ‘programme’ seem to be applied somewhat more arbitrarily with variable timeframes. The *Sustainable Development Transition Concept (2007-2030)*, for instance, covers a 24-year period, while the *2016 National Development Strategy for the period until 2030* covers 15 years. Programme are particularly variable: the *State Environmental Programme (2009-2019)*
lasts half as long as the State Programme for Research and Conservation of Glaciers (2010-2030).

A well-defined hierarchy, from long-term documents (concepts and strategies) cascading through to medium-term and near-term documents (programmes and plans), allows lower-level documents to link their goals with longer-term objectives. In Tajikistan’s existing strategic documents, these links appear to be absent, for example, the National Development Strategy to 2030 does not refer to the Sustainable Development Transition Concept, despite a number of overlapping goals.

**Institutional set-up and decision-making processes**

Tajikistan lacks a dedicated environment ministry. The Committee on Environmental Protection, which is not an integral part of the government but rather a body subordinate to it, is responsible for most environment-related policy areas. As a result, the Committee lacks the authority to influence in coordination bodies and consultations on policies and strategies with environmental impacts, as evidenced by the poor integration of environmental concerns in sectoral documents (UNECE, 2017[23]).

The National Development Strategy identifies poor coordination across government bodies as a barrier to policy implementation. Previous efforts to address coordination concerns led to the creation of the National Development Council under the President in 2007 to facilitate communication and cooperation across the government (Ministry of Justice of the Republic of Tajikistan, 2007[34]). Overall, horizontal coordination mechanisms are relatively strong in Tajikistan, but relevant coordination bodies regularly exclude the Committee on Environmental Protection. The bodies charged with policy coordination on areas as diverse as public health and investment climate improvement do not include a representative of the Committee (UNECE, 2017[23]).

The Programme for Medium-Term Development (2016-2020) tasks the Presidential Administration and the finance and economy ministries with improving coordination across ministerial portfolios to better deliver policy coherence, and USD 2 million was earmarked for the task. During this review of coordination mechanisms, the government should reconsider the status of the Committee on Environmental Protection and its voice in coordinating bodies.

Tajikistan also lacks a system of intermediate and final evaluation of investment projects (Emerging Markets Forum, 2019[8]). Improved mechanisms for screening investment projects against national development and environmental goals could help Tajikistan more selectively harness foreign investment when the projects are in the country’s best interest. Given the number of large-scale infrastructure projects in Tajikistan and the state of public finances, its debt situation could worsen if not managed appropriately. By articulating the government’s long-term development and climate goals more clearly and consistently in a mid-century development strategy, Tajikistan would be better equipped to weigh the costs and benefits of large-scale infrastructure development projects.

**List of relevant strategic documents**

Table 7.5. Main strategic documents in force

<table>
<thead>
<tr>
<th>Status</th>
<th>Time Horizon</th>
<th>Sectoral Coverage</th>
<th>Main objectives</th>
</tr>
</thead>
</table>

Unclassified
| First Nationally Determined Contribution (NDC) | Submitted in 2017 | 2017-2030 | Economy-wide | - Unconditional target: not exceed 80-90% of the 1990 level of greenhouse gas emissions by 2030, 1.7-2.2 tons in CO2e per capita
- Conditional target: target of 65-75% of the 1990 level of greenhouse gas emissions by 2030, 1.2-1.7 tons in CO2e per capita
- Main sectors targeted for emission reduction: Water (linked with improvement in irrigation, water resource management and protection of glaciers), Industry (introduction of new technologies), Transport (development of low-emission transport infrastructure), Energy (transition to renewable energy sources)
- Main adaptation tool: the list of strategic documents mentioned below |
| National Development Strategy for the period until 2030 | Adopted in 2016 | 2016-2030 | Governance, planning, transport, energy, water, industry | - Industrial development through the implementation of infrastructure projects and promoting the rational use of land, water and energy resources, as well as an aim to increase production capacities
- Develop an effective public administration system
- Human capital development, focusing on improving levels of education, science, health, social protection, living environment and social equality
- Improve the investment climate and promote growth in the financial sector
- Increase access to water supply systems and sanitation
- Increase electricity generation, aiming to reach 26.2 billion kWh by 2020, 37.5-37.6 billion kWh by 2025 and 40.7-45 billion kWh by 2030
- Improve connectivity, especially to neighbouring countries and key markets, by developing transport and telecommunications |
| State Environmental Programme for the period 2009-2019 | Adopted in 2009 | 2009-2019 | Governance, energy, water, industry | - Promote the efficient and rational use of natural resources
- Ensure environmentally safe processes in production
- Introduce and use environmentally friendly technologies
- Increase the level of responsibility of government bodies and society
- Create institutions and organisations that support an environmental mind-set to development
- Produce reports on the state of the environment in various sectors, to promote environmentally friendly practices |
| Programme on Improving Access of the Population to Clean Drinking Water for the period 2008-2020 | Adopted in 2006 | 2008-2020 | Water | - Rehabilitate existing water systems and construct new centralised water supply systems with the use of modern technology
- Construct local water supply systems (e.g. water wells)
- Introduce modern methods of water disinfection
- Promote a more efficient use of water resources |
<table>
<thead>
<tr>
<th>Programme of Water Sector Reform for the period 2016-2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2015</td>
</tr>
<tr>
<td>2016-2025</td>
</tr>
<tr>
<td>Water</td>
</tr>
<tr>
<td>• Enable the implementation of integrated water resource management</td>
</tr>
<tr>
<td>• Institutional reforms in the water sector to promote transparency and create accountable structures</td>
</tr>
<tr>
<td>• Transition from administrative-territorial water resource management to management within hydrological and hydrographic zones</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programme for Mid-Term Development of the Republic of Tajikistan for 2016-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2016</td>
</tr>
<tr>
<td>2016-2020</td>
</tr>
<tr>
<td>Governance, planning, finance</td>
</tr>
<tr>
<td>• Create a functional strategic planning system and increase coordination within the government</td>
</tr>
<tr>
<td>• Improve the business environment and investment climate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Programme for the Adoption of Renewable Sources of Energy and the Construction of Small Hydroelectric Plants for 2016-2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2016</td>
</tr>
<tr>
<td>2016-2020</td>
</tr>
<tr>
<td>Energy, Water</td>
</tr>
<tr>
<td>• Increase electricity supply, especially to remote highland areas</td>
</tr>
<tr>
<td>• Construct small hydroelectric plants and create the conditions necessary for operational maintenance of existing small hydroelectric power plants</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Targeted Government Programme of transport Development in the Republic of Tajikistan to 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2011</td>
</tr>
<tr>
<td>2011-2025</td>
</tr>
<tr>
<td>Transport</td>
</tr>
<tr>
<td>• Develop a set of measures that promote the consistent development of transport infrastructure in an economically sustainable manner</td>
</tr>
<tr>
<td>• Create a national transport network, in compliance with established safety standards, to meet domestic needs</td>
</tr>
<tr>
<td>• Promote free competition in domestic and international transport service markets</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept of State Policy for Attraction and Protection of Investment of the Republic of Tajikistan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2012</td>
</tr>
<tr>
<td>No defined timeframe</td>
</tr>
<tr>
<td>Governance, Industry</td>
</tr>
<tr>
<td>• Increase investment in infrastructure projects</td>
</tr>
<tr>
<td>• Modernise production processes by updating their material and technical base</td>
</tr>
<tr>
<td>• Improve the effectiveness of the regulatory policy of the state within the investment sphere</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept of Transition to Sustainable Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2007</td>
</tr>
<tr>
<td>2007-2022</td>
</tr>
<tr>
<td>Governance, planning, transport, energy, water, industry</td>
</tr>
<tr>
<td>• Establish an effective form of governance</td>
</tr>
<tr>
<td>• Ensure energy security, as well as social security</td>
</tr>
<tr>
<td>• Promote environmentally sustainable production</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Concept of Environmental Protection in the Republic of Tajikistan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adopted in 2008</td>
</tr>
<tr>
<td>No defined timeframe</td>
</tr>
<tr>
<td>Governance, energy, water, industry</td>
</tr>
<tr>
<td>• Promote environmentally friendly practices across all economic sectors</td>
</tr>
<tr>
<td>• Develop an environmental monitoring system</td>
</tr>
<tr>
<td>• Protect and promote the rational use of land and water resources</td>
</tr>
<tr>
<td>• Improve the welfare of the population</td>
</tr>
</tbody>
</table>
### Table 7.6. Other relevant documents

<table>
<thead>
<tr>
<th>Document</th>
<th>Status</th>
<th>Time Horizon</th>
<th>Sectoral Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mid-Term Plan for the Implementation of the Concept on Environment Protection for the period 2010-2012</td>
<td>Adopted in 2010</td>
<td>2010-2012</td>
<td>Multi-sector</td>
</tr>
<tr>
<td>Programme for Effective Use of Hydroelectric Resources and Energy Efficiency for 2012-2016</td>
<td>Adopted in 2011</td>
<td>2012-2016</td>
<td>Energy</td>
</tr>
</tbody>
</table>

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