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From Enclave to Corridor

Cross-Border Mobility, Institutions and Regional Spillovers in Horgos–Ili under the Belt and Road Initiative

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Abstract

This thesis examines whether cross-border mobility at Horgos, on the China–Kazakhstan border, translates into economic activity in the Ili hinterland, and where the resulting gains are retained. Treating the Belt and Road Initiative as a set of spatially targeted industrial-policy instruments rather than as a geopolitical project, it studies the Horgos–Ili corridor as an embedded single case with two units: the Horgos enclave and the inland host region formed by Yining, Kokdala and the directly administered counties of Ili Prefecture. Drawing on policy documents, official statistics, recent Chinese-language scholarship and first-hand observation, it compares outcomes before and after two thresholds, 2013 and 2023, channel by channel, and uses share analysis to distinguish concentration at the border from diffusion inland. Five channels are examined: logistics and transit, firm registration, employment, cross-border retail, tourism and e-commerce, and productive linkage. Throughput grew by more than two orders of magnitude, yet the value retained at the border is narrow; registrations were driven largely by a fiscal regime that predates the Initiative; and productive linkages with the interior are weak. Horgos accounts for about 11 percent of regional output with 2.5 percent of the population, but its share has not risen since 2019. Inland growth has been driven mainly by resource-based industry oriented towards eastern China, while border trade handles goods produced elsewhere. The evidence suggests that Horgos functions as a hub in a corridor rather than as a growth pole, and that regional integration depends on coordination and absorptive capacity more than on infrastructure alone.

Keywords: Belt and Road Initiative; Horgos; development zones; regional spillovers; cross-border corridor; industrial policy

摘要

本文探讨中哈边境霍尔果斯口岸的跨境流动是否转化为伊犁腹地的经济活动，以及由此产生的收益最终留在何处。本文不把“一带一路”倡议视为地缘政治工程，而是将其理解为一组具有空间指向性的产业政策工具，并以霍尔果斯—伊犁走廊为嵌入式单案例，设定两个分析单元：霍尔果斯“飞地”，以及由伊宁市、可克达拉市和伊犁州直属县市构成的内陆腹地。研究综合使用政策文件、官方统计数据、近年中文文献及实地观察，以 2013 年和 2023 年为两个时间节点，逐一比较各渠道在节点前后的变化，并通过份额分析区分“边境集聚”与“向内陆扩散”。本文考察五个渠道：物流与过境运输、企业注册、就业、跨境零售、旅游与电商，以及产业关联。研究发现：口岸吞吐量增长了两个数量级以上，但留在边境的附加值十分有限；企业注册热潮主要由早于倡议的财税政策驱动；与内陆的产业关联薄弱。霍尔果斯以约 2.5%的人口创造了约 11%的地区生产总值，但其占比自 2019 年以来并未上升。内陆增长主要来自面向中国东部的资源型工业，而经霍尔果斯出口的商品大多产自外地。研究表明，霍尔果斯更像走廊中的枢纽节点，而非增长极；区域一体化更多

取决于跨层级协调与本地吸收能力，而不仅仅是基础设施建设。

关键词：“一带一路”倡议；霍尔果斯；开发区；区域溢出效应；跨境走廊；产业政策

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Chapter 1 — Introduction

1.1 The Belt and Road Initiative and Industrial Policy

The Belt and Road Initiative was announced in 2013. It did not acquire a written programme until March 2015. In that month the National Development and Reform Commission, the Ministry of Foreign Affairs and the Ministry of Commerce published a joint document. The document explained how the Initiative was to be built (Ministry of Foreign Affairs, 2015). Much can be read from its text: for the first time, this document mapped not only the land corridor of cooperation envisaged but also the sea corridor; and along both corridors, it provided a list of designated coastal provinces and core area provinces. Along the land belt, for example, Xinjiang stood out as the core area. Thus, this was the starting point of the thesis: under one policy document, one sentence would bring a long-removed border region back into the national planning agenda with a national programme.

It addresses somewhat more particular matters than usual. Cooperation will take place in five fields: financial integration, unimpeded trade, facilities connectivity, people-to-people bonds, and policy coordination. There is considerable detail in the next chapter. Port facilities and international cooperation in customs clearance, transshipment, multimodal transport, single windows at borders, lowering clearance fees, accepting each other’s inspection outcomes and authorized economic operator designations, ports themselves, and international cooperation concerning customs, businesses, ports, facilities, transshipment, multimodal transport, customs clearance, one another’s inspections, and authorizations of economic operators all appear. So does transshipment. That means something when every container going west from Horgos must change trains because Chinese standard gauge there joins Kazakh broad gauge; hence, according to national policy, special attention paid to transshipment actually concerns the single physical activity upon which the whole corridor depends. Chapter 3 carries out those instructions in what was built and how things then worked.

Throughout this thesis, I focus on the spatial dimension of the initiative and industrial policy rather than a geopolitical strategy. However, the choice is not cosmetic. Read geopolitically, the BRI is a projection of influence. The questions that follow then concern alignment, dependence and rivalry. Read as policy, it becomes narrower and easier to test. It is a set of instruments: zones, transport infrastructure, customs facilitation

and bilateral agreements. These are applied to specific places, and specific economic results are expected from them. The big question is: do the geography or economy exist and, if so, on whose terms? Note that such questions make sense only in the second dimension or category.

The instruments themselves are not new. China has used them for more than four decades. The first special economic zones were set up in the early 1980s as experiments in market allocation within geographically restricted areas along the coast. They were Shenzhen, Zhuhai and Shantou in Guangdong province, and Xiamen in Fujian. Based on these first experiments, other kinds of economic development zones were then created in other coastal cities throughout the later 1980s. From the early 1990s, these zones were also expanded to inland areas (Barbieri, Pollio & Prota, 2020). Over time, these defining features have drastically multiplied, including economic and technological development zones, high-technology development zones, free-trade zones, export processing zones and industrial parks (Zheng, Barbieri, Di Tommaso & Zhang, 2016). No other country in the world can claim to have created such a blanket network of special economic enclaves. Two features of the system stand out as relevant for the case at hand. First, zones of every administrative level can be designated so that in the last 30 years, all levels of government, from central to provincial to prefectural to county, have been creating zones (Barbieri, Pollio & Prota, 2020). Second, the rate of production has not been linear. Before 1990, zones corresponded almost exclusively to the coastal region. During the 1990s, zones appeared in coastal inland prefectures, followed by the inland provinces. After 2000, the density again increased dramatically and continued until 2008. Thus, the Belt and Road Initiative did not bring a new tool; it imposed an established regime of zones and infrastructure on borderland areas long neglected by the coastal strategy. Horgos, for example, lies at the Kazakh border of Ili Kazakh Autonomous Prefecture, but a clear instance of what occurred within such a "redirected" strategy.

1.2 The Horgos–Ili Corridor

In 2014, Horgos was raised to the county-level city. It is located on the border upon Kazakhstan, it is ninety kilometres west of the Ili prefectural capital, Yining. On the surface, it transformed from a simple border crossing into what appeared to be three regimes stacked on one another. First of all, it hosts the China–Kazakhstan Horgos International Border Cooperation Centre, a unique enclave directly on the border line. Secondly, it is part of a so-called comprehensive bonded zone. Third—and this only since 2023—part of the Pilot Free Trade Zone China (Xinjiang). In total, this area officially

covers 16.58 square kilometres. The bonded zone itself takes only 3.61 square kilometres, while the Fourth Division of the Xinjiang Production and Construction Corps occupies another 1.95 square kilometres ((Shao, 2025)). This last point is indeed noteworthy. Recall that the Corps division governing Kokdala also holds territory within the free trade zone. Indeed, the enclave is physically contiguous to the interior by that section of the border line. It is not connected through anything that came later, radiating outward. Horgos, accordingly, actually performs three functions simultaneously—a customs port, a railway node on the road China–Europe services, and finally an implementing agency of regional industrial policy.

I therefore describe Horgos as the western end of a once-inland corridor—actually inland all the way to Yining and to Kokdala. This is a particularly rich moment for writing this story because, somewhat coincidentally, those events happened at almost the same time. First, overland trade reopened after the pandemic. Second, policy support increased at all administrative levels, most clearly through the designation of the free trade zone and the China–Kazakhstan visa exemption agreement. Third, corridor infrastructure is reaching across all three modes again. There is new rail capacity at Horgos and Alashankou; a new expressway will cross the Tianshan; the Tianshan Shengli Tunnel forms the core of this; and there is a newly-planned airport in Yili.

I would thus wish to make one more observation about chronology. There is, in principle, little reason to align the ordering of events in strict chronological sequence. Indeed, some existing institutions were already in place before the flagship program. For example, the Cooperation Centre was established in the early 2000s through an agreement with Kazakhstan, while the State Council approved the Development Zone only in 2011.

The fiscal system was largely established in 2010 and was already in place when registrations began to increase rapidly.

Therefore, this thesis does not argue that the BRI created Horgos from nothing. The more useful question is how an existing border post was absorbed into a national strategy, and what this has meant for the region behind it. Section 1.5 turns this into two research questions.

1.3 Institutions and Local Actors in the Implementation of the BRI

Past research on BRI has focused on state and firm behavior, on Beijing's intentions, on the activities of Chinese companies overseas, and on changes in host-country debt and sovereignty. Against this backdrop of publicly available data, there has been solid input to

better understand BRI. However, this has not tackled BRI implementation on the ground. More generally, the studies follow a dangerous logic that assumes a smooth line of implementation from one level—a national initiative—to another at a local level.

Recently, from this institutional perspective, investment outcomes in Italian ports result from negotiation processes among actors at different governance levels, with diverging interests and different capabilities in realizing or capturing rights- Luise, Buckley, Voss, Plakoyiannaki, and Barbieri (2022). Thus, implementation becomes a site of contingency instead of simple execution. To that extent, I take this argument further in this case. However, I do not consider the usually accompanying property rights apparatus in the analysis. None of these justified exercises concern asset or investment negotiations. I borrow a more commonplace insight: where decisions are made shapes what policy produces.

This could be argued over the Horgos–Ili corridor at least four governance levels. The international level is reflected in the agreements with Kazakhstan, including the visa exemption, and China–Central Asia relations more broadly. At the international level, the BRI founding documents and the approvals by the State Council for each zone, together with the rules on customs, form the substantive core of the central level. At the regional and municipal level, this refers to the bodies of government from the Xinjiang autonomous region, the prefecture, and the two cities of Horgos and Yining—plus the Corps division administrating Kokdala. Lastly, the zone or project level refers to the administrative committees of the cooperation centre, the bonded zone, and the free-trade area—and their users, operators, and traders. These four levels are divergent in wanting, spending, and willing-to-wait for what the corridor eventually achieves in becoming a region. This is formalized in proposition 3 of section 2.6.

1.4 Problem Statement and Research Gap

Thus, three lacunas in the current literature shape the space that this thesis occupies.

The first is the outdated nature of the evidence. The published literature on Horgos either precedes the pandemic or the 2023 FTA reform. The most popular figures, in English, end in 2021, but everything since then has constituted the most momentous period in the corridor, including resumed land trade, the free trade zone and visa exemption, and completed infrastructure- none of which have themselves been written about.

The second is one of framing. Horgos is usually viewed in one of two ways. Either it is seen as a successful transshipment node, measured by its freight performance, or it is

simply treated as a symbol of the Initiative. An important link is missing: how is the economic relationship between Horgos and its hinterland established? To what extent, and through which channels, does economic activity at the border reach inland areas?

The third gap emerges from the first two. Studies of Chinese development zones suggest that their impact on host regions is not linear but differential.Impact is least where the surrounding industrial base is weakest. "What features have helped zone policy work so well in Guangdong, and are any of these transferable to other regions?" Zheng, Barbieri, Di Tommaso and Zhang (Zheng et al., 2016). This is an obvious set, inland and visibly poorer border regions, that would give the answer in the negative. They lack the technical and absorptive capacities on which benefits after the fact logically depend. No one has yet extended this question beyond the border into a poorer inland region. This study does so.

One qualification is owed to the first issue and goes against me. Since 2025, a body of literature in Chinese on the free-trade area has been published. This is the newest literature on this subject in the international literature, but it is far more comprehensive than that. Shao (2025) discusses the institutions that are developed and their legal and bureaucratic implications. Jiang, Zhang, and Jian (2026) measure trade performance relative to written targets and build the newest, most comprehensive dataset on the topic. Qiu (2025) assesses whether the centre for cooperation has adequate provisions for dispute resolution. Much of my chapter 3 is based on this literature. In this sense, my earlier gap, regarding evidence, has been largely closed. As to where the proceeds from this activity accrue, none of these studies has raised questions about whether gains are distributed within the zone or in surrounding regions, focusing on the entity and judging it according to internal benchmarks, external regions being largely providers of inputs into it. Again, framing gaps continue to exist in this evidence, while evidence keeps accumulating.

1.5 Research Questions and Objectives

This thesis tries to answer two questions:

> RQ1: What are the processes by which cross-border movement at Horgos translates into economic activity in Ili? Logistic and transshipment services, corporate registration, employment, cross-border shopping, and tourism are considered to be candidates.
>
> RQ2: Where would be potential gains captured: within the Horgos enclave or the

inland city core of Ili (Yining, Kokdala)?

Because these two questions reflect two different dimensions, mechanism, and distribution, they can be raised independently. Some channels may be fully active while little activity spills over from the enclave. Indeed, this is what I would expect to some extent, which is why a more differentiated question is needed to reveal such differences.

These are therefore four main purposes. First, to describe Horgos not simply as a port, but as a combination of policy instruments identified in relevant policy documents. Second, to examine which forms of inland mobility are effectively connected to Horgos and which are not, and how this has changed from the pre-2013 to the post-2013 period. Third, to assess whether the changes observed so far can be linked to the BRI, to earlier policies, or to the area's broader catch-up process. Fourth, to draw selected implications for inland border regions from the perspective of industrial policy.

1.6 Methodology, Data, and Sources

The original idea I have borrowed from a conclusion of a paper published by my supervisor, Professor Elisa Barbieri, and her co-authors (Zheng, Barbieri, Di Tommaso & Zhang, 2016) it has mentioned : the evidence from Guangdong shows that economic zones can be effective in promoting industrial development in industrialized regions. Further research is needed to understand the specific factors (for example, government ability or other institutional aspects) that have made Guangdong a successful case and the extent to which such factors can, or cannot, be replicated elsewhere.

Thus, I transfer and design this research as an embedded single-case study of the Horgos–Ili corridor. For this purpose, the analysis uses two embedded units. One of them is the enclave, which refers to Horgos City and its three regimes. The other is the inland host region unit, which includes Yining, Kokdala, and the Directly Affiliated Counties of the Prefecture, while excluding Tacheng and Altay because they are geographically distant from the corridor and would make the analysis too broad. The definition remains the same across all data series.

There are three sources of evidence. First, policy and document study determines what each instrument does according to law. Founding documents, State Council decisions, the Overall Plan for the China (Xinjiang) Pilot Free Trade Zone, plans for implementing regions, municipal work reports, rules of customs, rules of cooperation centres, trade values, volumes shipped via ports, numbers of runs made by trains from China to Europe, enterprises registered, their sectors, investments, populations of Horgos City, Yining City,

and Kokdala, and other relevant figures contained therein provide the basis in documents. Second, fieldwork consists entirely of my living in Yining while also traveling across frontiers often enough to observe movements, infrastructure, formalities, and so on; no interview or individual information of any sort appears here at all.

The third is Chinese-language scholarship from CNKI which runs through the whole thesis. It informs Chapter 3 in particular, where a well-developed Chinese studies provide evidence on development zones .

Hence, I state the limitations of the evidence upfront and avoid making causal attributions. There is only one corridor, so no counterfactual is available.This is not an exercise in which causal estimates are made, nor should the following pages be read for those reasons. All quantitative information provided is only descriptive and indicative. I use two analytical tools. The first is a before-and-after comparison based on the policy thresholds. The second is a share analysis that distinguishes between concentration at the border and diffusion into the interior. Neither approach requires the data to support a causal claim.

Declaration on the use of artificial intelligence (AI) tools

Accroding to the regulations of Ca' Foscari University of Venice, I declare that the generative AI tool Claude (Anthropic) was used in the preparation of this thesis. It was used at the following stages: checking vocabulary using, revising parts of the text, and checking my analysis of data is they make sense. Making sure the accuracy, efficiency and adequacy. As most part of reference I have borrowed from CNKI and China’s government website in Chapter 1. 2 and 3, there are some key words I have to translate by myself, for making sure the content and key words are always loyalty to the original text, whenever I had picked and translated some idea and sentences, I double checked with Claude weather my writing matches academic required. Meanwhile, this AI tool I used here were not used as a source of data: all figures are taken from the official statistics, policy documents and literature cited. While I could not find the some part of data of Horgos in 2012 I used idea from Claude AI to reshape the table 4.1 and table 4.2. During the use of AI as tool I have noticed many limitation, some ideas comes from AI are safe but lack of creativity. I have ambitious that human, we, have more ability and room of innovation and evolution. I take full responsibility for the content of this thesis.

1.7 Structure of the Thesis

Chapter 2 reviews the literature on policy zones, host-region spillovers, and the BRI as a policy framework. It closes with the analytical framework and three propositions. Chapter 3 introduces the case itself. It examines the official documents published on government websites that define the corridor, the institutions and infrastructure established through these policies, and the actors involved in implementing them. Chapter 4 analyses outcomes before and after the Initiative, channel by channel. It then asks where the gains went. Chapter 5 discusses what all this means, draws implications for inland border regions, and concludes.

Chapter 2 — Literature Review: BRI Policy and Policy Zones

2.1 Introduction to the Chapter

There are three lines of literature that set this off: each contributes a different element in a different field. The literature on special economic and policy zones shows what Horgos is. The literature on spillovers from host regions explains what such an instrument should yield beyond the fence and under what circumstances. A literature on policy regarding the BRI sets the standard of proof regarding local outcomes and the Initiative itself.

2.2 Special Economic Zones and Policy Zones

Enclosing an area and expecting industry to arrive subsequently are not new ideas, and they have certainly not been taken up by economists during the past half-century. Three points need attention here: first, the international context; second, place-based policies, third, what makes zones special in China.

There was little cheer here until quite recently. According to trade-economic thinking until the late 1970s and early 1980s, most publications were skeptical about whether tax havens increase overall prosperity at all and thought distortions harmful in themselves (Hamada, 1974; Hamilton & Svensson, 1982; Young, 1987); second-generation works granted their usefulness only conditionally, if certain conditions apply (Devereux & Chen, 1995; Din, 1994). Then came another shift: from model-building exercises based on equilibrium considerations to costing considerations grounded in accounts of what actually happened. The latter type of research therefore took account of two important elements omitted before: the movement of capitals abroad and the highly mobile nature of zone enterprises themselves (Warr, 1987; Johansson & Nilsson, 1997; Madani, 1999). This becomes the reverse issue: does the enterprise purchase inputs locally, employ people from outside itself, transfer technology, etc.? Here again there is no clear answer according to existing evidence (see also Killick, 1993; Farole & Akinci, 2011); zones may help development if certain conditions apply regarding how little know-how exists nearby overall relative to what industries need in order to function well technologically where they operate.

The second strand is conceptually close to place-based policies in advanced countries, aimed at pulling growth from lagging states or regions (Kline & Moretti, 2014; Neumark & Simpson, 2015). The rationale is simple: subsidized relocation reduces capital costs,

making marginal investment projects more viable.However, incentives are poorly targeted, so most benefits go to activities that would have been undertaken without them (Criscuolo et al., 2012; Busso, Gregory & Kline, 2013). Empirical results are mixed (Ham et al., 2011; Briant, Lafourcade & Schmutz, 2015; Ambroziak & Hartwell, 2018). These two literatures share a common object but disagree on displacement assessment, a key concern for place-based assessment. This is mainly what concerns a place-based assessment. However, while the EPZ is being adopted simultaneously with regional imbalance, the net-effect matter can only be addressed empirically and will depend on where the fence is drawn.

China has drawn more boundaries than any other country. In the early 1980s, SEZs were established, followed by coastal development zones and interior zones in the early 1990s (Barbieri, Pollio & Prota, 2020). Each type has a mission statement and package of incentives (Di Tommaso, Rubini & Barbieri, 2013; Zeng, 2015). Two things are noteworthy for the present argument. One, zones are designed at different levels-national, provincial, prefecture, and county levels-very localized to central policy. Local officials set their competition for investment, which improvises preferential treatment (Barbieri, Pollio & Prota, 2020). Horgos demonstrates this on a micro-scale, where a cooperation center, bonded zone, and free-trade area coexist within a single county. As Chapter 3 shows, stratification stems from this competition logic.

2.3 Zones and Host-Region Spillovers: Engines or Islands

The value of zones depends on what already happens outside zones-a dimension on which Chinese literature has not yet converged. Defenders pointed to the propensity of zones to incite spillover and backward linkage and to grow into hubs of advanced manufacturing clusters and engines for the hosting regions. While municipal econometric studies report gains in FDI, exports, and foreign-invested firms' output (Wang, 2013), work at the city levels identifies real GDP spillovers in neighboring areas (Alder, Shao & Zilibotti, 2016).

Two scales in one study provide telling evidence. Across Chinese cities, zones don't support output levels commensurate with physical space; the association is negative and persists. Across Chinese cities, the association is, on average, negative and remains negative for the entire period. At the county and district levels within Guangdong, however, it is positively significant and related to industrial output in the county and district. This explains territorial heterogeneity. In the most industrialized cluster of the

Pearl River and Yangtze River Deltas and Beijing–Tianjin–Hebei, the effect is positive; in less industrialized areas, it declines as those areas become more bifurcated by zones of land use intensity (Zheng, Barbieri, Di Tommaso & Zhang, 2016).

Thus, two competing expectations explain the magnitude of the role context should play in the following: On the one hand, the pessimistic view argues that neither spilling over nor backward linkage would be realized under conditions of little or no local supply, technical capability, or absorptive capacity for linkages-(Johansson & Nilsson, 1997; Farole & Akinci, 2011; Schrank, 2008). On the other hand, the optimistic view supports the idea that, instead, it would be realized; given the low wage level, along with the absence of congestion effects-an element of negative externality characteristic of the core-neo-Marshall-type spillover growth would be much more than proportional (Ago, Isono & Tabuchi, 2006; Fujita & Thisse, 2013). Polish data support the latter argument; the effect is pronounced in the most underdeveloped regions (Ambroziak & Hartwell, 2018). The relationship cannot be a priori linear.

There is recent evidence and experience from Guangdong on this matter. With quantile regressions, one can separate these two aspects: whether a county has any development zone at all, and, if so, how many. One can then include some kind of spatial term. Barbieri, Pollio, and Prota (2020) find that the spatial lag of zone presence is negative and statistically significant. Hence, there appears to be less industry where one finds many neighboring counties with special zones. Thus, according to these authors, this is “one more reason why polarization takes place inside provinces.” Again, they raise the issue mentioned above: that an enclave might attract economic activities from its own backyard. That idea becomes Proposition 1 herein and guides much of what follows.

The case here is consistent with the pessimistic revision.The Ili region is directly administered, and its economy is based mainly on agriculture, resource extraction, and services rather than manufacturing.Given the evidence, there is no reason to assume that growth will diffuse from Horgos to the rest of the region. Whether it does so, and in what ways, is the empirical question examined in Chapter 4.

2.4 Agglomeration, Growth Poles, and the Cross-Border Question

Section 2.3 observes how a boxed incentive regime cannot diffuse growth at all. This will now be analyzed and explained with respect to spatial logic, as will the reasons why improved connectivity attracts activities rather than dispersing them.

A not-so-functional idea of new economic geography is that improvements in transport

and access to markets do not inevitably imply a spatial diffusion of activities. Thanks to the economies of scale and the links created between firms, any initial attractive factor is prone to being reinforced in a feedback loop: firms are inclined to settle where there is demand and suppliers, and by settling there, they further reinforce the factors that attracted them there; thus, they do not disappear (Krugman, 1991; Fujita & Thisse, 2013) However, this process was clearly defined: while spread effects describe the transmission of growth from the core to the periphery, backwash effects refer to the flow of resources from the periphery to the core. In contrast, from the other angle of the growth pole theory, it should be expected that growth will be unequally spatially distributed around certain poles and that any further diffusion was not guaranteed but, at most, contingent (Perroux, 1955). Suppose agglomerations continue to arise due to agglomeration economies. In that case, they will generally take place due to labor-market pooling, input sharing, and knowledge spillovers- (Rosenthal & Strange, 2004).

The agglomeration is not the equivalent of the cluster, then. The literature on clustering identifies further conditions under which proximity can generate productivity gains beyond those of individual firms: collective efficiency. In this case, accidental externalities from agglomeration and willful cooperative action among firms in proximity to each other create collective efficiency (Schmitz, 1995). Willful cooperative action requires norms, repetition of transactions, and at least some level of trust. China has been landing on building clusters, as is evidenced in the Guangdong specialized-town program (Barbieri, Di Tommaso & Rubini, 2009; Di Tommaso, Rubini & Barbieri, 2013). However, anything is trying to be optimistic, given that quantile regression for counties in Guangdong showed a significant negative value of the coefficient related to the count of specialized towns and industrial output. This fact can be interpreted by the policy's implementation, mainly after 2008, in poor counties at the edges with a weakly developed industrial base (Barbieri, Pollio & Prota, 2020). A cluster policy implemented on thin soil is a sign of weakness.

Therefore, all these would beg a somewhat different reading of the recent infrastructure program: the Tianshan mountain highway tunnel and the new Ili International airport will significantly reduce the Horgos-Yining-Kazakh road distance. What follows further down the road remains to be seen. This shortening will probably draw Yining into the port's active hinterland—that is, an internationally oriented transport network for the hinterland region. How this will turn out is an empirical question and the substance of RQ2.

This relates rather directly to the point of internal consistency in everything that has been

said so far: somewhere inside the unitary legal-cum-customs-currency space, each case is located. Does anything survive across national boundaries? Collective efficiency implies common institutional settings and repeated interaction across a border. A cluster is likely to take the form of a cross-border corridor or enclave in that case. I hypothesize this, not as an axiom.

For this, a relevant toolkit from the border literature is needed. In an influential article, (McCallum, 1995) compared inter-provincial trade within Canada to inter-provincial trade with US states, using two similar-sized states with similar distances between them. He found that, other things being equal, trade between two provinces was about twenty times larger than trade between a province and a state. Some further research has reduced the quantitative effect, but the magnitude remains. The border is an economic fact, not a map fact. Hence, a foreign-border corridor is fundamentally different from its domestic analog. In other words, the cluster literature applies only with suitable caveats across borders.

The most productive approach to explaining the mechanism lies in transaction-cost economics. Following (Coase, 1960) and (Williamson, 1979), transaction costs consist of information, negotiation, monitoring, and enforcement. After this, institutions are valued according to the extent to which they reduce such transaction costs. From this perspective, international borders give rise to increased transaction costs through differential standards and clearance regimes, incompatibilities in legal regimes, and uncertainty on which laws apply. This is Proposition 3. Evidence for its presence or absence is in Section 3.6.

(Melitz, 2003) linked border frictions to a model of firm selection and distribution. Export involves fixed costs; hence, only firms above a certain productivity threshold value export profitably. Increased frictions raise that threshold, hence reducing the number of firms that export. High-friction areas are represented only by large and very productive firms across the border. Such are usually absent in poorer inland areas. This has direct relevance to RQ2: spillovers may occur from the enclave to the hinterland only through trade if hinterland firms export; such is unlikely because of the border effect. Spillovers will go along the routes of services, retail trade, and tourism, per Proposition 2.

In the rent-seeking literature, the distributive aspect of privileged perimeters is addressed. On the part of the administrative privilege, rents are generated, and actors spend real resources to obtain these rents. For this reason, such resources are wasted in the vain

pursuit of production when capture displaces compensation (Krueger, 1974; Tollison, 1982). This is the case due to fiscal and customs privileges granted in this border zone. Whatever it is, the activities attracted may be more a matter of formality than substance. This distinction is particularly important for firm registrations, one of the channels examined in RQ1.At the macro level, tax-induced increases in firm registrations are difficult to distinguish from actual enterprise formation. At the regional level, however, the two can be distinguished.Chapter 4 traces this distinction through the regional data

The spatial structure therefore follows a hub-and-spoke pattern.(O'Kelly, 1987) O'Kelly (1987) argues that, when transport costs are minimized, networks tend to concentrate around hubs, which in turn aggregate flows and generate efficiency gains for cities. Hubs concentrate and redirect flows, so most of the efficiency gains accrue to the hub. Here, the rail and road networks help establish Horgos as a hub in this system.Additional hub capacity allows border throughput to grow even if only one inland spoke develops.This supports the earlier argument that the effect of increasing permeability is ambiguous: it may promote regional integration, but it may also lead to functional bypass. Connectivity data alone cannot determine which of these outcomes is occurring.

Few months ago, study by Jiang, Zhang and Jian (2026) rought these strands together published their study, "Research on Strategies for High-Quality Development of Foreign Trade in Border Pilot Free Trade Zones, on Modern Urban Studies, The article establishes a mechanism framework comprising 'one core, four interlinked components and four pillars' to nalyse foreign trade in the Horgos area of the Xinjiang Pilot Free Trade Zone, and on this basis proposes targeted development strategies across five dimensions: infrastructure, industrial upgrading, institutional innovation, digital empowerment and governance capacity. The convergence is reassuring, suggesting that this analytical framework is appropriate for the case.It also shows where the field currently stops and highlights where field currently stops: at the performance of the zone rather than where the benefits of that performance come to rest.

2.5 The Belt and Road Initiative as a Policy Framework

The preceding sections discussed the instrument and its expected effects. This section must place the instrument back in its policy context. What kind of evidence does this call for before we attribute local outcomes to the Initiative?

Most existing BRI literature is state-firm-centric: either the objectives of the Chinese state or the international behavior of Chinese enterprises are examined (Summers, 2016;

Yu, 2017; Tekdal, 2018; Buckley, 2020; Sutherland et al., 2020). Another strand of literature looks at the outcomes for host countries, involving debt, sovereignty and control (Narins & Agnew, 2020). This does not question the connection between the name given and the outcome.Projects such as the Khorgos Gateway in Kazakhstan, the Kyrgyz free-trade zone, and several projects in Malaysia have not worked out as expected.(Liu & Lim, 2019; Liu, Schindler & Liu, 2020).These examples show that designation and actual outcomes should be examined separately to identify the differences between them.

The BRI is, after all, a policy with identifiable instruments. At Horgos each of them leaves a paper trail. The 2015 Vision and Actions made Xinjiang a key area of the Silk Road Economic Belt and included it in the New Eurasian Land Bridge corridor. State Council decisions established and developed the zone in 2011, elevated Horgos to city status in 2014, and in 2015 issued a county-level city of Kokdala. In 2023, the Council approved the China (Xinjiang) Pilot Free Trade Zone, which included a 16.58-square-kilometer area in Horgos.Plans have also been made for transport and e-commerce pilot projects and fiscal arrangements. Chapter 3 gives a detailed explanation of the sequence.

The most recent instrument is also the most explicit about priorities. The Overall Plan for the China (Xinjiang) Pilot Free Trade Zone (Guofa [2023] No. 17) assigns the Horgos area 16.58 km² and directs it to rely on cross-border cooperation and its status as a national logistics hub at a land border port. It gives first priority to cross-border logistics, cross-border tourism, financial services and exhibitions, and only then to pharmaceuticals, electronic information and new materials. The Plan sets out its institutional innovations in eight areas, none of which addresses the relationship between the zone and the wider regional economy. The ordering matters for what follows: if gains appear mainly in trade, logistics and tourism, that is what the Plan asked for.

2.6 Analytical Framework and Propositions

The three strands reviewed above lead to three propositions, which Chapter 4 tests against the evidence.

P1. Policy instruments and infrastructure are concentrated in Horgos, and the growth of cross-border flows after 2013 is not converted proportionally into economic activity in the interior. This follows from the Guangdong evidence (Section 2.3) and from the hub-and-spoke logic (Section 2.4): a zone may draw activity from its hinterland rather than spread it.

P2. Spillovers from Horgos to the interior are limited by the region's absorptive capacity and by a policy design that gives priority to services. Where local suppliers are weak and border frictions are high, gains are expected mainly in logistics, retail and tourism inside the enclave, not in productive linkages (Sections 2.4 and 2.5).

P3. Regional integration depends on coordination across the levels of implementation, not on infrastructure alone. Borders raise transaction costs (Section 2.4), and institutions and procedures reduce them more than physical capacity does.

These propositions are not causal hypotheses. They state what the literature leads us to expect, so that the descriptive evidence in Chapter 4 can be read against it.

Chapter 3 — The Case: Instruments, Institutions, and Infrastructure in the Horgos–Ili Corridor

3.1 Introduction to the Chapter

Chapter 2 explained Horgos as an instrument and explained what we can expect from it according to the literature. This chapter is devoted to describing the instrument. This corridor has authorizing documents, institutions set up in document form, infrastructure created to run flows, actors assigned the task to make it operate and measurable traffic volume and composition. Each is well documented. At this stage, therefore, the order of description is required. Indeed, the description is not neutral; the way the chapter is ordered leads to the set of propositions tested by Chapter 4.

This means that the description of instruments follows in section 3.2. We need clear criteria to compare the situation before and after. For this corridor, there are two key points: the 2013 announcement and the 2023 designation of the free-trade zone. Section 3.3 looks at the different institutional layers. In fact, some institutions were already in place before the flagship program began.These systems have different boundaries, customs rules, and, in some cases, different authorities.Infrastructure, flows, actors, and coordination are discussed in Subsections 3.4 to 3.6. Subsection 3.6 presents the evidence used to support Proposition 3.

Before starting this analysis, the sources should be clearly identified. Since policy documents are official sources, they are treated as reliable evidence. However, the quantitative data used in this chapter come from official Chinese customs websites, municipal work reports, and recent Chinese studies.Three main points should be considered throughout this chapter. First, most of the data are reported by a single source, usually the relevant government agency. Second, they measure what passes through the area rather than what remains there. Third, the data cover differently bounded spaces: some series refer to the road port, some to the rail port, others to the port per se, and yet others to the municipality. Such a variable unit is rarely indicated in the series source. Thus, subsequent numerical data primarily give a direction and order of magnitude. Where one source contradicts another, I note it but leave the contradiction intact.

3.2 The Chain of Instruments

The institutional system in Horgos was built over a two decates , so the whole chain

matters more than any single link.

The first instrument concerned fiscal matters. After the 2010 Central Work Conference on Xinjiang, the government extended a preferential corporate income-tax regime to new enterprises in some sectors in specified areas of extreme hardship, one of which was Horgos. Indeed, the regime triggered the registration spurt noted in Chapter 4. It predates the Initiative by three years. In 2011, the State Council approved the construction of the Horgos Economic Development Zone, which was designated as a state-level economic development zone. The Initiative itself was announced only in 2013. The Silk Road Economic Belt was proclaimed in Astana, on this side of the border, in September 2013. In 2014, Horgos was upgraded to a county-level city with a municipal government. Kokdala was upgraded similarly in 2015, and the Fourth Division of the Production and Construction Corps was an area of responsibility. In the same year, Xinjiang was identified as the core area of the Silk Road Economic Belt in the Vision and Actions document.

This should be considered an accumulation of designations. In 2020, the State Council approved the integration of the Chinese supporting area of the cooperation centre into the Horgos Comprehensive Bonded Zone, with a planned area of 3.61 square kilometres (Xinjiang Daily, 2020). The China-Kazakhstan International Border Cooperation Centre in Horgos had been jointly agreed upon in the early 2000s, was functional before the Initiative, and continues to be functional under another instrument. In November 2022, Ili Prefecture, which includes Horgos, was approved as a cross-border e-commerce comprehensive pilot zone (State Council, 2022). Besides, Horgos has a national base for cultural exports (its only one in the northwest) and a border residents' mutual trade area (Shao, 2025).

It is a free trade zone, its last instrument, and likely the most important. The Overall Plan of the State Council on the China (Xinjiang) Pilot Free Trade Zone assigns an area of 16.58km2 for Horgos; out of this, the bonded zone occupies 3.61 km2, and 1.95 km2 belong to the Fourth Division (Shao, 2025). Therefore, Horgos becomes the first pilot free trade zone in China's northwestern border.

I need to clarify one fact from here, fixing the second threshold used in Chapter 4. Three Chinese-language sources locate the zone's setting at different times. Shao (2025) states the approval date as October 2023 and cites the State Council Notice of 31 October, Guofa [2023] No. 17. Jiang, Zhang, and Jian (2026) talk about an official unveiling on 1 November 2023. Qiu (2025) indicates that the Overall Plan was issued on 21 October and

that the inauguration of Horgos took place on 5 December. Whether this happened is probably because of three different events: approval, national inauguration and inauguration of the area. Most of the secondary literature thus discusses these events interchangeably. For this reason, the issue date of the Overall Plan is used as the second key point. Different inauguration dates suggest that some information in previous studies may not be accurate.

It does not convey much information beyond this. These new bodies were created bit by bit until they made up today's institutions surrounding Horgos. In fact, most elements of the system had been established long before the launch of the Initiative in 2013; some existed even before then. Thus there is no point in attributing their existence to what happened afterward. More generally, attention needs to focus on changes occurring at certain stages if one wishes to attribute something to their having taken place. This issue will also be addressed more fully later (see Sec. 4.1).

3.3 The Layered Enclave

Many boundaries touch on Horgos territory, but they cannot all converge there.

It is said to be the most special system, as well as being the only one across countries' frontiers worldwide. In terms of its own regulation, what has been repeatedly stressed by many authors in China applies here: "open the first line but close the second." Merchandise brought into the center will not be taxed from whichever side it came. Trade itself inside the zone is also duty-exempted. Controls take place when the commodities depart from there and enter each country's own customs territory; citizens may enter without obtaining entry permits in advance. Retailing, traveling, and light commerce matter much more; governments build platforms and supervise while merchants start enterprises on their own initiative (Jiang, Zhang, & Jian, 2026).

The bonded area covers 3.61 square kilometres, classifying its use functions into bonded logistics, processing, maintenance and repair, and leasing. The development intention was to establish linkages with the surrounding economy, as assessed in Chapter 4.

The Horgos Economic Development Zone, established in 2011, is another national-level platform.A free trade zone established in 2023 partially overlaps with the Development Zone.The other two pilot cross-border e-commerce bases, cultural export bases, and policies for border residents and immigrants also vary by area, with different rules and eligibility requirements.

This consequently suggests two implications: The first describes the competition logic of Section 2.2 as extreme. Since this logic holds, every form of jurisdiction will encourage them to compete since designation is possible at all levels of government. In reality, Horgos has brought together all these types within a limited area.A second result concerning jurisdiction follows. Overlapping boundaries can create overlapping jurisdictions. As far as I can tell Chinese literature treats practically, not theoretically. In fact, the cooperation centre, bonded zone, and development zone have some overlapping policy functions. However, some policy instruments have not yet been clearly assigned to a specific platform. As a result, implementation can become distorted because firms have no control over which policy instruments apply to their operations (Jiang, Zhang & Jian, 2026). As such, firms have to bear precisely the transaction costs anticipated in Section 2.4 . However, in this case, these costs arise mainly within the domestic administrative system rather than across international borders.

3.4 Infrastructure and the Gauge Break

Section 2.4 therefore provides an interpretation of the infrastructure of this corridor.From this perspective, the investments mainly aim to increase the capacity of the nodes, while also improving connectivity along the corridor to a lesser extent. This distinction is particularly important in a hub-and-spoke network: enlarging the hub does not necessarily result in more flow through the spokes.

The first transport facility is the rail port, where physical capacity is the main constraint.Chinese railways use a 1,435 mm standard gauge, while Kazakh railways use a 1,520 mm broad gauge. This difference in gauge means that trains cannot pass directly between the two railway systems.

Consequently, every westbound consignment requires either transshipment in the port yard or a bogie change. Thus, this gauge mismatch makes handling, storage, marshalling, and forwarding important sources of locally retained value at the port.



Figure 3.1 A China-Europe freight train assembled at Horgos railway port, Standard Gauge Yard on 25 August 2025 Xinhua News Agency The strategic gauge mismatch underwrites the value-generating core at the port for locally retained services to handling, storage, marshalling, and forwarding. The Standard Gauge Yard is adjacent to Kazakh in the Broad Gauge Railroad Network, hence all westbound consignments must be transshipped or have their bogies changed.

However, the constraint is now binding: this maximum transshipment capacity has not grown with frequency; congestion has hit the port. Chinese literature sees its priorities as transshipment capacity, new transfer tracks, and intelligent warehousing. The target is twenty transshipments per day (Jiang, Zhang & Jian, 2026). The size of that target says something about the gap.

On the other hand, that constraint is physical at the highway port but administrative. It is a vehicle port and is currently the most significant export. Using the self-driving vehicle export fast-tracking customs clearance will reduce clearance times from over 30 hours to under five hours. Two other constraints mentioned in this literature are the equipment of an intelligent port and the speed at which traders obtain permits to proceed into Kazakhstan.

Of the three modes, air capacity is the least developed. Where the Yili International Airport is intended in making up current shortfalls in channeling flows of low volume, high value, and time-sensitive cargo through the corridor,

The three actual relevant modes were accordingly designed at the international logistics park. The international logistics park, specializing in road and rail, was set up in October 2025 and serves as the aggregation node for cross-border e-commerce cargo flows. Two concrete weaknesses identified by the literature remain in integrating those modes: first,

the great inefficiency involved in performing drayage between the highway and the rail ports, which therefore aggravates congestion, and second, the inadequate capacity of the container yard which forces the storage of goods in the open air (Jiang, Zhang & Jian, 2026). Other investments in the corridor that matter, aside from the port itself, are the Tianshan expressway, especially the Shengli Tunnel, and the airport.

The pattern is evident. Investment has focused almost exclusively on constructing a border facility with unimpeded flow. This, of course, is exactly what a port authority would want to do. But is this equally applicable for inland regions? This is what Chapter 4 explores in the sense of a hub and spoke in 2.4 Increasing the node's consolidating and forwarding capacity may continue to enable bypassing the node instead of finally reaching it.

3.5 The Flows

Volume through the beltway has increased sharply over the past decade. I will thus first refer to the main aggregates and then describe what they conceal.

The supervised freight at Horgos in 2025 amounted to 46.43 million tonnes, 1.9 percent up of 2024 and the top across all ports of Xinjiang for the seventh year. The first 10 months of 2025 alone accounted for 38.48 million tonnes, of which rail took the major share. Block trains running on the China–Europe and China– Central Asia routes increased from fewer than 400 in 2016 to 8,730 in 2024, an increase of 12.5 percent, and to 9,882 in 2025, an increase of 13.2 percent to 14.24 million tonnes. By October 2025, the port had cumulatively provided over 50,000 services to 46 cities in 18 countries (Ma, 2026).

The top exported category is automobiles. According to Horgos Customs, 421,000 vehicles were exported in 2024, an increase of 38.6 percent, and 450,000 in 2025, an increase of 6.9 percent and a new record. New-energy vehicles are taking market shares in Central Asia and Russia; figure 219,000 units in the first half of 2026, up 25.7 on year-on-year comparisons. The above figures make Horgos the leading commercial vehicle export land port in China.

Starting from zero, cross-border e-commerce registers significant growth. Cross-border e-commerce through Horgos was valued at RMB 30.97 billion in 2025, an increase of 288.9 percent, with 45 registered operators engaged in warehousing, logistics, live-streaming e-commerce, and platform operations (Jiang, Zhang & Jian, 2026). Municipal total foreign trade in 2025 was RMB 118.65 billion.

People moved proportionally. After the resuming land travels and mutual visa exemptions, the flows to and from the cooperation center reached 3.893 million person-times, up 87.2 percent in 2023（Jiang, Zhang & Jian, 2026). Figure 3.2 gives some scale as to how many people use this crossing.

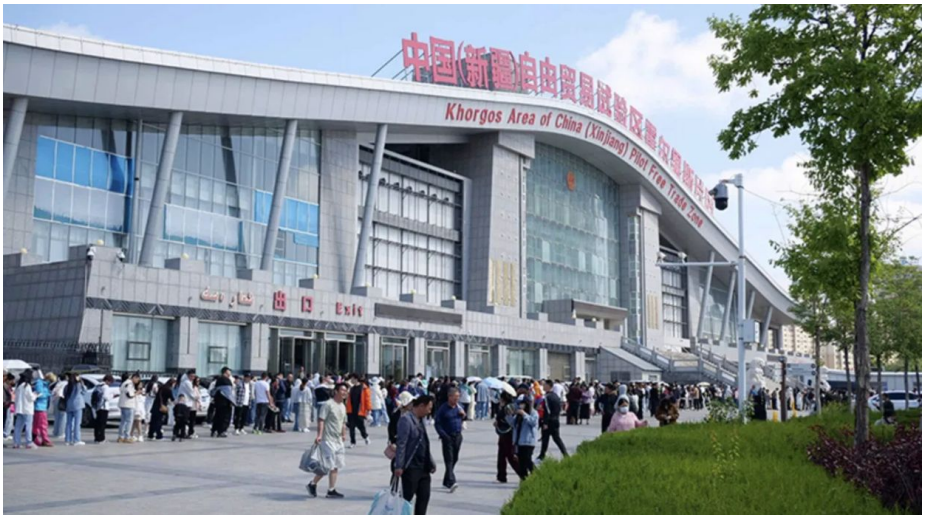


Figure 3.2 Visitors exit from the Horgos area of the China (Xinjiang) Pilot Free Trade Zone May 2, 2025. Source: Xinhua. This picture illustrates that modern cross-border consumer activities are confined to areas serviced by entry and exit tolls, whereas geographical diffusion into Yining or Kokdala is referred to Chapter 4.

The clearance time fell sharply. Transit time for imported goods decreased by about 70 percent, from 2 or 3 days to less than 16 hours. Processing time for locally originated exports through the port has been cut by about 80 percent, from 6 hours to 1 hour. This was achieved through smart railport procedures and origin-based fast clearance (Jiang, Zhang & Jian, 2026).

Two features of composition would be more meaningful than any of the reported aggregates.In other words, the 2026 municipal government report shows that, despite record-high trade volumes in 2025, the structure of trade remains limited. Vehicle export and daily commodity import through cross-border e-commerce is dominating the old structure, with very few specialty and high-tech exports. Secondly, the productive base underwriting those flows is narrow: secondary industry is a minor player in the local economy, there is low processing, no leading firms, and the sizes of cross-border e-commerce firms are small. Up to mid-2025, there had ever been only 23 processing firms within the bonded zone (Jiang, Zhang & Jian, 2026). Twenty-three firms in 3.61 square kilometres failed to create the productive linkages on which such zones are premised.

But there is an even more basic drawback to this kind of aggregate figure. Such measures

concern flows instead of what really occurs inside a given territory. Throughput merely registers how much product has passed a given checkpoint. It does not indicate where value was created, taxes paid, or money finally spent. In reality, millions of tons may cross docks but generate little activity around themselves because all the profitable activities take place somewhere else. Hence arises precisely the problem when trying to determine whether Horgos will remain just a corridor or become a growth pole. For that reason, each type deserves separate treatment in Chapter Four.

There is one methodological reservation which must be made about the vehicle series and thus other related series. Some sources give different versions, with figures for the highway port, the rail port, and the port whole; others frequently dispute the figures for Xinjiang province as a whole, which are even multiple. The figures cited above for 2024 and 2025 are all from Horgos Customs; their relative year-on-year changes confirm this. In this respect, figures from other sources are not comparable.

3.6 Actors and the Coordination Problem

The corridor's four levels of governance are summarized in Section 1.3. I now list the main actors at each level and how they fit together so well to substantiate the evidence for Proposition 3.

At the international level, the cooperation center is based upon the bilateral agreement, with three frequently highlighted problems in the Chinese language literature. The first is the pace: the formulation of the two states stipulations has been slow, and new agreements on the rules for emerging cross-border activities such as e-commerce supervision, digital trade standards, cross-border payment and settlement, and consumer protection have yet to be reached (Qiu, 2025). The second is the implementation, which leads to double standards, fragmenting operational mechanisms, and incompatibility between security and development priorities (Fu & Li, 2025, cited in Jiang, Zhang & Jian, 2026). The third is structural: The two sides' administrative agencies are asymmetrically constituted, and the duties of the Chinese management committee are beyond those of the two sides' management committee (Shen & Wang, 2025, cited in Jiang, Zhang & Jian, 2026).

On the other hand, customs cooperation works much more smoothly than expected.The two customs authorities have developed a cooperation mechanism for rail transit. They also recognize each other’s authorized economic operators and accept each other’s inspection results.However, the foundation of the process is far behind. The degree of

digitalization on the Kazakh side is low, and the two systems of intelligent logistics are not connected, so the border forms an "information island" from the literature, with poor coordination of efficiency, supervision blind spots, and inspection bottlenecks (Zhang, 2025; Xie, 2025, both cited in Jiang, Zhang & Jian, 2026).

The platform is allowed under State Council resolutions and is run under customs regulations. Many authors state that there is a non-apparent boundary of powers and functions between the center and Horgos administration and that the center should delegate a wide range of powers to the ground level of approval and implementation and strengthen central supervision afterward (Qiu, 2025).

Five government bodies are involved at the regional and municipal levels: the autonomous region, Ili Kazakh Autonomous Prefecture, the municipal government of Horgos, the municipal government of Yining, and the fourth division of the Production and Construction Corps in Kokdala. There is little coordination between the different levels, and each operates independently.The information is not shared between departments, while customs, border inspection, and market regulation agencies have limited coordination. As a result, integrated management remains difficult. (Shao, 2025). The two special districts in Xinjiang Kashgar, and Horgos-have not achieved coordinated development and resource sharing (Jiang, Zhang & Jian, 2026).

Zone and project-level management committees shall administer the economic operation. It is assumed that the government will transfer economic and administrative tasks to the committees based on the principle of gradation in the separation of zone and municipal administration. That has not happened, and functions balancing committee functions vis-à-vis local governments remains a sensitive task (Jiang, Zhang & Jian, 2026).

The first point concerns dispute settlement, because a lack of coordination at this level affects both courts and businesses.A joint China-Kazakhstan platform for dispute resolution has been established, and it is mentioned in the Supreme People’s Court’s 2022 Report on Foreign-related Adjudication. The regional authorities thus appealed, in February 2023, for the platform's full-substantive operation (fifty measures, item 44). The Horgos court has thus also established a dispute settlement unit at the center for cooperation. These arrangements are far from being a fait accompli. Both states have yet to reach an agreement on the law applicable to the instruments within the conjoined zones and cross-border enforcement has, until now, entirely rested on the goodwill of cooperation. In short, companies do not know what their remedy options are, let alone the rules that apply to them (Qiu, 2025).

The second observation concerns the asymmetry of coordination across these levels. Coordination is most advanced where it is operational and technical, and least developed where it requires institutional agreement; Chapter 4 returns to this asymmetry.The two sides have linked their procedures, shortened clearance times, and started accepting each other's inspection results. In contrast, the government agencies involved have not yet established links to coordinate jurisdiction, applicable law, data sharing, and the division of functions between the platforms. Efficiency gains thus far have come from unproblematic areas of reform, and the remaining constraints would have had to be institutionally coordinated.

Chapter 4 — Analysis: Outcomes Before and After Designation

4.1 Analytical Strategy

This chapter tests the three propositions developed in Chapter 2 against the evidence presented in Chapter 3 and the additional data series compiled for this purpose. The analysis is organized around the two thresholds defined in Section 3.2. The first is 2013, when the Silk Road Economic Belt was announced; Xinjiang was named its core area in the 2015 Vision and Actions. The second is 2023, when the State Council issued the Overall Plan for the China (Xinjiang) Pilot Free Trade Zone.

There are two kinds of thresholds. One refers to the incorporation, in 2013, of an existing border-port-development-zone-fiscal-regime-cooperation-center entity into a national plan. Another concerns the creation, in 2023, of a special mechanism devoted to implementing that plan in Horgos specifically. Hence, if something changes only beginning in the former period, then one can conclude merely national naming. But if something changes only beginning in the latter period, then one may infer enactment there afterward via the FTZ device. And if something changes starting from each period, then one may infer first national naming followed later by institution-building on-site. Finally, anything changing either never or else earlier than either cutoff cannot be attributed to the measure concerned here according to this way of thinking about these matters throughout this chapter.

There is an extremely large gap here because almost all of the institution-building occurred before the first cutoff date. According to the municipal government, the two heads of state agreed to establish the centre in 2003 and signed the agreement in 2005; the State Council approved the Chinese supporting area in 2006; the Central Work Conference on Xinjiang of May 2010 decided to establish the Horgos Economic Development Zone; and the centre opened and began sealed operation in April 2012. It covers 5.6 km², of which 3.43 km² lie on the Chinese side and 2.17 km² on the Kazakh side, and was the first cross-border economic cooperation zone China established with another country (Horgos Municipal Government, n.d.).

Each date mentioned above happened earlier than 2013; hence, the whole set of institutions had been completed beforehand and began functioning normally when nothing concerning the Belt and Road Initiative appeared yet. Therefore, in this study, attention will be paid merely to what has changed since each cut-off point arrived instead

of whether such organizations exist in general.

Two tools are carried forward from Section 1.6. The first compares the periods on either side of each threshold. The second is a share analysis. It measures Horgos's share of the directly administered Ili region, mainly in output, with fiscal revenue as a supplementary check. Other indicators, such as investment, employment and registered enterprises, are discussed in Section 4.8, together with the reasons they cannot be used. Absolute growth alone cannot show whether activity is concentrating or spreading, because the border and the interior may both grow. Shares can. A rising Horgos share means activity is concentrating at the border; a falling share means it is spreading inland. This is the question posed by RQ2, and it can be answered without making causal claims.

There is no room here for causality because there is no untreated comparator corridor from which to obtain a counterfactual. One corridor observed before and afterward does not allow identification of causation, nor may anything found here provide grounds for saying something about another corridor. What will emerge, therefore, concerns only whether what happened when it did seems compatible with having been caused by the Initiative; whether the improvements observed stayed on the border itself or reached inland; how each channel looks on its own (Sections 4.3–4.7); then the distributional test (Section 4.8); what this means for the propositions (Section 4.9); and finally some limits on what may be inferred (Section 4.10).

4.2 Data, Definitions, and Their Limits

Geography is held constant across the various series. It consists of Horgos City, Yining City, Kuitun, Kokdala and the 8 directly administered counties constituting Ili Prefecture. Tacheng and Altay have been dropped for reasons explained above. Kokdala deserves special mention， because although it lies within Ili Prefecture, it is a county-level city directly administered by the autonomous region and run jointly with the Fourth Division of the Production and Construction Corps under the "division-city integration" system (师市合一). Hence, Corps statistics appear irregularly, making estimates difficult when no figures can be found regarding what happens inside its territory.

There is also one more definitional issue involved in each prior-post comparison. Prior to 2014 there was no such entity as Horgos City. It came into being when the State Council approved the request made by the autonomous region back in 2012 (Xinzhengfa [2012] No. 54). On June 26, 2014, the State Council issued Guohan [2014] No. 80 approving its

establishment. Its area consists of five parts: the Yichegashan Xibe Ethnic Township and Mohur Pasture, which were formerly under Huocheng County jurisdiction; the 61st and 62nd Regiments, belonging respectively to Division Four of the Xinjiang Production and Construction Corps; and finally the Horgos port area. In fixing boundaries, geographical coordinates rather than unit transfers determine where they lie. Here again is another problem raised by this study itself: statistics yearbooks give information only about townships, pastures, and Corps regiments. Hence, if one wants to obtain an estimate for “Horgos” prior to 2014, one must first construct such a number by adding together these five components; however, two of them follow the rules set out by the Corps rather than those established by prefectures. In fact, most existing publications concerning “Horgos” before 2014 actually present port-level numbers because they relate to a certain territory. Port-level series will thus appear here when they exist, but their presence will always be explained.

There are two aspects of the nature of what is known that determine how much the chapter claims. One is that most of the information concerns the border area but says little about the interior. It includes customs release forms and local government reports full of figures relating to volumes shipped out, vehicles exported, trains operated, people passing through checkpoints, etc.; there is hardly any information about the makeup of industries based in Yining, where migrant workers come from, let alone details on suppliers of processors. What exists mainly pertains to investments; these too occurred mainly near frontiers. Another problem arises because records go back only so far; hence the lack of anything before 2013 other than harbor statistics instead of municipal accounts. Neither matter happens here by chance, nor does either cease affecting what the evidence allows one to claim once it has been pointed out.

The three caveats in Section 3.1 apply throughout this chapter. Most figures come from the agency that reports them. The figures measure flows through the port rather than value retained there, and they refer to geographic areas with different boundaries. This difference in geographic scope is addressed using a simple rule. A series is compared across years only when its geographic scope remains the same. Where the scope changes, the series is treated as discontinuous. The two periods are reported separately rather than combined.

The pandemic period requires a rule, but not the blanket one that is often applied. Freight and passenger traffic at Horgos behaved very differently between 2020 and 2022. Freight did not stop. Block-train services continued to grow during this period. The highway port

continued to handle cargo. In August 2023, it introduced round-the-clock freight clearance, becoming the first port in Xinjiang to do so.Passenger clearance, by contrast, was suspended in the first months of 2020. It resumed only on 8 January 2023, when the first inbound travellers passed through the arrivals hall of the highway port after the reopening (China Pictorial, 2023). No single published notice of the suspension has been identified in the sources available for this study. The suspension period is therefore dated from the reopening date and from the interruption visible in the passenger series.

Rule here applies to freight categories: there will also appear supervised tonnage, block-trains, automobile exports, cross-border e-commerce values, etc.; they remain unchanged throughout the entire period shown, hence their continuous nature.

The passenger sub-index consists of three components: entry-exit volumes at cooperative centers, tourists’ arrivals, and duty-free shops’ turnover. It will also be broken from early 2020 until January 2023, during which period no trends can therefore be calculated, making post-reopening values relative to their corresponding months in 2019 instead of in 2022. Increases observed right after reopening will all count as recoveries unless they exceed the respective figures in 2019; see more discussion on this point later in Section 4.6.

It is also one piece of evidence employed in Section 4.8; for three full years, although there was no passenger movement at all, there continued to be some traffic of goods across the border at Horgos; hence there was still something like normal business concerning transit. But nothing whatsoever occurred connected with any kind of locally based economic activity tied to passengers crossing back and forth. Thus again, by means of what happened naturally because of the existence of COVID everywhere, these two parts were divided from each other.

Breaks matter much more here than spaces. There are five interruptions altogether; none, however, can be detected from the face of the published numbers themselves. Unless due account is taken of each break when calculating its associated rate of change, an apparent alteration could arise merely because of a change in definitions. Table 4.1 sets out what needs to be done, and this is then followed everywhere necessary.

Table 4.1. Breaks in the statistical series

Break	When	Nature	Effect on comparison	Treatment in this chapter
Creation of Horgos city	2014	Administrative: the municipality was assembled from five predecessor units	No municipal series exists before 2014; pre-2014 figures describe either the port or the predecessor units	Port-level series used; any reconstruction stated explicitly
Change in the reporting scope of gross regional product	2018–2019	Statistical: reported output rises from RMB 5.39 bn to RMB 19.35 bn in one year	The two segments measure different units and cannot be joined	Segments reported separately; no growth rate computed across the break
Suspension of passenger clearance	Early 2020 to 8 January 2023	Operational: freight continued, passenger traffic stopped	Passenger series broken; freight series continuous	Passenger figures compared with 2019, not 2022; freight compared across the whole period
Revision following the fifth national economic census	2023	Statistical: output series revised retrospectively	Horgos reports RMB 20.84 bn for 2022 and RMB 18.74 bn for 2023 while recording growth of 2.7 percent	Revised figures used where published; break marked where they are not
Inclusion of pipeline natural gas in port tonnage	Varies by release	Definitional: some figures exclude the Central Asia–China gas pipeline, others do not	Reported tonnage differs by a factor of five between adjacent years	Scope stated with every tonnage figure; series with differing scope not joined

There is a note about each break: the founding of the city (in 4.2), the scope change and the census revision (in 4.10), suspension (in 4.2), and the gas question (in 4.3). It appears here because everything that follows refers to this table.

4.3 Channel One: Logistics and Transit Services

It is also the largest channel in volume and the one whose development became most evident afterwards. In 2002, the port handled 0.34 million tons of cargo; there were 146,800 entries-exits across borders and 29,000 vehicles passing through. The first China–Europe service ran through Horgos in 2016. Thereafter, block trains rose from fewer than four hundred in 2016 to 1,489 during the first half of 2019, reaching 8,730 in 2024 and 9,882 in 2025. They transported a total weight of 14.24 million tons in 2025; this figure was 17.8 percent more than in 2024 (Ma, 2026). Supervised freight reached 17.5 million tonnes in the first half of 2019, 41.78 million tonnes in 2023, and 46.43 million tonnes in 2025. Therefore, the study takes these years as reference points instead of providing an uninterrupted yearly sequence. Although no such information is available according to publicly accessible documents, one can still learn something about what happened from them. In fact, the amount of tonnage handled grew by more than two

orders of magnitude between 2002 and 2025, mostly afterward. Rail traffic hardly changed at all beforehand because nothing like this existed until it suddenly appeared in 2016 before growing gradually to nearly ten thousand per annum by 2025. It thus satisfies the time requirement set out above.

The second threshold presents a different pattern.Total supervised freight grew by only 1.9 percent in 2025. By comparison, block-train services grew by 13.2 percent, while the tonnage they carried increased by 17.8 percent.

There seems to have been more growth in rail traffic itself than in overall port traffic. Something must then have remained constant or decreased among the rest of what makes up port traffic. Part of the difference could arise from definition rather than reality. In its communication for 2021, 8.01 million tonnes appear, and pipelines carrying natural gas are expressly ruled out. But nothing indicates whether they are included or omitted from the headline numbers given for 2023 and 2025. And part of the Central Asian–Chinese gas pipeline does enter China via this very port. Hence one cannot yet treat all these statistics together as constituting some kind of steady trend until their respective scopes become clarified. None actually shows any obvious pickup in tonnage once the free-trade zone began operating. Congestion, therefore, is understandable if transfer facilities did not grow along with trains’ becoming increasingly frequent.

Tonnage matters, but so does its makeup. And once again, there seems little doubt about which way most movement is heading. In the first four months of 2019, the port handled 11.23 million tonnes of imports compared with only 0.37 million tonnes of exports. Weighted according to tonnage alone, imports accounted for roughly thirty times more than what was exported.

Imported goods consisted mostly of natural gas, timber, and leather from Turkmenistan, Uzbekistan, and Kazakhstan; exports consisted mostly of machinery and electric products, garments, fruits, and vegetables. Most went to other Central Asian countries, though some also went to Russia (Horgos Customs, 2019). In fact, most of its traffic by weight consists of imports made up largely of raw materials passing straight into the country's own system. None of the latter enters the local economy at all; thus, a corridor carrying mainly eastbound pipelines full of gas cannot help develop industry within itself either. Therefore, these impressive-sounding figures concerning how much material passes through say nothing about how economically active this distant land really is.

There is no point here in asking about volumes at all; the issue concerns what portion of

its total value actually remains in Horgos. A gauge break requires certain actions on each side of a border: transshipment, handling, sorting, storing, marshaling, forwarding, etc. This is one element of Corridor Value, and it does occur physically within Horgos itself. However, it is only a tiny fraction: the profit made by performing these operations amounts to very little relative to the worth of the merchandise being moved. Nor are the companies earning such profits likely to reside locally. They consist either of divisions belonging to state railways (and hence recorded under some other region altogether when calculating incomes) or else forwarders whose arrangements originate elsewhere altogether (in coastal areas or major cities inland). Nothing resembling an inventory exists showing who holds licenses for this kind of activity in Horgos itself. Hence, the conclusion depends entirely upon how these businesses operate generally throughout China, instead of resting on any actual enumeration found concerning them particularly in this locality.

Hub-and-spoke wise, investment at Horgos enlarged the hub's own volume but did nothing apparent for the links connecting the hub with Yining and elsewhere inside Ili. As regards the logistics channel, therefore, one may say that P1 holds true in some respects: although throughput grew fast afterwards, the amount remaining at the border seems rather modest (it consists merely of a small service mark-up). Nothing suggests that any part reached farther inward.

4.4 Channel Two: Firm Registration and the Fiscal Regime

There are two possibilities here, which appear very similar when certain kinds of aggregate statistics are consulted. One concerns the actual founding of firms operating somewhere. Another arises if companies register themselves somewhere mostly in name only, so that they can take advantage of tax benefits granted there (Krueger, 1974; Tollison, 1982). In this sense again, Horgos offers especially clear evidence concerning the latter possibility.

Starting from the tax system launched shortly after the Central Work Conference concerning Xinjiang held in Beijing in 2010, qualified newly established enterprises would enjoy exemption from company profits tax for five years if they belonged to some preferred categories. Reductions were granted locally regarding both VAT retention by local treasuries themselves and individual income taxes (see Section 3.2 above). Their impact seems considerable according to registration records available afterwards. There appears to be considerable difference among various figures reported by media outlets.

According to press reports dated 2018, either nearly ten thousand or over twenty thousand enterprises had been registered altogether till then in Horgos alone. Yet there lived approximately seventy-one thousand residents there according to the seventh national population census conducted in 2020. At most times, more than sixteen hundred cinema-related firms existed although nowhere suitable for actual filming existed at all.

There is also a record concerning the order of events and their dates, and this matters because attribution depends partly upon these facts: In January 2018 the management committee of the Horgos Economic Development Zone issued a notice to regulate enterprise registration (Jiemian News, 2018), then in March an inspectorate set up jointly by the MOF found during a visit that empty shells existed among approximately two hundred entities transferred annually by several others who had profits exceeding twenty million RMB apiece onto daughter firms registered there, according to what was said at this meeting. Then, beginning sometime after June until October, at least another 106 producers announced they would withdraw (National Business Daily, 2018; Phoenix Finance, 2018) altogether from this area via advertisements placed in locally issued newspapers. All this information comes from journalists reporting while events happened, rather than from municipal orders issued officially later, which cannot now be obtained via official channels online, although they seem to agree regarding when everything occurred according to available evidence.

That is why the timing test may also apply to registration figures. Were these determined by an initiative-type consideration, there ought to have been upward swings following both thresholds; if influenced only by taxes, an upward movement would follow reduction of withholding and then cease once attention was paid to compliance. Something like this seems supported by what actually happened. Registration took off three full years before the lower limit arrived and ended nearly half a decade afterward. It responded not because someone changed something connected with corridors but simply because taxation officials did something about how they themselves carried out their responsibilities. Continuous annual records exist concerning numbers registered and subsequently deleted from registers kept nationally. Although available somewhere domestically, nowhere does one find published totals based upon them. Hence only turning points known from documents remain worth considering here at all.

Two indicators help to distinguish between local presence and simple registration. The first is whether a registered entity has premises and staff in Horgos. The 2018 reform targeted multiple registrations at a single address, providing direct evidence that many

registered entities had no actual presence there. The second is municipal tax revenue, which does not follow the pattern expected in a normally growing border economy. General public budget revenue in Horgos was 4.13 billion yuan in 2021 and 2.52 billion yuan in 2025. Revenue grew by 17.1 percent in 2025, which implies a figure of roughly 2.15 billion yuan for 2024.(Horgos Municipal Government, 2022, 2026). The general public budget revenue therefore roughly halved between 2021 and 2024. At the same time, both output and trade increased. Trade exceeded 100 billion yuan for the first time in 2024.

It hardly needs elaboration here. In late 2024 there were reportedly some 17,694 registered companies and 71,872 registered individual businesses in Yining itself; the total resident population according to the 2020 census was then about 778,047 (Yining Statistical Bureau, 2025). Horgos had approximately 71,466 inhabitants when it obtained these figures in 2020; they show that at least ten thousand but possibly up to twenty thousand firms had already registered there. Taking the smaller number, this amounts to roughly one registered company per seven people, whereas in the prefectural capital itself there was only one for every forty-four residents. But once again, such statistics need not mean much unless they can actually be verified. Nothing seems to have appeared yet concerning recent developments in the latter case, hence the reason why only approximate values dating back several years appear here.

It concerns the following analysis because if numerous registrations occur only nominally, then the high numbers of companies registered in Horgos cannot reflect positive developments concerning what is really happening economically on site. Hence, too much emphasis placed elsewhere upon registration figures alone could result erroneously in an overly large figure shown subsequently for Horgos’s own proportion. That is why attention is paid somewhat less hereafter to registrations themselves but instead addresses investments, finance revenues, and jobs created.

For the propositions, the registration channel supports P1 because enterprises are concentrated at the border without corresponding economic activity.It also supports the rent argument behind P2. The enclave attracted firms through fiscal incentives rather than through productive advantages that could create links with inland suppliers.

4.5 Channel Three: Employment and Population

Employment seems to provide the most important avenue for border activities to affect households inland, but there is hardly any information about this topic at all. With a total

resident population of 71,466 according to the 2020 census, Horgos is itself still just a small town. By the end of 2018, among the town's registered inhabitants, numbering some 64,800 persons, about 31,600 fell under municipal administration while another 33,200 belonged to the Production and Construction Corps; only 23,000 were considered urban residents, whereas the rest (41,800) were counted as countryside dwellers.

In the census, Yining's own population reached nearly 778,000 people altogether, whereas the directly administered parts of Ili Prefecture amounted to some 2.85 million inhabitants in total. Hence Horgos makes up barely more than two and one-half percent of the whole region that it serves as an entry point. Therefore, no matter what kind of work the port itself creates locally, most workers will have to live elsewhere. Lastly, they divide their own registration among municipal and Corps jurisdictions. Consequently, there will still be two distinct systems regulating whom they hire even when hiring locals themselves.

This matters if one wants to answer RQ2, because it then depends on whether these people work there who come from Yining City itself or from other nearby areas under its jurisdiction. In fact, nothing about how many employees hold each type of position exists anywhere online. Of all the available statistics concerning the town's inhabitants, something like this seems most relevant here. According to census records, 71,466 live there normally, but another 64,800 have registered officially as living there. Hence hardly any difference apparently exists, from which nothing follows regarding whether many others actuallywhether many non-registered residents also live there

A second factor supports the same interpretation.Public services in Horgos, especially schools and hospitals, are limited compared with those in a prefectural capital. This is consistent with the smaller size of the city. A city of around 70,000 people cannot provide the same level of services as a city of 700,000. Limited public services make it difficult for a place to retain families.Workers may stay at the border during the week while keeping their families in Yining. Others may commute along the expressway, which now takes less than two hours. The effect is not clear. It limits how much of the wage bill is spent in Horgos. However, it may also make household spending in Yining one of the few genuine channels through which economic activity reaches the interior. This thesis therefore treats this as a hypothesis, but the available statistics do not allow it to be tested.

The available evidence does not allow a firm conclusion on this channel.The evidence suggests that employment is the channel most likely to carry gains inland. The population data are also consistent with Horgos being a place where people work rather than

settle.Both points are relevant to P1 and RQ2.

4.6 Channel Four: Cross-Border Retail, Tourism, and E-Commerce

This is the channel that the free-trade-zone plan puts first. As noted in Section 2.5, the plan gives priority to cross-border logistics, cross-border tourism, financial services and exhibitions, with industry second.

There were altogether 3.893 million entries and exits at the Cooperation Centre in 2023. That was an increase of 87.2 percent over the previous year because land connections resumed and visa restrictions were lifted mutually (according to Jiang, Zhang, and Jian, 2026). However, according to rule set out from section 4.2, the percentage rise needs to refer to 2019 instead of 2022; otherwise, one cannot explain what happened here. In the first full year of operation under seal conditions (2012), there were about 270,000 crossings(Horgos Cooperation Centre Administration, cited in Global Times, 2023). Then came successive increases until reaching nearly six million in each of the last two years before the pandemic broke out. Therefore, although the number did rise sharply again from barely four hundred thousand to nearly four million afterward, that still amounted to less than sixty percent of where things had stood in 2019.Recovery was completed in the following year. In 2024 the centre recorded one million visitors by 27 March, two million by the end of May and four million by 16 August, 81 percent more than at the same point in 2023. At this pace, the annual total is likely to have approached or exceeded the 2019 level. All of these developments took place while two kinds of favorable change happened externally worldwide: borders reopened on both side, and visas became unrequired both side. But nothing like that happened at any point concerning FTZ status attribution issues.

There is another question that matters much more: where visitors spend. The answer is not encouraging.According to regulations issued by competent authorities, every visitor can purchase up to ¥8,000 worth of tax-and-duty-free merchandise daily while staying inside the cooperation center. Visitors enter, buy what they want, and then depart. Therefore, most economic value created during their visits remains within these limits (see Figure 3.2). To bring some benefits inward, tourists themselves must either stay overnight in Yining or proceed farther into Ili. However, two features of the current system rule this out. One concerns how duty-free allowances apply; they run according to persons per day. Hence, they might encourage repeated same-day visits instead of lengthier stays. Average waiting times have decreased sharply to merely several seconds

nowadays, thus facilitating repeat trips. Another issue regarding efficiency arose because the aim of improving ease of entry-exit was pursued more vigorously than striving to retain more of the economics involved internally. Lastly comes the issue of size raised when considering the whole region. Tourism statistics show that approximately 59.72 million people visited the non-directly administered of Ili Prefecture altogether in 2019. Spending reached nearly 70.11 billion yuan. In 2025, the region received 92.29 million visitors, who spent 89.03 billion yuan (Ili Prefecture Statistical Bureau, 2020, 2026). Compared with these regional totals, the 3.893 million crossings at the Cooperation Centre in 2023 are only a small share of tourism in Ili. Moreover, these figures count border crossings, not individual visitors.

Tourism does exist elsewhere within Ili thanks partly to its prairies, rivers, valleys, summers, etc.; hence cross-border shopping constitutes only a tiny fraction of tourism throughout this large area overall. No figures concerning arrivals or tourism revenue exist for Horgos alone nor for Yining separately. Therefore, one cannot find out where spending occurred from tourism accounts alone, but one needs to draw conclusions according to how duties operate and what the enclosed area looks like.

There is also something similar in cross-border e-commerce. In trade volume, Horgos reached RMB 30.97 billion in total in 2025. At present, there are altogether 45 companies engaged in warehousing, logistics, livestreaming, platforms, etc. (Jiang, Zhang & Jian, 2026). On average, each company accounts for nearly RMB 690 million. Therefore, only a few traders account for most of the trade volume, showing great concentration here. Products produced elsewhere first go to Horgos for consolidation before leaving the country. Currently, this function mainly lies in the International Logistics Park, which was completed in October 2025 (see Sect. 3.4). The figure mentioned above refers precisely to what passes through the customs station; value creation takes place when goods gather and wait to clear customs, stay in warehouses, or await sale. As stated in its annual report (municipal level) of 2026, however, trade is narrowly defined and consists mostly of common necessities. Hence, one can conclude what has just been said about how values arise within the territory of Horgos. Nothing about origins is reported in official statistics. One concludes from their absence that such merchandise came together because nothing resembling any of this exists locally (see Sect. 4.7).

It is a channel that supports P2, because there will likely be considerable improvement on precisely those accounts, due mostly to trade, retail activity, and travel-related industry within the enclosed area itself, according to current knowledge.

4.7 Channel Five: Productive Linkage and the Bonded Zone

Here too some result must appear if such connections have indeed been created by the corridor. The bonded zone was intended to accommodate processing, maintenance, and leasing activities, along with logistics functions (see Sec. 3.3); according to the FTA scheme, industry is to exist alongside services in Horgos. One cannot explain merely on the basis of how policies were drawn up why nothing appears here either.

There is very little evidence available. As of mid-2025, there were twenty-three processing companies operating inside the 3.61-square-kilometer bonded zone itself (Jiang, Zhang, and Jian, 2026). Moreover, according to the overall picture presented by the structure of its own economy, Horgos does indeed differ greatly from what lies inland. In terms of Gross Regional Product (GRP), Horgos reached RMB 20.84 billion in value in 2022. Of this amount, RMB 2.09 billion came from the secondary sector (that is, 10.0%), whereas RMB 17.44 billion derived from services activities (or precisely 83.6%). In 2024, the directly administered portion of Ili Prefecture had reached RMB 180.67 billion in GRP, wherein the secondary sector already accounted for no less than 32%. And Yining City achieved RMB 42.69 billion; here again, the secondary sector contributed 33.4%, reaching almost one-third(Ili Prefecture Statistical Bureau, 2025; Yining Statistical Bureau, 2025). Thus, relative to its hinterland, Horgos still needs to develop much more industry before living up to its designation to accommodate such activities. Nevertheless, something resembling industrial development can be observed. Industry's own increase exceeded 100% over this year industrial value-added produced by large-scale enterprises went up from RMB 2.22 billion in 2024 to reach RMB 4.5 billion in 2025 (an increase of 102.7%). Yet even then, industry barely amounted to nearly one-fifth of the entire town’s economic output, because total output reached RMB 22.75 billion (Horgos Municipal Government, 2025, 2026). Five kinds of industry have been chosen as priorities for future development: namely, foodstuffs based on agriculture, textiles along with apparel products, gold together with other types of new materials, advanced equipment manufacture generally, and finally pharmaceutical products connected with biology in particular.

For four of these sectors, Ili has a limited local supplier base. Firms would therefore need to source inputs from other provinces, making backward linkages with the local economy more difficult.Agricultural processing is the exception. Ili is an agricultural region, so this sector provides the clearest opportunity for links between inland suppliers and the border. It therefore provides the most direct test of P2.No published source

records whether the processors in the bonded zone source inputs from producers in Ili. This question therefore remains open. What can be established is that the zone hosts only twenty-three processing firms. This is too few to constitute a supplier network, regardless of where they source their inputs.

The theoretical expectation is clear. The literature on backward linkages suggests that zones are more likely to connect with their host economies when a local supplier base with some productive capacity already exists (Johansson & Nilsson, 1997; Madani, 1999).

As discussed in Section 2.4, Melitz (2003) adds that border frictions raise the productivity threshold for exporting. As a result, few inland firms may be able to serve foreign markets directly. Together, these arguments suggest that backward linkages are likely to be weak in a region whose economy is based mainly on agriculture and services.

According to what has been found here based on the available evidence, P2 holds true concerning this particular channel. Twenty-three processors make too small a productive base for such a large area. There has also been nothing yet about local buying by processors. Although the plan itself does give Horgos an industrial function, the lack of industry cannot then reflect the planners' wishes but must arise instead from something that went wrong during implementation. This point will appear again later (see Section 5.3).

4.8 The Distributional Test

The channels show how cross-border mobility translates into economic activity. The distributional test then asks where this activity is located. It uses the share analysis described in Section 4.1: Horgos's share of regional output in the directly administered Ili region, read against its share of population. The share is compared across the two thresholds (Table 4.3), and fiscal revenue is used as a supplementary check for 2025.

Foreign trade is excluded from the share test. Almost all of the prefecture's foreign trade passes through the port, so Horgos accounts for almost all of it by construction. This share therefore says little about how economic activity is distributed across the region. Fixed-asset investment, employment and registered enterprises are also excluded, for the reasons given at the end of this section.

Three outcomes are possible. A rising Horgos share with rising absolute values in both Horgos and the inland cities indicates concentration with diffusion: the border grows

faster, but the interior grows too. A rising share with stagnant inland values indicates capture: the gains stay at the border. A falling share indicates diffusion: growth is spreading inland. In the terms of Myrdal (1957), the first and third outcomes correspond to spread effects and the second to backwash.

Two of the shares can already be calculated. Table 4.2 reports them alongside population figures for comparison. The directly administered part of Ili Prefecture recorded a gross regional product of 164.64 billion yuan in 2023 and 180.67 billion yuan in 2024. Horgos recorded a GRP of RMB 18.74 billion in 2023, based on the revised figure published after the fifth national economic census. The 2024 figure was about RMB 20.26 billion. The 2024 figure is also consistent with the 2025 outturn, which reports 10.6 percent growth from the 2024 level. Horgos therefore accounted for 11.4 percent of regional output in 2023 and 11.2 percent in 2024.

Table 4.2. Output, population and output per head, directly administered Ili region, 2024

Unit	GRP (RMB bn)	Share of region	Population (2020)	Share of region	GRP per head (RMB)
Horgos	20.26	11.2%	71,466	2.5%	283,500
Yining city	42.69	23.6%	778,047	27.3%	54,900
Rest of the region	117.72	65.2%	1,998,880	70.2%	58,900
Directly administered Ili	180.67	100%	2,848,393	100%	63,400
Memo: Horgos 2023	18.74	11.4%	—	—	—

Note: gross regional product from the 2024 statistical communiqués of Horgos, Yining city and the Ili prefecture; population from the 2020 census, which is the last year for which comparable figures exist for all three units. Output per head is computed here as output divided by census population; the method reproduces the officially published figures for Yining (RMB 53,822) and for the region (RMB 63,116) to within two percent, which supports its use for Horgos, where no per-head figure is published. The Horgos 2023 figure is the one revised after the fifth national economic census and is not comparable with earlier years (section 4.10).

The table shows a clear imbalance. Horgos produces 11.2 percent of regional output, but it has only 2.5 percent of the population. Output per head in Horgos is about RMB 283,500. This compares with RMB 63,400 for the region as a whole and RMB 54,900 for Yining. In other words, Horgos produces about four and a half times the regional average per person, and more than five times the level of the prefectural capital. Yining looks very different. Its share of output (23.6 percent) is close to its share of population (27.3 percent), and the same is roughly true for the rest of the region. Only Horgos stands out. This pattern is typical of an enclave: a small area with high output but a narrow economic base. However, a single year shows only the level of concentration, not its direction. Whether the gap is widening, as P1 predicts, requires a time series, which Table 4.3

provides.

Table 4.3. Horgos as a share of the directly administered Ili region, gross regional product, by reporting basis

Year	Horgos (RMB bn)	Region (RMB bn)	Share	Reporting basis
2016	3.90	78.20	5.0%	Municipality
2017	4.74	85.69	5.5%	Municipality
2018	5.39	93.99	5.7%	Municipality
2019	19.35	119.07	16.2%	Development zone, several parks
2023	18.74	164.64	11.4%	Development zone; post-census revision
2024	20.26	180.67	11.2%	Development zone; post-census revision
2025	22.75	193.63	11.8%	Development zone

Note: no share can be computed before 2014, when Horgos city did not exist; the pre-2013 baseline is carried by the port-level series in section 4.3. The two panels rest on different reporting units and must not be joined: the rise from 5.7 percent in 2018 to 16.2 percent in 2019 records a change in what is counted, not growth. Horgos figures from the Ili yearbook (2016–19), the municipal communiqués (2023–24) and the 2026 municipal work report (2025); regional figures from the prefectural communiqués. The 2024 municipal work report forecast RMB 23.48 bn for that year against the RMB 20.26 bn finally reported, a gap that illustrates the distance between work-report estimates and settled statistics.

There is one thing about these accounts that needs mentioning before the numbers themselves appear: from 2019 onward, the figures given here for “Horgos” refer to the whole Horgos Economic Development Zone, which consists of multiple parks within one zone; some but not all parts actually adjoin the frontier. In fact, part of the zone lies quite far inside China: there is also an Industrial Park located in Yining City (about ninety kilometers away); another belongs to Division Four of the PCC; while yet another supportive industry park exists at Qingshuihe Town in Huocheng County itself (Horgos Statistical Bureau, 2022). Thus, the numbers shown have included some degree of inland activity since their release began. Until then, it seems much more limited in extent and includes only the municipality itself (hence the large jump from 3.9 billion yuan reported for 2016 to nearly 19.35 billion for 2019). Two important points arise from this. First, the percentage calculated here exceeds what actually applies along the line itself because some portion of its own top number belongs inside Yining City. Second, the division between enclaved territory and everything else that occupies so much attention throughout this study cannot appear sharp when it comes to the very records used. Lastly, what the indicator concerns in each period was worked out according to the park breakdown contained in that year’s municipal communication instead of appearing explicitly therein.

It turned out otherwise, however, and this needs to be stated clearly: as regards the smaller entity (taken municipally), there was a steady rise from 5.0 percent in 2016 to 5.7 percent in 2018; but concerning the larger unit (taken according to the development zone), there was a decline from 16.2 percent in 2019 to 11.4 percent in 2023 and then to 11.2 percent in 2024, followed by some recovery to reach 11.8 percent in 2025. In fact, over these years, total production hardly changed at all: it rose from nearly 19.35 billion yuan in 2019 to approximately 22.75 billion in 2025, which means an increase of merely 17.6 percent over this whole six-year span, whereas the directly controlled area advanced from about 119.07 billion yuan to around 193.63 billion, thereby achieving growth of close to 62.6%. Therefore, according to what was decided earlier, if the ratio decreases, this is called diffusion rather than capture. In other words, during the years when corridor traffic grew fastest, Horgos's share of regional output fell rather than rose. It began to recover only in 2025, and only slightly.

There are then three qualifying points regarding what weight this can bear. The first is the fiscal regime.Part of what had previously appeared as production and taxation at Horgos itself involved entities incorporated there without being based there (see Section 4.4). When their special treatment ceased, some activities ceased to appear because they had never really existed at all. The second is the census revision. It lowered the reported figure for Horgos in 2023, but the 2019 figure was published before the revision and was not changed. Part of the fall between 2019 and 2023 may therefore reflect the revision rather than a real decline. The third is the pandemic. For three of the five years, passenger traffic at the border was suspended, and with it the shopping and tourism economy of the enclave. Freight continued, and so did farming and industry in the hinterland. The comparison therefore covers a period that hurt the border more than the interior. None of these factors reverses the direction of the change. Taken together, however, they mean that the falling share is evidence against growing concentration at the border, not evidence that growth is spreading inland.

There is also one more thing worth checking in its own right. A declining proportion may result just as readily if there has been considerable progress on the divisor side; tourism seems likely here, since Ili is famous everywhere and many more people visited during this time than ever before. But this cannot explain what happened according to the available information about how each part changed size throughout the entire time from 2019 onward. Industry accounted for 29.39 billion out of nearly everything produced

locally (which totaled almost 120 billion) at first but then reached close to twice that amount itself afterward (57.79 billion); thus its own portion increased sharply from around one quarter originally (approximately 24.7%) until nearly reaching one third eventually (almost 32%). Services decreased correspondingly from having held more than half originally (about 58.1%) down toward holding somewhat less afterwards (just over 51.1%, actually). Finally, something called "Bulletin of Ili Prefecture Statistics explains later why industry figures rose so much overall: nonferrous metals smelting rose177.3%, non-ferrous ore mining 165.5%, and mining as a whole 42.5%(Ili Prefecture Statistical Bureau, 2026).

. Hence the whole region expanded because resources were developed further inside, rather than owing to greater success achieved either by tourism or by trade.

Table 4.4. Composition of growth, directly administered Ili region, 2019–2024

Sector	2019 (RMB bn)	2024 (RMB bn)	Change	Share 2019	Share 2024
Primary	20.52	30.55	+48.9%	17.2%	16.9%
Secondary	29.39	57.79	+96.7%	24.7%	32.0%
Tertiary	69.16	92.33	+33.5%	58.1%	51.1%
Total	119.07	180.67	+51.7%	100.0%	100.0%
Memo: Horgos 2022	—	20.84	—	secondary 10.0%	tertiary 83.6%

Note: prefectural figures from the Ili statistical communiqués for 2019 and 2024; Horgos from the municipal communiqué for 2022, the last year before the census revision for which a full sectoral breakdown has been located. Growth is computed on current prices and is not adjusted for the revision recorded in Table 4.1. Tourism receipts, which rose from RMB 70.11 bn in 2019 to RMB 89.03 bn in 2025, are gross visitor spending and are not a component of gross regional product; they are reported in section 4.6.

That finding matters more than the share arithmetic it explains, and it requires a more precise formulation than the observation that the two economies grew separately. Both are covered by policy, and by the same framework. The Silk Road Economic Belt core-area programme has contained from the outset two distinct components: a corridor and trade component, expressed as regional centres for transport, commerce and logistics, finance, culture and medical services, and corridors and ports to carry them; and a resource component, expressed as the “three bases and one channel”, meaning large oil and gas, coal and coal-chemical, and wind-power bases, together with the national overland energy and resource channel. The five strategic positions assigned to Xinjiang from 2023 restate the same division, placing the gateway for opening to the west alongside the national energy and resource security base as separate items. The

formulations quoted here are those used in the official presentation of the core-area programme and of the five strategic positions; the founding texts are cited in the references.

Reading against that division, however, the evidence here suggests more than just failure on the part of the corridor itself. Under the resource-transfer arrangement, Ili developed industries, but none appeared along the border under its control until later. Trade runs only one way because nothing produced locally leaves via Horgos. Of the RMB 138.5 billion worth of merchandise trade recorded by the directly controlled area for all of 2025, imports amounted to only RMB 6.79 billion, whereas exports reached RMB 131.71 billion. Nearly 86 out of every 100 yuan came solely from Horgos (RMB 118.65 billion). But what passes through Horgos does not originate in Ili; instead, vehicles, machines, household appliances, and similar goods converge there from elsewhere before being shipped outward. As for what Ili actually produces (coal, electricity, and so on), it flows eastward instead, toward fulfillment of separate plans concerning the transfer of energy resources from Xinjiang to other parts of China. Thus, while hinterland industry looks eastward and border trade points westward, the two never intersect.

It does not qualify the thesis negatively but positively, by pointing out that there is no connection; therefore, the lack of correlation cannot constitute proof that nothing happened because of Belt and Road policies in Ili itself. Instead, something occurred due to their existence along two paths never intended to affect each other in this way: while one kind of corridor mechanism acted on the frontier region, another type of resource-based measure operated inside the basin. Nothing stated anywhere says anything about development occurring throughout all these places simply because both things happened simultaneously everywhere concerned. This topic also comes up again later (Chapter 5).

Two further shares can be computed for 2025 and they point in different directions, which is itself instructive. Horgos recorded general public budget revenue of 2.52 billion yuan against 17.23 billion for the directly administered region, a share of 14.6 percent, higher than its share of output. Its foreign trade was 118.65 billion yuan against 138.50 billion for the region, a share of 85.7 percent. The border therefore accounts for about a tenth of what the region produces, a seventh of what it collects in tax, and six sevenths of what it trades. Trade is concentrated at the border almost completely, output is not, and the gap between those two facts is the subject of this chapter.

What survives is the level rather than the trend. Horgos still holds about eleven percent of regional output with two and a half percent of the population, and produces some four

and a half times the regional average per head (Table 4.2). The enclave is real; what the evidence does not support is the claim that it has been drawing an increasing share of the region's activity to itself. P1 is accordingly assessed as partly supported in section 4.9, and the compositional evidence of sections 4.3 to 4.7 carries more of the argument than the share series does.

Three further indicators were considered for the share test and are not used, for reasons that are themselves informative. Fixed-asset investment cannot be expressed as a share because the prefectural communiqués report it only as a rate of change, not as a level; the denominator is not published. Employment is not reported on a comparable basis for county-level units. Registered enterprises are reported, but section 4.4 has shown that the count at Horgos is inflated by nominal registration, so a share built on it would measure the fiscal regime rather than economic activity. What remains are output, fiscal revenue and population, and of these only output and population are available for both the numerator and the denominator across several years. The share test therefore rests on output, read against population, and is supported rather than replaced by the channel evidence of sections 4.3 to 4.7.

The comparator is the Guangdong evidence reviewed in section 2.3. Barbieri, Pollio and Prota (2020) found that the presence of a development zone in one county was associated with lower output in neighbouring counties, and Zheng, Barbieri, Di Tommaso and Zhang (2016) found that zone effects were weakest in less industrialized regions. Ili is less industrialized than any part of Guangdong, and the prior expectation drawn from that literature is capture rather than diffusion.

One piece of direct evidence is already available, and it comes from the development zone’s own accounts. The zone is organized as “one zone, several parks”, of which the Horgos park sits at the border and the Yining park lies ninety kilometres inland. In 2021 the two parks divided the zone’s activity very unevenly, and in opposite directions. The Yining park accounted for 42.1 percent of the zone’s industrial output above designated size, against 36.0 percent for the Horgos park; but it accounted for only 1.6 percent of the zone’s foreign trade, against 85.1 percent for Horgos (Horgos Statistical Bureau, 2022). Industry sits inland and trade sits at the border, and the two barely meet. This is what a corridor without linkage looks like in a single pair of figures: the inland park is not processing what crosses the border, and the border park is not sourcing from the interior. Taken with the composition of the Horgos economy itself, where services accounted for 83.6 percent of output in 2022, the picture is of a border economy built on trade and

services and an inland economy producing for other markets. The same breakdown is not published for later years, so whether the split between the two parks has narrowed since 2021 cannot be established.

The indirect evidence from sections 4.3 to 4.7 points the same way. Throughput grew very fast, but the retained margin is narrow; registrations are largely nominal; e-commerce value runs through a few operators; processing is thin; and the channel most likely to carry income inland, employment, is the least documented. The plan contains no mechanism for diffusion. None of this is a share measurement, however, and it cannot substitute for one.

4.9 Assessment of the Three Propositions

Table 4.5 summarizes the evidence for each proposition. The assessments are stated at the strength the evidence allows.

Table 4.5. Assessment of the propositions

	Proposition	Evidence	Assessment
P1	Instruments and infrastructure are concentrated in Horgos, and flows after 2013 are not converted proportionally into activity in the interior	Level: 11.2% of regional output with 2.5% of population and 4.5 times average output per head (4.8). Trend: the Horgos share fell from 16.2% in 2019 to 11.2% in 2024 (Table 4.3), qualified by the collapse of the registration regime, the census revision and the pandemic suspension	Partly supported: concentration in level is clear, accelerating concentration is not
P2	Spillovers are limited by absorptive capacity and by a service-oriented policy design	Gains concentrated in logistics, retail, tourism and e-commerce (4.6); 23 processing firms and no evidence of inland sourcing (4.7)	Supported
P3	Integration depends on coordination across levels of implementation, not on infrastructure alone	Largest efficiency gains came from procedural reform (3.4, 3.5); largest rise in person flows followed international-level measures (4.6); coordination failures documented at each level (3.6)	Supported

There also needs to be some comment on P3 itself. The greatest improvements made there did not derive from additional physical facilities but rather came about because certain procedures were changed. Self-driving export vehicles were allowed, which brought down clearance time from over thirty hours to less than five; clever ways of using rails together with ports led to reductions of about 70% regarding imports’ overall journeys while exports underwent processing about 80% less time (see again sections 3.4 and 3.5). As far as the bottleneck caused by too little room for switching cars when gauges change goes, nothing was done about that through investments either. Finally, all of these problems connected with lack of coordination identified later in chapter 3 (from

‘an "information-island" problem exists at borders’ onward) concern exactly the kinds of transactions costs mentioned before in section 2.4 as being reduced if good organization prevails (according to Coase [1960] and Williamson [1979]). Thus, once again one finds that how well each level interacts matters far more here than anything constructed.

Taken together, the evidence gives a provisional answer to RQ1. The channels differ greatly in strength. Logistics is the strongest in volume but retains a narrow margin locally. Retail, tourism and e-commerce are strong and favoured by the policy design, but largely enclosed. Employment is moderate, and it is the channel most likely to reach Yining. Registration is large in number, but mostly nominal, and predates the initiative. Productive linkage is the weakest. The answer to RQ2 depends on the share series in section 4.8, but the indirect evidence points to capture at the border. Chapter 5 develops both answers.

4.10 Threats to Interpretation

There are still four dangers facing interpretation.

There is then the question of what one attributes to these thresholds. Change occurring afterward could indeed indicate that the initiative took effect. But there could have been completion of construction projects already under way, reopening following the end of restrictions connected with COVID-19 worldwide, general progress throughout Xinjiang, or even nationwide development. Region-wide figures show total output rising overall from approximately 1,359.71 billion yuan in 2019 to nearly 1,912.59 billion in 2023, hence by some 40.7 percent. For directly administered Ili alone, however, the respective values were about 119.07 billion initially and roughly 164.64 billion finally, yielding growth of merely 38.3 percent. Thus Ili kept pace with the rest of Xinjiang but did not rise faster than others because of corridors. Nor can either cutoff point itself provide entirely clear information. Startup of transfrontier train service took place soon afterwards. In addition, removal of visas occurred at the same time as reaching the later boundary value, along with the ending of pandemic measures everywhere. Hence this latter stage cannot serve as a basis for drawing conclusions concerning what difference the establishment made.

Secondly, there is also the Kazakh side; if something shifted westwards, toward either Khorgos Gateway Dry Port or Nurkent instead of east towards Yining, such movement would never appear in any Chinese record. Therefore, little benefit appears to have come to the inland Ili region themselves, partly because part of their supposed advantage

actually went beyond their own borders altogether and left Horgos. However, these points cannot be addressed using the information available for this research.

The third concerns definitions, and one instance of it is serious enough to state separately. Following the fifth national economic census, the statistical authorities revised the gross regional product series retrospectively. Horgos published 20.84 billion yuan for 2022 and, after revision, 18.74 billion for 2023, a figure lower in level than the year before it although reported as 2.7 percent growth. The prefectural communiqué states that historical data were revised on the same basis. Pre-revision and post-revision figures are therefore not comparable, and any series that crosses the revision must either use revised data throughout or be broken at that point. This thesis uses revised figures where they exist and marks the break where they do not. A second break appears earlier in the same series. The yearbook figures for Horgos rise from 5.39 billion yuan in 2018 to 19.35 billion in 2019, more than threefold in a single year, which no plausible rate of growth explains; the change almost certainly reflects a widening of the reporting unit, most likely to consolidate the development zone and its Corps components with the municipality. The same caution applies to the creation of Horgos city in 2014, discussed in section 4.2, and to changes in the reporting scope of port statistics, in particular the inclusion or exclusion of pipeline natural gas.

Fourthly, there is Kokdala itself. Its accounts are held by the Production and Construction Corps and are not consolidated with those of the prefecture. Thus, any comparison that includes Kokdala also brings together two types of administration with quite distinct ways of accounting. Growth here might simply mirror corps investment decisions rather than anything happening along the Corridor at all.

None of these threats seems likely actually to reverse their direction. But they do restrict what may be claimed about whether what was found arose from the program itself or instead from something else about the corridor itself, and this restriction also recurs in Chapter 5.

Chapter 5 — Discussion, Implications, and Conclusion

5.1 Summary of Findings

Chapter 4 traced five channels, and what they show could hardly be more uneven.

It is the largest among the five because port traffic rose from 0.34 million tons in 2002 to 46.43 million tons in 2025, while block trains increased from fewer than 400 to 9,882 over roughly the same period, which means it passes the timing test easily, but little value remains at the border. There remain only negligible residues: breaking gauge creates work, since something must happen when trains cross borders, but there is little profit in placing containers onto other trucks, and whoever performs these services does so as part of some country’s entire rail system rather than being some local operator trying to make ends meet.

There were once far too many of them, but most turned out to be hollow when inspected closely. More than 1,600 film-media companies had registered their addresses here at times, although hardly any suitable studios existed locally. Such conditions lasted roughly from 2010 until nearly 8 years afterward, as tax evasion grew increasingly difficult. None of those periods relates to an important stage reached earlier or more recently regarding Belt and Road efforts themselves. Since then tax revenues thus fell sharply in just three years, dropping from about RMB4.13bn in 2021 to only some RMB2.15bn in 2024, yet production levels kept rising steadily meanwhile, along with sales figures. Hence, once again, one finds evidence that fewer duties actually came in although positive developments occurred everywhere else at once.

Of employment I know nothing, because there appears to be no information available on either the breakdown by type of activity or the provenance of workers. In Horgos, where according to the 2020 census some 71,466 people live against 778,047 in Yining municipality, the figures given for household registration and actual residence hardly diverge from one another; thus, apparently very few migrants reside here.

There is no problem if retail, tourism, and electronic commerce develop well within their enclosure. Cross-border electronic commerce reached RMB 30.97 billion through 45 operators in 2025. The Cooperation Centre recorded 3.893 million crossings in 2023; this seems satisfactory at first glance but then appears unsatisfactory when compared with the 6.597 million crossings registered in 2019.

There is hardly any productive linkage at present; by mid-2025 only about twenty-three

processors had relocated to the bonded zone, and even then Horgos accounted for only 10% of percent of Horgos’s GRP in 2022, compared to nearly 32% in the directly administered Ili region in 2024.

Here then are the results regarding the propositions themselves (see Table 4.5): P1 is partially supported, whereas both P2 and P3 are supported.

5.2 Corridor or Growth Pole: Answering the Research Questions

RQ1 concerns which sorts of cross-border ties actually influence the local economy at all; they seem to run roughly from strongest to weakest as follows: first, logistics (with very high volume but hardly anything left over); next, retail trade, followed by travel, and finally electronic commerce (each fairly considerable but largely self-sufficient); then employment (which may extend right up to Yining itself); next, registration (merely on paper); and last, all forms of productive connection whatsoever (none).

As regards RQ2 concerning settlement: Levels show very strong polarization indeed, since almost eleven percentage points’ worth of regional product occur here and barely more than two and one-half percent of all inhabitants create these, amounting together to roughly 450 percent of the normal value per head in the region taken overall. However, trends paint an entirely contrary picture. From 2019 onward until 2024, what belonged locally fell sharply from 16.2 percent down to 11.2 percent. Even when traffic reached record levels again, the share barely recovered: in 2025 it stood at only 11.8 percent. In other words, in the years when flows grew fastest, Horgos did not pull ahead of the rest of the region. It lost ground.

There were also three possible interpretations of that sort of picture given inthe three reading implied by section 2.4 . One was a growth pole generating positive spillovers; another, a pole creating negative backwash; and finally, a hub within networks through which things flow but hardly change afterward. Here the last one applies. There seems to be little productive connection among places and thus no diffusion benefit arising from their proximity. Nor does there appear to have been any clear case at any point of destructive backwash. Instead, again according to the figures presented above, something resembling a node occurred here: its own traffic increased sharply, but elsewhere development continued according to some quite separate logic.

Here Chapter 4 explained how otherwise. Inland development depended largely upon its own resources: while from 2019 to 2024 the whole territory’s secondary sector increased by 96.7 percent compared to 33.5 percent for services, and nonferrous smelting itself

grew no less than 177.3 percent year-on-year in 2025 alone, their produce moves outward according to another set of initiatives called “coal from Xinjiang” and “power transmitted from there,” whereas what actually passes across Horgos had been manufactured somewhere else inside China. Industry proceeds inwardly; commerce develops externally; these activities run parallel but never intersect.

5.3 Was the Outcome Designed?

In the free-trade-zone scheme, modern-type service activities come before industry; they mention cross-border logistics, cross-border tourism, financial services, and exhibitions, then pharmaceutical products, electronics information, and new materials, but none of these eight fields’ institutional-innovation measures has anything at all to say concerning relations between zones themselves and their surrounding regional economies.

Changing the order also alters what counts as failure. Should gains appear mainly in trade, logistics, and tourism, they will amount precisely to what was wanted, according to such reasoning. Thus arises another important distinction made here: one between implementation failure and limitation built right into the plan from the beginning.

There is also another sense in which this is correct: according to the Plan itself, part of what Horgos has been designated for is industry and bonded-processing. And twenty-three processors covering 3.61 km² hardly fulfill such purposes under any interpretation; hence an actual shortfall exists here rather than something created deliberately by design.

One final point, which is the sharpest lesson the evidence allows: both these local economies are within what policymakers call their jurisdiction, and they have been governed according to the same blueprint. There were always going to be two parts to the central-region plan. One concerns corridors and commerce. Another involves resources; hence “the three bases, one passage.” Ili developed because of the latter consideration. Horgos owes everything to the former concern. Neither place changed its nature accordingly. Therefore, there was never any likelihood that a transport device alone would ever transform its own backyard. That is what happened here. To claim otherwise means attributing to policy texts intentions they never state at all.

5.4 Contribution

It addresses three kinds of literature and makes one kind of contribution by providing some evidence.

Here I take up the issue raised but left unanswered by Zheng et al. (2016): what were the

favorable conditions found there, if anywhere at all, and could they possibly have traveled elsewhere? To find out, I carry the inquiry about how diffusion works forward from its usual setting (development zones) inward (from the coast), across frontiers, and finally to less prosperous lands. In fact, nothing was transferred; absorption failed everywhere except where all the tools were already united beforehand.

For the Belt and Road literature itself, it studies mechanism rather than purpose. Existing studies mostly take either governments or companies as their object; here one Corridor is followed from its means of existence onward to discover where along its course there is no further movement.

As for the Cross-border literature, it asks if the collective-efficiency logic of section 2.4 crosses an international boundary. It does not. What appears instead at Horgos is neither a cluster nor even a network but merely a corridor and an enclave, again because of the border itself.

That is why the evidential merit consists precisely in using Chinese-language sources along with firsthand knowledge of a case hardly studied since 2021; nothing like what has appeared since 2025 exists elsewhere at present, and these publications have not yet been read with this question in mind with regard to their relevance to the issue raised here.

5.5 Policy Implications for Inland Border Regions

It is said conditionally hereafter, and nothing more than the proof itself allows is claimed.

Here the first point concerns precisely what was explained above about the distinction between node capacity and corridor connectivity. An increase in the amount of traffic passing through the border will not produce connections inland unless something also changes regarding the links from center to periphery within countries. More capacity in the center might actually reduce these connections because there is no need to stop if one can continue on through. Hence, true regionalism requires payment both for hubs and for spokes.

There is also absorptive capacity. On this point, Zheng et al. (2016) argue that for the industry part, the limiting factor is again what the rest of the economy can provide, not how large an inducement there may be. Ili’s supplier base is mainly agricultural and resource-based. Therefore, among these five sectors chosen especially for Horgos, only agro-processing could possibly have sources nearby. Hence sequencing again:

capabilities need to appear first if they are later supposed to serve orders.

Thirdly, there is coordination; this is the cheapest lever left. Information islands exist at borders because of overlaps among platforms and unclear divisions of power (see Section 3.6). In fact, of all possible kinds of improvement along this whole corridor during this entire period, procedure mattered most. Clearance time decreased by about seventy to eighty percent, and vehicles waited no more than five hours instead of over thirty hours before. Nothing constructed then did nearly as much good.

Four is about people. There will never be enough public services or human resources for such numbers in one town; nor can seventy thousand inhabitants provide an adequate foundation if their presence depends entirely upon a trading arrangement. In fact, without services that let families settle, wages earned at the border leave the town; Horgos remains a place to work but not to live.

5.6 Limitations

There are four limitations worth mentioning outright rather than concealing them.

Attribution, First, attribution: a single corridor without a counterfactual. Neither threshold is tidy either: 2013 occurs shortly before cross-border trains open, while 2023 happens right after the end of the pandemic and just before visas disappear altogether; hence, whatever one finds near the latter needs especially careful reading.

Statistics come second. There have also been five breaks. As can be seen from Table 4.1, they occurred because the municipality was created in 2014; the reporting unit was enlarged from 2018 to 2019; passengers could not enter from 2020 to 2023; and there was an adjustment following the fifth national economic census. Port-tonnage statistics depend partly on whether pipeline gas is included.

The third is coverage, which is the most serious limitation. The evidence is rich at the border but poor in the interior. There are no published employment figures by sector or by the origin of workers, and no information on where processing firms buy their inputs. Tourist arrivals are not reported separately for Horgos or for Yining. These are exactly the data that RQ2 needs.

Fourthly, there is no Kazakh counterpart to the investigation; had movement occurred westward instead of eastward, Chinese figures would reflect none of it.

5.7 Further Research

Three lines of inquiry suggest themselves at once here.

There is first its own inner geography. There is one zone divided into many “parks,” but they are not arranged along the edges alone; instead, they also occur inwardly, instead, they also lie inland, with parks at Yining, attached to the Fourth Division, and at Qingshuihe.

n terms of industry throughout the whole zone in 2021, the share held by enterprises inside the Yining Park amounted to approximately 42.1 percent of their summed output value and about 1.6 percent of foreign trade turnover altogether. Something so massive certainly warrants study separately, never mind how hard it then becomes to determine precisely what lies outside its borders.

Secondly, there is a comparison with Alashankou. They share the boundary and the rail functions but have no cooperation centre. Putting these two together will also help distinguish what an enclave institution does from what a corridor does.

Third comes the Kazakh side and the connection between Khorgos–Eastern Gate and its own hinterland: whether what I think was found here actually exists depends on checking whether this holds for Chinese policy generally or for frontiers everywhere.

5.8 Conclusion

I asked whether Horgos acts as a growth pole for the Ili region or only as a corridor through which goods and people pass. The evidence points to the second answer. Horgos is a hub in a corridor, not a growth pole.

This does not mean the policy failed. Throughput grew by more than two orders of magnitude, clearance times fell sharply, and a small transit point became an important centre for trade and services. But that is all it did. Little of this activity has been connected to the surrounding region, and the policy design never asked for such a connection. The corridor instruments were applied at the border, while the interior developed under a separate, resource-based programme. The two did not meet.

There is also another lesson concerning the way corridor policies themselves will be judged. Passing traffic can easily be counted and makes for good headlines. Holding power, by contrast, cannot readily be measured at all; yet holding power constitutes regional development. Inland borders were never meant to let something pass through but

rather to retain something there.

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Appendix. Policy Documents Applying to the Horgos–Ili Corridor

Chapter 3 treats the corridor as the product of a chain of policy instruments rather than of

a single designation. This appendix reproduces those instruments in full, in the order in which they were issued. Each entry gives the title, the issuing body, the document number where one exists, the date of issue, the official source, and the provisions that bear on Horgos. Documents issued by Chinese state organs are not subject to copyright under Article 5 of the Copyright Law of the People's Republic of China, and are reproduced here from the official government portals cited in each entry. Where a document number has not been confirmed against the original text, the field is left blank rather than filled by inference.

A.1 中哈霍尔果斯国际边境合作中心协定 Agreement on the China–Kazakhstan Horgos International Border Cooperation Centre

Issuing body: Governments of the People's Republic of China and the Republic of Kazakhstan

Date: signed 2005; Chinese supporting area approved by the State Council in 2006; sealed operation from April 2012

Source: Ministry of Commerce of the People's Republic of China; Horgos Municipal People's Government

Relevance: establishes the cross-border enclave of 5.6 km², of which 3.43 km² lie on the Chinese side and 2.17 km² on the Kazakh side; the first cross-border economic cooperation area China established with any country. Analysed in sections 3.3 and 4.6.

中华人民共和国政府和哈萨克斯坦共和国政府 关于霍尔果斯国际边境合作中心活动管理的协定

中华人民共和国政府和哈萨克斯坦共和国政府（以下简称“双方”）。

根据 2004 年 9 月 24 日在伊宁市签署的《中华人民共和国政府和哈萨克斯坦共和国政府关于建立霍尔果斯国际边境合作中心的框架协议》，

为确保霍尔果斯国际边境合作中心（以下简称“ 中心”）的运行， 达成协议如 下:

一般条款

商品—未排除流通的，根据两国本国法律和缔结的国际条约进行销售和交换的产品。

保障安全和维护社会秩序的机关（治安管理部门或授权机构）一根据双方国家本国法律、国际条约、双边协议，履行保障安全和社会秩序、预防和取缔犯罪和其他危害个人和公民的权利和自由、社会和国家利益行为的执行和指挥职能的国家授权机关。

自然人（人员）—入出或逗留在中心区域内的双方国家公民、第三国公民和无 国籍人员。

经营主体一在中心区域内按照其所在区域所属国法律规定从事经营活动的自然人或任何所有制形式的法人。

第一章 法律地位和管理机构

第一条

中心是指由中方和哈方组成的，位于两国边境接壤地区的贸易、经济和投资合作中心（综合体）。

第二条

中心中方部分受中华人民共和国司法管辖。

中心哈方部分受哈萨克斯坦共和国司法管辖。

第三条

中心的中方部分和哈方部分分别由双方授权机构依据各方本国现行法律实施管理。

中心中方部分授权管理机构为中华人民共和国新疆维吾尔自治区人民政府。
中心哈方部分授权管理机构为哈萨克斯坦共和国工业和贸易部。

第二章　中心的布局、划界和面积

第四条

中心位于沿中华人民共和国和哈萨克斯坦共和国国界线两侧的毗邻接壤区域，紧邻“霍尔果斯（中）—霍尔果斯（哈）”边境口岸。

中心中方部分和哈方部分位于距边界线不少于 10 米的距离，并由跨越两国国界的专门通道连接。中心实行封闭式管理，各方对其采取有效封闭措施。

第五条

中心总面积为 4 ．63 平方公里，其中中方部分面积为 3 ．43 平方公里，哈方部 分面积为 1 ．2 平方公里。

中心的地理位置、布局和划界见附件一，该附件为本协定不可分割的部分。

双方在中心中方部分和哈方部分各自设立一个供人员、货物（商品）和交通运输工具入出的检查通道（站点），各方将根据各自国家本国法律在此设立边检、海关、卫生检疫、动植物检疫和其他检查机构。

第六条

中心中方部分和哈方部分之间的来往经专门通道进行。

专门通道的地理位置见附件二，该附件为本协定不可分割的部分。

中心内跨国界的专门通道由两国有关部门共同建设和维护，各方负担本方费用。穿过专门通道并与国界线重合的线是双方建设、管理及维护专门通道的分界线。

第三章　中心的功能和管理制度

第七条

在中心区域内经营主体可从事双方国家法律均不禁止的活动。如就与中心区域内从事活动有关的问题出现分歧，双方将进行相互磋商。

第八条

中心的功能为：商务洽谈、商品展示和销售、仓储运输、宾馆饭店、商业服务设施、金融服务、举办各类区域性国际经贸会议等。

第九条

双方管理机构间应建立经常和有效的工作会晤和协调机制，以确保中心各方面活动的正常进行。

第十条

中心各自部分区域内的交通设施、供水、供电、通讯、保护工程及其他工程设施、专门通道、检查通道（站点）、检查检验设施、行政管理设施以及隔离设施的设计、建设和维修工程的资金将由本方预算支付。

中心区域内商贸展览设施、各类业务用房、仓库等商务活动设施由两国企业或合资企业按照根据规定程序批准的文件自行出资建设。

第四章　中心区域的税收和投资制度

第十一条

中心区域内的税收将根据两国本国法律和 2001 年 9 月 12 日签订的《中华人民共和国政府与哈萨克斯坦共和国政府间关于对所得避免双重征税和防止偷漏税的协定》办理。

第十二条

中心中方部分区域内适用中华人民共和国法律规定的投资优惠。

中心哈方部分区域内将根据哈萨克斯坦共和国的法律提供投资优惠。

第五章　工作制度、签证制度、人员、货物（商品）和交通运输工具的入出管理办法

第十三条

中心的管理原则基于各自国家关于口岸限定区域和入出境管理的本国法律。中心中方部分和哈方部分参照口岸限定区域管理，人员、交通运输工具及货物（商品）进出中心部分参照入出境管理。

第十四条

货物（商品）进出中心，须遵守本国法律法规和国际公约的相关规定。对进出中心的货物（商品）原则上实行日间 8 小时通关；人员和（8 座以下）小型客车的通关时间，必要时将予以延长。

在中心区域内人员、货物（商品）及交通运输工具可自由流动。
中心的工作制度：

5 月 1 日至 9 月 30 日：

9：30—19：00（北京时间）8：30—18：00（阿斯塔纳时间）

10 月 1 日至 4 月 30 日：

10：00—18：00（北京时间）9：00—17：00（阿斯塔纳时间）

第十五条

中华人民共和国公民和哈萨克斯坦共和国公民、在双方国家境内合法逗留的第三国公民及无国籍人员凭双方主管部门协商认可的以下有效证件免办签证在 30 天的期限内入出中心。

（一）中华人民共和国公民凭以下有效证件之一可从中方一侧入出中心：
中华人民共和国护照（外交、公务、因公普通、普通）

中华人民共和国入出境通行证：

中华人民共和国旅行证；

港澳居民来往内地通行证；
港澳同胞回乡证；

台湾居民来往大陆通行证；

（二）哈萨克斯坦共和国公民凭以下有效证件之一可从哈方一侧入出中心：
哈萨克斯坦共和国护照（外交、公务、哈萨克斯坦共和国公民护照）。

（三）中华人民共和国公民和哈萨克斯坦共和国公民在对方国家境内合法逗留

期间，凭有效国际旅行证件之一可从对方国家一侧入出中心。

（四）第三国公民和无国籍人员在双方国家境内合法逗留期间，凭有效国际旅行证件可入出中心。

（五）中华人民共和国公民和哈萨克斯坦共和国公民离开中心后只能从原路返回。如需进入对方国家境内，该人员凭有效护照和有效签证从霍尔果斯口岸（中）—霍尔果斯口岸（哈）通行。

（六）第三国公民、无国籍人员离开中心后只能从原路返回。如需进入对方国家境内，该人员凭有效国际旅行证件和有效签证从霍尔果斯口岸（中）—霍尔果斯口岸（哈）通行。

第十六条

人员、交通运输工具只允许经其来自的入口离开中心区域。如需出境到对方国家领土，该人员及交通运输工具经霍尔果斯口岸（中）—霍尔果斯口岸（哈）通行。

第十七条

双方在专用通道各自一侧设立必要的设施用于临时实施管制或中止双方区域之间的通行。该设施只在出现自然灾害、传染疫情等紧急情况、调查违法犯罪案件时使用，就此双方应提前相互通报。

第十八条

双方主管部门负责对入出中心的人员、交通运输工具进行检查和登记。 中方为 霍尔果斯边防检查站；哈方为霍尔果斯检查单独站点。

第十九条

双方主管部门以商定的方式建立入出中心人员和交通运输工具信息共享的统一数据库。双方在各自一侧入口处记录相关信息。中方交通运输工具凭中国边检部门颁发的有效机读卡入出中心。

第二十条

进入中心的人员在丢失或损毁身份证件的情况下，应向其进入一方国家主管部门或授权机构求助，该方根据需要与另一方国家主管部门或授权机构配合，及时确

认其身份和合法进入中心的事实。

第二十一条

中心区域内的交通运输由中哈双方共同确定的交通运输工具承担。

第二十二条

双方边检部门之间的工作联系通过会谈会晤渠道进行。

第六章　中心区域的安全和法律秩序保障

第二十三条

双方在中心各自一侧区域设立治安管理部门或授权机构：
中方为霍尔果斯口岸公安边防派出所：

哈方为安全保障、维护社会秩序和边防地区分队。

第二十四条

中心区域内的治安管理部门或授权机构职能：依据本国现行法律及有关国际条约、中哈协议的规定，维护中心区域内安全和法律秩序，防范和打击各类违法犯罪活动。

第二十五条

进入中心区域的人员，应根据所在一方国家法律到治安管理部门或授权机构进行登记注册。

第二十六条

中心区域内发生的违法和犯罪，由发生地主管部门依据本国法律进行司法管辖。根据双方协商，也可按商定程序将其移交对方主管部门管辖。

第二十七条

双方主管部门应协作配合，交换有关情报信息。在处理中心区域内的违法犯罪案件时，相互提供必要的力所能及的协助，包括提供信息、证据、协助调查、抓捕罪犯等。

第二十八条

为实施有效监管，双方沿中心区域四周设立专用隔离设施，安装监控系统和照明设备。由中方治安管理部门和哈方授权机构负责中心各自一侧的监管、巡视。

第二十九条

为保障中心区域安全和法律秩序，中方治安管理部门与哈方授权机构将签署必要协议并建立会晤和联系制度。

第三十条

在一方区域内发生紧急情况时，另一方根据请求提供必要协助。中方治安管理部门与哈方授权机构为应对中心区域内可能发生的紧急情况进行联合演练。

第七章　中心的海关管理

第三十一条

双方国家的海关机构根据各方本国的法律和规定对进出中心区域的货物（商品）、交通运输工具、自然人、携带的物品（手提行李）实行海关监管，在中心入出口处对其办理海关手续。

第三十二条

双方国家的海关机构根据本国的法律法规，每月交换各自进出中心区域的交通运输工具和所载货物（商品）的海关统计信息及其权限范围内的其他必要信息。

第三十三条

违反海关法律的人员根据违法行为发生地一方国家的国内法律承担责任。

第八章　外汇调节和外汇监管

第三十四条

中心中方部分和哈方部分区域内根据各方本国法律进行外汇监管。

第三十五条

中心区域内的货物（商品）及服务贸易项下的资金支付和转移，遵循经常项目可自由兑换的原则办理，经常项目根据各方本国法律予以确定。

第三十六条

自然人携带现金入出中心区域中方部分应符合中华人民共和国法律的规定。

自然人携带现金入出中心区域哈方部分应符合哈萨克斯坦共和国法律对自然人携带现金入出哈萨克斯坦共和国国境规定的要求。

第三十七条

在中心中方部分和哈方部分区域内设立的银行或其他机构根据各方本国法律提供现钞兑换服务。

第九章　关于银行活动

第三十八条

在中心中方部分设立银行或其分支机构及从事业务按照中华人民共和国法律规定的方式进行调控和监管。

在中心哈方部分设立银行或其分支机构及从事活动按照哈萨克斯坦共和国法律规定的方式进行调控和监管。

第十章　中心区域内的检验检疫

第三十九条

双方在中心入出口和中心各自区域内按本国法律对货物（商品）、交通运输工具、人员及其随身携带物品，以及公共服务行业等实施相应的卫生检疫、动植物检

疫和其他检验检疫监管方式。

第四十条

当一方国家相关机构发现货物（商品）不符合检验检疫、卫生标准、卫生传染病、动植物检疫标准时，输出方应将这种货物运离中心至本国境内。

双方禁止对方国家法律禁止进口的货物（商品）进入中心区域。

第四十一条

双方相关机构应实施和加强传染病控制、动植物检疫领域的相互合作，并且相互通报动植物疫病疫情和及时采取的消除措施的信息。

第四十二条

违反卫生检疫、动植物检疫和其他检验检疫法律的人员，依据违法发生地所属国家的法律承担责任。

第十一章　中心区域内的劳动活动问题

第四十三条

一方国家公民在中心本方区域内的劳动活动按照本国的法律法规办理。

一方国家公民在中心对方国家区域内的劳动活动应按照对方国家的法律法规及双边政府间相关协议的规定办理。

第十二章　协定的生效、终止和修改

第四十四条

本协定的签署不影响双方在其参加的其他国际条约中所承担的权利和义务。

第四十五条

在本协定的解释和使用产生分歧时，双方将通过友好协商予以解决。

经双方同意，可通过签署议定书的方式对本协定进行修改和补充。该议定书为

本协定不可分割的部分。

第四十六条

本协定将自接到关于双方完成其生效所必需的国内程序的最后一份书面通知之日起生效。

本协定将长期有效并在任何一方收到另一方关于其希终止 2004 年 9 月 24 日在 伊宁市签署的《中华人民共和国政府和哈萨克斯坦共和国政府关于 建立霍尔果斯国 际边境合作中心的框架协议》效力的书面通知之日起满 6 个月后失效。

本协定于二。。五年七月四日在阿斯塔纳市签订， 一式两份，每份均用中文、哈文和俄文写成，三种文本同等作准。

A.2 国务院关于支持喀什、霍尔果斯经济开发区建设的若干意见 Opinions on Supporting the Construction of the Kashgar and Horgos Economic Development Zones

Issuing body: State Council of the People's Republic of China

Document number: 国发〔2011〕33 号

Date: 30 September 2011

Source: www.gov.cn, policy document database

Relevance: authorises the Horgos Economic Development Zone and sets out its incentive framework; origin, together with the 2010 Central Work Conference on Xinjiang, of the fiscal regime analysed in section 4.4.

国发〔2011〕33号《国务院关于支持喀什霍尔果斯经济开发区建设的若干意见》

国务院关于支持喀什霍尔果斯经济开发区建设的若干意见

国发〔2011〕33号

各省、自治区、直辖市人民政府，国务院各部委、各直属机构：

为贯彻落实《中共中央国务院关于推进新疆跨越式发展和长治久安的意见》（中发〔2010〕9号）精神，支持喀什、霍尔果斯经济开发区的建设，现提出如下意见：

一、战略定位

（一）我国向西开放的重要窗口。充分发挥喀什地区和伊犁州对外开放的区位优势，拓展对外联结通道，发挥口岸和交通枢纽的作用，加强与中亚、南亚、西亚和东欧的紧密合作，实现优势互补、互利互惠、共同发展，努力打造“外引内联、东联西出、西来东去”的开放合作平台，把喀什、霍尔果斯经济开发区建设成为我国向西开放的重要窗口，推动形成我国“陆上开放”与“海上开放”并重的对外开放新格局。

（二）新疆跨越式发展新的经济增长点。通过实施特殊经济政策，吸引国内外资金、技术、人才，高起点承接产业转移，促进产业集聚发展，构建现代产业体系，加快推进新型工业化和城镇化步伐，充分发挥对当地经济社会发展的辐射带动作用，将喀什、霍尔果斯经济开发区建设成为推动新疆跨越式发展新的经济增长点。

二、总体要求

指导思想：以邓小平理论和“三个代表”重要思想为指导，深入贯彻落实科学发展观，充分发挥喀什和霍尔果斯的特殊区位优势、资源优势和人文优势，进一步解放思想、大胆探索、突出特色，加大对经济开发区的政策扶持力度，着力推进与中亚、南亚、西亚和东欧国家的经贸合作，着力加强与内地的紧密联系，着力提升工业化、城镇化、信息化水平，促进产业集聚、协调发展和社会和谐，将喀什市和伊宁市建设成为我国西部地区重要的对外开放门户城市和区域中心城市，在推进新疆跨越式发展和促进我国向西开放大局中发挥更大的作用。

发展目标：到2015年，基本完成喀什、霍尔果斯经济开发区的基础设施建设，初步构建科

学合理、特色鲜明、功能配套、协调发展的空间布局和产业体系，为经济开发区又好又快发展打下坚实基础；到2020年，大幅度提升喀什、霍尔果斯经济开发区综合经济实力、产业竞争力，为推动新疆跨越式发展发挥重要的引领和带动作用。

三、基本原则

（一）统筹规划，滚动发展。高起点、高标准、高水平地做好经济开发区的总体规划，采取统一规划、综合协调、系统推进、滚动开发的模式，加快经济开发区开发建设步伐，并为今后发展预留空间。

（二）解放思想，创新发展。充分借鉴国内各经济特区和各类产业集聚区建设发展的成功经验，根据新疆地域特点和比较优势，有针对性地实行特殊优惠政策，先行试验一些重大改革开放措施，创新和完善管理体制、发展模式，推动经济开发区又好又快发展。

（三）完善功能，协调发展。以经济开发区为载体，进一步增强和发挥喀什市、伊宁市的区域中心城市功能，吸引技术、产业、资金、人才集聚，培育壮大特色产业和新兴产业，推动产业园区和城市协调发展，尽快形成新的经济增长极，更好地发挥辐射带动作用。

（四）内引外联，共同发展。提高对外开放水平，积极参与国际产业分工与合作，加强与东部和中部地区的经济技术交流，高起点地承接国内外产业转移，鼓励东部省市开发区对口支援经济开发区建设，实现优势互补、产业联动、利益共享、共同发展。

（五）市场导向，科学发展。充分发挥市场配置资源的基础性作用，提高政府宏观调控能力，加强政策引导和扶持，创造良好的发展环境和公平竞争的市场秩序，推动技术进步，努力实现科学发展。

四、区域范围

喀什经济开发区面积约50平方公里（含新疆生产建设兵团），其中包括喀什市40平方公里左右、伊尔克什坦口岸10平方公里左右。

霍尔果斯经济开发区面积约73平方公里（含新疆生产建设兵团），包括霍尔果斯口岸30平方公里左右（含国务院已批准的中哈霍尔果斯国际边境合作中心13.16平方公里）、伊宁市35平方公里左右、清水河配套产业园区8平方公里左右。

以上区域应纳入所在城市的城市总体规划，并实施统一的规划管理。四至范围在与当地土地利用总体规划做好衔接后，由新疆维吾尔自治区人民政府按程序报国务院审批。

五、产业布局

做好喀什、霍尔果斯经济开发区产业布局工作，要充分发挥当地及周边国家的资源优势，积极利用中央支持和全国对口支援的特殊政策和有利条件，以市场需求为导向，因地制宜，突出特色，推进技术进步，构建适合经济开发区长远发展的现代产业体系。

喀什经济开发区重点发展商贸物流、出口机电产品配套组装加工、农副产品深加工、纺织、建材、冶金、进口资源加工、机械制造、旅游、文化、民族特色产品加工、生物技术、可再生能源、新能源、新材料等产业。其中，喀什市重点建设区域性商贸物流中心、金融贸易区和优势资源转化加工区；伊尔克什坦口岸重点建设进出口商品物流仓储集散中心、进出口产品加工区。

霍尔果斯经济开发区重点发展化工、农产品深加工、生物制药、可再生能源、新能源、新材料、建材、进口资源加工、机械制造、商贸物流、旅游、文化及高新技术等产业。其中，伊宁市重点建设区域性商贸物流中心和优势资源转化加工区；霍尔果斯口岸重点建设中哈霍尔果斯国际边境合作中心中方中心区及配套区；清水河配套产业园区重点建设农副产品深加工和出口机电产品配套组装加工基地。

六、扶持政策

（一）2011 年至 2015 年，中央财政对经济开发区建设每年给予一定数额的补助。将经济开发区内基础设施建设纳入现行国家级经济技术开发区基础设施项目贷款财政贴息政策范围，对符合条件的基础设施项目银行贷款，中央财政给予贴息支持。

（二）2011 年至 2015 年，对经济开发区内符合条件的生产企业固定资产投资，中央投资给予支持；对符合条件的企业购置机器设备的固定资产投资贷款，地方财政予以贴息支持。

（三）2010 年至 2020 年，对经济开发区内新办的属于重点鼓励发展产业目录范围内的企业，给予自取得第一笔生产经营收入所属纳税年度起企业所得税五年免征优惠，具体目录由财政部、税务总局会同有关部门研究制订。对农副产品加工转化和劳动密集型产业等符合条件的企业，在用电、运输等方面给予特殊价格政策支持，具体办法由发展改革委会同有关部门研究制订。

（四）对经济开发区内属于《产业结构调整指导目录（2011 年本）》鼓励类、《外商投资产业指导目录》鼓励类和《中西部地区外商投资优势产业目录》的项目，进口国内不能生产的自用设备，以及按照合同随设备进口的配套件、备件，在规定范围内免征关税。

（五）支持在经济开发区内设立海关特殊监管区。批准霍尔果斯为整车进口口岸。经济开发区内符合条件的企业以边贸方式经营进出口商品，在申请配额、许可证时给予倾斜。

（六）鼓励和引导各类金融机构在经济开发区内设立分支机构。建立经济开发区金融监管协调机制，统筹研究和协调金融政策，推进金融创新试点，推动金融行业发展，支持经济开发区建设。支持设立经济开发区产业投资基金。

（七）加大国家各类科技计划的支持力度，引导企业和科研机构在经济开发区实施一批重大科技项目。通过科技型中小企业创新基金，加强对经济开发区科技型中小企业的支持。实施科技成果转化的股权激励政策，进一步加大高新技术企业认定、研发费用税前加计扣除、技术转让免税等政策落实力度，对外商投资企业设立研发中心按规定给予政策支持。支持内地科技成果在两个经济开发区转化。中央财政支持经济开发区职业技术人才的培养。

（八）国家在编制土地利用年度计划时，对新疆维吾尔自治区和新疆生产建设兵团用地计划指标给予适当倾斜。自治区和兵团可根据建设需求和进度安排，单列经济开发区用地计划指标，保障经济开发区建设。使用戈壁荒滩开发建设经济开发区、引进产业项目的，免交土地出让收入和新增建设用地土地有偿使用费。

（九）对有利于经济开发区发展的疆内重大基础设施建设，中央投资加大支持力度。积极推动中吉乌、中巴铁路建设；加快改善口岸查验设施条件；加快边境口岸铁路、公路建设；支持伊宁、喀什机场进一步完善机场设施。

（十）适时开放伊宁机场口岸和霍尔果斯铁路口岸。支持和鼓励中外航空企业开通喀什机场直达周边国家主要城市的国际航线，在伊宁机场航空口岸设立后适时开通相关国际航线。在霍尔果斯口岸和喀什机场口岸符合规定条件的前提下，适时研究批准其办理口岸签证业务。

七、组织领导

（一）新疆维吾尔自治区和新疆生产建设兵团成立喀什、霍尔果斯经济开发区领导小组，全面负责经济开发区工作，有关对口支援省市参与领导小组工作。为加强喀什、霍尔果斯经济开发区的规划、建设和管理工作，可根据需要，按有关规定和程序研究设立开发区管理机构。新疆维吾尔自治区人民政府和新疆生产建设兵团可根据实际工作需要，将相关经济管理权限适当下放给喀什、霍尔果斯经济开发区。

（二）新疆维吾尔自治区人民政府和新疆生产建设兵团要会同有关对口支援省市，编制好

《喀什经济开发区总体发展规划》和《霍尔果斯经济开发区总体发展规划》，报国务院批准后实施。要加强组织协调，落实自治区、兵团相关部门和喀什地区、伊犁州的责任，确保经济开发区各项建设任务顺利有序推进。有关对口支援省市要把支持经济开发区建设作为援疆工作的重要内容，在规划制订、项目引进、人才培养等方面加大帮扶力度。

（三）发展改革委要会同有关部门，指导喀什、霍尔果斯经济开发区发展和建设，协调落实有关重大发展政策。商务部负责中哈霍尔果斯国际边境合作中心建设的指导协调工作。国务院各有关部门要抓紧研究出台各项政策措施的具体实施细则，并切实加强指导和服务。

国务院

二〇一一年九月三十日

A.3 国务院关于同意新疆维吾尔自治区设立县级霍尔果斯市的批复 Reply Approving the Establishment of the County-Level City of Horgos

Issuing body: State Council of the People's Republic of China

Document number: 国函〔2014〕80 号 (Guohan [2014] No. 80)

Date: 26 June 2014; request Xinzhengfa [2012] No. 54

Source: www.gov.cn; Xinjiang Uygur Autonomous Region People's Government

Relevance: creates the municipality from five predecessor units — the Yichegashan Xibe Ethnic Township and the Mohur Pasture of Huocheng county, the 61st and 62nd Regiments of the Fourth Division of the Production and Construction Corps, and the Horgos port area. The boundary is defined by geographic coordinates, which is the definitional problem set out in section 4.2 and Table 4.1.

国务院关于同意新疆维吾尔自治区

设立县级霍尔果斯市的批复

国函〔2014〕80号

新疆维吾尔自治区人民政府：

《新疆维吾尔自治区人民政府关于设立县级霍尔果斯市的请示》(新政发〔2012〕54号)收悉。现批复如下：

一、同意设立县级霍尔果斯市， 由伊犁哈萨克自治州管辖。霍尔果斯市人民政府驻陇海路3号。

二、霍尔果斯市行政区域界线走向为：北起中国与哈萨克斯坦分界线，沿温泉县与霍城县界线向东至北纬44°37′45″、东经80°39′26″，折向东南至北纬44°33′07″、东经80°45′11″，沿伊车嘎善乡界与大西沟乡和清水河镇的界线向南至北纬44°10′23″、东经80°33′58″，再折向南沿莫乎尔牧场与六十四团的界线至北纬44°00′52″、东经80°35′28″，再折向北至北纬44°01′41″、东经80°31′42″，再折向西北至北纬44°04′07″、东经80°31′08″，再折向西至北纬44°03′52″、东经80°29′25″，再折向北至北纬44°06′02″、东经80°29′24″，再折向西沿六十二团与六十三团的界线至中国与哈萨克斯坦分界线。

霍尔果斯市的各类机构要按照“精简、统一、效能”的原则设置，涉及的行政区域界线要按规定及时勘定，所需人员编制和经费由你区自行解决。要严格按照国务院“约法三章”的要求，不新建政府性楼堂馆所，不增加财政供养人员，不增加“三公”经费。要严格执行中央关于厉行节约的规定和国家土地管理法规政策，加大区域资源整合力度，优化总体布局，促进区域经济社会协调健康发展。

中华人民共和国国务院

2014年6月26日

A.4 推动共建丝绸之路经济带和 21 世纪海上丝绸之路的愿景与行动 Vision and Actions on Jointly Building the Silk Road Economic Belt and the 21st-Century Maritime Silk Road

Issuing body: National Development and Reform Commission, Ministry of Foreign Affairs and Ministry of Commerce, with State Council authorisation

Document number: —

Date: March 2015

Source: Ministry of Foreign Affairs of the People's Republic of China, https://www.mfa.gov.cn/eng/zy/jj/2015zt/xjpcxbayzlt2015nnh/202406/t20240606_11381659.html

Relevance: designates Xinjiang the core area of the Silk Road Economic Belt; sets out the five areas of cooperation; under facilities connectivity calls for port facility construction, international coordination of customs clearance, transshipment and multimodal transport, single-window arrangements at border ports, lower clearance costs, and mutual recognition of inspection results and of authorized economic operators. Analysed in sections 1.1, 2.5 and 3.2.

推动共建丝绸之路经济带和 21 世纪海上丝绸之路的愿景与行动

国家发展改革委 外交部 商务部

（经国务院授权发布）

2015 年 3 月

目录

前言

一、时代背景

二、共建原则

三、框架思路

四、合作重点

五、合作机制

六、中国各地方开放态势

七、中国积极行动

八、共创美好未来

前言

2000 多年前，亚欧大陆上勤劳勇敢的人民，探索出多条连接亚欧非几大文明的贸易和人文交流通路，后人将其统称为“丝绸之路”。千百年来，“和平合作、开放包容、互学互鉴、互利共赢”的丝绸之路精神薪火相传，推进了人类文明进步，是促进沿线各国繁荣发展的重要纽带，是东西方交流合作的象征，是世界各国共有的历史文化遗产。

进入 21 世纪，在以和平、发展、合作、共赢为主题的新时代，面对复苏乏力的全球经济形势，纷繁复杂的国际和地区局面，传承和弘扬丝绸之路精神更显重要和珍贵。

2013 年 9 月和 10 月，中国国家主席习近平在出访中亚和东南亚国家期间，先后提出共建“丝绸之路经济带”和“21 世纪海上丝绸之路”（以下简称“一带一路”）的重大倡议，得到国际社会高度关

注。中国国务院总理李克强参加 2013 年中国－东盟博览会时强调，铺就面向东盟的海上丝绸之路，打造带动腹地发展的战略支点。加快“一带一路”建设，有利于促进沿线各国经济繁荣与区域经济合作，加强不同文明交流互鉴，促进世界和平发展，是一项造福世界各国人民的伟大事业。

“一带一路”建设是一项系统工程，要坚持共商、共建、共享原则，积极推进沿线国家发展战略的相互对接。为推进实施“一带一路”重大倡议，让古丝绸之路焕发新的生机活力，以新的形式使亚欧非各国联系更加紧密，互利合作迈向新的历史高度，中国政府特制定并发布《推动共建丝绸之路经济带和 21 世纪海上丝绸之路的愿景与行动》。

一、时代背景

当今世界正发生复杂深刻的变化，国际金融危机深层次影响继续显现，世界经济缓慢复苏、发展分化，国际投资贸易格局和多边投资贸易规则酝酿深刻调整，各国面临的发展问题依然严峻。共建“一带一路”顺应世界多极化、经济全球化、文化多样化、社会信息化的潮流，秉持开放的区域合作精神，致力于维护全球自由贸易体系和开放型世界经济。共建“一带一路”旨在促进经济要素有序自由流动、资源高效配置和市场深度融合，推动沿线各国实现经济政策协调，开展更大范围、更高水平、更深层次的区域合作，共同打造开放、包容、均衡、普惠的区域经济合作架构。共建“一带一路”符合国际社会的根本利益，彰显人类社会共同理想和美好追求，是国际合作以及全球治理新模式的积极探索，将为世界和平发展增添新的正能量。

共建“一带一路”致力于亚欧非大陆及附近海洋的互联互通，建立和加强沿线各国互联互通伙伴关系，构建全方位、多层次、复合型的互联互通网络，实现沿线各国多元、自主、平衡、可持续的发展。“一带一路”的互联互通项目将推动沿线各国发展战略的对接与耦合，发掘区域内市场的潜力，促进投资和消费，创造需求和就业，增进沿

线各国人民的人文交流与文明互鉴，让各国人民相逢相知、互信互敬，共享和谐、安宁、富裕的生活。

当前，中国经济和世界经济高度关联。中国将一以贯之地坚持对外开放的基本国策，构建全方位开放新格局，深度融入世界经济体系。推进“一带一路”建设既是中国扩大和深化对外开放的需要，也是加强和亚欧非及世界各国互利合作的需要，中国愿意在力所能及的范围内承担更多责任义务，为人类和平发展作出更大的贡献。

二、共建原则

恪守联合国宪章的宗旨和原则。遵守和平共处五项原则，即尊重各国主权和领土完整、互不侵犯、互不干涉内政、和平共处、平等互利。

坚持开放合作。“一带一路”相关的国家基于但不限于古代丝绸之路的范围，各国和国际、地区组织均可参与，让共建成果惠及更广泛的区域。

坚持和谐包容。倡导文明宽容，尊重各国发展道路和模式的选择，加强不同文明之间的对话，求同存异、兼容并蓄、和平共处、共生共荣。

坚持市场运作。遵循市场规律和国际通行规则，充分发挥市场在资源配置中的决定性作用和各类企业的主体作用，同时发挥好政府的作用。

坚持互利共赢。兼顾各方利益和关切，寻求利益契合点和合作最大公约数，体现各方智慧和创意，各施所长，各尽所能，把各方优势和潜力充分发挥出来。

三、框架思路

“一带一路”是促进共同发展、实现共同繁荣的合作共赢之路，是增进理解信任、加强全方位交流的和平友谊之路。中国政府倡议，秉持和平合作、开放包容、互学互鉴、互利共赢的理念，全方位推进

务实合作，打造政治互信、经济融合、文化包容的利益共同体、命运共同体和责任共同体。

“一带一路”贯穿亚欧非大陆，一头是活跃的东亚经济圈，一头是发达的欧洲经济圈，中间广大腹地国家经济发展潜力巨大。丝绸之路经济带重点畅通中国经中亚、俄罗斯至欧洲（波罗的海）；中国经中亚、西亚至波斯湾、地中海；中国至东南亚、南亚、印度洋。21世纪海上丝绸之路重点方向是从中国沿海港口过南海到印度洋，延伸至欧洲；从中国沿海港口过南海到南太平洋。

根据“一带一路”走向，陆上依托国际大通道，以沿线中心城市为支撑，以重点经贸产业园区为合作平台，共同打造新亚欧大陆桥、中蒙俄、中国－中亚－西亚、中国－中南半岛等国际经济合作走廊；海上以重点港口为节点，共同建设通畅安全高效的运输大通道。中巴、孟中印缅两个经济走廊与推进“一带一路”建设关联紧密，要进一步推动合作，取得更大进展。

“一带一路”建设是沿线各国开放合作的宏大经济愿景，需各国携手努力，朝着互利互惠、共同安全的目标相向而行。努力实现区域基础设施更加完善，安全高效的陆海空通道网络基本形成，互联互通达到新水平；投资贸易便利化水平进一步提升，高标准自由贸易区网络基本形成，经济联系更加紧密，政治互信更加深入；人文交流更加广泛深入，不同文明互鉴共荣，各国人民相知相交、和平友好。

四、合作重点

沿线各国资源禀赋各异，经济互补性较强，彼此合作潜力和空间很大。以政策沟通、设施联通、贸易畅通、资金融通、民心相通为主要内容，重点在以下方面加强合作。

政策沟通。加强政策沟通是“一带一路”建设的重要保障。加强政府间合作，积极构建多层次政府间宏观政策沟通交流机制，深化利益融合，促进政治互信，达成合作新共识。沿线各国可以就经济发展

战略和对策进行充分交流对接，共同制定推进区域合作的规划和措施，协商解决合作中的问题，共同为务实合作及大型项目实施提供政策支持。

设施联通。基础设施互联互通是“一带一路”建设的优先领域。在尊重相关国家主权和安全关切的基础上，沿线国家宜加强基础设施建设规划、技术标准体系的对接，共同推进国际骨干通道建设，逐步形成连接亚洲各次区域以及亚欧非之间的基础设施网络。强化基础设施绿色低碳化建设和运营管理，在建设中充分考虑气候变化影响。抓住交通基础设施的关键通道、关键节点和重点工程，优先打通缺失路段，畅通瓶颈路段，配套完善道路安全防护设施和交通管理设施设备，提升道路通达水平。推进建立统一的全程运输协调机制，促进国际通关、换装、多式联运有机衔接，逐步形成兼容规范的运输规则，实现国际运输便利化。推动口岸基础设施建设，畅通陆水联运通道，推进港口合作建设，增加海上航线和班次，加强海上物流信息化合作。拓展建立民航全面合作的平台和机制，加快提升航空基础设施水平。

加强能源基础设施互联互通合作，共同维护输油、输气管道等运输通道安全，推进跨境电力与输电通道建设，积极开展区域电网升级改造合作。

共同推进跨境光缆等通信干线网络建设，提高国际通信互联互通水平，畅通信息丝绸之路。加快推进双边跨境光缆等建设，规划建设洲际海底光缆项目，完善空中（卫星）信息通道，扩大信息交流与合作。

贸易畅通。投资贸易合作是“一带一路”建设的重点内容。宜着力研究解决投资贸易便利化问题，消除投资和贸易壁垒，构建区域内和各国良好的营商环境，积极同沿线国家和地区共同商建自由贸易区，激发释放合作潜力，做大做好合作“蛋糕”。

沿线国家宜加强信息互换、监管互认、执法互助的海关合作，以及检验检疫、认证认可、标准计量、统计信息等方面的双多边合作，推动世界贸易组织《贸易便利化协定》生效和实施。改善边境口岸通关设施条件，加快边境口岸“单一窗口”建设，降低通关成本，提升通关能力。加强供应链安全与便利化合作，推进跨境监管程序协调，推动检验检疫证书国际互联网核查，开展“经认证的经营者”（AEO）互认。降低非关税壁垒，共同提高技术性贸易措施透明度，提高贸易自由化便利化水平。

拓宽贸易领域，优化贸易结构，挖掘贸易新增长点，促进贸易平衡。创新贸易方式，发展跨境电子商务等新的商业业态。建立健全服务贸易促进体系，巩固和扩大传统贸易，大力发展现代服务贸易。把投资和贸易有机结合起来，以投资带动贸易发展。

加快投资便利化进程，消除投资壁垒。加强双边投资保护协定、避免双重征税协定磋商，保护投资者的合法权益。

拓展相互投资领域，开展农林牧渔业、农机及农产品生产加工等领域深度合作，积极推进海水养殖、远洋渔业、水产品加工、海水淡化、海洋生物制药、海洋工程技术、环保产业和海上旅游等领域合作。加大煤炭、油气、金属矿产等传统能源资源勘探开发合作，积极推动水电、核电、风电、太阳能等清洁、可再生能源合作，推进能源资源就地就近加工转化合作，形成能源资源合作上下游一体化产业链。加强能源资源深加工技术、装备与工程服务合作。

推动新兴产业合作，按照优势互补、互利共赢的原则，促进沿线国家加强在新一代信息技术、生物、新能源、新材料等新兴产业领域的深入合作，推动建立创业投资合作机制。

优化产业链分工布局，推动上下游产业链和关联产业协同发展，鼓励建立研发、生产和营销体系，提升区域产业配套能力和综合竞争力。扩大服务业相互开放，推动区域服务业加快发展。探索投资合作

新模式，鼓励合作建设境外经贸合作区、跨境经济合作区等各类产业园区，促进产业集群发展。在投资贸易中突出生态文明理念，加强生态环境、生物多样性和应对气候变化合作，共建绿色丝绸之路。

中国欢迎各国企业来华投资。鼓励本国企业参与沿线国家基础设施建设和产业投资。促进企业按属地化原则经营管理，积极帮助当地发展经济、增加就业、改善民生，主动承担社会责任，严格保护生物多样性和生态环境。

资金融通。资金融通是“一带一路”建设的重要支撑。深化金融合作，推进亚洲货币稳定体系、投融资体系和信用体系建设。扩大沿线国家双边本币互换、结算的范围和规模。推动亚洲债券市场的开放和发展。共同推进亚洲基础设施投资银行、金砖国家开发银行筹建，有关各方就建立上海合作组织融资机构开展磋商。加快丝路基金组建运营。深化中国－东盟银行联合体、上合组织银行联合体务实合作，以银团贷款、银行授信等方式开展多边金融合作。支持沿线国家政府和信用等级较高的企业以及金融机构在中国境内发行人民币债券。符合条件的中国境内金融机构和企业可以在境外发行人民币债券和外币债券，鼓励在沿线国家使用所筹资金。

加强金融监管合作，推动签署双边监管合作谅解备忘录，逐步在区域内建立高效监管协调机制。完善风险应对和危机处置制度安排，构建区域性金融风险预警系统，形成应对跨境风险和危机处置的交流合作机制。加强征信管理部门、征信机构和评级机构之间的跨境交流与合作。充分发挥丝路基金以及各国主权基金作用，引导商业性股权投资基金和社会资金共同参与“一带一路”重点项目建设。

民心相通。民心相通是“一带一路”建设的社会根基。传承和弘扬丝绸之路友好合作精神，广泛开展文化交流、学术往来、人才交流合作、媒体合作、青年和妇女交往、志愿者服务等，为深化双多边合作奠定坚实的民意基础。

扩大相互间留学生规模，开展合作办学，中国每年向沿线国家提供 1 万个政府奖学金名额。沿线国家间互办文化年、艺术节、电影节、电视周和图书展等活动，合作开展广播影视剧精品创作及翻译，联合申请世界文化遗产，共同开展世界遗产的联合保护工作。深化沿线国家间人才交流合作。

加强旅游合作，扩大旅游规模，互办旅游推广周、宣传月等活动，联合打造具有丝绸之路特色的国际精品旅游线路和旅游产品，提高沿线各国游客签证便利化水平。推动 21 世纪海上丝绸之路邮轮旅游合作。积极开展体育交流活动，支持沿线国家申办重大国际体育赛事。

强化与周边国家在传染病疫情信息沟通、防治技术交流、专业人才培养等方面的合作，提高合作处理突发公共卫生事件的能力。为有关国家提供医疗援助和应急医疗救助，在妇幼健康、残疾人康复以及艾滋病、结核、疟疾等主要传染病领域开展务实合作，扩大在传统医药领域的合作。

加强科技合作，共建联合实验室（研究中心）、国际技术转移中心、海上合作中心，促进科技人员交流，合作开展重大科技攻关，共同提升科技创新能力。

整合现有资源，积极开拓和推进与沿线国家在青年就业、创业培训、职业技能开发、社会保障管理服务、公共行政管理等共同关心领域的务实合作。

充分发挥政党、议会交往的桥梁作用，加强沿线国家之间立法机构、主要党派和政治组织的友好往来。开展城市交流合作，欢迎沿线国家重要城市之间互结友好城市，以人文交流为重点，突出务实合作，形成更多鲜活的合作范例。欢迎沿线国家智库之间开展联合研究、合作举办论坛等。

加强沿线国家民间组织的交流合作，重点面向基层民众，广泛开展教育医疗、减贫开发、生物多样性和生态环保等各类公益慈善活动，

促进沿线贫困地区生产生活条件改善。加强文化传媒的国际交流合作，积极利用网络平台，运用新媒体工具，塑造和谐友好的文化生态和舆论环境。

五、合作机制

当前，世界经济融合加速发展，区域合作方兴未艾。积极利用现有双多边合作机制，推动“一带一路”建设，促进区域合作蓬勃发展。加强双边合作，开展多层次、多渠道沟通磋商，推动双边关系全面发展。推动签署合作备忘录或合作规划，建设一批双边合作示范。建立完善双边联合工作机制，研究推进“一带一路”建设的实施方案、行动路线图。充分发挥现有联委会、混委会、协委会、指导委员会、管理委员会等双边机制作用，协调推动合作项目实施。

强化多边合作机制作用，发挥上海合作组织（SCO）、中国－东盟“10+1”、亚太经合组织（APEC）、亚欧会议（ASEM）、亚洲合作对话（ACD）、亚信会议（CICA）、中阿合作论坛、中国－海合会战略对话、大湄公河次区域（GMS）经济合作、中亚区域经济合作（CAREC）等现有多边合作机制作用，相关国家加强沟通，让更多国家和地区参与“一带一路”建设。

继续发挥沿线各国区域、次区域相关国际论坛、展会以及博鳌亚洲论坛、中国－东盟博览会、中国－亚欧博览会、欧亚经济论坛、中国国际投资贸易洽谈会，以及中国－南亚博览会、中国－阿拉伯博览会、中国西部国际博览会、中国－俄罗斯博览会、前海合作论坛等平台的建设性作用。支持沿线国家地方、民间挖掘“一带一路”历史文化遗产，联合举办专项投资、贸易、文化交流活动，办好丝绸之路（敦煌）国际文化博览会、丝绸之路国际电影节和图书展。倡议建立“一带一路”国际高峰论坛。

六、中国各地方开放态势

推进“一带一路”建设，中国将充分发挥国内各地区比较优势，

实行更加积极主动的开放战略，加强东中西互动合作，全面提升开放型经济水平。

西北、东北地区。发挥新疆独特的区位优势和向西开放重要窗口作用，深化与中亚、南亚、西亚等国家交流合作，形成丝绸之路经济带上重要的交通枢纽、商贸物流和文化科教中心，打造丝绸之路经济带核心区。发挥陕西、甘肃综合经济文化和宁夏、青海民族人文优势，打造西安内陆型改革开放新高地，加快兰州、西宁开发开放，推进宁夏内陆开放型经济试验区建设，形成面向中亚、南亚、西亚国家的通道、商贸物流枢纽、重要产业和人文交流基地。发挥内蒙古联通俄蒙的区位优势，完善黑龙江对俄铁路通道和区域铁路网，以及黑龙江、吉林、辽宁与俄远东地区陆海联运合作，推进构建北京－莫斯科欧亚高速运输走廊，建设向北开放的重要窗口。

西南地区。发挥广西与东盟国家陆海相邻的独特优势，加快北部湾经济区和珠江－西江经济带开放发展，构建面向东盟区域的国际通道，打造西南、中南地区开放发展新的战略支点，形成 21 世纪海上丝绸之路与丝绸之路经济带有机衔接的重要门户。发挥云南区位优势，推进与周边国家的国际运输通道建设，打造大湄公河次区域经济合作新高地，建设成为面向南亚、东南亚的辐射中心。推进西藏与尼泊尔等国家边境贸易和旅游文化合作。

沿海和港澳台地区。利用长三角、珠三角、海峡西岸、环渤海等经济区开放程度高、经济实力强、辐射带动作用大的优势，加快推进中国（上海）自由贸易试验区建设，支持福建建设 21 世纪海上丝绸之路核心区。充分发挥深圳前海、广州南沙、珠海横琴、福建平潭等开放合作区作用，深化与港澳台合作，打造粤港澳大湾区。推进浙江海洋经济发展示范区、福建海峡蓝色经济试验区和舟山群岛新区建设，加大海南国际旅游岛开发开放力度。加强上海、天津、宁波－舟山、广州、深圳、湛江、汕头、青岛、烟台、大连、福州、厦门、泉州、

海口、三亚等沿海城市港口建设，强化上海、广州等国际枢纽机场功能。以扩大开放倒逼深层次改革，创新开放型经济体制机制，加大科技创新力度，形成参与和引领国际合作竞争新优势，成为“一带一路”特别是 21 世纪海上丝绸之路建设的排头兵和主力军。发挥海外侨胞以及香港、澳门特别行政区独特优势作用，积极参与和助力“一带一路”建设。为台湾地区参与“一带一路”建设作出妥善安排。

内陆地区。利用内陆纵深广阔、人力资源丰富、产业基础较好优势，依托长江中游城市群、成渝城市群、中原城市群、呼包鄂榆城市群、哈长城市群等重点区域，推动区域互动合作和产业集聚发展，打造重庆西部开发开放重要支撑和成都、郑州、武汉、长沙、南昌、合肥等内陆开放型经济高地。加快推动长江中上游地区和俄罗斯伏尔加河沿岸联邦区的合作。建立中欧通道铁路运输、口岸通关协调机制，打造“中欧班列”品牌，建设沟通境内外、连接东中西的运输通道。支持郑州、西安等内陆城市建设航空港、国际陆港，加强内陆口岸与沿海、沿边口岸通关合作，开展跨境贸易电子商务服务试点。优化海关特殊监管区域布局，创新加工贸易模式，深化与沿线国家的产业合作。

七、中国积极行动

一年多来，中国政府积极推动“一带一路”建设，加强与沿线国家的沟通磋商，推动与沿线国家的务实合作，实施了一系列政策措施，努力收获早期成果。

高层引领推动。习近平主席、李克强总理等国家领导人先后出访 20 多个国家，出席加强互联互通伙伴关系对话会、中阿合作论坛第六届部长级会议，就双边关系和地区发展问题，多次与有关国家元首和政府首脑进行会晤，深入阐释“一带一路”的深刻内涵和积极意义，就共建“一带一路”达成广泛共识。

签署合作框架。与部分国家签署了共建“一带一路”合作备忘录，

与一些毗邻国家签署了地区合作和边境合作的备忘录以及经贸合作中长期发展规划。研究编制与一些毗邻国家的地区合作规划纲要。

推动项目建设。加强与沿线有关国家的沟通磋商，在基础设施互联互通、产业投资、资源开发、经贸合作、金融合作、人文交流、生态保护、海上合作等领域，推进了一批条件成熟的重点合作项目。

完善政策措施。中国政府统筹国内各种资源，强化政策支持。推动亚洲基础设施投资银行筹建，发起设立丝路基金，强化中国－欧亚经济合作基金投资功能。推动银行卡清算机构开展跨境清算业务和支付机构开展跨境支付业务。积极推进投资贸易便利化，推进区域通关一体化改革。

发挥平台作用。各地成功举办了一系列以“一带一路”为主题的国际峰会、论坛、研讨会、博览会，对增进理解、凝聚共识、深化合作发挥了重要作用。

八、共创美好未来

共建“一带一路”是中国的倡议，也是中国与沿线国家的共同愿望。站在新的起点上，中国愿与沿线国家一道，以共建“一带一路”为契机，平等协商，兼顾各方利益，反映各方诉求，携手推动更大范围、更高水平、更深层次的大开放、大交流、大融合。“一带一路”建设是开放的、包容的，欢迎世界各国和国际、地区组织积极参与。

共建“一带一路”的途径是以目标协调、政策沟通为主，不刻意追求一致性，可高度灵活，富有弹性，是多元开放的合作进程。中国愿与沿线国家一道，不断充实完善“一带一路”的合作内容和方式，共同制定时间表、路线图，积极对接沿线国家发展和区域合作规划。

中国愿与沿线国家一道，在既有双多边和区域次区域合作机制框架下，通过合作研究、论坛展会、人员培训、交流访问等多种形式，促进沿线国家对共建“一带一路”内涵、目标、任务等方面的进一步理解和认同。

中国愿与沿线国家一道，稳步推进示范项目建设，共同确定一批能够照顾双多边利益的项目，对各方认可、条件成熟的项目抓紧启动实施，争取早日开花结果。

“一带一路”是一条互尊互信之路，一条合作共赢之路，一条文明互鉴之路。只要沿线各国和衷共济、相向而行，就一定能够谱写建设丝绸之路经济带和 21 世纪海上丝绸之路的新篇章，让沿线各国人民共享“一带一路”共建成果。

A.5 国务院关于同意新疆维吾尔自治区设立县级可克达拉市的批复 Reply Approving the Establishment of the County-Level City of Kokdala

Issuing body: State Council of the People's Republic of China

Document number: 国函〔2015〕53 号

Date: 16 March 2015

Source: www.gov.cn

Relevance: creates Kokdala under the Fourth Division of the Production and Construction Corps on a combined division-city basis; the accounting consequence is set out in section 4.2.

国务院关于同意新疆维吾尔自治区设立县级可克达拉市的批复

国函〔2015〕53号

中华人民共和国国务院

2015年3月16日

新疆维吾尔自治区人民政府：

你区《关于设立县级可克达拉市的请示》（新政发〔2014〕80号）收悉。现批复如下：

一、同意设立县级可克达拉市。可克达拉市人民政府驻幸福路1号。

二、可克达拉市由新疆维吾尔自治区直辖，管理方式按有关文件规定执行。

三、可克达拉市行政区域界线走向为：

1．西起六十三团十五连西北角北纬 44°04′53″、东经 80°26′14″，向东偏东北至多垄沙地 644 高程点，折向南至六十三团四号水库北纬 44°03′53″、东经 80°28′58″，折向东偏东北至莫乎尔大渠北纬 44°04′06″、东经 80°31′15″，沿莫乎尔大渠向南偏东南至多垄沙地北纬 44°01′43″、东经 80°31′34″，折向东偏东南至六十四团十五连西北角北纬 44°00′51″、东经 80°35′33″，折向北偏西北至 312 国道与黑水沟交汇处，沿 312 国道向东偏东北至 312 国道与三道河交汇处，折向南偏东南至二道河北纬 44°08′06″、东经 80°42′03″，沿二道河向南偏西南至伊犁河北岸 552 高程点，沿伊犁河北岸向西偏西南至霍尔果斯河东岸北纬 43°50′43″、东经 80°31′33″，沿霍尔果斯河东岸向北偏西北与起点闭合。

2．西起六十六团八连东北角清伊高速北纬 43°59′22″、东经 81°01′01″，沿清伊高速向东偏东南至伊宁市与霍城县边界线北纬 43°57′53″、东经 81°04′38″，沿伊宁市与霍城县边界线向南至伊犁河北岸北纬 43°54′49″、东经 81°04′29″，沿伊犁河北岸向西偏

西北至伊犁河与六十六团六连灌渠交汇处，沿六十六团六连灌渠向东北与起点闭合。

3．西起六十七团八连西北角伊犁河主航道与中哈国界线交汇处，沿伊犁河向东偏东北至伊犁河与六十七团四连干渠交汇处，折向东南至多拉图公路北纬43°48′06″、东经80°46′25″，沿多拉图公路向南至六十七团都拉塔分场通连公路北纬43°43′06″、东经80°46′24″，沿六十七团都拉塔分场通连公路向西偏西南至中哈国界线，沿中哈国界线向北偏西北与起点闭合。

4．西起六十八团十一连西北角北纬43°53′11″、东经80°44′17″，沿伊犁河向东偏东北至伊犁河与东风牧业队东侧排渠交汇处，沿东风牧业队东侧排渠向东偏东南至东风牧业队东侧排渠与六十八团七连灌渠交汇处，沿六十八团七连灌渠向西偏西南至七连西南角北纬43°51′37″、东经81°04′00″，继续沿六十八团七连灌渠向南偏西南至六十八团通连公路北纬43°50′18″、东经81°03′13″，沿六十八团通连公路向西偏西北至六十八团十一连排渠北纬43°51′08″、东经80°45′45″，沿六十八团十一连排渠向北偏西北与起点闭合。

可克达拉市的各类机构要按照“精简、统一、效能”的原则设置，涉及的行政区域

界线要按规定及时勘定，所需人员编制和经费由你区自行解决。要严格按照国务院“约法三章”的要求，不新建政府性楼堂馆所，不增加财政供养人员，不增加“三公”经费。要严格执行中央关于厉行节约的规定和国家土地管理法规政策，加大区域资源整合力度，优化总体布局，促进区域经济社会协调健康发展。

中华人民共和国国务院

2015 年 3 月 16 日

A.6 霍尔果斯综合保税区设立批复 Approval of the Horgos Comprehensive Bonded Zone

Issuing body: State Council of the People's Republic of China

Document number: not published for public

Date: Oct. 2020

Source: Xinjiang Daily

Relevance: establishes a customs special supervision area of 3.61 km² with a processing, maintenance and leasing mandate; the twenty-three processing enterprises recorded in mid-2025 are discussed in section 4.7. The official not shown for public.

新疆霍尔果斯综合保税区获批

来源：新疆日报

近日，国务院正式批复同意中国—哈萨克斯坦霍尔果斯国际边境合作中心中方配套区域整合优化为霍尔果斯综合保税区。至此，新疆综合保税区增至 4 个。

2006 年，国务院同意建立中哈霍尔果斯国际边境合作中心，同时在中方境内、靠近中心的位置建立中方配套区域，作为支撑中心发展的产业基地。

此次整合优化，霍尔果斯综保区规划面积 3.61 平方公里，共分为两个区块，将结合区位优势和政策优势，发展保税加工、保税物流、保税服务等业务。

霍尔果斯综保区验收合格后，将继续作为中哈霍尔果斯国际边境合作中心中方配套区，并享受现行综合保税区相关税收和外汇管理政策。此外，除法律、法规和现行政策另有规定外，将享受境外货物入区保税或免税；货物出区进入境内区外销售按货物进口的有关规定办理报关手续，并按货物实际状态征税，其中生产加工的货物可按其对应进口料件征收关税；境内区外货物入区视同出口，实行退税；区内企业之间的货物交易免征增值税和消费税。

“验收合格后，霍尔果斯综保区将在执行中方配套区政策的同时，叠加综保区的相关政策。届时，这里将成为新疆政策优势最明显的综保区。”乌鲁木齐海关企业管理和稽查处副处长张军说。

目前，新疆有阿拉山口综保区、乌鲁木齐综保区、霍尔果斯综保区（中哈霍尔果斯国际边境合作中心中方配套区）、喀什综保区等 4 个综保区。（陈蔷薇）

A.7 国务院关于同意在廊坊等 33 个城市和地区设立跨境电子商务综合试验区的批复（含伊犁哈萨克自治州） Approval of the Cross-Border E-Commerce Comprehensive Pilot Area

Issuing body: State Council of the People's Republic of China

Document number: 国函〔2022〕126 号

Date: Nov ,2022

Source: Ministry of Commerce; www.gov.cn

Relevance: basis for the e-commerce channel analysed in section 4.6, which recorded RMB 30.97 bn of trade through 45 registered operators in 2025.

33 地获批新设跨境电商综合试验区

新华社北京 11 月 25 日电（记者谢希瑶）国务院近日批复同意在廊坊等 33 个城市和地区设立跨境电子商务综合试验区。

根据批复，同意在廊坊市、沧州市、运城市、包头市、鞍山市、延吉市、同江市、蚌埠市、南平市、宁德市、萍乡市、新余市、宜春市、吉安市、枣庄市、济宁市、泰安市、德州市、聊城市、滨州市、菏泽市、焦作市、许昌市、衡阳市、株洲市、柳州市、贺州市、宜宾市、达州市、铜仁市、大理白族自治州、拉萨市、伊犁哈萨克自治州等 33 个城市和地区设立跨境电子商务综合试验区。

批复要求，综合试验区建设要复制推广前六批综合试验区成熟经验做法，发挥跨境电子商务助力传统产业转型升级、促进产业数字化发展的积极作用，推动外贸优化升级，加快建设贸易强国。

自 2015 年在杭州设立首个跨境电商综合试验区，这是该试验区在近 7 年时间里的第 7 次扩围、今年以来的第 2 次扩围。截至目前，我国跨境电商综合试验区已扩至 165 个。近年来，我国跨境电商等外贸新业态迅速发展，跨境电商进出口规模 5 年增长近 10 倍。

“一年里两次扩围，体现了国家对于跨境电商发展的高度重视。”上海财经大学电子商务研究中心主任劳帼龄说，此次扩围“下沉、普惠”特色更为鲜明，鼓励中小城市通过数字化转型加快融入全球产业链的导向明显。

批复还提出，努力在健全促进跨境电子商务发展的体制机制、推动配套支撑体系建设等方面取得新进展、新突破。

商务部研究院国际市场研究所副所长白明说，此次综试区的扩围将推动各地加快改革创新，有利于推动产业数字化和贸易数字化加速融合，进一步推动贸易便利化、监管制度创新、参与国际规则对接等，为我国外贸高质量发展积蓄新优势。

A.8 霍尔果斯市暂停“一址多照”及地方税收返还政策的措施 Measures Suspending Multiple Registration at One Address and the Local Tax Rebates

Issuing body: Horgos Municipal People's Government; Xinjiang Uygur Autonomous Region administration for industry and commerce

Document number:（新工商企登〔2018〕26 号）

Date: 11 April 2018 (autonomous region)

Source: Horgos Municipal People's Government; contemporary press reporting

Relevance: ends the registration regime analysed in section 4.4; followed on 3 April 2018 by the requirement that 2,118 enterprises conduct tax self-inspection, and in July 2018 by the tightening of tax administration for the film and television industry.



新疆维吾尔自治区

工商行政管理局文件

新工商企登〔2018〕26号

关于暂停执行“一址多照”政策的通知

喀什市、霍尔果斯市市场监督管理局:

鉴于“一址多照”政策在执行中可能出现相关税收政策风险，即日起，暂停两个经济开发区内市场主体按照《新疆维吾尔自治区市场主体住所（经营场所）登记暂行规定》（新政办发〔2014〕32号）第七条“允许将同一地址作为多家市场主体的住所”的规定办理登记。

请你们及时清理规范不符合条件使用“允许将同一地址作为多家市场主体的住所”政策办理的各类市场主体，要求其限期办理住所变更登记。

自治区工商行政管理局

2018年4月11日

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A.9

A9. 国务院关于印发《中国（新疆）自由贸易试验区总体方案》的通知 Notice on Issuing the Overall Plan for the China (Xinjiang) Pilot Free Trade Zone

Issuing body: State Council of the People's Republic of China

Document number: 国发〔2023〕17 号 (Guofa [2023] No. 17)

Date: issued 21 October 2023; published 31 October 2023

Source: www.gov.cn; Department of Commerce of the Xinjiang Uygur Autonomous Region

Relevance: assigns the Horgos area 16.58 km², including the comprehensive bonded zone of 3.61 km²; states that the area shall rely on cross-border cooperation and its status as a land border port national logistics hub, and shall give priority to cross-border logistics, cross-border tourism, financial services and exhibition services, and then develop pharmaceuticals, electronic information and new materials. The ordering of services before industry is the basis of the argument in sections 2.5, 4.6 and 5.3.

国务院关于印发《中国（新疆）自由贸易试验区总体方案》的通知

国发〔2023〕17号

各省、自治区、直辖市人民政府，新疆生产建设兵团，国务院各部委、各直属机构：

现将《中国（新疆）自由贸易试验区总体方案》印发给你们，请认真贯彻执行。

国 务 院

2023 年 10 月 21 日

中国（新疆）自由贸易试验区总体方案

建立中国（新疆）自由贸易试验区（以下简称自贸试验区）是党中央、国务院作出的重大决策，是新时代推进改革开放的重要战略举措。为高标准高质量建设自贸试验区，制定本方案。

一、总体要求

（一）指导思想

以习近平新时代中国特色社会主义思想为指导，全面贯彻落实党的二十大精神，统筹推进“五位一体”总体布局和协调推进“四个全面”战略布局，完整、准确、全面贯彻新时代党的治疆方略，坚持稳中求进工作总基调，完整、准确、全面贯彻新发展理念，加快构建新发展格局，着力推动高质量发展，更好统筹发展和安全，主动服务和融入国家重大战略，坚持推进高水平对外开放，加快实施自由贸易试验区提升战略，发挥好改革开放综合试验平台作用，把自贸试验区建设成为新时代改革开放新高地。

（二）战略定位及发展目标

以制度创新为核心，以可复制可推广为基本要求，全面贯彻落实第三次中央新疆工作座谈会精神，深入贯彻落实习近平总书记关于新疆工作的系列重要讲话和指示批示精神，牢牢把握新疆在国家全局中的战略定位，把依法治疆、团结稳疆、文化润疆、富民兴疆、长期建疆各项工

作做深做细做实，努力打造促进中西部地区高质量发展的示范样板，构建新疆融入国内国际双循环的重要枢纽，服务“一带一路”核心区建设，助力创建亚欧黄金通道和我国向西开放的桥头堡，为共建中国—中亚命运共同体作出积极贡献。

赋予自贸试验区更大改革自主权，充分发挥新疆“五口通八国、一路连欧亚”的区位优势，深入开展差别化探索，培育壮大新疆特色优势产业。经过三至五年改革探索，努力建成营商环境优良、投资贸易便利、优势产业集聚、要素资源共享、管理协同高效、辐射带动作用突出的高标准高质量自由贸易园区。

二、区位布局

（一）实施范围

自贸试验区的实施范围 179.66 平方公里，涵盖三个片区：乌鲁木齐片区 134.6 平方公里（含新疆生产建设兵团第十二师 30.8 平方公里；含乌鲁木齐综合保税区 2.41 平方公里），喀什片区 28.48 平方公里（含新疆生产建设兵团第三师 3.81 平方公里；含喀什综合保税区 3.56 平方公里），霍尔果斯片区 16.58 平方公里（含新疆生产建设兵团第四师 1.95 平方公里；含霍尔果斯综合保税区 3.61 平方公里）。

自贸试验区的开发利用须遵守土地利用、生态环境保护、规划有关法律法规，符合国土空间规划，并符合节约集约用地的有关要求。

（二）功能划分

乌鲁木齐片区依托陆港空港联动发展区位优势，加强陆港型国家物流枢纽建设，重点发展国际贸易、现代物流、先进制造业、纺织服装业及生物医药、新能源、新材料、软件和信息技术服务等新兴产业，积极发展科技教育、文化创意、金融创新、会展经济等现代服务业，打造与中亚等周边国家交流合作的重要平台。喀什片区依托国际贸易物流通道优势，做大做强外向型经济，重点发展农副产品精深加工、纺织服装制造、电子产品组装等劳动密集型产业，大力推动进口资源落地加工，积极培育国际物流、跨境电商等现代服务业，打造联通中亚、南亚等市场的商品加工集散基地。霍尔果斯片区依托跨境合作及陆上边境口岸型国家物流枢纽等优势，重点发展跨境物流、跨境旅游、金融服务、展览展示等现代服务业，做大做强特色医药、电子信息、新材料等产业，打造跨境经贸投资合作新样板。

三、主要任务和措施

（一）加快转变政府职能

1.打造一流营商环境。率先推进“数字政府”建设，提高政府运行效能，推进服务数字化、规范化、智能化，打造全疆标杆。赋予自贸试验区更大改革自主权，新疆维吾尔自治区、新疆生产建设兵团能够下放的经济社会管理权限，凡具有实际需要、符合下放条件的，全部依法下放至自贸试验区。探索实施食品经营许可等“证照同办”。授权自贸试验区对食品相关产品等重要工业品生产许可证采取告知承诺制方式直接受理和审批。探索将农作物种子进出口企业的种子生产经营许可证核发

权限下放至新疆省级农业农村部门，同时加强管理，促进种子市场规范有序发展。支持乌鲁木齐建设“丝绸之路经济带法务区”，完善法律服务机制，集聚高素质法律服务人才，积极引进更多有国际影响力的涉外法律服务机构。提升法律服务能力，组建涉外法律专家和律师团队，建立涉外法律服务专家库，开展国际法律及合规培训，提升法治保障水平。

2.提升科技服务能力和合作水平。推动在风力发电等领域建设国家技术创新中心，持续推动“一带一路”联合实验室建设。布局建设具有区域特色的新疆实验室，优化提升自治区重点实验室，紧紧围绕特色产业开展基础研究、应用基础研究和前沿技术研究。探索与中亚等周边国家在农业、能源、资源、环境、医药健康等领域共建联合实验室或联合研究中心，搭建集成研究、科技人才交流与培养合作平台。建立中国—中亚等区域创业创新创客基地和技术转移中心，建设科技成果孵化基地和科技企业孵化器。

3.坚持生态优先和低碳发展。推动重大生态环保改革举措优先在自贸试验区试点，指导支持自贸试验区开展生态文明示范创建。鼓励自贸试验区内企业开展自愿碳减排，推动符合条件的企业参与碳排放权交易。实施企业环境信息依法披露制度，探索完善环保信用评价与修复机制，推进环保信用评价制度建设。深入探索减污降碳协同增效路径，支持建设绿色低碳生态园区。拓展“三线一单”（生态保护红线、环境质量底线、资源利用上线和生态环境准入清单）应用场景，加强生态环境分区管控成果对生态、大气、固废等环境管理的支撑，促进产业发展绿色转型。持续提升重点领域和行业环评管理效能，发挥环评制度源头预防效

力。在大气环境容量偏低的区域，涉气重点行业落实好产能等量置换要求，着力构建科技含量高、资源消耗低、环境污染小的绿色产业结构。

（二）深化投资领域改革

4.推动投资自由化便利化。健全外商投资服务保障机制，切实保障外商投资企业依法公平参与政府采购、招投标、标准制定等事项，支持符合条件的企业平等享受产业和区域发展政策。鼓励设立外资研发中心，在研发费用、专职研发人员数量、购置设备等方面降低准入门槛。支持采取“平台+园区”、“机构+企业”的共享开放合作发展模式，建设国别产业合作园区。

5.提升对外投资合作水平。构建对外投资政策促进、服务保障和风险防控体系，建设企业“走出去”窗口和综合服务平台。鼓励支持自贸试验区内企业通过合资、合作、并购、参股等多种方式，对中亚等周边共建“一带一路”国家在能源资源、新材料、特色医药、农产品种植等领域开展对外投资，与国内产业衔接、产能互补、协同发展。完善对外投资管理，提升非金融类境外投资的便利化水平。

（三）推动对外贸易创新发展

6.提升贸易便利化水平。加快中国（新疆）国际贸易“单一窗口”建设，丰富跨境电商、物流全程协同等地方特色应用。扩大自中亚等周边国家优质农产品、食品进口。率先推进边境口岸农副产品快速通关“绿色通道”全覆盖。扩大周边国家特色中药材进口，对进口睡莲花、秋水仙、洋甘菊、石榴花、玫瑰花、牛舌草等新疆急需中药材批量开展

风险评估，加快签订双边议定书。探索进口大麦加工为饲用芽苗的闭环监管模式。依托中哈霍尔果斯国际边境合作中心（以下简称合作中心），加强与周边国家农产品、食品风险信息互通、检测执法互助领域合作。推进中国—中亚区域检验检疫安全技术合作与交流，搭建中国—中亚法规标准信息交流平台。推动综合保税区与自贸试验区统筹发展。实施重要矿产品“口岸+卸货地”联合监管模式。探索在满足监管条件的基础上，打造国际邮件、国际快件、跨境电商集约化监管模式。对边民互市贸易进口商品实施分层查验、分类监管。做好进口资源性商品的采信试点工作，鼓励符合资质要求的第三方检验检测机构参与，进一步提高通关效率。

7.培育外贸新业态新模式。推动建设边境仓、海外仓，鼓励优势企业在中亚国家建设海外仓，构建多仓联动跨境集运模式。支持符合条件的边境贸易商贸中心和商品市场夯实市场采购贸易发展基础，按程序申请开展市场采购贸易方式试点。集聚供应链管理、贸易中间商等功能性企业，探索开展离岸贸易，培育具备全球资源配置功能的中转集拼和国际分拨业务。支持自贸试验区内符合条件的企业按照综合保税区维修产品目录开展“两头在外”的工程机械、轨道交通、航空航天等高技术、高附加值、符合环保要求的保税维修业务。建立“一次检测、一次运输、一体化作业”整车保税仓储“三个一”监管模式。整合中亚粮食、棉花等优势农产品资源，支持符合条件的粮食加工、棉纺企业做好粮食、棉花进口业务。

8.推进内外贸一体化发展。在自贸试验区内开展内外贸一体化先行先试，聚焦棉纺、番茄、硅基等优势产业，用足用好现有支持政策，支持企业一体化经营、一体化市场开拓、一体化品牌培育。加快构建特色产品全产业链标准体系，推动棉纺、番茄、硅基产品标准与国际标准协调对接，提升内外标准一致化水平。统筹推进棉花认证体系建设工作，打造具有国际影响力的棉花认证品牌。发挥重点贸易促进平台作用，借助中国国际进口博览会、中国进出口商品交易会、中国国际服务贸易交易会、中国国际消费品博览会等大型综合展会开展组展招商工作，安排一定面积展销特色产品，对参展企业给予展位费减免。加强非商业性境外展会公共服务，支持企业参加特色产品国际展会。加强与行业商协会合作，开展特色产品进商超、进电商平台、进批发市场活动。组织电商平台、线下零售企业举办特色产品主题消费活动，推动电商平台等设置特色产品专区。

（四）打造开放型特色产业体系

9.做大做强传统优势产业。大力发展服装等吸纳就业能力强的纺织终端产业，高质量发展棉纺织业，打造国家优质棉纱生产基地，提高纺织服装产业促进就业能力。利用现有对二甲苯（PX）产能，打造炼化纺产业链条。支持自贸试验区内纺织服装和电子产品组装、鞋帽皮具、箱包等劳动密集型产业发展。提升林果、葡萄酒、乳制品等特色产品加工业标准化、规模化水平，打造特色优势品牌。支持新疆承接东部地区出口导向型特别是劳动密集型产业链转移，通过整合中亚国家初级产品、欧洲国家科技创新和高端部件制造能力，打造亚欧大陆产业链合作的重

要节点，形成具有新疆特色的产业体系，提高就业吸纳能力。依托传统优势特色产业，加大中小企业特色产业集群培育力度，促进中小企业专精特新发展。

10.推动制造业转型升级。依托现有石油化工产业基础，推动延链补链强链。建设国家战略性矿产资源基地和有色金属产业基地，提高有色金属就地转化比例。推动在综合保税区开展保税混矿业务。加快发展轨道交通装备、农牧机械、农产品加工装备、纺织专用装备、建筑与矿山机械装备等制造业，加快形成先进制造业集群。支持承接中东部先进装备制造业产业转移，打通绿色铸造等装备制造业配套环节，加快发展新能源汽车零部件配套产业。拓展通用航空商业化市场，推进相关基础设施建设，大力发展航空器制造维护、通航飞行、教育培训、应急救援等通用航空全产业链，打造通用航空产业集群。壮大安全应急产业，培育国家安全应急产业示范基地。打造特色医药产业，建设大宗原料药生产基地，将符合条件的创新药、中成药纳入国家医保药品目录和基本药物目录。

11.推动数字经济创新发展。加快数字基础设施建设，构建综合数字服务平台，支持自贸试验区充分发挥新疆能源和气候优势建设数据中心，带动数据中心相关产业向新疆转移，推动新疆积极参与“东数西算”工程建设、融入国家算力网络体系。加快国际通信设施建设，助力数字丝绸之路建设。支持新疆面向中亚国家，加快布局软件及信息技术服务类企业。为中小企业数字化转型提供政策支持，加快企业数字化转

型。支持乌鲁木齐片区与中亚国家依法有序开展数据信息交流合作，推动实现数据信息服务、互联网业务等领域互联互通。

（五）深化金融服务和开放创新

12.增强金融服务功能。鼓励自贸试验区内非金融企业和金融机构与共建“一带一路”国家金融机构创新合作方式、深化交流合作。支持境外金融机构在自贸试验区依法依规新设银行、保险、证券等法人金融机构。将自贸试验区内中外资银行分行级以下分支机构（不含分行）设立、变更、终止和高级管理人员任职资格核准事项，保险支公司及以下分支机构设立、迁址、撤销和高级管理人员任职资格核准事项，由事前审批改为事后报告。鼓励银行业金融机构按照法治化、市场化原则加大对自贸试验区基础设施及配套设施建设的金融支持力度。支持在自贸试验区内综合保税区开展期货保税交割、融资租赁、仓单质押融资等业务。

13.推动投融资便利化。在依法合规、风险可控的前提下，鼓励银行业金融机构创新科技金融服务模式，不断提升对自贸试验区内科创企业的金融服务水平。完善债券融资支持机制，推动企业发行绿色公司债券、绿色债务融资工具等。扩大出口信用保险覆盖面，支持自贸试验区内企业通过“单一窗口”、跨境金融区块链服务平台等开展线上保单融资。

14.扩大人民币跨境使用。依托双边政府间合作平台和联动机制，推动与共建“一带一路”国家在大宗商品贸易、境外承包工程、边民互市等领域开展人民币跨境结算。拓展与共建“一带一路”国家商业银行

间合作，鼓励开展双边本币直接交易和现钞跨境调运。服务合作中心建设，在依法合规、风险可控的前提下，探索开展自贸试验区内金融机构向共建“一带一路”国家转让贸易融资资产等金融业务创新。

15.建立健全金融风险防控体系。坚持系统观念、底线思维，加强重大风险识别和系统性金融风险防范，依托信息技术创新风险研判和风险防控手段，建立联防联控机制，完善金融分类监管机制，强化反洗钱、反恐怖融资和反逃税工作，打击非法金融活动，不断提升金融风险防控能力。

（六）建设联通欧亚的综合物流枢纽

16.构建现代综合交通枢纽体系。推动建设乌鲁木齐临空经济区，推进与国际陆港区联动发展。加快建设乌鲁木齐陆港型国家物流枢纽，推动建设空港型国家物流枢纽。扎实推进综合货运枢纽补链强链，推进跨运输方式一体化融合，强化区域协同联动，服务产业链供应链稳定顺畅。推动建设国家骨干冷链物流基地。强化国际邮件互换局（交换站）功能，探索建设“中国邮政中亚—中欧海外仓枢纽站”。支持发展中吉乌公铁联运，探索发展中巴多式联运，合作建设中吉乌等铁路项目，推动自贸试验区内陆港、口岸、园区、企业等集疏运体系建设。加快现有口岸现代化改造，增强铁路口岸能力，畅通自贸试验区多式联运大通道和末端网络。

17.创新物流运输服务模式。推进公铁联运“一次委托、一单到底、一次结算”，探索建立符合沿边地区多式联运发展特点的业务模式和规则标准，加快与国际联运规则衔接和标准互认，推动多式联运规则标准

“走出去”。探索赋予运单物权凭证功能，为有关国际规则制定提供实践支撑。探索开展基于铁路运输单证的金融服务。加强中欧班列集结中心建设，积极支持乌鲁木齐国际陆港区开行中欧班列，有效对接西部陆海新通道班列。支持搭建国际多式联运物流信息平台。优化自贸试验区与周边国家主要城市航路航线网络衔接，根据平等互利原则并结合乌鲁木齐机场、喀什机场国际航线网络建设需要，与有关国家和地区扩大包括第五航权在内的航权安排，培育发展国际航空市场。

18.推动内陆口岸经济创新发展。支持乌鲁木齐药品进口口岸建设，提升口岸运营水平。支持开展国际航线航班保税航油加注业务。研究开展国际邮件和跨境电商商品搭乘中欧班列（乌鲁木齐）出口等业务。积极引进国际物流企业，完善流通加工、包装、信息服务、物流金融等物流服务，构建“通道+枢纽+网络”的现代物流运行体系。支持探索口岸联动发展，加快“单一窗口”优化升级，推动“智慧海关、智能边境、智享联通”建设与发展。依托现有机构构建统一高效的口岸监管体系。开展口岸综合绩效评估，清理规范口岸收费。完善口岸联防联控机制，推动监管部门信息互换、监管互认、执法互助。

（七）深化向西开放多领域交流合作

19.强化与周边国家经贸合作。充分发挥上海合作组织、“中国—中亚五国”相关合作机制、中亚区域经济合作（CAREC）等国际交流平台和多双边机制作用，支持参与或承办相关框架下活动。不断完善合作中心三级联动机制。高质量举办中国—亚欧博览会，探索与共建“一

带一路”国家特别是中亚国家、上海合作组织国家合作举办国家主题展会和行业专题展会。优化合作中心出入境通行证办理程序。

20.推进国际文化教育交流。加强国际传播能力建设，创新文化服务海外推广模式，开展音乐舞蹈、文化遗产、艺术展览、文化创意、竞技赛事等国际交流活动，打造多元文化交流平台。支持申请创建国家对外文化贸易基地，打造一批具有中国特色、丝路元素的优势文化产品和服务。充分发挥旅游业提供岗位多、带动能力强的优势，依托新疆自然风光和人文风情，打造具有世界影响力的丝绸之路旅游走廊，带动各族群众就业增收。支持创建边境旅游试验区和跨境旅游合作区。联合周边国家打造跨境旅游线路，研究开行国际旅游列车。实施“留学新疆”计划，委托符合条件的高校承担中国政府奖学金生培养任务，对优秀留学生赴新疆高校学习予以奖学金支持，鼓励高校招收自费来疆留学生，培养服务自贸试验区发展需要的国际化人才。

21.提升国际医疗服务能力。推动互联网跨境远程医疗深入发展，引进国内外高端医疗资源和高层次医疗团队，升级远程会诊服务平台，支持打造服务周边国家的“云医院”。培育国际学术交流平台，鼓励举办医疗健康领域国际会议和会展活动。以乌鲁木齐片区为核心，依托区域医疗资源优势，开展对周边国家的国际诊疗业务。探索开展干细胞、免疫细胞、基因治疗等临床前沿诊疗技术研究。探索建立国际医疗商业保险、跨国医疗保险等衔接机制，为外籍患者提供便利高效的医疗服务，积极打造辐射周边的国际医疗服务中心。支持医药产品开展以共建“一带一路”国家为重点的国际注册。

（八）深化人才发展体制机制改革

22.示范推行人才改革政策。支持自贸试验区率先落实编制岗位、科研经费、人才评价、激励保障等人才改革政策。推行以增加知识价值为导向的分配政策，探索年薪制、协议工资制和项目工资制等分配形式，鼓励通过股权、期权、分红等激励方式，调动高层次人才积极性。支持自贸试验区优化人才管理制度，更好促进人才流动。支持国有企业在职和退休专业技术人才，事业单位在职和退休专业技术人才、管理人才按规定在自贸试验区兼职兼薪、按劳取酬，支持高校、科研院所符合条件的科研人员按规定到自贸试验区创新创业。

23.集聚高层次和急需紧缺人才。按程序认定的高层次人才到自贸试验区长期工作的，地方可按照有关规定，在住房、医疗、子女教育等方面给予支持。对具有国际国内一流水平、能够引领产业发展的人才，“一事一议”给予支持。支持地方为优秀高校毕业生提供实习补贴，对优秀的博士或博士后研究人员给予经费支持，吸引人才来疆创新创业。

24.建设人才创新创业平台。支持自贸试验区加快人才发展平台建设，支持行业龙头企业培育建设重点实验室、企业研发中心、高技能人才实训基地、技能大师工作室等平台，建设产业创新研究院等新型研发机构，开展联合技术攻关、协同创新和科研成果转化。支持企业与高校、科研院所开展产学研用合作，共建产业技术联盟、技术孵化基地、实习实训基地、行业公共（共性）技术平台等。

25.加强涉外人才服务保障。支持出入境人员综合服务“一站式”平台建设，为外籍高层次人才投资创业、讲学交流、经贸活动等提供出入境便利。对在自贸试验区工作的外籍高层次人才、外籍技术技能人才等重点群体，提供签证、工作许可、居留和永久居留、驾照转换等便利服务，不断提升服务质量。支持自贸试验区大力发展人力资源服务业，创建国家级人力资源服务产业园和人力资源服务出口基地，引进培育一批高水平人力资源服务机构。

四、保障机制

坚持把加强党的全面领导贯穿于自贸试验区建设的全过程，牢固树立总体国家安全观，聚焦新疆工作总目标，加强抓稳定和促发展两方面工作的统筹结合，强化底线思维和风险意识，切实加强自贸试验区风险防控体系建设，完善防范化解重大风险隐患机制，维护国家安全和社会安全，牢牢守住不发生区域性系统性风险底线。坚持绿色发展，筑牢生态安全屏障，落实生态环境分区管控要求，切实维护国家生态环境安全和人民群众身体健康。

自由贸易试验区工作部际联席会议机制要发挥好统筹协调作用，充分发挥地方和部门积极性，抓好各项改革试点任务落实，高标准高质量建设自贸试验区。新疆维吾尔自治区和新疆生产建设兵团要切实履行主体责任，坚持规划统筹、政策协调、资源整合、优势互补，合力推进自贸试验区建设；完善工作机制，构建精简高效、权责明晰的自贸试验区管理体制；加强地方立法，建立公正透明、体系完备的法治环境；加强

监测预警，深入开展风险评估，制定相关工作方案，切实防范化解重大风险；加强人才培养，打造高素质专业化管理队伍；坚持“三个区分开来”，鼓励大胆试、大胆闯。新疆维吾尔自治区、新疆生产建设兵团和有关部门要依法及时下放相关管理权限，完善配套政策，确保各项改革举措落地实施。自贸试验区各片区要把工作做细，制度做实，严格监督，严格执纪执法。

国务院关于在自由贸易试验区暂时调整实施有关行政法规规定的决定统一适用于中国（新疆）自由贸易试验区。自贸试验区内的综合保税区以及合作中心的实施范围和税收政策适用范围维持不变。本方案提出的各项改革政策措施，凡涉及调整现行法律或行政法规的，按规定程序办理。重大事项及时向党中央、国务院请示报告。

A.10 新疆“五大战略定位” Five Strategic Positions for Xinjiang

Issuing body: central authorities; restated in autonomous region planning documents

Date: 2023

Underline : the official document is not for public here is related government article instead

Source: Xinjiang Uygur Autonomous Region People's Government; zytzb.gov.cn

Relevance: places the gateway for opening to the west and the national energy and resource security base as separate strategic items. The separation of the corridor component from the resource component is the basis of the argument in sections 4.8 and 5.3.

深度解析新疆在国家全局中的“五大战略定位”

更新日期： 2025-03-12

3 月 11 日，十四届全国人大三次会议在北京闭幕。

大会凝聚人心、催人奋进!

当前最重要的是落实好习近平总书记重要讲话精神和全国两会精神。

新疆如何落实?

让我们从 3 月 7 日全国两会新疆代表团开放团组活动上向中外媒体详尽阐释的新疆在国家全局中的“五大战略定位”，来看看落实工作该怎么干。（“五大战略定位”：打造亚欧黄金通道和向西开放的桥头堡、打造构建新发展格局的战略支点、打造全国能源资源战略保障基地、打造全国优质农牧产品重要供给基地、打造维护国家地缘安全的战略屏障）

“五大战略定位”谋划有何深意?

系统梳理公开报道，在“问疆”AI 智能体平台输入“五大战略定位”关键词，发现最早于 2023 年 8 月见诸报端。

刊登于《新疆日报》2024 年 2 月 2 日 A03 版的《奋力谱写高质量发展新篇章》一文，在解读 2024 年《政府工作报告》时提到：

2023 年，是我区发展史上极不寻常、具有里程碑意义的一年。习近平总书记心系新疆稳定发展、情系新疆各族人民，时隔一年再次莅临新疆，听取自治区和兵团工作汇报、发表重要讲话，为我们完整准确全面贯彻新时代党的治疆方略提供了根本遵循；党中央、国务院专门出台更好紧

贴民生凝聚人心推动新疆经济社会高质量发展的实施方案，确定了新疆在国家全局中的“五大战略定位”，提出了一系列支持新疆高质量发展的重要举措，总书记对新疆“独一份”的深切关怀和党中央、国务院的极大支持，为我们更好建设美丽新疆提供了重大机遇、注入了强大动力。党中央、国务院赋予新疆在国家全局中的“五大战略定位”，为新疆发展带来前所未有的机遇。

目标已经明确，方向已经确定。那么，新疆如何贯彻、落实好“五大战略定位”呢?

第一、完整准确全面贯彻新时代党的治疆方略。

做好新疆工作，必须要放在世界大局中考量、着眼国家全局推进，不能简单地关起门来做自己的事。这是我们要把握“五大战略定位”推进高质量发展的一个重要出发点。

第二、锚定“五大战略定位”。

统筹发展和安全、统筹开放和安全，加强系统谋划，释放优势潜力，不断把各方面优势转化为现实生产力。

把“五大战略定位”落到实处，新疆最突出的是资源优势和区位优势——

从资源优势上说，新疆，拥有 166 万平方公里的土地，约占我国陆地面积的六分之一，自然资源禀赋优势巨大、潜力巨大。新疆不仅有丰富的石油、天然气、煤炭等重要矿产资源，还有粮食、棉花、果蔬等优质农产品资源。

就拿能源来说，无论是以煤炭、石油、天然气为代表的化石能源，还是

以太阳能、风能为代表的新能源，新疆均排名全国前列。

从区位优势上说，新疆与 8 个国家接壤，陆地边境线长 5700 多公里，是中国向西开放的前沿。新疆历来享有“五口通八国、一路连欧亚”的美誉。

2022 年至 2024 年，新疆外贸进出口总值连续突破 2000 亿元、3000 亿元、4000 亿元，3 年跨越 3 个千亿元台阶，对外开放已展现出强劲发展势头。

系统梳理“五大战略定位”，看看还有哪些优势：

——打造亚欧黄金通道和向西开放桥头堡。

2022 年，习近平总书记在视察新疆时强调，随着我国扩大对外开放、西部大开发、共建“一带一路”等深入推进，新疆从相对封闭的内陆变成对外开放的前沿，要推进丝绸之路经济带核心区建设，把新疆的区域性开放战略纳入国家向西开放的总体布局中，创新开放型经济体制，加快建设对外开放大通道，更好利用国际国内两个市场、两种资源，积极服务和融入新发展格局。

经两年多的实践，充分证明习近平总书记的高瞻远瞩。

2023 年，中国（新疆）自由贸易试验区设立，涵盖乌鲁木齐片区、喀什片区、霍尔果斯片区。这对打造亚欧黄金通道和向西开放桥头堡来说，是重大利好！

积极参与中国—中亚交通走廊建设，筹划近 30 年的中吉乌铁路项目正式开工。这条铁路将使新疆在全球交通和贸易中枢纽作用更为凸显，为新疆带来“泼天富贵”。

——打造构建新发展格局的战略支点。

政府工作报告提出，纵深推进全国统一大市场建设。

深化与国内其他省份对接，新疆优化资源配置，更好融入全国统一大市场。

作为连接国内国际双循环重要枢纽，当前新疆就像一块“磁铁石”，吸引来大批企业投资。

目前，国内外大企业大集团，尤其是中央企业、各省区市国有企业，都在向新疆进军。2024 年通过中央企业产业兴疆推进会，新疆与 25 家央企签署投资协议 9400 亿元。他们的到来，进一步推动构建新发展格局的战略支点实现。

不仅如此，新疆本土企业综合实力也不断显现。特变电工致力为全球能源事业提供绿色清洁解决方案，是国家级高新技术企业集团和我国大型能源装备制造企业集团，2024 年，在“全球最大 250 家国际承包商”榜单中排名第 60 位；金风科技以强大科研创新和最佳业务实践，将可再生能源的效率提升至新高度，是全球可信赖的清洁能源战略合作伙伴，业务遍及全球 6 大洲，全球风电整机销售排名前列。

像特变电工、金风科技等一批新疆本地崛起的优秀企业，他们也是构建新发展格局战略支点的坚实臂膀！

——打造全国能源资源战略保障基地。

当前，新疆资源优势展现出巨大开发潜力。

2024 年，新疆油气产量当量达 6664 万吨，连续四年居全国第一。向地球深部挺进，在塔里木盆地完钻的深地塔科 1 井，井深 10910 米，

创全球和亚洲五大工程纪录，并且首次在万米之下发现油气显示。

加快煤炭先进产能释放，近年来，新疆煤炭产量大幅跃升。2021 年原煤产量 3.21 亿吨，2022 年达 4 亿吨，2023 年达 4.59 亿吨，2024 年达 5.41 亿吨。伴随着煤炭先进产能的释放，新疆服务保供全国大局能力也不断增强。“十三五”期间，“疆煤外运”6939 万吨，2021 年达 4387 万吨，2022 年突破 8800 万吨，2023 年突破 1 亿吨，2024 年突破 1.4 亿吨。

能源空中走，电送全中国，目前，新疆电力已送至全国 20 余个省区市。2024 年，“疆电外送”1264 亿千瓦时，全球单体规模最大氢储能项目开工建设，新型储能累计建成并网近 1000 万千瓦，位居全国前列。“疆电外送”第三通道建设已进入收尾阶段，预计今年 6 月开始向重庆送电，与此同时，第四通道正加紧建设，第五通道也正在谋划。

加快战略性矿产资源勘探开发，新疆出台推动矿业高质量发展政策措施，形成大型资源基地 6 处，和田大红柳滩锂矿、火烧云铅锌矿实现首期投产。下一步，我们要开发好重要战略性矿产资源，包括锂、铍、铜、金等，都展现出巨大潜力。

——打造全国优质农牧产品重要供给基地。

当前，“西部粮仓”正在崛起。

2024 年，新疆粮食播种面积 4440 万亩、新增 202.9 万亩，粮食增产 42.2 亿斤，总产 466 亿斤、全国排名上升到第 13 位，粮食单产 1050 斤、首次跃居全国第一。2025 年，新疆力争粮食再增产 10 亿斤以上，使中国饭碗有更多新疆粮。

棉花更是不必说，新疆已是名副其实的“中国棉库”，2024 年棉花总产 568.6 万吨、占全国 92.2%。

新疆还是享誉全国的“瓜果之乡”，2024 年林果产量达 1400 万吨。

还有，最近几年火爆出圈的“陆养海鲜”， 包括三文鱼、石斑鱼、青蟹等已跃出天山、远销全国，2024 年新疆水产总量 19.65 万吨，位居西北五省区第一，新疆海鲜已成为全国人民餐桌上的“新宠”。

——打造维护国家地缘安全的战略屏障。

新疆工作在党和国家工作全局中具有特殊重要地位。新疆社会稳定和长治久安，关系全国改革发展稳定大局，关系祖国统一、民族团结、国家安全，关系中华民族伟大复兴。

当前，新疆春耕春播由南到北依次展开，沉睡一冬的大地正被唤醒；沙漠戈壁，油气开发钻机轰鸣，重点工程项目陆续开工；商场、美食街区、汽车销售市场，更是顾客如云，天山南北呈现出一派安定祥和、蓬勃发展的新面貌新气象。