

ITF's work on regional freight connectivity

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The economics of transport connectivity

Benefits of improving freight connectivity

- Connecting peripheral areas to markets
- Boosting international trade
- Improving the quality of infrastructure and services and relieving congestion
- Enhancing safety and sustainability
- Reducing costs for domestic economies
- Increasing revenues from transit

New context



The pandemic put to test the resiliency of transport systems and global supply chains



Geopolitical tensions and economic sanctions forced to re-route trade flows through new corridors



Global energy crisis put pressure on transport costs and highlighted the importance of energy autonomy



New study on regional freight connectivity

Highlights:

- Addressing current freight transport challenges in Central* and Southeast Asia with “hard” and “soft” policy measures.
- Comprehensive assessment of all major infrastructure projects in both regions, including regional multimodal corridors.
- Innovative methodology combining the connectivity, sustainability and resilience dimensions of regional freight systems.
- Application of both quantitative and qualitative tools, including the ITF Global Freight Transport Model.

* In the context of this study, Central Asia includes the following countries:
Kazakhstan, Kyrgyzstan, Mongolia, Tajikistan, Turkmenistan, Uzbekistan



Holistic vision for regional freight systems

CONNECTIVITY

- Infrastructure quality
- Efficiency and reliability
- Intermodality
- Overall costs and times
- Digital integration
- Logistics and supply chain
- Policies and regulations
- Access to global markets

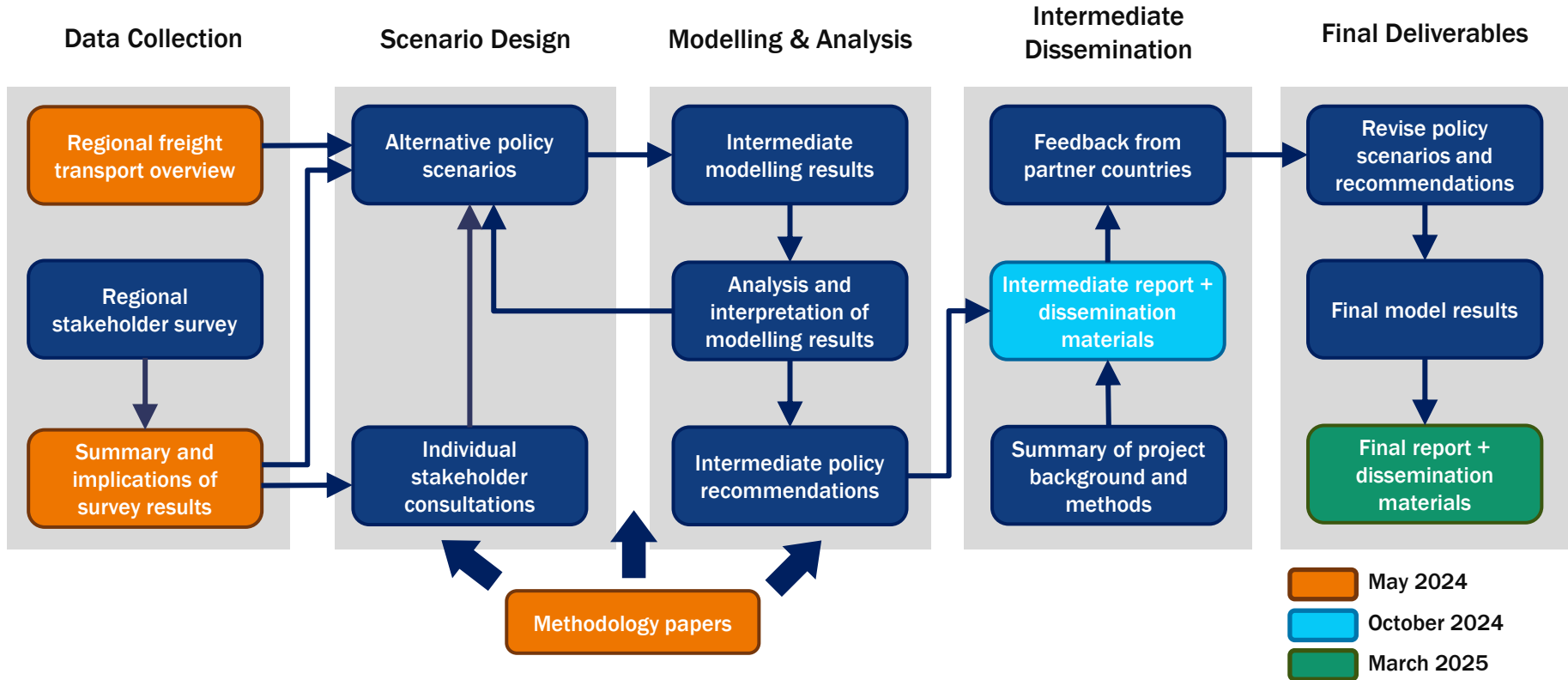
SUSTAINABILITY

- Demand management
- Green infrastructure
- Freight modal composition
- Cargo flow optimisation
- Energy efficiency
- Low-carbon energy
- Sustainable investment
- Social sustainability

RESILIENCE

- Risk management and planning
- Adaptive infrastructure
- Diversification of supply chains
- Capacity for real-time response
- Availability of extra resources
- User/operator competencies
- Data-driven predictability
- Cybersecurity

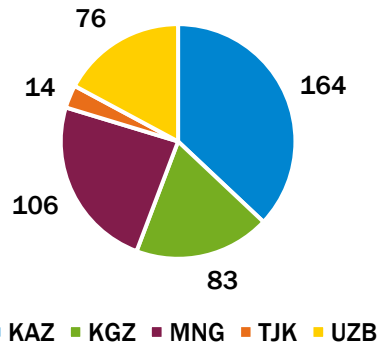
Project roadmap



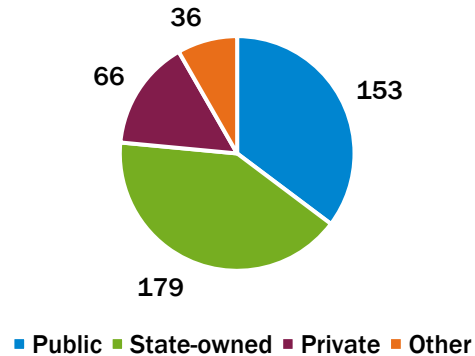
Regional stakeholder survey

- Improving regional freight networks
- Connectivity, sustainability and resilience
- National freight transport planning

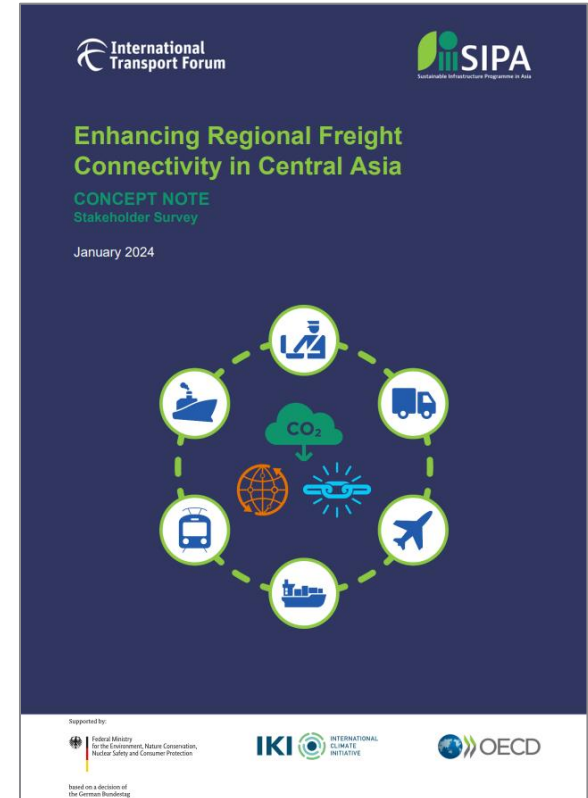
Countries



Stakeholder groups

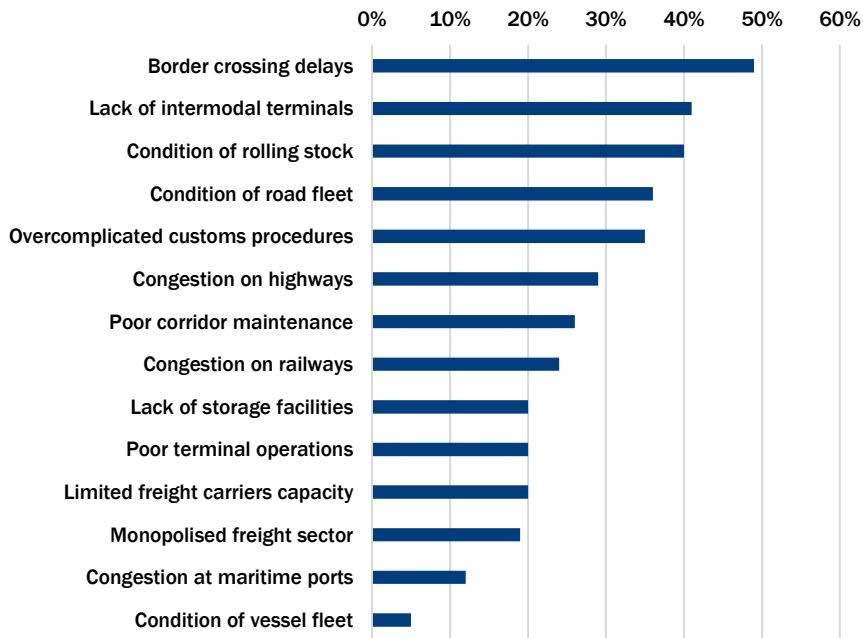


* Survey collection will close on April 30

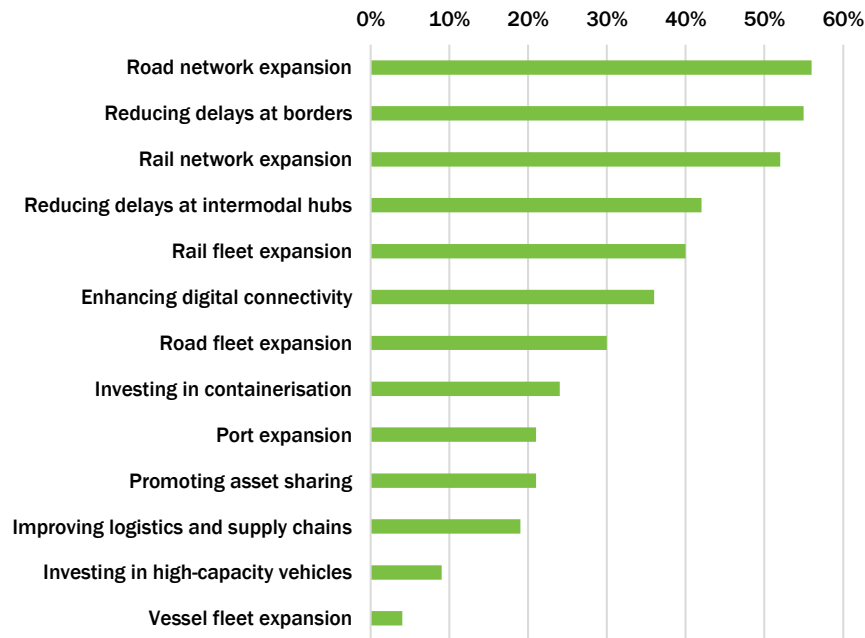


Survey results: connectivity

Main bottlenecks in Central Asia*



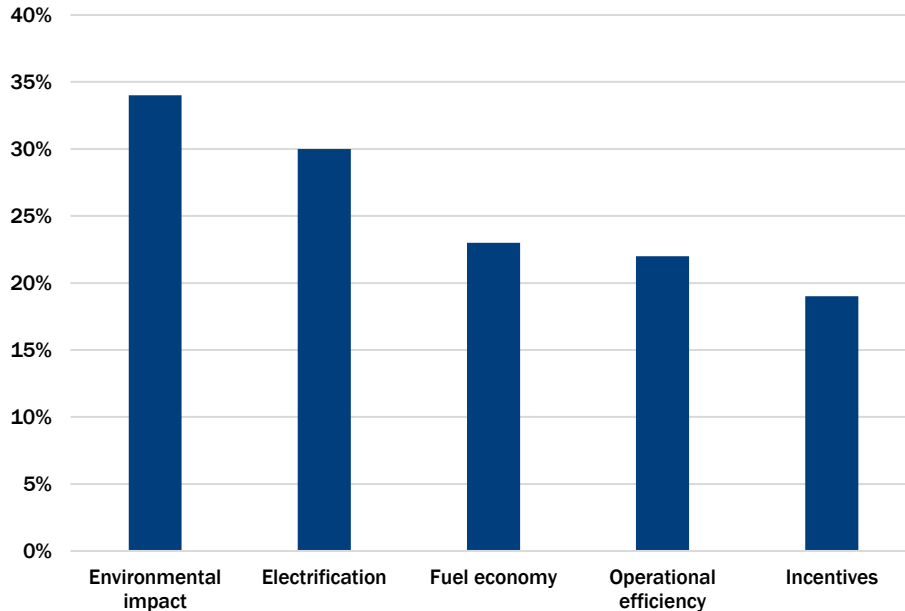
Freight transport strategies in Central Asia*



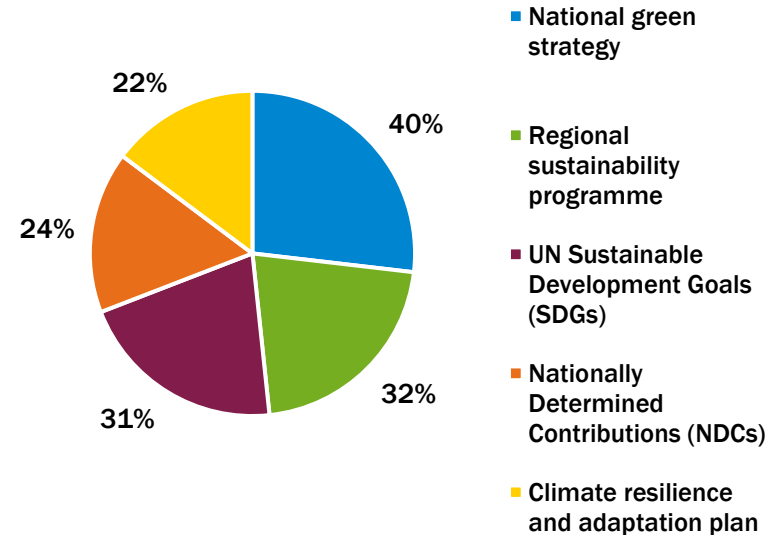
* Average share of total respondents from all countries in the survey

Survey results: decarbonisation

Decarbonisation policies included in freight transport strategies

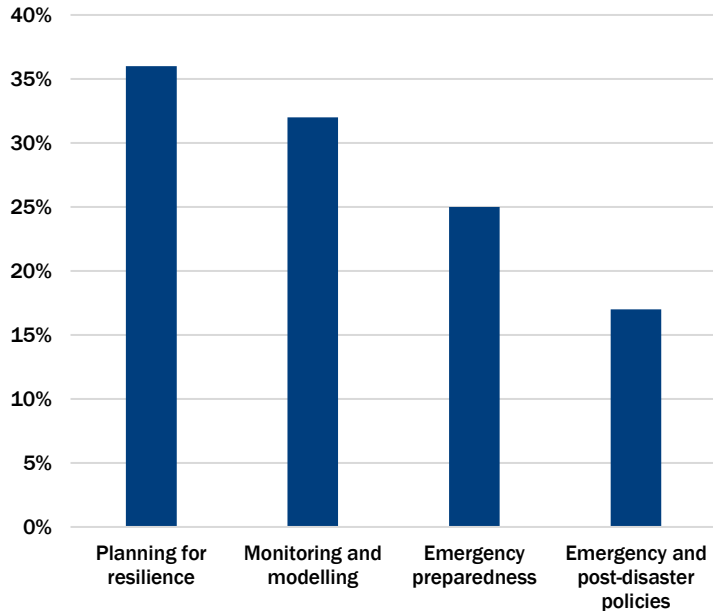


Use of high-level climate frameworks to guide freight infrastructure planning

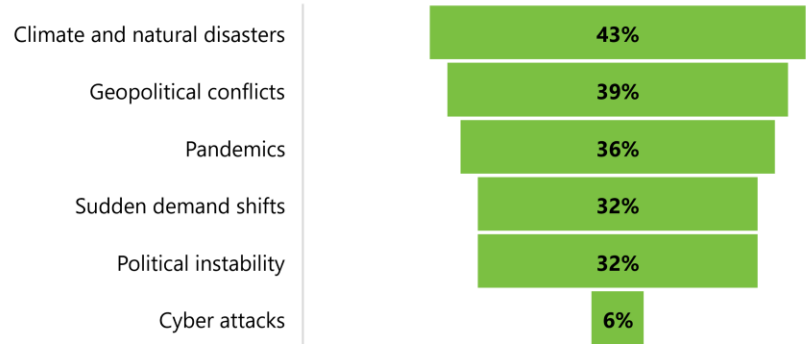


Survey results: resilience

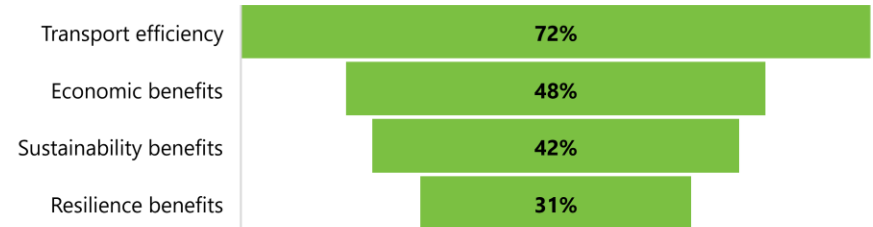
Resilience policies included in freight transport strategies



Most challenging risks for regional freight networks



Guiding priorities for potential freight infrastructure projects

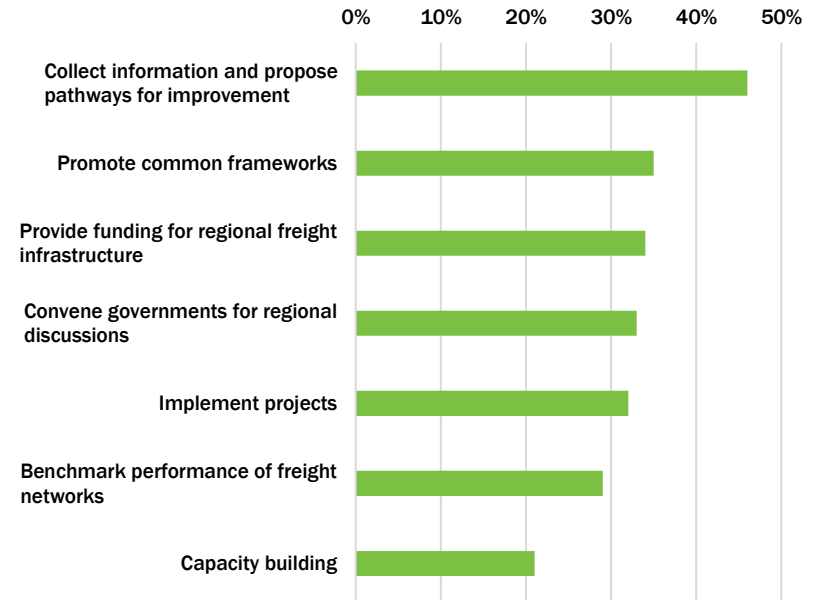


Survey results: where ITF can play role?


Main challenges for future freight transport development



Role of NGOs in regional and national freight transport development



Next steps

- **May 2024**
 - Delivery of methodology papers, survey results, regional overview with country chapters
 - Virtual thematic workshops with authors (TBC)
 - **June – September 2024**
 - Individual in-depth stakeholder interviews
 - Policy scenario planning and validation
 - **October - November 2024**
 - Review of intermediate study results: model outputs and policy recommendations
 - Regional stakeholder event to gather feedback on study results (TBC)
 - **March 2025**
 - Regional dissemination event, including high-level dialogue and technical workshops (TBC)
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Thank you

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