



23rd Transport Sector Coordinating Committee Meeting

8-9 June 2026 | Ulaanbaatar, Mongolia

23-е заседание Координационного комитета по транспортному сектору

8-9 июня 2026 года | Улан-Батор, Монголия

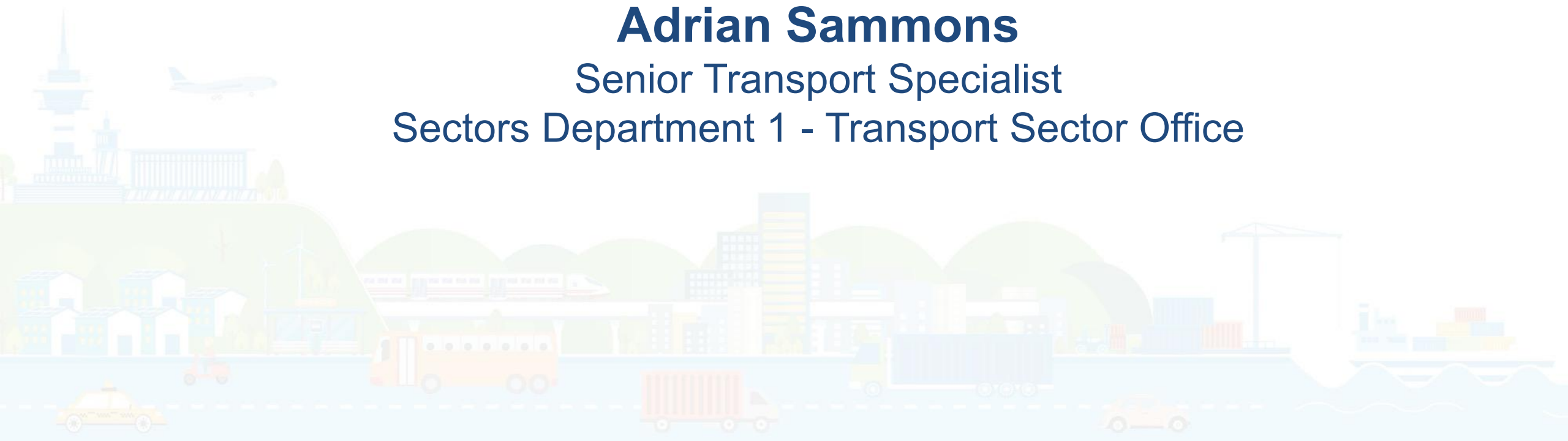


Initiatives in the Waterborne Transport

Adrian Sammons

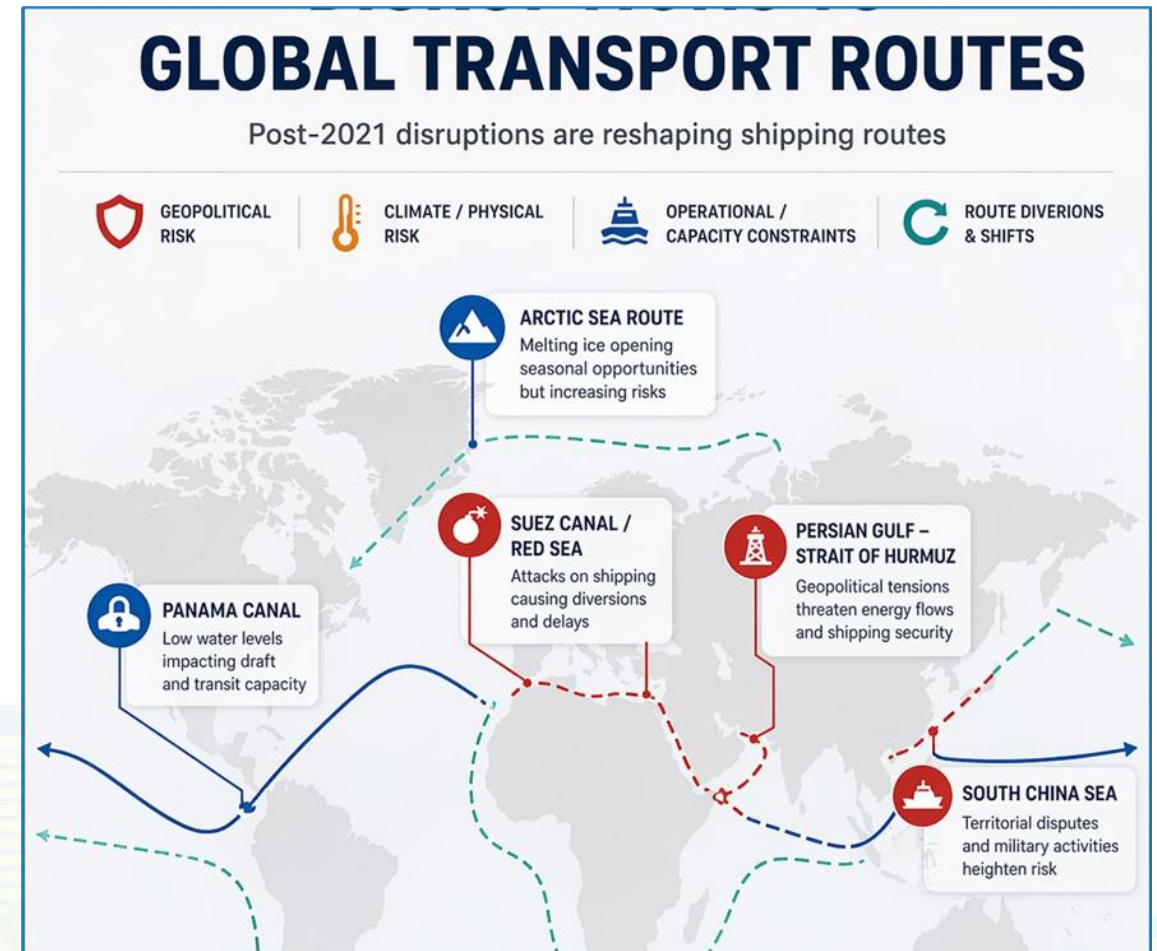
Senior Transport Specialist

Sectors Department 1 - Transport Sector Office



WHY THIS MATTERS

- Global trade is no longer stable, predictable, or cost-efficient
- Shipping reliability declining → schedule integrity broken
- Costs volatile: fuel, insurance, charter, carbon
- Climate change now physically constraining waterborne transport
- Competitiveness now defined by resilience + optionality



GLOBAL PRESSURES ARE STRUCTURAL (NOT TEMPORARY)

Geopolitical disruption

- Red Sea / Suez rerouting
- Black Sea constraints
- Hormuz risk → cost shocks

Climate constraints

- Caspian water level decline
- Panama drought precedent
- Extreme weather variability

System-wide cost escalation

- Fuel + insurance + charter costs
- Decarbonization costs
- Delays, re-routing

WHAT THIS MEANS FOR CAREC

- Global disruptions reprice entire logistics chains
- Demand shifts toward multimodal alternatives
- Middle Corridor is being stress-tested as a live options
- The constraint is not rail capacity — it is the waterborne interface



CAREC WATERBORNE SYSTEM



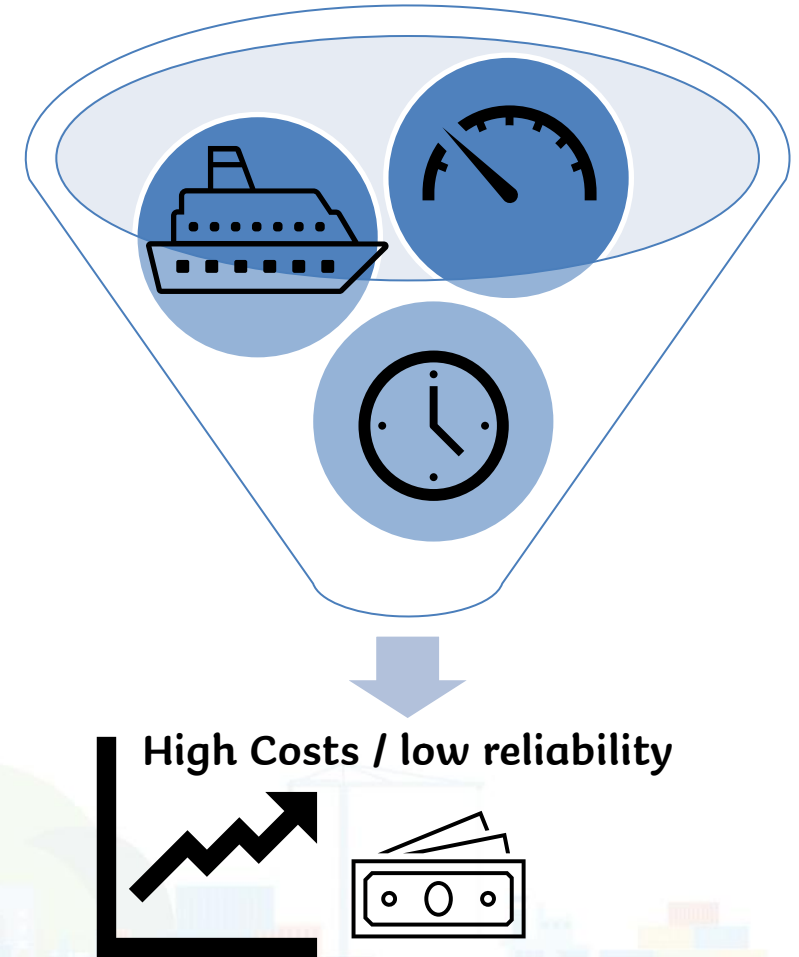
- Three system realities:
- Caspian → rail-ferry constrained
- Black Sea → feeder constrained
- Arabian Sea → gateway dependency
- System Issues:
 - Fragmented infrastructure
 - Fragmented operations
 - Fragmented institutions

CASPIAN SEA SYSTEM REALITY

- Draft/channel constraints limit vessel capacity
- Falling water levels → worsening constraint
- Rail ferry dominated system
- Irregular schedules

Implications:

- throughput structurally capped
- reliability fundamentally weak
- cost high and non-linear



Operational Bottlenecks (Port–Rail Interface)



- Misaligned rail / vessel schedules
 - Unreliable transfers, missed connections
- High dwell at port–rail interface
 - Idle wagons, extended turnaround times
- Excess handling & shunting steps
 - Slow transfer train-yard-quay
- Fragmented stakeholder coordination
 - Rail, port, shipping operate in silos
- Weak data & digital integration
 - Limited visibility, reactive operations

GOVERNANCE CONSTRAINTS

Fragmented mandates

- Ports, rail, shipping governed separately

Weak corridor-level coordination

- No authority managing end-to-end flows

Limited cross-border alignment

- Inconsistent rules, procedures, priorities

Siloed planning and investment decisions

- Modal projects not designed as integrated systems

Lack of operational accountability

- No ownership of corridor performance

WHY INITIATIVES IN WATERBORNE TRANSPORT NOW



- Middle Corridor demand increasing
- Global disruptions accelerating diversion
- Current system cannot scale
- Demand is rising faster than system capability

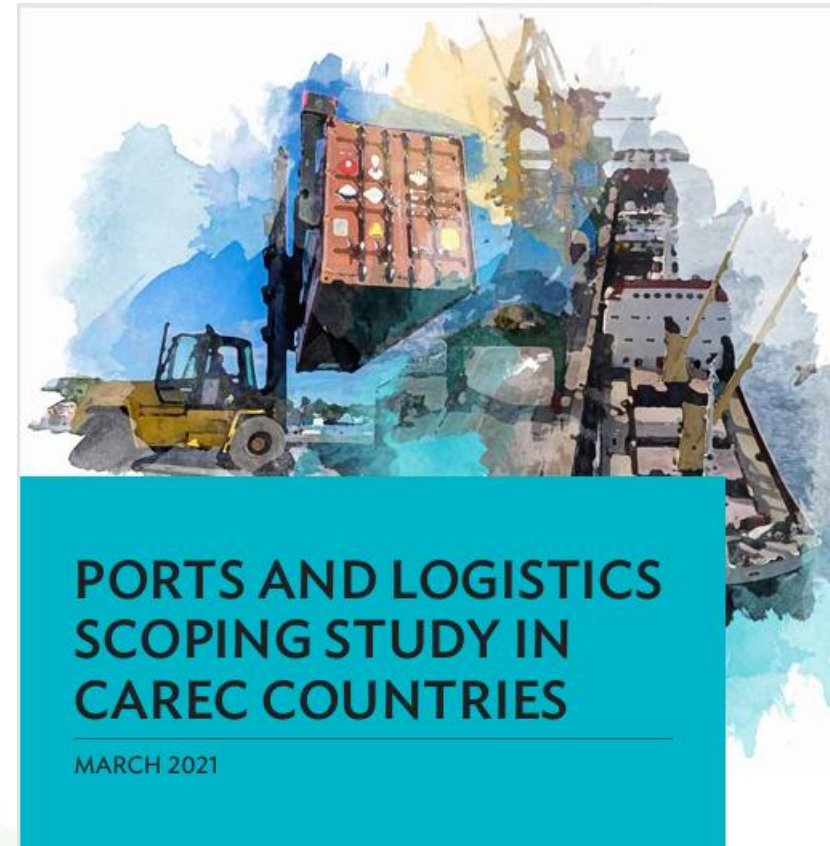
Scaling Waterborne Connectivity in CAREC

UPDATE 2021 CAREC PORTS/LOGISTICS BASELINE

- assess post-2021 system changes
- analyze climate risks to ports & shipping (including water level variability, weather impacts)
- evaluate multimodal system performance and constraints
- assess governance, policy, institutional gaps

NEW AREAS

- Green port development
- Shipping decarbonization pathways
- Digital port & logistics systems
- Port–rail integration and coordination



Objective and Purpose of the Assignment

INVESTMENT PIPELINE

- climate-resilient port and shipping solutions
- multimodal integration measures
- policy and governance reforms
- prioritized, investment-ready pipeline
- Not analysis — bankable investments

STRATEGIC OUTCOME

- Make Middle Corridor competitive vs traditional maritime routes
- Focus areas:
- RELIABILITY
- COST PERFORMANCE
- SCALABILITY
- RESILIENCE

CALL TO ACTION



FOCUS AREAS

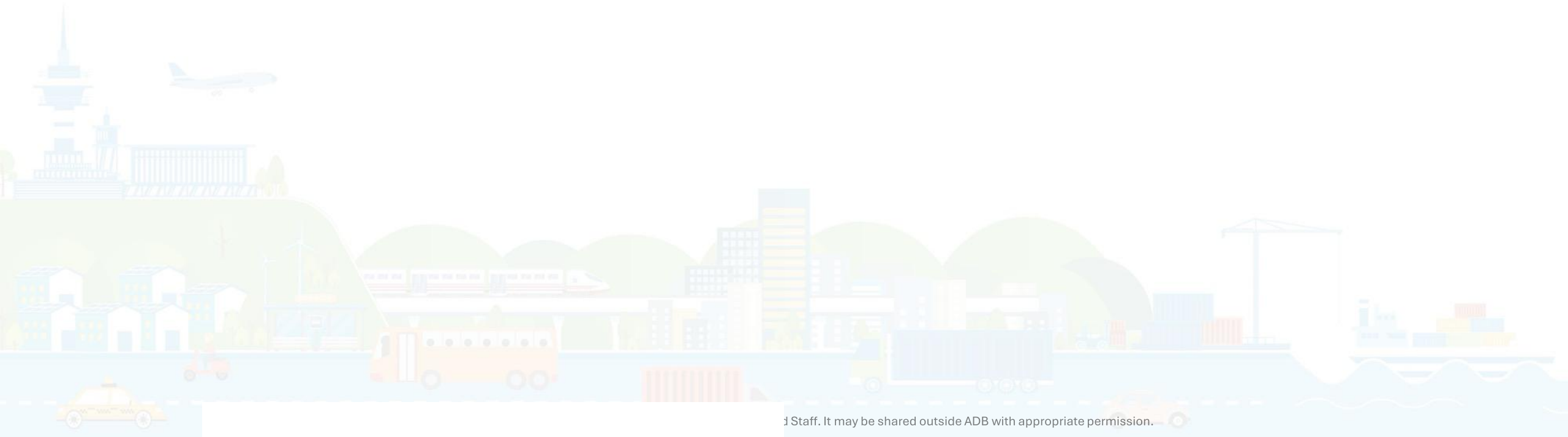
- ✓ Move from infrastructure to → system design
- ✓ Prioritize port–rail interfaces
- ✓ Align investments across modes
- ✓ Strengthen corridor governance

TA Consultants Timeline

- **Initial CAREC country consultations fact finding 20 July 2026**
- **Inception Report 31-Aug-2026**
- **Interim Findings / Progress Note 30-Nov-2026**
- **Draft TA report 15-Mar-2027**
- **Regional Stakeholder Workshop 20-Apr-2027**
- **Draft Final Report 20-May-2027**
- **Final Report 25-Jun-2027**

Contact information

amsammons@adb.org



Thank you for attending

