

When Logistics Meet Geopolitics: Chinese Initiatives in Central Asia Landlocked Countries

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Transport infrastructures have always paved the way to trade networks. Eurasian Rail Landbriges bring new logistic opportunities for all the countries crossed by those renewed intermodal corridors linking Europe and Far East. The implementation of value-added services for shippers and freight forwarders as well as deployment of services for railway operators are amongst those opportunities which have to be tackled by Central Asia landlocked countries. Otherwise, the logistic fluidity of the entire transcontinental transportation system lies on the political willingness to guarantee legal and institutional framework by each country crossed by those corridors of flows. The global performance is based on a kind of "positive reciprocity or mutual interest" which has to be assumed by all the States acting as "natural stakeholder".

Viewed from Beijing, Eurasian Rail Landbriges appear as a fundamental cornerstone to build on of the largest economic market of the World. It also appears as a strategic vehicle to assume their new political ambition over those Central Asia landlocked countries. UE and Russia are competing with China to keep their leadership on those new routes... and the landlocked countries crossed. The paper proposes to analyze how geopolitics and logistic are closely linked in a very sensible game where Russia, UE and China are fighting for ensuring a wider influence over the Central Asia area.

Introduction

Leader of the BRIC's and stronger as ever into the G20, the Popular Republic of China (PRC) keeps strengthen its foreign policy. From the South China Sea to the Indian Ocean and more recently with many Sub-Saharan Countries of Africa, PRC definitely assumes its strategies to expand their influence far beyond Far East Asia. Thanks to the worldwide turmoil due to the financial crisis, the Chinese political power has taken advantage of the US & Europe's waning influence on the

international scene. Just a year after the XVIII Annual Congress of the Chinese Communist Party, Beijing revealed some new tools to support its foreign policy:

- Impose PRC as an essential contributor to support the United Nations, especially in direction to less developed and emerged countries located on the South Hemisphere;
- Guarantee loans with very few conditionality for strategic partners and support Chinese FDI toward those emerging countries positioned especially in Africa and Central Asia;
- Encourage bilateral and multilateral agreements to spread-out the influence of China on the "Far West" of Asia, from the borders of Mongolia to the Black Sea including Middle East, Sub-Indian Continent, Pakistan down to Turkey.

The concept of «*Fundamental Mutual Interest*» hammered for years by top Chinese officials found realization with several immediate neighboring countries in Central Asia. The *Shanghai Cooperation Organization* has been a prominent vehicle to engage some peaceful reconciliation thanks to massive investment into transportation & logistics networks. Trade development with neighboring partners allowed reinforcing some strategic relationships alongside transportation corridors. Beyond goods, values and borders, infrastructures carry on the idea of a real sub-regional logistics continuum avoiding breakthrough at critical chokepoints. Bearing in minds the weight of ideological legacies, rail land-bridges feed territories and spread-out economic outcomes. A Transcontinental planning is promoted by Beijing to embody an influence over former Soviet Union Satellites, mostly located southern of Russia.

Actually, Eurasian rail land bridges combine with three geopolitical aspects for Beijing:

- The opportunity to serve European Markets without transiting though the Suez Canal via all-water services;
- The opportunity to bridge some political links with Eurasian Countries including Turkey, future Southern gateway of the European & Eastern Med Markets;
- The opportunity to put some pressure over Russia by investing Russian rail networks to guarantee reliability and quality of services throughout the way from Mainland China to Western Europe.

A fourth dimension is related to the domestic Chinese dimension with the hope to encourage some economic and social development of remote provinces. Transportation infrastructures must fertilize isolated and less-connected territories [Scales, Sondhi & Amos, 2012]. It is a crucial issue for Beijing because social and political stability might be jeopardized by the increasingly dissimilarity between coastal fringes and most of the western countryside provinces [Alix & Zhong-Zhen, 2011]. Open up Chinese western provinces to Eurasian trade constitute a cornerstone

of the policy supported by the Central Government to fuel political stability through economic and social welfare [Alix, 2013].

The paper analyses the Chinese transportation & logistics strategy to cope with domestic development as well as Eurasian expansion. Networks and services are viewed as tools to expand economic and political influence of Beijing over neighboring countries. A Eurasian Logistics Vision anchored on central Asia is defended by Beijing, which creates some tension with Moscow about regional leadership. To conclude, a discussion reviews most of the challenges to be tackled in order to promote a future smoothness Eurasian transportation system.

Politics, Economy and Strategy: from domestic growth to international influence of China

Early 2000' demonstrates a significant acceleration of Chinese diplomatic initiatives with respect to its neighbors and the neighbors of its neighbors (Cabestan, 2007). On one hand, China works to lay the foundations of the future largest unified market of the world, encompassing all Eurasian countries stretched from European Union to China borders (CAREC, 2012). On the other hand, fueled by oil & gaz dividends, Russia does not hide their ambitions to build the backbone of a future geopolitical framework with his former best enemy. The *Shanghai Cooperation Organization* (SCO) constitutes one masterpiece of the geopolitical puzzle with five Central Asia Nations (Russia, Kazakhstan, Tajikistan, Kyrgyzstan and Uzbekistan) to which we should add 5 neighboring Nations with a status of observer member (Mongolia, Pakistan, India, Iran and Afghanistan).

All have a common desire to establish the basis of a future global market. Trade facilitation, border management, transit regime, regulation and reforms are negotiated to eliminate bureaucratic barriers inherited. Railway land bridges appear somewhat like the infrastructural tool of these common ambition to build-up a future trade market ideally set-up between Europe and China. [Rounov, 2012; Roest-Crollius, 2012]. Big players like Kazakhstan does not want to become a pawn into a geopolitical game between China and Russia. Kazakhstan and most of the smaller Nations alongside railway land bridges claim their legitimacy and sovereignty. They insist to be actively part of the strategic deployment of new logistics solutions. They want to set-up some logistics services on regional railway hub to consolidate some employment and add value services.

An interesting poker game is now in place in Central Asia to connect those landlocked countries to the global value chain networks. Chinese, Russian but also European and even Turkish, Indian and US are all activating their diplomacy for economic, financial and political support in Central Asia. Logistics and transportation appear definitely as of the prominent vehicle to implement and develop some strong political links with regional Nations.

For instance, *China Transportation Association* explains Eurasian Land bridges contribute as much to save transit time for importers / exporters between China and

Europe that boost trade with Nations of Central Asia. Since the establishment of the SCO in 2001, the total value traded between China and the five partners has increased by 10 in 2011 to reach 111 billion USD. Last September 2011, Urumqi, capital of the autonomous Chinese province of Uygur hosted the first *China-Eurasia Expo* where all neighboring Nations of China could notice the full potential of a common central Asian market!

Obviously, the \$ 111 billion exchanged between SCO partners do not pass only through Eurasian rail services. However, Eurasian land bridges accelerate economic integration and participate in the willingness of China to distribute value-added products in those emerging regional markets. Road and rail infrastructures are backbones of a huge transnational planning process in order to connect people and markets. Eurasia represents $\frac{3}{4}$ of the world population and cover more than 70% of proven mineral reserves. Efficient and reliable facilities serving daily dozens of regional hubs located on the route between Mainland China and Europe stimulates exchanges between Central Asia Countries as well.

From a geostrategic perspective, benefits for China will also be captured thanks to the abilities of Beijing to finance, build-up, operate and maintain some logistics services abroad. Ahead to those transcontinental railway networks, Beijing has done its job with a multibillion programme to modernize domestic railway network. Central and Western provinces have been strongly invested to facilitate exchange and connectivity [He, Wei and Xie, 2008]. In that sense, Beijing has succeeded to plan in less than 3 decades a total reboot of the domestic continental transportation network. Launched at the end of the 1990, Beijing turned an outdated and archaic national port network into the strongest and most efficient port system of the World, able to accommodate the largest bulk, oil and container vessels.

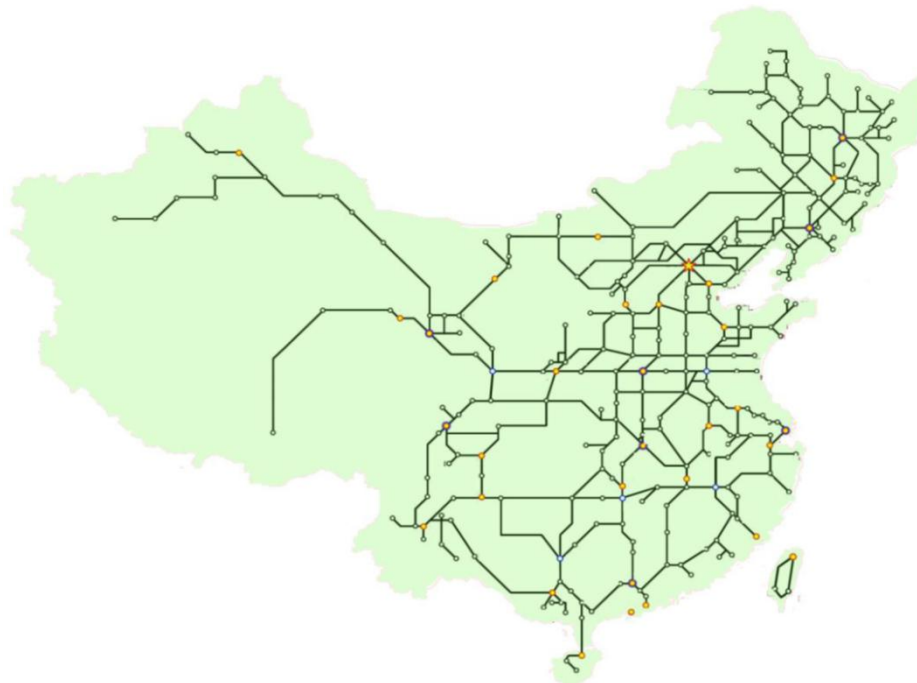
At the same time and in the same way, thousands of kilometers of highways have been built-up to connect maritime gateways to industrial & logistics giant parks distributed not so far from the coastal fringes. Raw materials as well as manufactured goods have been taken into consideration through tremendous planning processes to encourage fluidity and efficiency. Road, rail, river and air: all the modes have been considered to provide multimodal and intermodal transportation systems to serve a 500 kilometers fringe alongside the coastline. Nevertheless, and except some tremendous investments on main river corridors, all the provinces located far away from the coastline were not so much impacted and concerned by those waves of transport modernization. Consequently, in its twelfth five year-plan programme (2010-2015), the central government announced:

“Transport should support the optimization of the re-structure of the regional economy.”

We have to bear in mind that in the previous five-year plan, investment in the transportation sector alone grew by 20% per year with already priority structuring internal networks (interconnections North / South and East-West Domestic Axis). In

2003, Ministry of Railway launches the *China Railway Container Transport Corp. Ltd* (CRCT), in charge of domestic and international deployment of intermodal transport. The figure 1 shows the railway network prior to the latest wave of modernization launched by the Central Government. As seen, most of inherited networks were layout to serve coastal provinces.

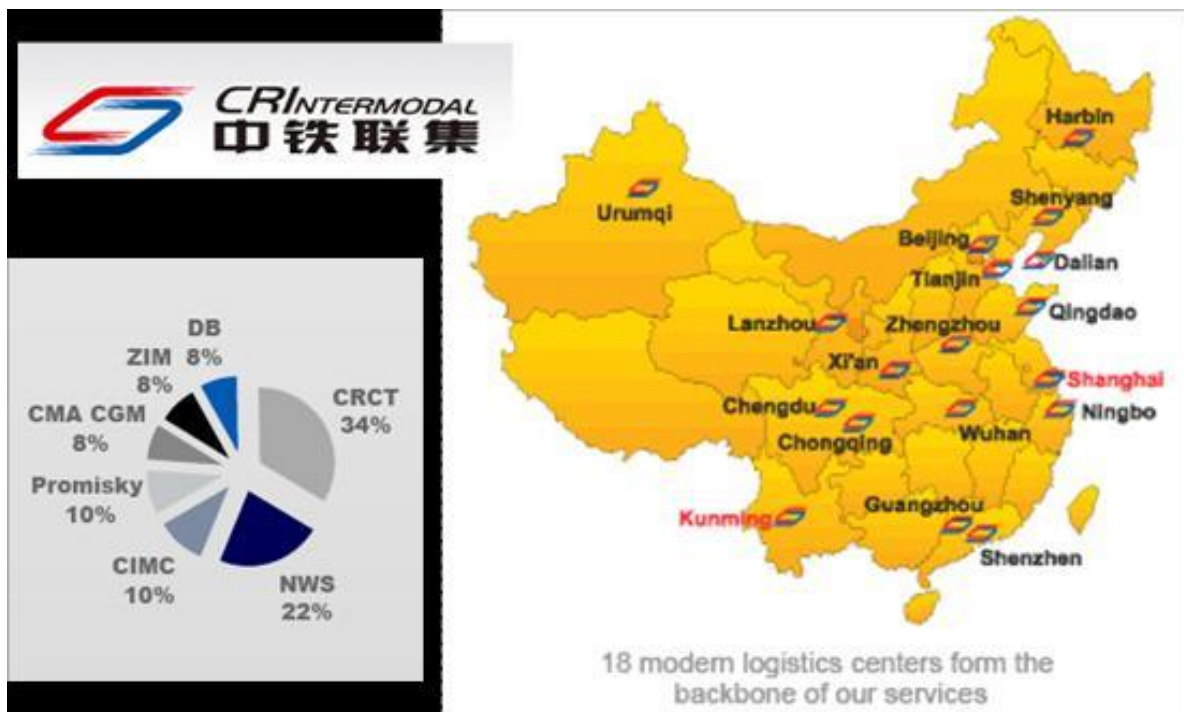
Figure 1. Sketch of the National Railway Network of Mainland China in the mid 2000



Source : Zhong-Zhen, 2011

In 2007, CRCT concludes an historic agreement with seven partnerships including the French shipping cie CMA-CGM, the Israeli shipping cie ZIM and Deutsch Bahn, one of the most advanced cargo rail company from Germany. They created *CRIntermodal Inc.* which can be described as a “domestic railway trojan horse”. 18 containerized rail terminals, 40 Rail Freight Stations and over 100 inland sites are then planned (Figure 2). *CRIntermodal Inc.* has one vital challenge to tackle: feed and serve the immediate domestic hinterland by connecting coastal main maritime gateways to super regional multimodal crossroads.

Figure 2. CRIntermodal domestic network



Source: Ministry of Railway, 2009

In a long-term vision, CRCT and CR Intermodal Inc. are the first two steps to build-up a 16,000 km double-stack containers railway network, gridded a large part of the domestic market. In 2020, most of the largest cities located on the western and central provinces of China will be interconnected by rail, road and air daily services. Urumqi and Lanzhou are the two main gateways to the northeastern domestic market, en route to Mongolia, Kazakhstan and Russia.

Central Chinese provinces are targeted to welcome logistics and manufactured production activities. Outsourcing activities with high mobilization of labor are encouraged thanks to the implementation of transportation facilities and better multimodal connectivity. More or less 800 millions of potential consumers are living out of the coastal area. They represent an amazing domestic opportunity. One remarkable example is "Upper Yangtze Area" which has been heavily invested to construct in the Chongqing/Chengdu area the country's largest multimodal center. 120 million people live in a radius of 100 km. Chongqing is now one the busiest railway hub in the world, combining local, national, international and transcontinental movement of cargo. Chengdu inaugurated in March 2010 the first block container train to Shanghai. Thousands of barges sail daily on a 3,000 km network to connect Chongqing, Wuhan, Nanjing and finally the busiest port complex of the world (Shanghai).

Western provinces and immediate neighboring countries somehow redefine economic, logistic and geostrategic attractiveness of the "remote" China. Mongolia, Kazakhstan, Kirgizstan and obviously Russia are considered as natural business continuum as far as transportation networks can connect opportunities without too many constraints and barriers. In Central and Western China, several huge

multimodal hubs have been planned by Beijing, combining public and private partnerships. Beijing opened-up the domestic market to foreign direct investors in charge of bringing money as well as knowledge, know-how, skills and tools to accompany this unique spatial planning operation.

From logistics to geopolitics: when landlocked Central Asia becomes a crossroad between Europe, Russia and China

Eurasian land bridge corridors between Western Europe and China also feed themselves on the potential of the Russian Market as well as the ones of the landlocked Central Asian countries. Based on the hub & spokes concept, several strategic chokepoints are disseminated alongside transcontinental networks in order to bring and consolidate local-regional opportunities of business. An additional volume of traffic in both import-export directions (eastbound & westbound) has to be considered on various Central Asia “logistics hot spots” (Otsuka, 2001). If we just want to highlight one single example, during the mid-2000, Hyundai and Mitsui signed partnership agreements to consolidate blocks train filled out with auto parts to serve Europe, Asia and “in-between markets”.

In 2010, 416 trains have shipped more than 80,000 teu's, mainly on the heart of the transcontinental network between Moscow, Novosibirsk and Vladivostock with an average transit time of 10 days (reduced from 13-15 days registered a decade ago). European, South Korean and Chinese infrastructure legs impose themselves as logistics continuum to plug market opportunities. Russia inherits a unique transcontinental railway network which has been enhanced thanks to connectivity to Eastern Europe as well as to NorthEastern Asia.

CRCT and CRI have signed a tripartite agreement with *Eurasia Good Transport Inc (GT)* to consolidate operations on behalf of the German BASF. Consequently, chemical products were carried out using Eurasian land bridges and Chinese domestic intermodal infrastructures. For a better understanding, of the interpenetration of international and domestic networks, we just need to take the case of GT. The capital structure of GT is in itself an indication of China's strategy. Launched in 2008, GT appears as a complex joint-venture including:

- *China National Silk Import & Export Corp.*
- *Institute of Logistics & Transportation of CCTA (China Communications & Transportation Association)*
- *Beijing Xingchang High-Tech Dvp. Co. Ltd*
- *Century Top. Inc.*

Finally, GT incorporates together exporters-importers, freight forwarders, a piece of technology & research and various Chinese business interests. They are all united for one ambition as reveal on their official statement:

“Our logistics services consist of three sections: international block train transport, international road-rail-sea multimodal transport, international bulk and LCL cargos rail transport and logistics service. We also work as freight forwarder for door to door business and logistics services in both domestic and international areas. Apart from general cargo, GT is cooperating with its strong partners in both China and abroad to work together on hazardous and chemical cargos containers transport through Eurasia land bridge”.

The last mile for the construction of a truly integrated supply chain solution between Europa and China was achieved late 2010 with the signature of a MoU between the Chinese Ministry of Railways and Deutsche Bahn. It allows deploying railway services without any operational constraints over 10,000 km.

Dr. Karl-Freidrich Rausch, Board of DB Mobility Logistics AG sums up the strategic competitive edge of such Eurasian rail services:

“The more Chinese production sites that move for the coast inland, the more interesting rail transport to Europe becomes for many manufacturers. We want to meet this demand”.

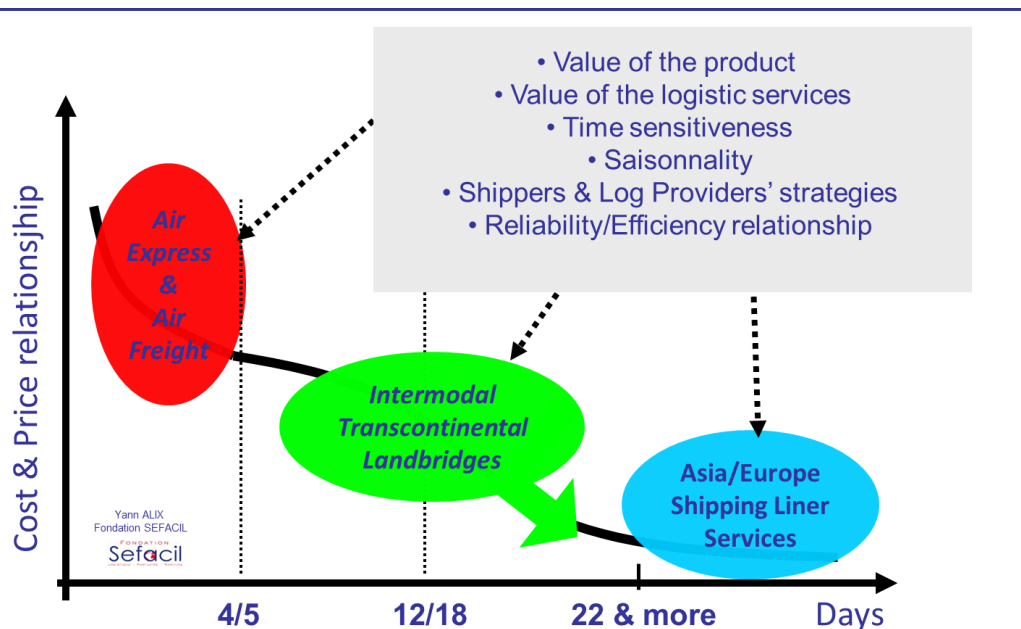
Of course, the « Northern route » crossing mostly the Russian territory is already in strong competition with Southern ways involving other Nations. The route through Ukraine crossing Kazakhstan via the Druzhba Pass is particularly attractive for Chinese interests with more than 4000 kilometers without any border. From a political perspective, this route is essential to strengthen the links between Beijing and Astana. Kazakhstan alone weights more than all the other countries of Central Asia. By saying that, we have to keep in mind Kazakhstan, due to some huge energy dividends, does not wait for some financial support from Moscow nor Beijing. Kazakhstan enjoys a new geopolitical and strategic status by imposing as a true landlocked gateway, whatever you want to reach the Caspian Sea, the Mid-East and even the Arabian Sea through new corridors as projected at Gwadar in Baluchistan (Alix, 2014). For Astana as well as for Beijing, close collaboration on Southern logistics land bridges mean avoiding in a large extent Russia. Beijing and Ankara have already signed a strategic agreement to connect the Pearl Delta Ports + the Free Trade Zone of Shenzhen to Turkey using a dedicated containerized rail service crossing Myanmar, Bangladesh, India, Pakistan and Iran Republic (Işık, 2012). In direct competition with Asia-Europe all-water route, Turkey and China share a common vision which consists to embarking some emerging Central Asia and Southern Asia countries into a multilateral project (Engdahl, 2012).

A *South to South Axis* is also endorsed by most of countries involved, putting in light some huge potential embedded into regions like Northern India and Pakistan. Manufacturing and industrial opportunities will emerge alongside transportation corridors crossing North Bangladesh and Myanmar. Beside political

willingness, some logistics and economic opportunities consistently support such land bridge shortcuts.

As shown into the figure 3, the southern corridor would allow cutting another few days compared to the all-water and airfreight routes. Depending on the final route confirmed by all the stakeholders and the number of stopovers on the way, a Guangzhou-Istanbul trip can be done under 10 days!

Figure 3. Eurasian land bridges as cutting-edge transportation service



Source : Dr.Yann Alix, Fondation Sefacil 2012

Discussion

In Chinese, « *Jinbu* » means « *Progress* » but another translation might be « *one step forward* » [Despeux, 2012]. Since almost two decades, Chinese policy towards Central Asia reveals some clever strategic moves to keep moving « *one step forward* ». The Central Government of Beijing remarkably combined geopolitics, economics and logistics interests into some full transportation integrated package. Russia, Kazakhstan, Pakistan, Turkey and few others are all embarked into bilateral or multilateral agreements. A multi-scale approach has been orchestrated by Beijing to promote Eurasian logistics land bridges. For Beijing, some internal social issues on remote western provinces might be absorbed into some economic dividends brought by international business opportunities coming from neighboring countries.

Accordingly, logistics services and transportation networks become absolutely vital:

- At the local scale to release pressure under the overcrowded coastal fringes of China;

- At the regional scale to encourage setting-up of industrial & manufacturing activities toward Central & Western provinces ;
- At the national scale to promote a national strategic planning to relief massive poverty into remote countryside provinces and bring a piece of the Chinese economic miracle to millions of Chinese;
- And finally at the international scale to include neighboring countries and strategic partners as Pakistan or Turkey into a transcontinental integrated vision for building up the largest free trade zone of the World.

Definitely, Beijing' political and strategic willingness toward Central Asia is seen as a threat by Moscow which is aware of the limits of their influence under the former satellites. Ideological heritage does not weight so much compared with billions brought by Chinese public and private interests to modernize transportation infrastructure and make services more efficient. Fluidity and connectivity are sponsored by Beijing to plug landlocked Central Asia into global value chain networks. Nevertheless, despite some southern alternatives, the Russian and Kazakh territories are almost impossible to avoid to deploying full integrated intermodal railways services between Far East Asia to Western Europe. Fortunately, a long experience in railway transportation speaks in favour of Russia to raise-up the quality and efficiency of future Eurasian container block-train. Above all, the oil and gas benefits allow to Astana to assume a key role for financing value added logistics services into its own territory.

In addition, a significant amount of "non-technical and non-political barriers" have to be eliminated to make systems fluid, reliable and competitive. The persistence of specific permits, administrative harassment mostly at border checkpoints, customs duties, weighing packages processes or many informal practices registered act as important constraints to the performance of Eurasian logistics services. The phasing-out of these "non-technical barriers" is the concern of States. Change management into some public bodies like Customs is not an easy task.

Comprehensive reforms in administrative practices and behaviors require strong commitment at the highest political level (World Bank, 2008). Border management modernization demands some collaborative efforts to encourage trade supply chain. Major changes in the institutional environment can be possible only with very proactive policies (Kieck & Maur, 2011). Multilateral reciprocity and sub-regional legal adjustments must be backed up at the scale of the entire Eurasian network. For instance, change management means some dramatic changes for customs officers in charge of collecting taxes and duties. They must act as trade and logistics facilitators using some new tools like paperless solutions. Information technology procurement must be tacked beyond national borders. In order to comply with global shippers' requirements, Eurasian railway land bridges have to be considered as a transcontinental infrastructure project in which intermodal services are entirely guaranteed.

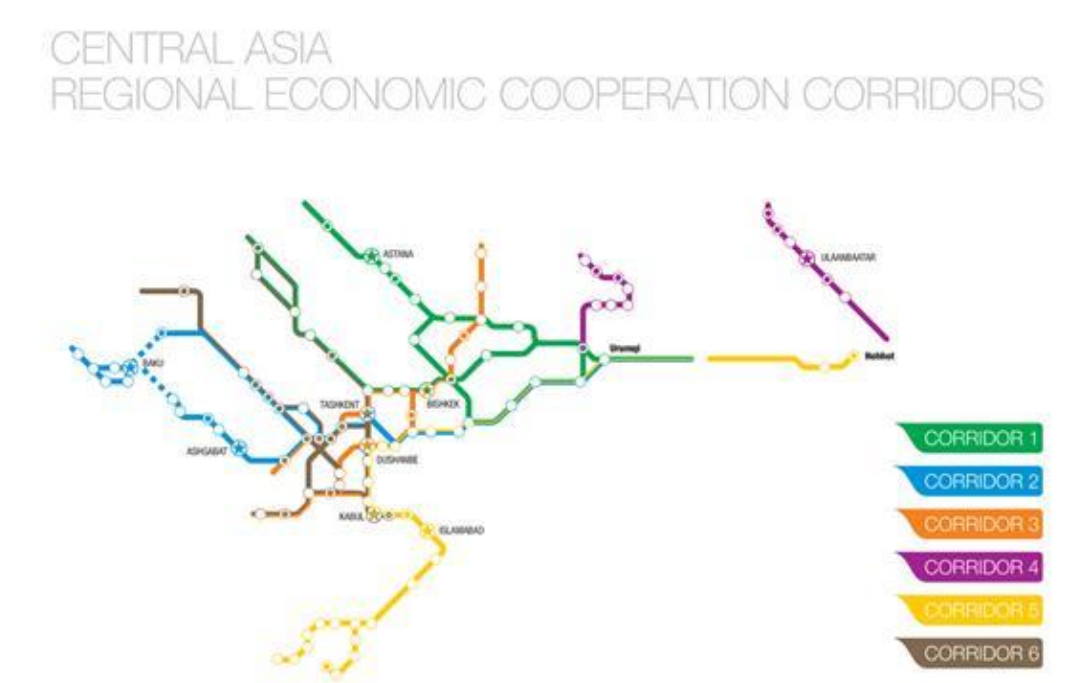
The White Paper entitled "The future belongs to fluidity" reminds:

“In a trading environment where physical and time borders are sublimated by the timeliness of technologies, fluidity stands out as one of the pillars of competitiveness. Production cycles and networks require the highest levels of reliability in the trade of goods and data.”

There is no fluidity and efficiency without interoperability of services and systems. Borders must become places for integrated value creation without redundancy of documents being managed. The political willingness to engage some reforms has to be “bringing down” into practices and habits. Several initiatives are supported as for instance the one done by the *Central Asia Regional Economic Co-operation (CAREC)* in order to implementing a sub-regional consensus on a general agreement including its 10 members as well as their immediate neighbors (CAREC, 2012).

In 2011, more than 120 projects supported by CAREC have engaged 17 billion of US\$ and more than two-third were focused on transportation and logistics matters! Connectivity between main corridors and networking major landlocked economic capital enable consolidation business opportunities. East-West Eurasian land bridges must be connected to North-South corridors (Figure 4).

Figure 4: CAREC Central Asia Transportation Corridors



Source: CAREC 2012

CAREC Motto "*good neighbors, good partners, good prospects*" summarizes how Eurasian investment planning seems like the challenge; for States as well as for private operators.

China Council for the Promotion of International Trade (CCPIT) and China Association of Ports-of-Entry (CAOP) jointly organized the *First International Trade Facilitation Forum on Trade Facilitation, New Engine for International Trade & Economy Recovery*. The Head of the General Administration of China Customs (GACC) took advantage of this global event to announce major reforms carry-out by Chinese Customs:

« Cancellation of various administrative charges relating to, for example, the printing of Customs declaration forms, the bar code fee, the Customs supervision fee, the ATA carnet regulation fee and the goods and luggage storage fee”.

A *Paperless Customs Protocol* with the Chinese Customs opens doors to the Chinese Market to any Central Asia government wishing to move forward! This type of signal exhibits a form of unilateralism that has to be combined with official speeches and multilateral policy initiatives.

But finally, beyond the mobilization and politic voluntarism, it is ultimately the market forces who decide to upgrade and optimize services to satisfy customers and attract shippers. (Joon- Kun Cho, 2007). Eurasian railway land bridge works today on few routes where private operators are satisfied. They continue to invest in modern equipment to make services ever more efficient, reliable and... profitable. Geopolitics, logistics... and economics are definitely the three pillars of the forthcoming success of Eurasian land bridges.

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