

## Central Asia Infrastructure Sector Overview

### 1.1 Economic Opportunity and Infrastructure

Central Asian economies are characterised by their small-scale, high levels of informality, lack of economic diversity, and low productivity. Between 2013 – 2017, the Kyrgyz Republic (Kyrgyzstan) and Tajikistan experienced moderate GDP growth (4.6% and 7.1% respectively), driven mainly by export commodities (gold, aluminium), remittance-reliant consumption, and expansion of services (i.e. communications, tourism, financial sector). Employment opportunities are severely limited, resulting in mass economic emigration, mainly to Russia. Infrastructure is generally characterised by: 1) outdated, unreliable, inadequate infrastructure assets and services, worsened by seasonal volatility; 2) poor internal and external connectivity and technologies, particularly in the transport and ICT sectors; 3) limited investments and poor financial sustainability of state-owned service providers due to below cost-recovery tariffs, lack of metering, and ineffective governance/management systems; and 4) a weak enabling environment and institutional governance.

The following opportunities are key to promoting inclusive growth in Central Asia:

- **Growth and job creation:** The majority of the workforce is in the informal sector; however, growth needs to be driven by productivity gains in a diversified formal private sector. Both countries have largely untapped natural resources (mineral and hydropower) and under-leveraged human resources (educated, technically skilled, young, and literate), both of which can drive growth. Commercialisation of agricultural production, manufacturing (garments/textiles), tourism and regional cooperation initiatives (e.g. “One Belt, One Road) in the ICT, trade, and transport subsectors provide more economic opportunities.
- **Inclusion and poverty reduction:** Nearly 1/4 of Kyrgyzstan’s and 1/3 of Tajikistan’s population lives below the poverty line (2016). Inequality is low compared to other regions. Nevertheless, woman and youth are particularly disadvantaged when it comes to employment opportunities. Large disparities exist between urban and rural access to improved utility services. Promoting agribusiness, garment manufacturing (where 90% women are employed), addressing infrastructure delivery gaps, and rationalising tariff structures/subsidies can support inclusive growth and poverty reduction.
- **Investment in infrastructure:** Investment needs are immense in the region and the public sector alone cannot close the infrastructure gap. In both countries, private sector participation is limited, and competition is largely absent. Attracting private investment and developing PPPs will necessitate strengthening of governance systems and investment climate. Efforts such as Taza Koom programme can transform efficiency and effectiveness of digital public service delivery to businesses and communities.
- **Climate and environmental resilience:** The region is highly vulnerable to climate change, particularly in the agriculture and energy sectors (hydropower). Floods, droughts, and earthquakes are frequent and land degradation is increasingly problematic. Climate change adaptation programmes provide opportunities to increase resilience (e.g. improving irrigation systems, low-waste technologies, green growth opportunities).

### 1.2 Stakeholder Analysis

This section sets out in short bullet points the relative engagement of key players in infrastructure.

Public sector	<ul style="list-style-type: none"> <li>• The Government of Kyrgyz Republic (GoKR) is currently formulating its long-term development strategy 2018-2040 while its medium-term strategy 2018-2022 was recently approved. Tajikistan’s National Development Strategy 2016-2030 includes infrastructure sector strategic goals.</li> <li>• Common priorities include: construction/rehabilitation of hydropower plants (e.g. Rogun HPP), energy efficiency, regional integration and cooperation (CAREC road &amp; transport initiatives), expansion/improvement of public utility services, digital connectivity (e.g. Taza Koom), and institutional reform (e.g. financial recovery plan for Tajikistan’s SOE, Barqi Tojik 2017-2022).</li> </ul>
Private sector	<ul style="list-style-type: none"> <li>• Only 5 PPPs are in place (e.g. Saima-Telecom – Kyrgyzstan &amp; Pamir Energy–Tajikistan). Efforts to adopt/upgrade PPP legislation have made slow progress.</li> <li>• FDI averaged around 8% GDP per year during 2013-2017, mainly in the mining, power, and manufacturing subsectors. However, it is not sufficient to close investment gaps. For example, Kyrgyzstan’s infrastructure investment needs were estimated at close to 13.3% of GDP, mostly to ensure maintenance of the existing assets.</li> </ul>
Donors	<ul style="list-style-type: none"> <li>• Multi-laterals: ADB (e.g. CAREC), EBRD (rehabilitation of water &amp; sewage systems), and World Bank (CASA-1000) are the main partners, whose programmes largely focus on 1) upgrading hydropower plants and regional transmission lines; 2) improving regional road corridors, 3) strengthening urban and rural public utility systems, 4) promoting digital connectivity, and 5) supporting institutional reform and financial viability of SOEs.</li> <li>• Bi-laterals: Active bi-lateral donors include EXIM Bank of China, JICA, USAID and KfW/GIZ.</li> </ul>

# 1. Sectoral analysis: Kyrgyzstan

## 2.1 Energy

### Overview

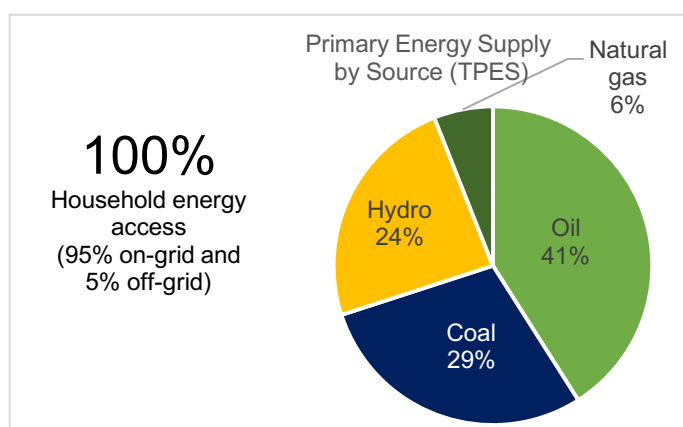
GoKR's Development Programme 2018-22 prioritises: energy security, reliable and modern energy supply, sector financial stability, system efficiency, and export opportunities.

Kyrgyzstan is a net-importer of energy and has high energy intensity and inefficiency. The residential sector is the largest energy consumer, followed by transport and industry. Total installed generation capacity is 3,863MW (85% hydroelectric; 15% thermal plants). GoKR plans to add 702MW capacity by 2027. Rising winter demand peaks, resulting from increased use of electricity as a heating source, have led to a supply-demand imbalance. Reliability is a major issue due to outdated assets, poor maintenance, and high T&D losses (avg. 25% in 2014).

Kyrgyzstan achieved 100% electrification in 2016 although power outages are common, and the cost of new connections is high. The sector is unbundled across generation, transmission and 4 distribution companies. The government owns nearly 95% of shares of the energy sector company (NEHC). A regulator was established in 2014.

Poor financial conditions, resulting from below cost-recovery tariffs (\$0.020/kWh end-user tariff vs. \$0.027/kWh actual cost). The GoKR undertook substantial tariff reforms, including an adoption of tariff setting methodologies and a two-tiered residential tariff. Attempts to increase residential tariffs in 2009 however led to political unrest and change in government in 2010.

### Energy Access for households and business



### Major ongoing and planned investments

- Completion of reconstruction of the At-Bashinskaya, Uch-Kurgan HPPs; rehabilitation of Toktogul HPP.
- Plans to add 100MW of renewable energy sources to the grid by 2027.
- CASA-1000 interregional project will provide a practical transition to the construction phase of the 500 kV transmission line facilities

## 2.2 Transport

### Overview

Poor transport infrastructure is a major obstacle to the business environment in Kyrgyzstan. Its land-locked country status puts transport infrastructure and regional cooperation high on the development agenda. In 2018, the country ranked 108<sup>th</sup>/160 in World Bank's LPI index. Road and rail densities are low and fragmented; more than 50% of road network is unpaved and poorly maintained, and air connectivity is limited.

Transport infrastructure consists of: 1) *Airports*: Manas, Osh, Tamchi airports. Domestic flights connect only a few routes; 2) *Railway*: 467km railway network is divided between the Northern and the Southern region. Commercial railway transport constitutes only 5% of total trade; 3) *Road*: 34,000km road network (55% public, 45% private-industrial roads).

For producers and traders, high costs of trade clearance, long delays, bribes/thefts, and underdeveloped logistics prohibit market access and reduce competitiveness. For example, transport and logistical services account for up to 20% of the total costs accrued by the importers, and up to 30% of the total costs accrued by the exporters. The country ranks 77<sup>th</sup> /190 in WBG's Ease of Doing Business survey.

Top 5 Exports	% GDP	Top Destination
Gold	15	UK – 39%
Precious metal ore	6.7	China – 62%
Dried legumes	5.8	Turkey – 47%
Planes, helicopters	4.6	Turkey – 54%
Refine petroleum	4.3	Turkey – 40%

### Trade corridors

Kyrgyzstan is a member of numerous trade and economic organisations/initiatives. Most notable transport initiatives include: ADB's Central Asia Regional Economic Cooperation Program (CAREC) and the Transport Corridor Europe-Caucasus-Asia (TRACECA). Opportunities to improve regulatory and procedural harmonisation as well as enforcement mechanisms remain high. As a member of Eurasian Economic Union and GSP+ initiative, Kyrgyzstan also enjoys custom-free access to the EU market for several goods. Four major CAREC trade corridors run through Kyrgyzstan: Europe-East Asia, Mediterranean-East Asia, Russia-Middle East-South Asia, and East Asia-Middle East and South Asia.

### Ports / Cross border trade

Kazakhstan is the main gateway to Russian and Eastern European markets. Other transit countries include China, Tajikistan and Uzbekistan. Cross border trade barriers include: high transportation cost/informal payments, significant custom clearance delays (mostly at the Chinese border), border tensions with Uzbekistan,

## 2.3 Digital Connectivity

### Overview

Taza Koom initiative was launched in April 2017 with the aim to develop Kyrgyzstan as a 'smart digital country'. Strategic goals include: improving digital government services and digital infrastructure, promoting digital innovation and skills, creating an open digital society, and becoming a regional digital hub on the new Silk Road.

Mobile subscription is high; however, only 34% of population actively use the internet (2016). Broadband penetration varies significantly across regions. Fixed broadband is available primarily in Bishkek through cable and DSL connections. Kyrgyzstan has 2719 km main fibre optic routes, and over 12,000km overall fibre optic network.

64% of internet users are urban residents. Affordability, relevance, and regional integration are the main drivers of increased digital connectivity. Mobile broadband cost is equivalent to 10% of average monthly per capita income. Lack of Kyrgyz language content and local relevance limit widespread use. The country ranks 109<sup>th</sup>/176 in ICT Development Index 2017.

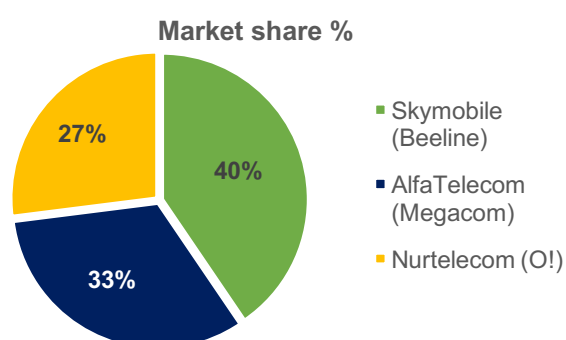
### Digital Access

Network coverage	2G	94.44%
	3G	62.94%
	4G	44.79%
Access	Household internet access	16.5%
	Individuals using internet	34.5%
	Internet speed	3815 KBps
	Mobile subscription	7.4m
Mobile price	Entry data usage	n/a
Adult literacy	Male	99.5%
	Female	99%

### Digital service accessibility

Local content	Apps in local language	n/a
	# apps in local language	21.75
e-gov services	Digital rank	n/a
	e-gov score	42.75 GSMA

### Telecommunication Sector landscape



### Major Investments

- Digital-CASA project (US\$50m) aims to increase access to affordable internet, crowd-in private investment, and strengthen capacity to deliver digital government services.
- South Korea and Kyrgyzstan signed a MOU on e-government in 2017 around electronic capabilities and development. Discussions with Fujitsu Limited and Nippon Signal on Taza Koom cooperation have commenced.
- EBRD plans to assist in the legal framework for geospatial data.

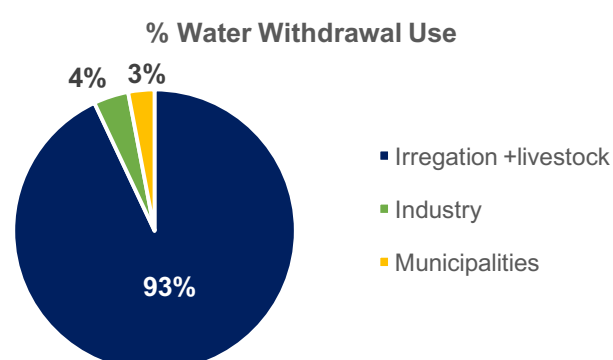
## 2.4 Water & Sanitation

### Overview

Kyrgyzstan has abundant, excellent quality water resources for municipal and industrial use. Irrigated farming constitutes 90% of water consumption. Government policies mostly concentrate on water sector regulation, rehabilitation of existing stocks, construction of new infrastructure and institutional development.

Nearly 90% of the population have access to improved water sources but access to improved sanitation stands only at 30.2%. Water supply, wastewater, and sanitation infrastructure is in critical condition, largely due to outdated infrastructure, investment deficit, and poor maintenance. Water sector is fragmented and ineffective. Tariffs are set by the government (no independent regulator) and they do not cover costs nor operations and maintenance. Public funds are utilised to subsidize about 50% of costs while the remaining revenue comes from service delivery fees.

### Water use and reliance



### Agricultural water use

- Agriculture accounts for 14.4% of GDP (2016); water use is high in crop production, which accounts for 51% agriculture outputs
- Wheat, fodder and pastures are the most important irrigated crops
- Main irrigation technique is surface irrigation through river diversion (80%)
- Inefficient use of irrigation and water managed contributed to soil erosion and land degradation

**Water resource availability**

Improved water resource access	89.9%
Proportion of total actual renewable freshwater resources withdrawn: MDG Water Indicator (Aquastat)	32.63%

**Transboundary dependencies**

The main transboundary rivers in Central Asia are the Amu Darya and the Syr Darya, which both flow to the Aral Sea. These two transboundary river basins as well as the Tedzhen-Murghab basin form the Aral Sea basin, which covers almost 40 percent of the total area of Central Asia.

Some tensions exist between countries in the region. Usage of water from Toktogul reservoir in Kyrgyzstan is a source of contention between Kyrgyzstan, Uzbekistan and Kazakhstan. There is also an unresolved issue around compensation for the lease of the Andijan reservoir between Kyrgyzstan and Uzbekistan.

**2.5 Urban Infrastructure****Overview**

Urbanisation is adding pressure on the main cities' economy and services. With an estimated population of 1.1 million in 2017, Bishkek has grown by over 30% in eight years through internal migration and a high birth-rate. 54% of firms are based in Bishkek. Employment opportunities remain low for the country's young population and are focussed mainly on construction, services, manufacturing and agricultural trade.

The main bottlenecks to urban development include: inadequate infrastructure and services, poor management of urban space development, lack of road safety and public transport quality and accessibility, poor housing conditions, limited skills and formal job opportunities, and inefficient municipal governance as well as limited municipal financing options and inadequate tariff structures. Only 10-50% of households living in *novostroickis* (or suburbs) have access to piped water services while sewerage system is non-existent.

Recognizing the urgency of improving urban infrastructure and planning, the Bishkek Master Plan 2025 highlights the need to improve infrastructure delivery, smart technologies, and social and economic opportunities.

**Urban Structure**

% urbanised	36
# urban residents	2.24m
% living in informal settlements	n/a
Urban poverty (%)	29.3
Urban employment (%)	
- Total	64%
- Youth	12%
- Female	23%

City size	# Cities	% Nat pop.	Tot pop.
Over 1m	0	0	0
500k-1m	1	16%	987,600
100-500k	2	6%	367,500
50-100k	3	3%	196,980
20-50k	11	6%	344,700

**Urban infrastructure overview**

Energy	% household access	100%
	Power outages (per month)	0.9
Water	% access to improved water	89%
	# connected to mains	89%
	% household spend water utility	n/a
	Cost of most recent flood event	1.5% of GDP
Sewerage	# with sewerage connection	30.2%
Urban transit	% household spend transport	4%
	Commute time in large cities	33min
	Air pollution deaths in cities	2917

**2.6 Construction****Overview**

Kyrgyzstan's non-gold economic development was mainly driven by construction and the services sectors. In 2014, construction sector grew by 24.9%. Kyrgyzstan receives modest inflows of FDI, which are evenly distributed between the construction, finance, food industry and mining sectors. Labour cost is low (avg. wage is US\$232 per month) but informality of urban labour market dominates the construction sector.

The government made significant efforts to address permitting and licencing in the construction sector. For example, a one-stop shop for permits were opened in 2008, removing the need for businesses to deal with multiple state agencies. However, one of the main bottlenecks for construction sector businesses is getting a new electricity connection – the process remains complex and lengthy (avg. 159 days). Enterprise surveys have also reported increased bribe expectations during recent years (EBRD/WB, 2014).

The country has labour legislation that balances the rights of the employer and the employee. Although basic labour standards are in place, enforcement is often weak. Women are concentrated in the public and manufacturing sector, which pays lower wages, while men tend to be concentrated in relatively better-paid sectors, including construction and transport. 96% of those who were employed in the construction sector were men in 2011.

# 1. Sectoral analysis: Tajikistan

## 2.1 Energy

### Overview

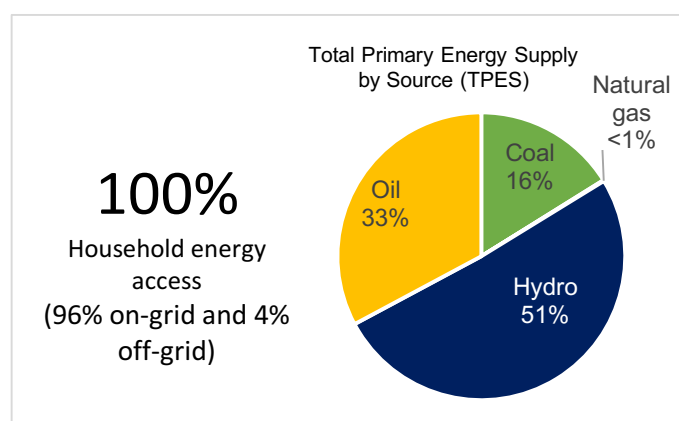
Tajikistan is a net-importer of energy; 56% of petroleum is from Russia. Nearly all electricity generation (5,389MW) is hydropower based, resulting in seasonal supply imbalances. Sector bottlenecks can be broadly divided into:

- 1) *Poor efficiency and reliability*: 80% of assets are outdated, 22% T&D loss, high energy intensity, dependency on hydropower (98%), winter demand peaks leading to frequent power outages
- 2) *Fragile financial viability*: low tariffs (\$0.017/kWh in 2015), poor tariff collection, thefts, inadequate management and maintenance, revenue losses and lack of capital investment
- 3) *Weak governance and capacity*: Barqi Tojik, a vertically integrated monopoly covers generation, transmission and distribution; it has an outdated structure and is subject to political interference (e.g. tariff setting).

Tajikistan achieved universal access to electricity. Urban apartment residents rely on electricity for heating while in rural areas, wood and coal are the main heating sources used.

The government strategy focusses on improving reliability, energy efficiency, commercialisation of utility operations (mainly improving Barqi Tojik's financial viability), enabling environment for private investment and increasing commercial energy exports.

### Energy Access for households and business



### Major ongoing/planned investments

- Pamir Energy— a US\$27.5m PPP project was co-financed by the World Bank, the Aga Khan Fund and Switzerland. 74% of residents of Badakhshan region gained access to electricity and the opportunity to export energy to Afghanistan as a result.
- Other efforts include: Construction (Rogun HPP) and rehabilitation of existing hydropower plants, Dushanbe-2 coal-fired plant project, transmission lines (through CASA-1000), and an action plan for the financial recovery of Barqi Tojik (approved in 2017).

## 2.2 Transport

### Overview

Large gaps in transport infrastructure undermine Tajikistan's trade competitiveness. It has one of the world's highest trade costs due to its land-lock & remote location, poor transport infrastructure, and underdeveloped logistics services. Tajikistan ranked 153<sup>th</sup>/160 in 2018 World Bank's LPI index and 123<sup>th</sup> /190 in Ease of Doing Business.

90% of passenger and 70% cargo traffic is via road. Although the government is making progress in road rehabilitation and regional transport integration (e.g. increasing links to China and Afghanistan), roads remain inadequate for traffic volume and load expansion. The country has 943km railways. Reopening the rail link with Uzbekistan (in 2018) and a Turkmenistan-Afghanistan-Tajikistan railway are expected to boost trade. In terms of air transport, it remains an expensive and inefficient option due to limited competition and coverage.

Top 5 Exports	% GDP	Top Destination
Raw Aluminium	29	Turkey - 55%
Lead Ore	12	Kazakhstan - 100%
Gold	9.5	Switzerland - 99.8%
Raw Cotton	8.4	China - 27%
Zinc Ore	8.1	Kazakhstan - 100%

### Trade corridors

- As in the case of Kyrgyzstan, Tajikistan participates in the CAREC and TRACECA initiatives. Tajikistan is a signatory of the Trans-Asian Railway Pact that links the railway systems of 28 countries in Asia and Europe
- Four major CAREC trade corridors runs through Tajikistan: Europe-Middle East and South Asia, Mediterranean-East Asia, Russia-Middle East-South Asia, and East Asia-Middle East and South Asia.

### Ports / Cross border trade

Kazakhstan is the top export destination while China is the top import origin for Tajikistan. Most trade transits through Uzbekistan while there are limited links to China and Afghanistan. As reported by traders, the most time-consuming activities in cross-border trade are waiting time, escort or convoy, and loading or unloading.

### Major Investments

- In August 2018, ADB announced plans to allocate \$300m between 2019-2021 to rehabilitate key transport corridors, support energy sector reform and improve energy infrastructure.

## 2.3 Digital Connectivity

### Overview

Economic opportunities can be widened through improving the telecommunications sector and expanding internet availability. Because of the limited competition in the market, ICT costs are high and limits mobile and internet usage.

In Tajikistan, only about 20% of the population use the internet, compared to nearly 30% in Kyrgyzstan. Fixed-line internet access in Tajikistan remains limited to major urban areas; Tajiks pay one of the highest prices in the world for internet service. For example, the cost of a basic subscription package is equivalent to 16% of the average monthly income. Although the coverage of mobile-broadband services in Tajikistan is higher than average in the region, penetration rates are relatively low.

Because of poor internet access and high costs, only 57% of firms in Tajikistan currently use e-mail for business and less than 40% of firms have a dedicated website.

### Digital service accessibility

Local content	Apps in local language # apps in local language	n/a 24.72
e-gov services	Digital rank e-gov score	n/a 12.32 GSMA

### Digital Access

Network coverage	2G (GPRS) 3G+ 4G	60.02% 90.00% 80.00%
Access	Household internet access Individuals using internet Internet speed Mobile subscription	10.3% 20.5% 3670 Kbps 9.4m
Mobile price	Entry data usage	n/a
Adult literacy	Male Female	99.7% 99.2%

### Telecommunication Sector landscape

Tajiktelecom, a state-owned national operator, is the main supplier of fixed telephone services. It has national coverage so many internet service providers use its infrastructure to provide their services. The 5 major telecommunication operators are: Tcell, TT-Mobile, Babilon-Mobile, Takom, TK-Mobile.

## 2.4 Water & Sanitation

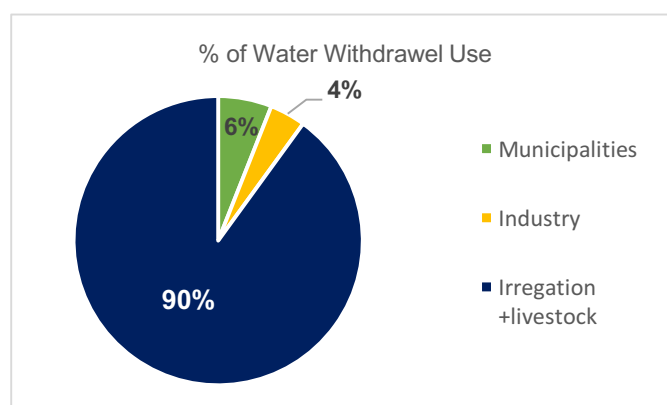
### Overview

Tajikistan has abundant fresh water resources but little land for cultivation. It mostly uses surface water (78%), followed by groundwater (19%). Nearly 80% of the population has access to improved water sources. The availability, accessibility, and quality of WASH services in rural area is a major problem. Access to sanitation has been improving; 60% of urban residents are connected to a sewage system. However, 41% of the rural population have access to improved sanitation and only 1.7% are connected to the sewage system.

Much of the public utility infrastructure was built during the Soviet era so service interruptions/ water outages (especially in the winter) are common.

Water utility tariffs are below cost-recovery and only 15% of water connections are metered. Household expenditures on water services make up on average 5% of total annual expenditure. Non-piped households (mostly urban poor and rural inhabitants) pay even higher costs for water services, taking into account costs for repairs, water treatment, transportation and time. Tajikistan's centralised yet fragmented water sector governance is also an impediment to service improvements. The government, together with development partners such as EBRD, is making efforts to reform the water services sector.

### Water use and reliance



### Agricultural water use

Agriculture accounts for 28% of GDP; 27% of the economically active population works in agriculture. About 95% of crop production is from irrigated land. Over 90% of water withdrawal is attributed to agriculture. Wheat and cotton constitute the majority of total irrigated crop production. Surface irrigation is the only irrigation technique used in Tajikistan.

### Water resource availability

Improved water resource access	78%
Proportion of total actual renewable freshwater resources withdrawn: MDG Water Indicator (Aquastat)	51.07%

## 2.5 Urban Infrastructure

### Overview

Tajikistan experienced de-urbanisation between 1991 – 1995 as a result of civil war, de-industrialisation and the deep socio-economic crisis. The urban population since has remained stable at around 27%, although Tajikistan is the least urbanised country in Central Asia.

Nearly half of the population lives in the capital Dushanbe. As in many developing countries, urban and rural development discrepancies are high in all infrastructure areas. The urban poverty rate stands at 24%, while rural poverty is 33.1% in 2017. Urban employment is only 25%, leading to high emigration of workers to Russia and Kazakhstan.

Urban infrastructure in Tajikistan is in a poor state; nearly 50% of water supply systems and pumping stations in the cities are out of service. Annual shortages of electricity amount to 30% of total consumption. In the autumn and winter seasons, municipalities cut off power supply for 14 to 20 hours per day. This is a major barrier for industries and business. The country is yet to develop an effective urban governance system to address urban infrastructure delivery, maintenance, and financing issues.

### Urban Structure

% urbanised	27
# urban residents	2.4m
% living in informal settlements	n/a
Urban poverty (%)	23.2
Urban employment (%)	
- Total	25%
- Youth	3%
- Female	9%

City size	# Cities	% Nat pop.	Tot pop.
Over 1m	0	0	0
500k-1m	1	9.39%	802,700
100-500k	2	4.48%	383,200
50-100k	3	1.92%	164,400
20-50k	28	4.68%	400,400

### Urban infrastructure overview

Energy	% household access	100%
	Power outages (per month)	6.1
Water	% access to improved water	78%
	# connected to mains	n/a
	% household spend water utility	5%
	Cost of most recent flood event	n/a
Sewer age	# with sewerage connection	14.9%
Urban transit	% household spend transport	n/a
	Commute time in large cities	n/a
	Air pollution deaths in cities	4379

## 2.6 Construction

### Overview

The construction sector constitutes approximately 10% of GDP. In 2016, this sector grew by 20.3%, which was fuelled by donor-funded public investment in the rehabilitation of hydropower plants and road infrastructure. Total investment in the sector was US\$1.3b in 2014, out of which US\$1.01 came from domestic sources (state, private) and US\$0.29 from FDI. Government-commissioned contracts make up a relatively small percentage of the housing market.

Local construction companies are mainly involved in building housing, schools, and hospitals while large-scale construction projects involve foreign companies (e.g. Chinese, Russian, Turkish). There are an estimated 2,000 construction companies (90% private) although the sector is dominated by a few large construction companies. Access to long-term finance, dealing with construction permits, getting electricity access are the main barriers to the sector development. Tajikistan ranks 132<sup>th</sup> in Doing Business survey – a rank significantly lower than other Central Asian countries.

The construction sector is the second highest-paid (formal wage avg. \$400 per month) industry after the financial sector. Between 200-2014, the sector created 26,000 jobs. Informal workers, who are often young and less educated, are more likely to work in construction and agriculture. For example, 19% of informal workers are involved in the construction sector compared to 10% among formal workers. Tajikistan's Labour Code (Article 160) prohibits women's employment in harmful or difficult jobs, which includes jobs in the construction sector. Since construction is a high-paying sector, it reduces women's earning potential.

## 3.0 Ongoing x-HMG Engagement

Dpt / Org	Initiative	£ value
FCO/ DFID (CSSF)	Central Asia Conflict Stability and Security projects	10.9m (c. 1m on water)
DFID	Support to resilience projects in Kyrgyzstan and Tajikistan (water infrastructure)	1.4m
	Central Asia Policy Innovation Facility (PIF) in Kyrgyzstan and Tajikistan - Smart Cities Initiative	5m
	Central Asia South Asia (CASA-1000) Electricity Transmission Project	31m