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中国新疆维吾尔自治区与中亚国家区域经济合作中交通通道提升为贸易走廊对策研究

Prepared by the Consultant Team of “On Countermeasures of Promoting Traffic Channel into Trade Corridor under the Regional Economic Cooperation — between XUAR and Central Asian Countries”

For Executing Agency: Ministry of Finance, People’s Republic of China
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中交通通道提升为贸易走廊对策研究

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I. INTRODUCTION

With the increased globalization of the economy, transportation has become the most essential element for international exchanges, ties, and the movement of strategic resources. With further implementation of the Western Development Strategy (WDS) and in-depth development of economic cooperation between the People’s Republic of China (PRC) and Central Asian countries, the need to transform the traffic corridor between them into an unobstructed passage to facilitate overland trade has become urgent. Currently, strategic planning for the Central Asian Region Economic Cooperation (CAREC) transport corridors involves six channels, with three channels connecting the region to the PRC’s Xinjiang Uygur Autonomous Region (XUAR). The ports are Alataw Pass (Duositeke Port), Horgos Port, Irkeshtam Port, and Turugart port. This study analyzes the bottlenecks restraining regional economic cooperation in Central Asia and the expansion of trade in the XUAR, recommending measures to solve these problems.

II. CURRENT SITUATION OF TRADE CHANNELS BETWEEN THE XUAR AND CENTRAL ASIAN COUNTRIES

At present, two railways connect Central Asia with the XUAR. The Lianyungang–Alataw Pass–Almaty, Kazakhstan–New Eurasian Continental Bridge–Rotterdam, the Netherlands, is designed for loads of up to 20 million tons at the Alataw Pass, but with shipments of over 16 million tons by mid-2012, it was already reaching the limit of its capacity. The second railway, which runs between the PRC and Kazakhstan—from Horgos in the XUAR to Aarden Corey in Kazakhstan—is still under trial operations. After formal operations get underway, it will effectively alleviate the pressure on the Alataw Pass railway. In addition, early investigative work into a PRC–Pakistan railroad, and planning for the Kashgar segment of the PRC–Kyrgyz Republic–Uzbekistan railroad is underway.

In terms of road transport, the XUAR has initiated 107 international road transport lanes (53 passenger, and 54 freight lanes) since 1990 between the XUAR and neighboring countries. The XUAR has implemented international road transport bilateral cooperation with Kazakhstan, Kyrgyz Republic, Tajikistan, Pakistan, and Mongolia. It has also participated in bilateral cooperation between the PRC and the Russian Federation, and Ukraine, with the support of the PRC Ministry of Transport, as well as multilateral international cooperation among the Shanghai Cooperation Organization (SCO) countries, such as the PRC, Kazakhstan, Kyrgyz Republic, and Pakistan.

In terms of ports and passes, the XUAR borders eight countries, including three in Central Asia. Currently, there are 15 first-class, two-way land ports between the XUAR and neighboring countries, of which 10 are between the XUAR and Central Asia, seven are between the PRC and Kazakhstan, two are between the PRC and Kyrgyz Republic, and one is between the PRC and Tajikistan.

Currently, Central Asian nations regard establishing export-oriented economies and foreign trade as a key strategy for fully utilizing natural resources, and promoting economic growth and sustainable development. Since 2000, Central Asia has seen a sharp increase in the volume of foreign trade, but with a high proportion of exports of primary products to just a few trade partners. Meanwhile, the XUAR’s primary export commodities are cotton, cotton yarn, and primary processed food and textiles, with
trade largely focused on Central Asia.

In terms of bilateral trade, between the XUAR and Central Asia, first, trade volume is large and growing fast. Trade between the XUAR and the five Central Asian countries' accounted for a large proportion of the total trade volume between the PRC and Central Asia—approximately 44%–70% during 2002–2012, making the XUAR the most important region for foreign trade between the PRC and Central Asia; second, Central Asia is the XUAR’s most important trade partner. Since 2000, trade between the XUAR and Central Asia consistently accounted for more than 55% of the XUAR’s total foreign trade volume, while since 2012, trade with Central Asia accounted for 79% of the total. Kazakhstan and Kyrgyz Republic are the XUAR's two most important trading partners; third, trade between the XUAR and Central Asia is highly complementary. Imports to the XUAR largely comprise oil, ore, and other natural resources, while the XUAR's exports are mostly textiles, clothing and footwear products, and building materials, among other items; fourth, the traffic channels between the XUAR and Central Asia are relatively concentrated to a few ports. Altogether, there are 10 bilateral trade ports between the XUAR and Central Asia, but a large proportion of the trade volume is concentrated in just several trade ports. Taking 2012 as an example, the value of cargo transported across the Alataw Pass, and via Horgos, Irkeshtam, Turugart, and Dulata ports exceeded $36.6 billion, accounting for 91.3% of the XUAR’s total foreign trade value.

In terms of the trade competitiveness and trade structure between the XUAR and Central Asia, taking Kazakhstan as an example, the XUAR offers a wider range of competitive products to Kazakhstan, but the volume of trade accounts for less than half of that of Kazakhstan to the XUAR. Kazakhstan relies on relatively few products with high export volume and value. Nevertheless, in the area of manufactured goods with wide market appeal, the PRC has the overall dominant position in terms of trade competitiveness compared to Kazakhstan, and this will not change in the short term. The trade structure between the PRC and Kazakhstan is also fully complementary in terms of its infancy—both in trade and the nature of the products.

III. FINDINGS OF THE STUDY

At present, a number of issues continue to hold back trade between the XUAR and Central Asia. We identify eight issues as follows:

1. **Border ports are not fully utilized.** Ports between the XUAR and Central Asia continue to be not fully utilized, and—in particular—transport efficiency is low. Based on estimates, the average utilization efficiency of eight land ports between the XUAR and Central Asia is 43.3% overall—roads 31.4%, railways 45.7%. With the exception of Dulata Port (which has a utilization efficiency of 85%) and Jimunai Port (78%), the remaining ports continue to have low utilization efficiency of 50% or less.

2. **The degree of trade facilitation via land transportation remains low.** The trade volume between the PRC and Southwest Asia and Europe reached $1.0755 trillion in 2012—98% via maritime transport, which is further proof that the second Eurasian Continental Bridge, which offers shorter transport distances, has not lived up to its promise. The primary reason is obstacles to the facilitation of trade at the four principal ports between the XUAR and Central Asia. As for the

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1 The five countries include Kazakhstan, Kyrgyz Republic, Tajikistan, Turkmenistan, and Uzbekistan.
reasons for the obstacles, they are largely due to non-technical factors—and, more importantly, inconsistent policies and low management efficiency.

3. **Trade imbalances exist between the PRC and Central Asia.** Trade complementarities between the PRC and Central Asia are strong, but the imbalance of trade is pronounced. In the case of trade between the PRC and Kazakhstan, for example, the trade imbalance mainly takes the form of a commodity-structure imbalance. Although Kazakhstan has achieved a trade surplus, some in Kazakhstan seriously question the sizable scale of the trade imbalance. As for the rest of Central Asia, the PRC is basically the primary trading partner there, and trade structures face similar issues to those with Kazakhstan, with a result that the PRC is more incentivized to enhance trade channels than its Central Asian partners.

4. **The ability of foreign trade to fuel the XUAR’s economic growth is limited.** First is the problem of how trade is structured. Since 2000, the XUAR has seen a significant trend in terms of the development of heavy industry, but Central Asia’s actual needs center around light-industry products. Second, the export share of local XUAR products is too low. Statistics show that close on 80% products exported from the XUAR to Central Asia are produced in the PRC’s coastal regions. In this context, the XUAR’s role is limited to that of a trade intermediary, providing very limited power to fuel local economic growth and contributing little to poverty eradication in the autonomous region. Because the direct benefits of trade facilitation for the XUAR local government is insignificant, it may also explain why local government has been relatively inactive in stepping up work on the construction of traffic channels.

5. **Traditional modes of transport are difficult to adapt to developing trade.** In the past 10 years, great changes have taken place in terms of how cargo is transported from the XUAR to ports of neighboring countries—rail transport dominance shifting to road transport and pipeline transport, with the two latter now accounting for 40% each, and rail transport only accounting for 20%. The decline of railway transport dominance is due to the docking difficulties between the PRC standard gauge and the broad gauge of former Soviet countries on the Asia–Europe Continental Bridge, a shortage of train wagons on both sides, backward infrastructure in some countries, and a continuing imbalance of railway ports in the northern and southern XUAR. In addition, road transport is also subject to delays and high tariffs at crossing points, as well as poor road conditions, all of which conspire to restrict the development of road transport and trade itself.

6. **Poor inter-sectoral coordination.** The PRC has too many administrative departments involving import and export, and these include customs, inspection and quarantine departments, traffic management departments, port authorities, and border management. Because such departments work under varying administrative systems, while there are mechanisms for coordination, they are restrained in performing their functions properly. Overlapping inter-departmental responsibilities, rights, and interests affect working efficiency.

7. **The impact of the Russia, Belarus, and Kazakhstan Customs Union.** Belarus, Kazakhstan, and the Russian Federation have established a customs union, which has achieved rapid growth of trade among its members. Meanwhile, the growth of trade between the customs union and other countries is significantly lower than the growth rate within the union. The customs union has brought some significant impacts: First, is the issue of tariffs. After the establishment of
the Russia, Belarus, and Kazakhstan Customs Union, Kazakhstan’s average tariffs have increased from 6.2% to 10.6%, which results in a significant cost increase of exports for non-customs union countries; Second, trade facilitation between customs-union and non-customs union countries is declining as a result of the union.

8. **Inadequate agricultural trade.** Due to poor traffic and trade channels, it follows that the agricultural trade between the PRC and Central Asia—as well as between Central Asia countries—is inadequate, and carried out to an insignificant degree. Such issues are illustrated by the Chongqing–Xinjiang–Europe International Railway, and the Haixin Socks’ cases cited in this study.

**IV. POLICY RECOMMENDATIONS**

Overall, trade channels are just one of the many obstacles restricting trade between the XUAR and Central Asia. To solve these problems, we propose the following recommendations gathered at a regional organizational level, a cross-national level, and the XUAR regional level.

(A) **At the Regional Organizational Level**

1. **Give full play to functions of the Central Asia Regional Economic Cooperation (CAREC).** First, CAREC should play a positive and effective role in terms of investment to fill the financial gap that is caused by the tight fiscal budgets of Central Asian countries; Second, in order to achieve shared goals, it is necessary to implement relevant measures, and guarantee more effective coordination between government departments. Under CAREC mechanisms, all member countries should take unified action. Specifically, cross-border management processes should be streamlined to establish a cross-border joint customs, inspection and quarantine-enforcement system approved by both national parties; to establish efficient mechanisms for bilateral customs cooperation, streamline cumbersome cross-border procedures, and standardize the formats of documents for submission. Unified, sharable trade-information systems need to be established, while the quality of cross-border point infrastructure and logistics center facilities along transport corridors need to be improved. More effort needs to go into railway construction, as well as into training programs.

2. **Take full advantage of the platform of the SCO.** The SCO is an international organization backed international law. As a regional international organizational cooperation mechanism in Central Asia, it is of great significance in international relations, making it an important platform for upgrading traffic channels into trade corridors.

3. **Strengthen cooperation between the SCO and ADB.** This is another effective solution to transport issues in Central Asia. CAREC should actively use the organizational mechanisms of the SCO to establish cooperation with transportation and economic ministers, giving full play to their respective functions, providing a strong impetus to upgrading traffic channels into trade

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2 CAREC is an Asian Development Bank (ADB) supported initiative, established in 1997, to encourage economic cooperation among the ADB member states of Afghanistan, Azerbaijan, People’s Republic of China, Kazakhstan, Kyrgyz Republic, Mongolia, Pakistan, Turkmenistan, Tajikistan, and Uzbekistan.
corridors between the XUAR and Central Asia. It should also give full play to role of the SCO and the ADB, so as to coordinate with the Russia, Belarus, and Kazakhstan Customs Union to solve tariff problems between neighboring countries, to establish coordination mechanisms, and to achieve short- and long-term goals that gradually eliminate the negative impacts on trade channels caused by the union.

(B) At the Cross-national Level

1. Promote more balanced trade. Balance of trade is Central Asia’s most important demand—particularly in the case of countries that export energy and other primary products, such as mineral resources, and import manufactured goods. Economic and trade cooperation between the PRC and Central Asia should not be limited to an energy-based, single-exchange model. There is a need for more abundant trade of goods, which would include the PRC expanding the import of agricultural commodities from Central Asia, expanding general trade and the processing of trade, and expanding investment into non-resource trade in services, which are also important areas of bilateral cooperation. Meanwhile, transportation, warehousing, logistics, finance, and business services can become the focus of future cooperation. Under the condition of non-violation of WTO principles and other multilateral cooperation agreements, the PRC should implement more favorable trade and investment policies in economic and trade exchanges with Central Asia, which will not only facilitate the opening of larger markets for both parties, but also serve of great significance in opening up the entire Asian and European markets.

2. Accelerate cooperation in agricultural trade. Increasing imports of agricultural products from Central Asia as soon as possible is key to the PRC’s obligations to CAREC agricultural production and trade agreements. This is essentially be determined by each nation’s natural conditions and agricultural production, and needs to be legally guaranteed, and protected from production to trade. Management procedures, from border control, customs, quarantine, animal and plant quarantine, transportation, and other areas need to be streamlined, and this will require simplifying trade procedures and formalities, coordinating with applicable laws and regulations, and improving infrastructure and standardization, in order to create a coordinated, simplified, transparent, and predictable environment for agricultural trade. The key is streamlining and coordinating customs and cross-border management. Moreover, it also covers the establishment of systems and functional areas of standardization, finance, logistics, and information technology, so as to facilitate trade. Agricultural trade cooperation is an important means to ameliorating poverty in the region.

3. Bilateral technical cooperation. In this aspect, the United States and Canada Customs and Border Protection provides a good example with its Free and Secure Trade (FAST) program. The PRC government should actively negotiate with neighboring countries, with the aim of putting the FAST program model in place at the Alataw Pass, and at Horgos, Irkeshtam, and Turugart ports for customs clearance management. It could be employed at all XUAR ports after the system proves effective.

(C) At the XUAR Level

In terms of its current positioning, the XUAR remains at the cargo-transport channel
level. To upgrade it as a trade corridor, more efforts need to be undertaken.

1. **Accelerate industrial transfers in the XUAR.** With strong support from the PRC government, industry is being intensively transferred from inland PRC provinces to the XUAR—particularly industries that meet the demands of Central Asian and European countries, and which are suitable to the XUAR. In other words, the XUAR should be preparing for undertaking the industrial transfers. After industry has achieved the advantage of scale, following in the steps of the Chongqing–Xinjiang–Europe model, and using a category of products (such as textiles) as a breakthrough model, the ultimate goal of comprehensive trade facilitation could be achieved. To accomplish the above objectives, the tax, fiscal, financial, and import and export policies need to be improved, and in particular more favorable policies are necessary to attract industrial transfers from the PRC inland provinces to the XUAR.

2. **Improve inter-governmental coordination.** Based on current management mechanisms, first, the responsibilities and rights of each government department should be clearly defined to improve the active administration of imports and exports, and eliminate poor communication, duplicate identification, and duplicate charges. This requires top-level oversight, and high-level participation. Therefore, it is a situation that requires state-level involvement, and coordination of the relationships between the XUAR government, the State Administration of Taxation, the China National Entry–Exit Inspection and Quarantine Bureau, the Ministry of Transportation, and border forces management to work in concert. This would result in more active management of port authorities. Secondly, it is necessary for the coordinating departments to effectively solve the problem of sluggish management response. It is recommended that after consultation between the XUAR government and relevant state departments, the local ports authorities should take the lead in the establishment of scheduled coordination mechanisms, to solve problems more rapidly and effectively facilitate customs clearance efficiency.

3. **Further improve current port infrastructure in XUAR.** First, port inspection facilities should be improved; second, the condition of roads at ports should be improved; third, there is a need to actively prepare for the establishment of electronic port-handling procedures.

4. **Speed up the opening of ports.** First, it is suggested that all ports with suitable conditions open to third countries; second, Kashgar and Yining airports should be more open, especially Kashgar Airport in southwestern XUAR; third, based on the XUAR port planning, existing ports, such as Ahtubek and Muzart ports, should be better integrated with other ports.

5. **Accelerate the pace of railway construction.** The construction of port railways should be speeded up—especially port railway construction connected to Kashgar. These include the PRC–Pakistan Railway, as well as the construction of the PRC–Kyrgyz Republic–Uzbekistan Railway. With the joint efforts of CAREC and the relevant countries, efforts need to be undertaken to construct these railways and end an era of the southern and western XUAR lacking railway transport that would provide a trade corridor between the PRC, and South and West Asia.

6. **Speed up the construction of industrial parks to support the joint development of secondary and tertiary industries in border cities.** The construction of industrial parks needs to be speeded up in Yili, which is a hub in
terms of rail, road, and air transport between the southern XUAR and Central Asia. It is also necessary to speed up construction of industrial parks in Kashgar, which is also a rail, road, and air transport hub connecting the southern XUAR and Central Asia, West Asia, South Asian countries. Preferential policies offered at both a state and XUAR level not only provide for a special policy zone, but also improve the cities’ natural environment, infrastructure, living conditions, and industrial park facilities. They should also implement differentiated industrial policies. In accordance with industrial park development plans, the preferential policies support the development of small- and medium-sized enterprises in line with available local natural resources, creating job opportunities and products that meet market demands. They also provide encouragement to multinational corporations with strong investment capacity, and international marketing experience to establish themselves and build regional industries with distinctive advantages and significant specialties.
中国新疆维吾尔自治区与中亚国家区域经济合作中交通通道提升为贸易走廊对策研究

摘 要

一、介绍

随着经济全球化的深入发展，交通运输成为国际间交往最重要的纽带和战略资源。随着西部大开发战略的深入实施和中华人民共和国（中国）与中亚各国经济合作的深入发展，迫切需要构建中国—中亚大交通，建成通畅的陆路便利贸易通道。

目前，CAREC 交通通道战略规划涉及 6 条线路，其中有关中国新疆维吾尔自治区（新疆）与中亚通道的线路有 3 条，涉及的口岸有阿拉山口口岸（多斯特克口岸）、霍尔果斯口岸（霍尔果斯口岸）、伊尔克什坦口岸（伊尔克什坦口岸）、吐尔尕特口岸（吐鲁噶尔特口岸）。

二、中国新疆与中亚国家贸易通道建设的相关现状

1、铁路方面，目前，中国新疆连接中亚国家的铁路有两条。一条为中国连云港—阿拉山口—哈萨克斯坦阿拉木图—荷兰鹿特丹的新亚欧大陆桥，阿拉山口铁路口岸年过货量设计为 2,000 万吨，而 2012 年年过货量为 1,600 万吨，已趋于饱和；中国与哈萨克斯坦对接的第二条铁路——中国霍尔果斯至哈萨克斯坦阿腾科里铁路。目前，该铁路还处于试运行状态。正式运营后，将有效缓解阿拉山口铁路口岸的压力；此外，中巴和中吉乌铁路在喀什段的前期勘探设计工作已经启动；

2、公路运输方面，自 1990 年新疆开展国际道路运输以来，中国新疆与周边国家现已开通国际道路客货运输线路 107 条（客运线路 53 条，货运线路 54 条），中国新疆有关国际道路运输合作有：与哈萨克斯坦、吉尔吉斯斯坦、塔吉克斯坦、巴基斯坦和蒙古国开展的国际道路运输双边合作；参与中国政府交通运输部主持开展的中俄、中乌间双边合作以及上海合作组织（上合组织）、中哈吉巴、中吉乌等多边国际合作；
3. 口岸方面，中国新疆与 8 个国家接壤，其中有 3 个中亚国家。目前，在新疆地区中国与周边国家共开放陆路一类口岸 15 对，其中，涉及到中国与中亚国家的是 10 对，其中中哈 7 对，中吉 2 对，中塔 1 对；

4. 新疆与中亚各国的现状，中亚国家将发展外向型经济和对外贸易视作发挥本国自然资源优势、促进经济增长和可持续发展的重要战略。从本世纪初以来，中亚国家的对外贸易表现出贸易量急剧增长、初级产品出口比重高、贸易对象集中等特点。新疆主要出口商品是以棉花、棉纱、初级加工食品、纺织品等为主，贸易对象主要以中亚国家为主；

5. 双方贸易方面，总体来说，新疆与中亚国家的对外贸易体现出以下几个特点：一是贸易规模大，增长速度快。中国新疆与中亚五国的贸易额占中国与中亚五国贸易总额的较大比例，2002—2012 年间，基本在 44%至 70%之间，中国新疆已经成为中国对中亚国家开展贸易的主要区域；二是中亚五国是新疆最重要的贸易伙伴国。进入本世纪以来，新疆与中亚五国的贸易额占新疆对外贸易总额的比重一直保持在 55%以上，到 2012 年，新疆与中亚五国的贸易额仍占新疆对外贸易总额的 79%。从国别看，哈萨克斯坦和吉尔吉斯斯坦一直是新疆对外贸易位居前二位的重要贸易伙伴；三是新疆与中亚五国贸易互补性强。进出口对比，新疆从中亚国家进口主要集中在石油、矿砂等产品上。中国新疆对中亚国家的出口产品主要集中在纺织服装鞋类、建材等产品；四是中国新疆与中亚国家交通通道相对集中。中国新疆与中亚国家通过 10 个双边口岸进行贸易，但主要集中在少数口岸。仅从 2012 年看，阿拉山口、霍尔果斯、伊尔克什坦、吐尔尕特和都拉塔口岸完成过货 366 亿美元，占新疆口岸过货金额的 91.3%；

6. 中国（新疆）与中亚国家贸易竞争力和贸易结构来看，以中国新疆与中亚国家有代表性的哈萨克斯坦为例，整体上，中国对哈萨克斯坦具有竞争力的产品种类多，但贸易额占比不足一半，而哈萨克斯坦相反，主要依靠少数产品出口数量多、金额高；从市场化程度高的制成品贸易看，中国对哈萨克斯坦的贸易竞争力全面占优，而且在短期内不易改变。中哈之间贸易还完全处于低层次的互补贸易阶段，产业内贸易基本处于起步阶段，产品内的贸易处于萌芽阶段。
三、目前中国新疆与中亚各国由交通通道提升为贸易通道还存在着一系列的问题

1、口岸利用率不高。中国新疆与中亚国家的边境口岸普遍存在着口岸利用率不高的问题，货运问题尤其突出。通过测算得知，新疆已正式开放的对中亚国家的8个口岸货运平均利用率为43.3%，其中公路为31.4%，铁路为45.7%。8个口岸中，除都拉塔口岸（85%），吉木乃口岸（78%）较高外，其余口岸货运利用率均较低，利用率均未到50%；

2、贸易便利化程度低。2012年中国与中西亚及欧洲贸易额达到了10,755亿美元，但98%都是通过海上运输进行的。这说明，运输距离更短的亚欧大陆陆路运输并没有发挥应有的作用。通过分析看到，中国新疆与中亚国家最主要的4个口岸贸易便利化方面存在着问题，从延误因素来看，均非技术性因素，而更主要是政策性因素及管理效率因素；

3、中国与中亚国家贸易不均衡。中国与中亚国家之间的贸易互补性很强，同时贸易不平衡较为严重。以中哈为例，中哈贸易主要表现在商品结构上的不平衡，尽管哈萨克斯坦对中国实现了贸易顺差，但由于商品结构上的巨大不平衡引起哈萨克斯坦国内对中哈贸易的质疑。从中亚其他国家来看，中国基本上都是这些国家最大的贸易伙伴，贸易结构大都如此。这种情况使得中国对提升交通通道的愿望远大于中亚国家；

4、对外贸易拉动新疆经济有限。一是贸易结构问题。进入本世纪以来，新疆工业重型化趋势非常显著，而中亚国家实际需求以轻工业产品为主。二是新疆地产品的出口比重过低。资料显示，新疆出口的产品中有接近80%的产品都是在中国沿海地区生产的，新疆仅起到了货物周转地和通道作用，边贸和旅游贸易所占比重较大，对当地经济的拉动作用有限。对当地政府进一步消除贫困的努力贡献不大。由于地方政府从通关便利化中得到的直接利益不显著，可能导致地方政府对提升交通通道建设的积极性不高；

5、传统运输方式难以适应贸易发展的要求。近10年来，通过新疆与邻国口岸运输物资的方式发生了很大的变化，由铁路运输一枝独秀到目前公路运输和管道运输各占四成，而铁路运输占二成的格局。铁路运输的衰落，主要有亚欧陆桥中国段准轨和前苏联地区宽轨对接难，双方列车车皮短缺，部分国家基础设施建设不足，铁路口岸在新疆依然存在着南北不平衡的问题等原因。公路运输也有不少问题。过境点的延误和费用高以及部分段路况较差，都制约着
交通运输自身和贸易的发展；

6、部门间协调不畅。在中国，涉及进出口管理的海关、检验检疫部门、交通管理部门、口岸管理部门、边境管理部门等。由于管理的部门多，管理体制不同，协调机制虽有，但未能充分发挥其功能，部门间责、权、利有重合，影响效率；

7、俄白哈关税同盟产生的影响。白俄罗斯、哈萨克斯坦和俄罗斯建立的“关税同盟”，使得成员国间的贸易高速增长。与此同时，“关税同盟”与其他国家的贸易增速明显低于同盟国间的增速。“关税同盟”带来的主要影响一是关税的影响。俄白哈关税同盟建立后，哈平均关税水平已由此前的6.2%提高至10.6%，导致非“关税同盟”国家对哈出口成本明显上升，竞争力下降；二是成员国与非成员国的贸易便利化程度降低；

8、农产品贸易不畅。由于通道不畅，导致中国与中亚国家间以及中亚国家各国之间的农产品贸易不畅的问题较为严重。

本课题通过“渝新欧”国际运输通道、海鑫袜业两个案例也证实以上问题的存在。

四、建议

总体看，目前中国新疆与中亚国家的通道还存在着很多问题，还远未达到贸易通道的标准。针对以上问题，从区域组织层面、国与国层面、新疆层面提出相应的建议：

（一）区域组织层面。

1、充分发挥中亚区域经济合作计划（CAREC）的功能。一是需要CAREC继续进行持续、有效的投资，以弥补相关国家因财力因素而造成投资不力的情况；二是更加有效地协调各国政府各部门为共同的目标而步调一致地实施相关措施，需要各国在CAREC机制下采取统一行动。具体来说，有理顺跨境管理流程、建立区域内认可的联合跨境海关、检验检疫等执法体系、建立高效双边海关合作机制、简化繁琐跨境流程及文件提交格式，建立统一的标准化的文件格式、建立统一的、可共享的贸易信息体系、提升多式联运之间的互通能力、改善跨境点基础设施、完善交通通道沿线部分物流中心设施、推进铁路建设，加大培训力度等方面；

2、充分利用上合组织的重要平台。上合组织是具有国际法地位的国际组织，其作为一个区域性国际组织的合作机制在中亚地区的作用及其国际关系中
的地位，决定了要将交通通道提升为贸易通道，需要上合组织这一重要平台，需要进一步发挥其不可替代的作用；

3、加强亚洲开发银行（亚行）与上合组织的合作。有效解决中亚地区的交通运输问题，需要加强上合组织与亚行的合作。建议 CAREC 积极利用该组织会议机制，与交通部长、经贸部长会议建立合作机制，加强沟通，充分发挥各自的功能与优势，有力促进中国与中亚地区贸易通道的形成；建议充分发挥上合组织与亚行的合作，协调俄白哈关税同盟国与其他邻国间的关税问题，建立磋商机制，达成近期及远期协调目标，逐步消除俄白哈关税同盟对建设贸易通道的负面影响。

（二）国与国层面。

1、促进贸易平衡。实现贸易平衡是中亚国家的重要诉求，尤其是以能源和其他非矿产资源等初级产品出口以及工业制成品进口为特点的国家。中国与中亚国家的经贸合作不应局限于能源和制成品单一的交换模式，不仅在贸易商品上更加丰富，如中国扩大从中亚国家的大宗农产品的进口，而且扩大一般贸易和加工贸易，扩大对中亚国家非资源领域的投资，服务贸易也是双方合作的重要领域，交通运输、仓储物流、金融、商务服务业都可以成为未来合作的重点。中国在与中亚国家的经贸往来中，在不违反 WTO 原则和其他多边合作组织协议的条件下，实施适当向中亚国家倾斜的贸易和投资政策，不仅可以打开两地市场更多的领域，而且对打通整个亚欧市场具有重要意义；

2、加快农产品贸易的合作。在中国加大从中亚国家进口农产品的力度外，一个关键点是需尽快签署并执行 CAREC 农业生产和贸易协议，其核心是根据各国自然条件和农业生产的特点，从生产到贸易予以法律上的保障，从边防检查、海关、卫生检疫、动植物检疫、运输等方面加快统一，简化贸易程序和手续，协调适用的法律和规定，改善基础设施和标准化等，为农产品贸易创造一个协调的、简化的、透明的、可预见的环境，核心是海关与跨境制度，此外还包括标准化、金融、物流、信息建设等领域所依赖的制度和功能建设，实现贸易便利化。农产品贸易的合作，是削除区域内贫困问题的重要因素；

3、双边技术层面的合作。此方面可借鉴美国和加拿大两国智能报关系统。建议中国政府与周边国家协商，先在霍尔果斯口岸、阿拉山口口岸、吐尔尕特口岸、伊尔克什坦口岸启用智能报关、通关管理系统，条件成熟后，推广至新疆所有口岸。
（三）新疆层面。
从新疆目前情况来看，其定位是仅是货物运输通道。要将其提升为贸易通道，还需更多的努力。

1. 加快新疆承接产业转移。在中国政府的大力支持下，大力促进内地相关产业向新疆转移，尤其是中亚地区及欧洲需求较大的劳动密集型产业、新疆的产业，需在各地各道、各口岸铁路建设的力

2. 加大部门间协调力度。针对目前的管理机制，一是明确划定管理部门各自的责、权、利，改善货物进出口管理中多头管理，沟通不畅的问题，杜绝重复查验，重复收费的情况，这需要顶层设计，高层参与。建议由国家牵头，新疆政府和国家税务总局、中国国家出入境检验检疫局、交通部、边境部队进行统一协调，达成一致并形成文件，切实解决多头管理的局面，并由口岸所在地各部门落实实施；二是切实解决由相关部门参加的协调机制运行不畅的问题。建议在新疆政府和相关部门协商后，建立由口岸所在地政府牵头、参加的协调机制，使其运行效率更高，解决速度更快，有效解决口岸通关效率不高的问题，提高口岸利用率。

3. 进一步改善当前的新疆口岸基础设施建设力度。一是加快改善口岸查验设施条件，二是升级改造口岸公路，三是积极筹备建设电子口岸。

4. 加快口岸的开放。一是建议具备条件的口岸均可向转口开放，二是建议给予喀什机场和伊宁机场更大的开放度，尤其是地处新疆南部的喀什机场；三是结合新疆口岸规划，从全局考虑对现有口岸进行进一步整合，如阿克苏阿克口岸和乌拉尔机场，建议由其他口岸整合。

5. 加快铁路建设步伐。建议加快口岸铁路建设步伐，尤其是加大喀什地区相关口岸铁路建设的力度。建议中国政府加快与巴基斯坦、吉尔吉斯斯坦、乌兹别克斯坦关于中巴铁路、中吉乌铁路建设的推进力度，在CAREC及相关国家的共同努力下，尽快促成上述铁路的建成，结束新疆南部无铁路口岸的历史，打通中国与南亚、西亚的大通道。

6. 加快产业园区建设，支持边境城市二三产业协同发展。建议加快连接北疆—中亚地区的铁路、公路和航空交通枢纽所在地伊犁，联通南疆—中亚、西亚、南亚的交通枢纽所在地喀什的产业园区建设。建议和新疆一系列的优惠政策不仅要在政策高地，改善城市的自然环境、基础设施和人文环境，并重点支持产业园区基础设施和配套设施，还要实行差别化的产业政
策，按照产业园区发展规划，支持发展符合本地资源禀赋特点、吸纳就业多、产品有市场需求的中小企业，同时引导域外有实力、有国际市场开拓经验的企业进入，形成特色鲜明、优势显著的地域性特色产业。