

The project of the international logistics center in the free economics zone Sughd – Tajikistan

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Abstract

In this article, the issue of the creation of logistics centres and their influence on sustainable development of regions and countries where they are located will be discussed. European experience shows that this type of investment requires support from national and local governments (in accordance with principles of Public Private Partnerships), by way of including them in their development strategies as well as the creation of stable conditions for potential domestic and foreign logistic operators. In this article, the example of Tajikistan, which can be characterized as an emerging economy, is discussed. Basic economic indicators and conditions for the operation of Free Economic Zones (FEZ) are presented, while the influence of the development of an international logistics centre on regional development is assessed on the example of the Sughd FEZ.

Keywords: logistics centres, Tajikistan, regional development

JEL L9, N75, Q01, R11

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Introduction

The efficiency of international supply chains is a key factor in the creation of competitive advantage. One of the determinants of the efficiency is logistic centres, which can create synergy effects through the aggregation of systems, leading to the emergence of huge objects. The logistic centre plays a specific, though very important role in the supply chain. Due to its character, tasks and broad range of activities, the logistic centre may strongly influence social and economic change in the region where they are created. As its activities often take place on a global scale, it is necessary to unify standards and procedures in the field of good exchange as well as information flows. The aim of this article is to present and assess potential benefits for and influence on the economy

and development of the Sughd region in Tajikistan, on the example of the plans for a new logistic centre in the Free Economic Zone (FEZ). Much information was collected by the authors from interviews with stakeholders and internal documents regarding the planned logistic centre.

The importance of logistics centres in national and international trade

Infrastructure is the basis of the functioning of a market economy (Platje 2013). A distinction can be made between technical, economic and informational infrastructure, depending on whether we talk about physical movement of goods, about analyzing the costs generated at different stages of the flow of goods, or about the informational flows regarding the state of these goods and related processes. From the 1950s, European companies, on the

example of US based enterprises, started to develop logistics management (compare Coyle et al. 2002). The basic aim of logistics management is to reduce the costs of final products and services, and to increase the competitiveness of enterprises. The introduction of the notion of the logistic chain made it possible to identify linear and point relationships between participants in goods exchange. In reality, it is not a chain but a network using linear and point infrastructure. Linear connections mainly embrace transport infrastructure such as roads, railways, inland and waterways, air connections, power lines and pipelines, but also telephone lines, radio links, satellite connections and in particular the Internet. Point elements concern the place of origin and receipt of goods, intermediate goods, raw materials, the place of their improvement and processing and the place where logistics services in the broadest sense of the word are provided. Distribution and logistics centers are examples of point infrastructure, whose role and importance in international trade is increasing (see Polski Kongres Logistyczny 2006).

The assumptions of the European transport policy are presented in the White Paper on Transport (European Commission 2011). Logistics centres are explicitly considered as opportunities to support regional and sustainable development. The existing and newly developing distribution chains and systems, flows of materials, goods and information as well as transport, reloading and storage infrastructure require an integrated, systemized, modern and interconnected unified logistics system. A logistics centre, in particular operation in an international context, can improve the conditions for and quality of delivery, reduce inventory costs as well as other costs (cost of frozen capital, transport costs, information costs, etc.). Furthermore, customer services may improve through the whole logistics chain. Indirectly, logistics centres may indirectly reduce pressure on the natural environment (Platje 2007). While existing infrastructure may be used more efficiently, and transit transport as well as traffic jams be reduced, different positive feedback loops (e.g., lower costs leads to increased demand for goods and in turn transport services) may level out these improvements (Sterman 2000).

The logistics centres developed in Western Europe have access to infrastructure enabling the use of different modes of transport, including combined transport, as well as information and IT infrastructure and storage units with specialist equipment for serving different types of loads. Logistics centres is the location of forwarders, combined transport operators and logistics operators offering a wide range of services, in this way creating value added (Nowakowski, Platje 2007). Without the development of international logistics centres not only the development of trade, and in turn the increase in welfare, may be hampered. When trade increases without facilitating, for example, the transport of goods, environmental effects may be serious. While the authors are aware of the fact that increasing trade and related economic growth may have negative environmental impacts due to increased use of natural resources, this aspect is omitted in this paper as the focus is on the importance of development in an emerging economy – Tajikistan – which still faces a wide range of social and economic issues to be solved.

Definition and classification of logistics centres

Logistics centres are defined differently by different authors. Zbigniew Korzeń gives a pretty complex definition: "Logistics distribution centers are appropriately organized nodes (platforms) for logistics services and their providers, where transport routes meet and terminals and warehouses are located, where sources of market information are concentrated. ... ZCL are built in a compact arrangement of organizational and functional as a rule, in a (sometimes quite substantial) away from the center of a big city (Korzeń 2001: 30-32)."

The definition given by the European Association for Logistics Centres Europlatforms is more general. It defines logistics centres as follows: "A Logistics Center is a center in a defined area within which all activities relating to transport, logistics and the distribution of goods - both for national and international transit, are carried out by various operators on a commercial basis. The operators can either be owners or tenants of buildings and facilities

(warehouses, distribution centres, storage areas, offices, truck services, etc.), which have been built here (Europlatforms 2014).”

The definitions rather concern the integrated logistics centre, located in one place. Also a so-called fragmented centre has been distinguished, characterized by (Dudek 2001):

- effective connections in the field of information flows, enabling central management,
- a monoblock, which is a combined road/rail transport terminal; the other functions of the fragmented logistics centre are fragmented in the form of other monoblocks,
- streams of flows between monoblocks, is performed with the use of specialized internal transport.

Logistics centres are classified in different ways, depending on the selected criteria and the tasks realized by these centres, as well as the way in which they are constructed. Three

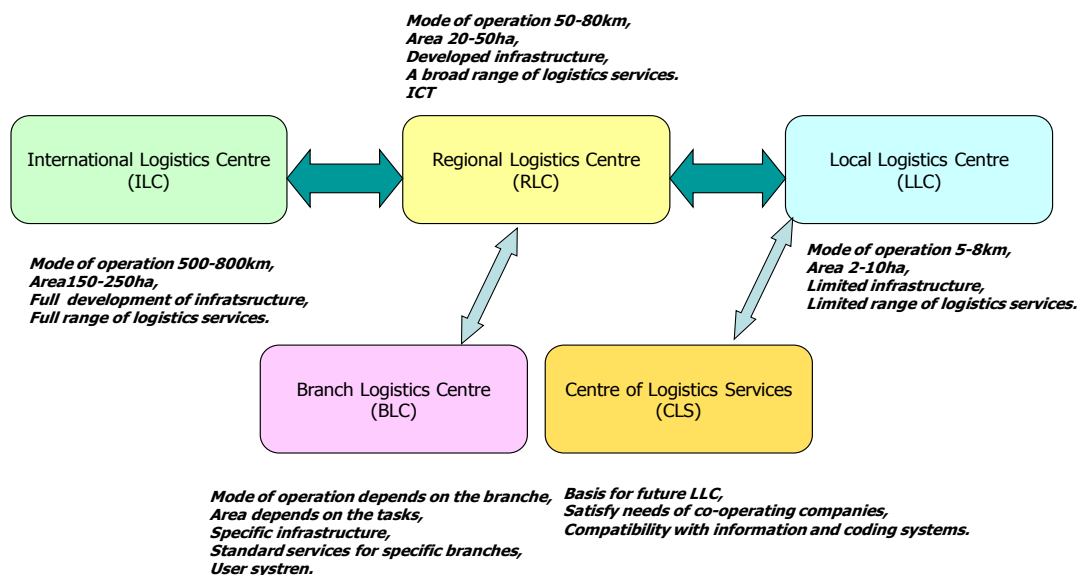
concepts of realization of logistics centres have been distinguished (Fechner 2001);

- the direct method,
- the developmental method,
- the revitalization method.

The direct method relies on the creation of logistics centres in accordance with principles of public-private partnerships (PPP) and attracting potential clients. The developmental method concerns the construction of logistics centres in areas where potential clients are already located. The revitalization method is based on the construction of logistics centres in areas which lost their attractiveness to its current users.

According to Korzeń (2000), the fundamental criteria for classification of logistics centres are the scope of effects, the area used, the infrastructure, the type of services offered and the information system applied. The classification is presented in Figure 1.

Figure 1. Classification of logistics centres.



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Source: authors' own elaboration, based on Korzeń (2000).

In the context of globalization, logistics centres are analyzed from a different point of view (Ernst & Young 2005). Logistics centres with a global reach are located in Asia, the United States, Canada, Europe, Africa and the Middle East. These centres co-operate with regional distribution centres, which prepare commodities and products for specific countries, for clients with different habits and demands. The same product will be packed differently for customers in the United Kingdom and Ireland than for customers in Poland or the Scandinavian countries. These regional centres supply domestic distribution centres, which are the last link in the flow to the final customer. It has to be emphasized that these global logistics centres are located in the vicinity of large producers and large agglomerations. A good example is China, facing a dynamic growth of logistics centres supplying different regions in the world.

The geopolitical and economic situation in Tajikistan.

The Republic of Tajikistan is a country in Central Asia. In the south, it borders with Afghanistan, in the north and the west with Uzbekistan and Kyrgyzstan, and in the east with China. Most of the country's area consists of mountains (about 93%, 143 100 km²), on average over 3000 metres high. These mountain areas are difficult to access, almost without any developed infrastructure. In Soviet Times, Tajikistan was one of the poorest and least developed Soviet republics. Its peripheral location and difficult geographical conditions were reasons why investments were not very attractive. Only the land connection of China with Central Asia, the so-called Silk Road, crosses Tajikistan near its northern border. The revitalization of this transport corridor should shorten the transport time from China to Europe. This project was initiated in 2005 by the European Union and the Road Transport Union (Spedycje.pl 2013). Tajikistan⁴⁵ is considered to be a country in transition, with an average nominal wage of about 150 USD. The country has a fixed ex-

change rate against the US dollar (4.47 TJS per USD). This is of great importance in the context of the very high inflation (over 100% per annum), as it reduces investment risks for foreign investors, as well as the risk of international trade. The total amount of investment (in current prices) was 2,070,2 million TJS. In total, 32,204,7 thousand tonnes of goods were transported. The first half of 2013 showed an increase in retail trade of 13.3 % (in TJS). Almost 54% of this trade took place on bazars. Export amounted to 612.3 million USD and import 1915.6 USD.

Tajikistan possesses few natural resources (e.g., aluminum). The main economic sectors are mining, metallurgy, water engineering, and textile industry. The main agricultural products are cotton, fruits, vegetables, silk, grains and tobacco. In the Fergana Valley, the climatic conditions and access to water allow for harvesting wheat and potatoes twice a year, while water melons are grown in cycles of 40 days.

Tajikistan consists of 4 administrative regions – the provinces Sughd, Khatlon, the autonomous province Gorno-Badakhshan and Republican Region. The capital of Sughd is Khujand, the capital of Khatlon is Qurghonteppa and the capital of Gorno-Badakhshan is Dushanbe. The country's capital Dushanbe is also the capital of the Republican Region. Each region is divided into districts, which in turn are divided into *jamoats* (similar to a municipality). Currently, Tajikistan has 58 districts and 367 *Jamoats*. After gaining independence in 1991, a destructive civil war broke out, which lasted until 1997. The end of the war allowed for regaining political stability. Foreign aid supported the dynamic economic development. Economic reforms and international aid allowed the country to recover from the damage of the civil war as well as bad harvests as a result of droughts. In the period 2000-2007, annual GDP growth amounted to 9.6%, larger than other Central Asian countries such as Turkmenistan and Uzbekistan. However, it was estimated in 2009 that more than 60% of the citizens lived from an income below the poverty line (The World Bank 2014).

In 2005, the national development strategy until the year 2015 was adopted. The government of Tajikistan defined four main di-

⁴⁵ The information on Tajikistan in this section is based on Ministerstwo Gospodarki (2011).

rections of development, which are the basis for its strategy for economic development and the reduction of poverty (Republic ... 2007):

1. The support of economic growth by intensive use of labour resources and the promotion of export (e.g., by way of creation of Free Economic Zones).
2. Effective and equitable development of basic social benefits.
3. Support for the poorest.
4. Effective management and improvement of national safety.

In the programme for development of the Republic of Tajikistan, strategic, political, economic and social aims are defined. *The strategic aims* is the sustainable development of the country. In order to achieve this, besides a significant increase in investment, optimal use of productive resources and the creation of an open economy, the quality of human capital should be improved. *The political aims* mainly concern the creation of the economic conditions for strengthening the political and economic sovereignty of the country, as well as the country's safety. *The economic aims* embrace the development of the material and technical basis, supporting intensive development of the economy in the future, and a significant increase in the level of economic growth and production growth. *The social aims* should be achieved by way of a range of policies aiming at solving the most important social problems. These problems include the achievement of full employment, a systematic reduction in the level of unemployment, reduction of poverty, urban development and the creation of a middle class as a mean to support social development.

The Public Investment Programme (PIP) is an instrument for managing investment, allowing for keeping control over the distribution of internal and external resources between for different economic sectors of Tajikistan. The national development strategy concentrates on the development of 12 branches of the economy, and economic reforms should take place in three areas:

1. *Management*: reform of public administration, macroeconomic development, improvement of the investment climate, development of the private sector and en-

trepreneurship, regional co-operation and integration with the global economy.

2. *Economy*: the main policies are aimed at creating the material conditions for economic growth by development of agriculture and food production, development of transport infrastructure, as well as the development of energy production and industry.
3. *Social*: development of health care, education and science, access to water and hygienic living conditions, social security and environmental protection.

The Free Economic Zone "Sughd"⁴⁶

Free Economic Zones are one of the elements of Tajikistan's economic development. The Free Economic Zone (FEZ) "Sughd" has been created for a period of 25 years in order to achieve economic, trade, social, scientific and technical aims. The decision to create the FEZ was taken in May 2008, the administration started to function in August 2009, and the first firms were registered and started to operate in the FEZ. The localization is the town Khujand on an area of 320 ha (Pic. 1).

⁴⁶ The information in this section is based on Feasibility study ... (2012) as well as information obtained by the authors during a visit to FEZ „Sughd”.

Pic. 1. Entrance of the Free Economic Zone „Sughd”.



Source: Jarosław Kłosowski.

The main economic aim of FEZ „Sughd” is to attract domestic and foreign investment capital, modern technology as well as know-how in order to reduce production costs, use unemployed labour force and natural resources in order to support economic growth. The goods produced should become more competitive on the world market.

The social aspect of the FEZ is related to the creation of employment and improvement of the standard of living. The technical, transport, IT and industrial infrastructure should comply with international standards, and together with the introduction of modern projects and operational solutions comply with the highest environmental standards.

The region „Sughd” is the northern trading „gate” of Tajikistan. FEZ “Sughd” is located at the historical crossing of trade routes connection Europe, Asia, the Far East, China and India. Khujand and the Fergana Valley are known in Central Asia for their advantageous geographical location and favourable climate. The FEZ is located in the south-western, industrial area of the city of Khujand. The available 2000 ha. enable its future development. The communicational and industrial infrastructure is already rather well-developed. The vicinity of the river Syr-Darya and the construction of a railroad connecting “Sughd” to the railroad system should support its development.

One third of the inhabitants of the province Sughd lives in Khujand or in a distance of 50 km. in Gafurov, Kairakkum, Chkalovsk, Rasulov, Spitamen and Taboshar. This provides access to a large market, with 2.4 million inhabitants. The good connections

with the Fergana Valley and the Zarafshan Valley, covering an area of Tajikistan, Uzbekistan and Kyrgyzstan, are inhabited by more than 3 million people. Via Uzbekistan and Kyrgyzstan, transport routes give access to, e.g., Afghanistan, China and seaports of the Indian Ocean. Khujand is the second largest international airport in Tajikistan. The passenger airport is located 12 kilometres from the FEZ “Sughd”.

The railways are operated by the state owned monopolist „Tajikistan railways”. The railway infrastructure is extended by connecting FZE “Sughd” with the railroad networks of the neighbouring countries in Central Asia. Also, in the future a railroad track from Urumchi (Xinjiang, China) to Osh (Kyrgyzstan) is planned, connecting Sughd to the Chinese continental railroad network, creating access to the sea ports of the Pacific. Khujand is located on the intersection of main roads. A new international highway is planned near the FEZ.

Besides the locational and infrastructural factor, other advantages for investing in the FEZ are tax incentives and simplified customs, as the goods stored on the area of the FEZ are treated as being outside the customs jurisdiction of Tajikistan. Procedures. The cost of renting land is 1 USD per square metre. The cost of registering a company for the FEZ amounts to 5000 USD. This registration is valid for a period of 15 years.

Firms registered in the Free Economic Zone, independent of the type of ownership, are exempted from all kind of taxes mentioned in the Tax Codex of the Republic of Tajikistan (with the exception of social insurance and personal income tax). Profits for foreign investors as well as wages for foreign workers

may be paid in foreign currency, and easily transferred abroad without being taxed dur-

ing this process.

Tab. 1. Comparison of tax rates for enterprises in the FEZ and other enterprises in Tajikistan

Tax	FEZ	Outside the FEZ
Value Added Tax	0	18.0%
Corporate Income Tax	0	15.0%
Highway tax	0	2.0%
Land tax (per ha)	0	375 TJS
Tax for car possession	0	7%
Real estate tax (per 1 m ²)	0	2.82 TJS
Social security	25 %	25%
Tax on minimal revenues	0	1%
Tax on retail trade	0	3.0%
Cotton tax	0	10%
Customs fees	0	5-15 %

Source: <http://fezsught.tj>

The logistic centre as an element of regional development

As with all ventures, established and agreed aims and tasks are elementary for the success of a logistic centre. For the logistic centre FRZ Sughd the following key strategic aims have been defined (Feasibility study ... 2012):

1. Focus on support of local and international trade, and facilitating flows of goods along the Silk Route and other transport corridors. The key to success will be interoperability and the introduction of good practice in the field of multimodal transport.
2. The logistics centre should be located along developed corridors for goods transport. The FEZ "Sughd" fulfills this criteria, and the planned investments in the mentioned railroad infrastructure only strengthen the localizational advantage.
3. The impact of the logistics centre on the economy of Sughd should be significant and sustainable. The may be directly through its economic activity, but also indirectly through the support of development of social and human capital, as well as local transport, distribution and production systems. The logistics centre, when operating properly, should increase demand for local products and transport services, and multiplier effects may

lead to increased employment and economic activity. The improvement of human capital (training is needed for the people employed) may also improve the competitiveness and attractiveness of the region for new investors. A challenge is to create and maintain high quality level services for customers, in order to attract also the more demanding customers and investors.

From 12 until 14 June 2014 the seventh Euro-Asian Road Transport Conference took place in Amman (Jordan). The focal point of discussions was launching the stream of cargo by road transport from China to Europe. In China the highway is ready, in Kazakhstan the highway is ready for 70% while in Tajikistan and Uzbekistan the highway should be ready by 2015. The conference promotes the Model Highway Initiative, along which safe parking for trucks, logistics centres and border controls are located (Brdulak 2013).

Khujand, one of the oldest cities in Central Asia, is at the intersection of key transport routes such as the Silk Road, the road to Fergana Valley, as well as roads to China, Kazakhstan, India and Turkey. The highway M34 from Dushanbe do Tashkent leads in the north to the Anzob Pass, in the west to Rabot and the south to Ayni, and across the river Zeravshan it provides communication with Turkmenistan and Uzbekistan. The M34 is

crucial for trade and connecting the logistic centre with other cities and countries, for example:

- Khujand - Isfara - Osz: 400 km, 6 hours.
- Khujand - Yalama (Uzbek – Kazakh border) - Chimkent: 300 km, 5 hours.
- Khujand - Ayni - Pyanjikent - Samarkanda: 300 km, 6 hours.
- Khujand - Ayni Dushanbe , Kurgan - Tube - Nižny Pyanj: 550 km, 10 hours
- Khujand - Ayni - Dushanbe - KurganTube: 1260 km, 24 hours.

The following transit routes are important:

- Chimkent - Khujand - Kokand - Andijan - Fergana - Osz - Kashgar 1096 km
- Chimkent - Khujand - Dushanbe - NijPyanj - Kabul - Peshavar (2269 km) Islamabad - Sewan - Karachi
- Chimkent - Khujand - Dushanbe - Nižny Pyanj - Kabul (1900 km) Peshavar - Islamabad
- New Delhi – Lahore.

In the Sughd region there are two customs divisions:

1. Fatekhobod - Oibek (direction Uzbekistan).

2. Patar or Kanibadan (direction Kyrgyzstan).

Tajikistan has a uniform system for customs clearing, having a common data base facilitating the monitoring of cargo. The country aims to integrate with the customs union Kazakhstan-Russia-Belarus. Customs clearing of one truck takes one to two days. Most of the forwarders using the system TIR come from Turkey, Iran and Kazakhstan. The main transit transport through Sughd goes to Uzbekistan (equipment) and Kyrgyzstan.

FEZ “Sughd” offers all types of services for trucks. The current price is 80 USD per day (including hotel, parking, food and medical care). Transit loads should not stay longer than three days on the territory of Tajikistan. Otherwise, large fines may have to be paid. One important determinant of the choice of the location of the logistics centre are the current and expected size of road transport. Data from 2010 are presented in Tables 2 and 3

Table 2. Road traffic in Kyrgyzstan and Tajikistan in 2010

From	Do	Vehicles	Tonnes
Kyrgyzstan	Tajikistan	1678	21 406
Tajikistan	Kyrgyzstan	1745	22 536

Source: Feasibility study ... 2012

Table 3. Good flow in Tajikistan for international trade in 2010

No.	COUNTRY	IMPORT		EXPORT		TRANZSIT		TOTAL	
		No. of vehicles	Tonnes	No. of vehicles	Tonnes	No. of vehicles	Tonnes	No. of vehicles	Tonnes
1	Kyrgyzstan	1119	21406	1114	22536	3229	74283	5462	118225
2	Turkey	545	10373	539	11645	3288	75642	4372	97660
3	Iran	427	8124	422	6364	2305	53033	3154	67521
4	Kazakhstan	998	29029	992	3303	229	4382	2219	36714
5	Tajikistan	1678	17790	1745	1676	0	0	3423	19466
6	Turkmenistan	289	6968	285	699	0	0	574	7667
7	China	252	4656	238	50	8	0	498	4706
8	Russia	82	678	46	72	8	117	136	867
9	Ukraine	15	192	15	57	35	0	65	249
10	Belarus	10	62	7	0	9	0	26	62
11	Bulgaria	1	23	1	0	0	0	2	23

12	Poland	2	22	0	0	0	0	2	22
13	Lithuania	1	10	0	0	0	0	1	10
14	Moldova	0	0	0	0	1	10	1	10
15	Azerbaijan	1	5	1	0	0	0	2	5
16	Germany	1	0	0	0	0	0	1	0
17	Latvia	2	0	0	0	2	0	4	0

Source: Feasibility study ... 2012.

It turned out to be impossible to obtain reliable data on the volume of air and railway transport. In particular data on railroad transport volumes would enable the assessment whether the location of the logistics centre near the railway intersection of Khujand is justified. All people interviewed by the authors in Tajikistan emphasized the fact that the amount of goods transported by rail are significantly higher than the amount of goods transported by road. This issue will be researched in more detail in the future.

Concluding remarks

The logistics centre „Sughd” can be characterized as an international logistics centre due to its strategic geographical location on the crossing of road and rail transport corridors and closeness to the border. The example of military logistics centres (American, Russian) in the vicinity of the border of Afghanistan strengthen the conviction that Tajikistan is a strategic location, and that all key transport corridors should cross this country. The project of this centre, which is supported by tax exemptions and different advantages of being located in the Free Economic Zone, is a public private partnership which fits very well in the national development strategy. The opportunities for development of the logistics centre are strengthened by access to qualified labour, transport networks and the planned development of railroads and highways.

The introduction of best practice is a determinant of civil and economic development. The aim of the management of the logistics centre is to attract an investor be willing to invest at least 50 million USD, while being able to apply modern solutions and create a learning effect for logistics operators in the area. Furthermore, the increase in trade, the development of internet trade and the in-

creasing need to deliver goods in smaller amounts creates the necessity to develop terminals for courier services and forwarders offering groupage cargo. While the entrepreneurship of the people of Tajikistan and their activity in international markets support the development of the logistics centre, it is the lack of raw materials that creates the need to focus on development of modern logistics solutions and logistics centres as one of the tools of stimulating economic development, for example by enabling the supply of resources to potential investors.

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Projekt międzynarodowego centrum logistycznego w wolnym strefie ekonomicznych Sughd – Tadżykistan

Abstrakt :

W pracy przedstawiono problematykę tworzenia centrów logistycznych i ich wpływ na zrównoważony rozwój regionów, państw, w których one powstają. Jak pokazują doświadczenia krajów europejskich, tego typu inwestycje wymagają wsparcia władz rządowych i samorządowych (realizacja zgodnie z zasadą PPP), umieszczenia ich w strategii rozwoju i stworzenia korzystnych i stabilnych warunków dla funkcjonowania potencjalnych operatorów logistycznych – krajowych i zagranicznych. Wykorzystano przykład Tadżykistanu, którego gospodarka aspiruje do krajów „wschodzących”. Przedstawiono podstawowe wskaźniki ekonomiczne, założenia dla funkcjonowania wolnych stref ekonomicznych (WSE), a na przykładzie WSE Sughd dokonano oceny wpływu utworzenia międzynarodowego centrum logistycznego na zmiany w zakresie rozwoju regionu.

Słowa kluczowe : centra logistyczne, Tadżykistan, rozwój regionalny