



Making Cooperation Work

COMCEC STRATEGY

For Building an Interdependent Islamic World

COMCEC TRANSPORT and COMMUNICATIONS OUTLOOK 2019



Transport and Communications Working Group 14th Meeting

October 3rd, 2019

Ankara, Turkey

OUTLINE

- **Importance of Transport and Communications for COMCEC**
- **Transport Infrastructure, Logistics, and Trade**
- **Transport by Modes**
- **Environmental Effects of Transport Sector**
- **Previous Studies and Policy Recommendations**



Importance of Transport and Communications

- One of the three principles of COMCEC Strategy is enhancing mobility (the other two are strengthening solidarity and improving governance)
- Transportation is explicitly declared by COMCEC as one of the three priority sectors together with agriculture and tourism
- One of the six cooperation areas specified by the COMCEC Strategy
- Closely related with the two other cooperation areas: trade and tourism
- Strategic objective: Improving the functioning, effectiveness and sustainability of transport and communications in the Member States



Transport Infrastructure, Logistics, and Trade



Quality of Transport Infrastructure

The indexes for the quality of transport infrastructure
(1=extremely underdeveloped infrastructure to 7=efficient infrastructure)

Region	Quality of roads	Efficiency of train services	Efficiency of seaport services	Efficiency of air transport services
OIC Average	3.9	3.1	3.7	4.2
OIC-Sub Saharan Africa	3.0	2.1	2.9	3.3
OIC-MENA	4.4	3.2	4.2	4.6
OIC-Asia	4.1	4.0	3.6	4.5
OIC Maximum	Oman	Malaysia	UAE	UAE
OIC Minimum	Mauritania	Yemen&Albania	Tajikistan	Yemen

Source: The Global Competitiveness Report 2018, WEF

Logistics Performance Index 2018 (LPI)

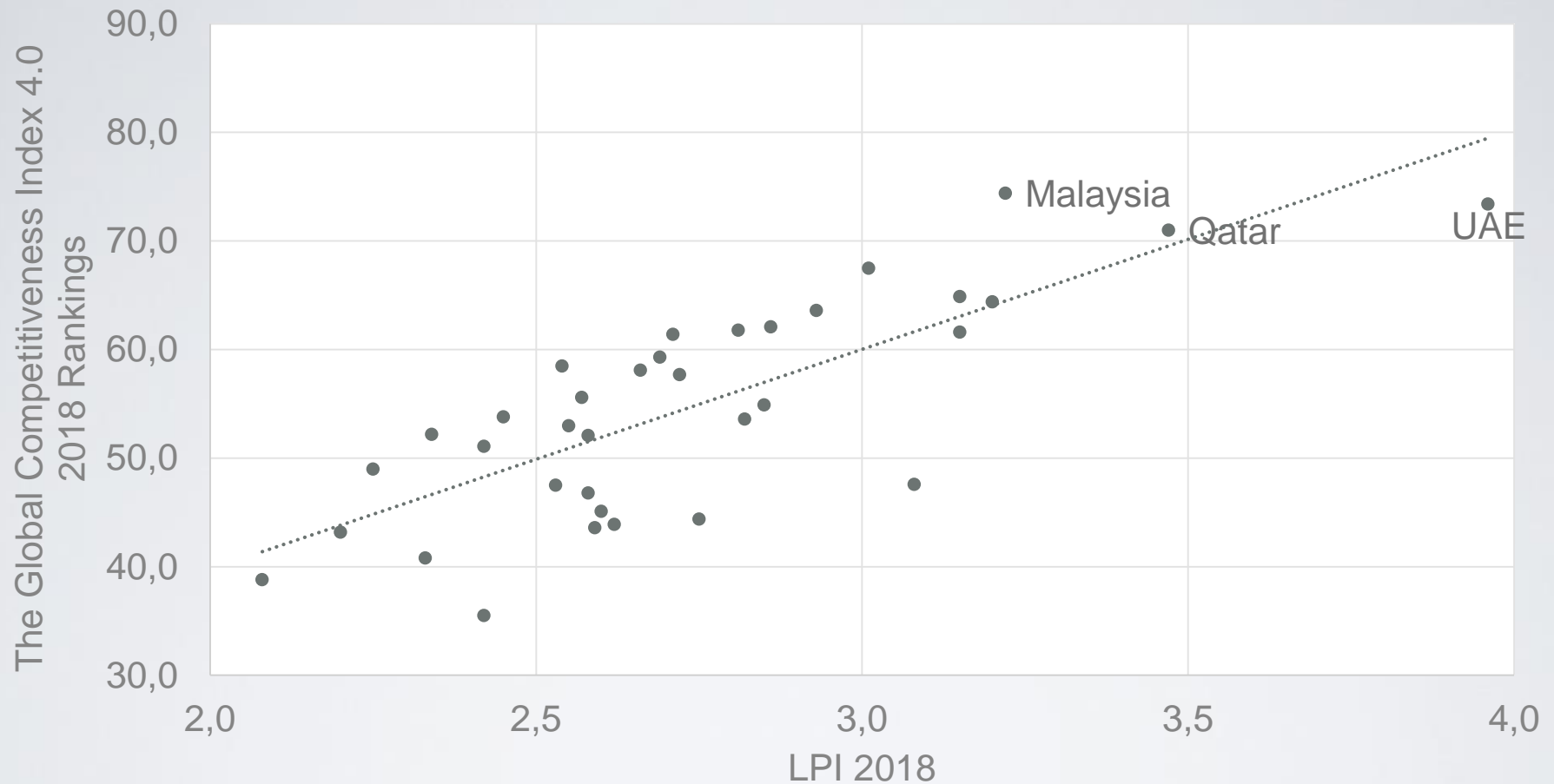
Regions	Overall LPI Score	Customs	Infrastructure	International Shipments	Logistics Quality and Competence	Tracking and Tracing	Timeliness
Germany	4,2	4,09	4,37	3,86	4,31	4,24	4,39
OIC Average	2,84	2,57	2,66	2,82	2,72	2,84	3,22
OIC-MENA	2,97	2,68	2,89	2,92	2,84	2,97	3,38
OIC-Asia	2,82	2,55	2,61	2,84	2,80	2,84	3,24
OIC-Sub Saharan Africa	2,60	2,41	2,30	2,64	2,45	2,65	2,93

Source: World Bank



Logistic Performance and Competitiveness

2018 LPI scores and 2018 GCI scores of the OIC countries

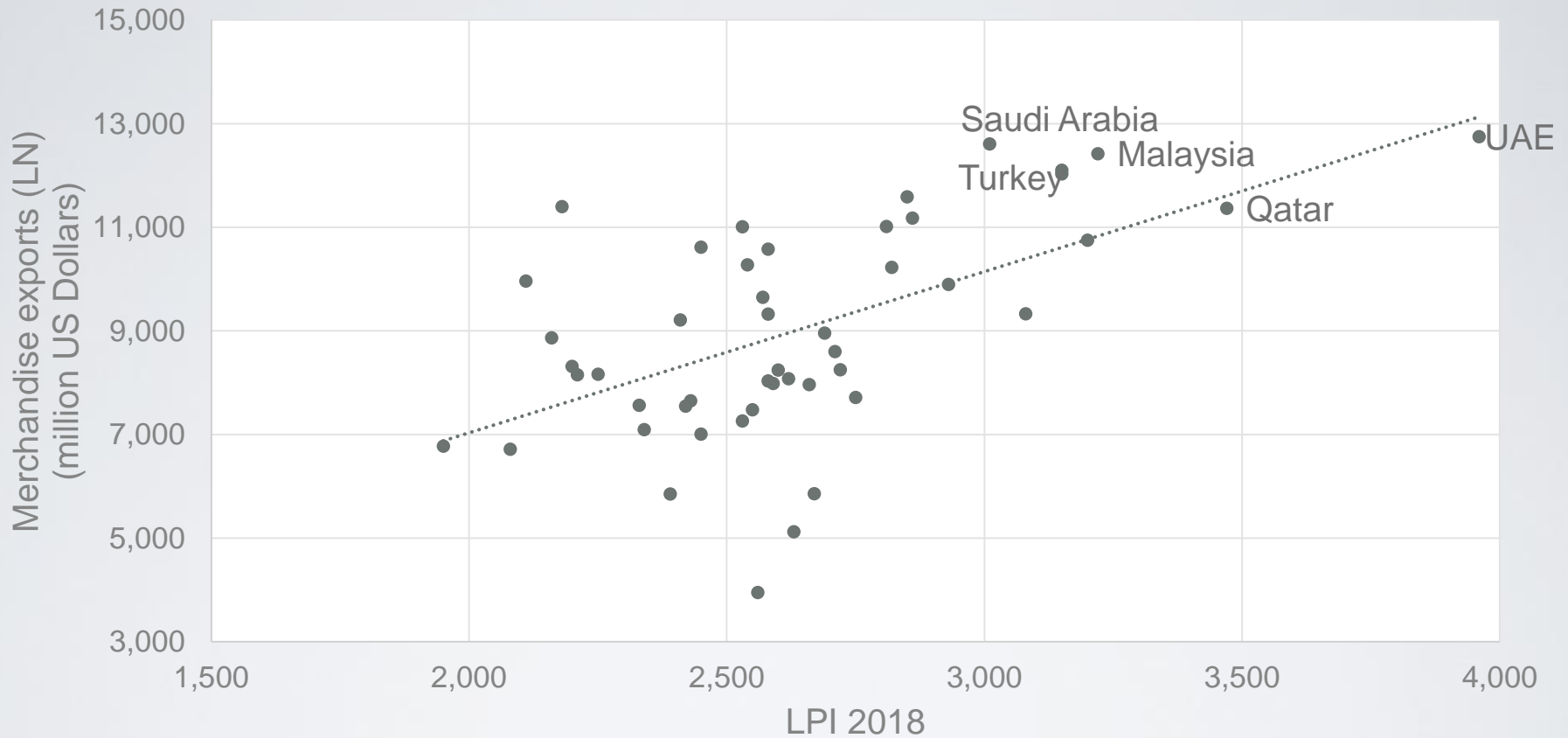


Source: World Development Indicators and World Economic Forum



LPI Score and Trade

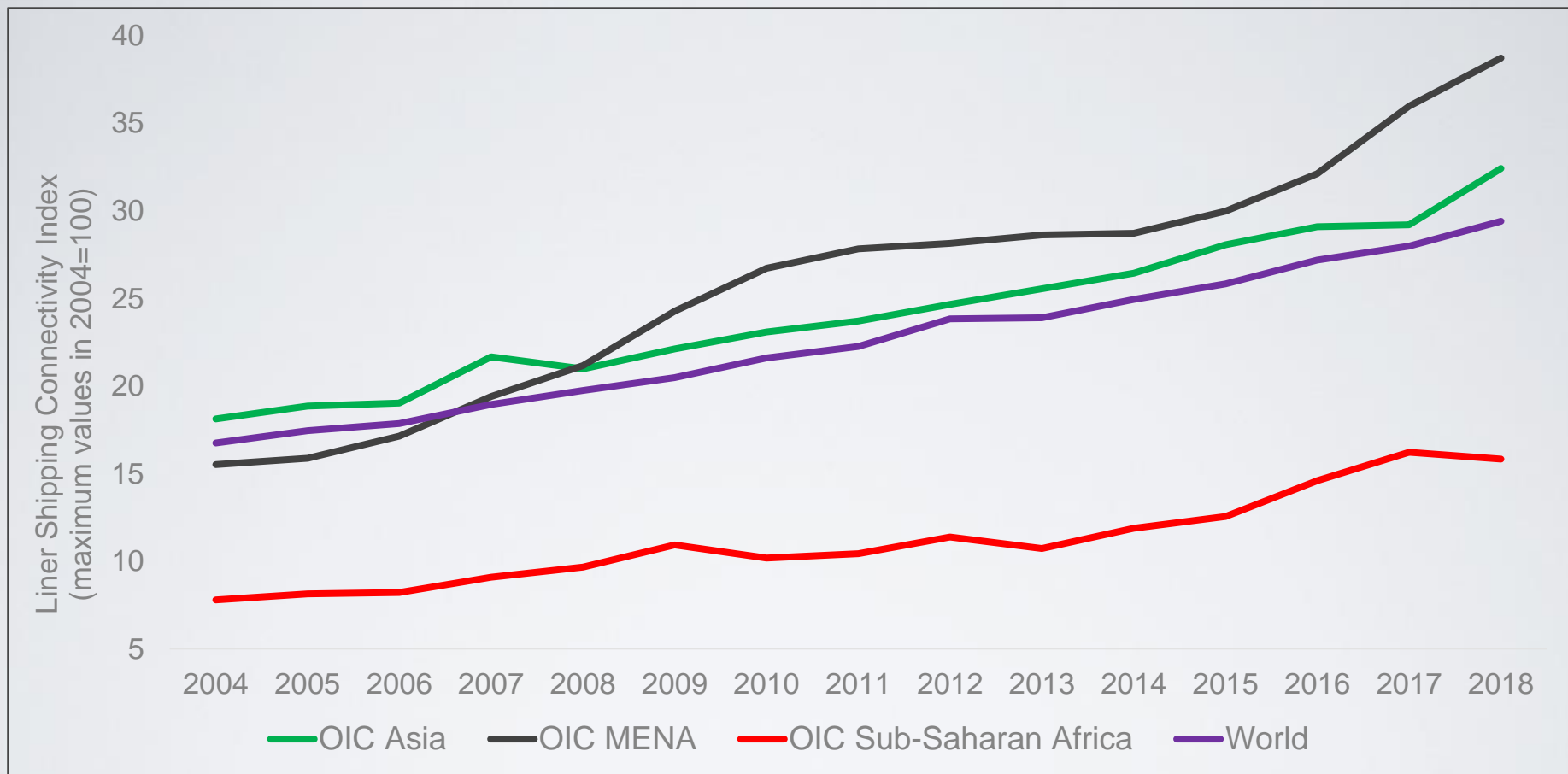
Merchandise exports and LPI scores in OIC countries (2018)



Source: World Bank World Development Indicators

The Liner Shipping Connectivity Index

Average liner shipping connectivity scores by OIC regions (2004-2018)



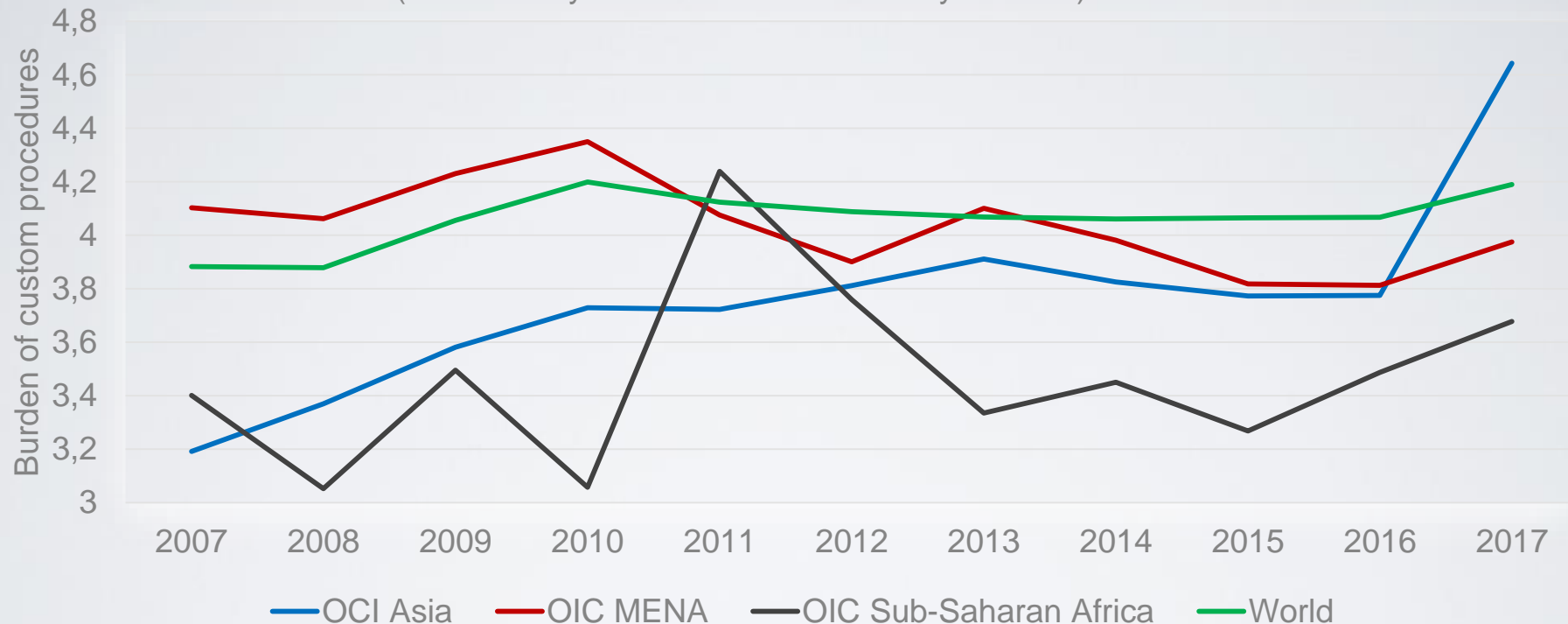
Source: UNCTAD Statistical Database



Burden of Custom Procedures

Average burden of custom procedure scores by OIC regions (2007-2017)

(1=extremely inefficient to 7=extremely efficient)



Source: World Development Indicators

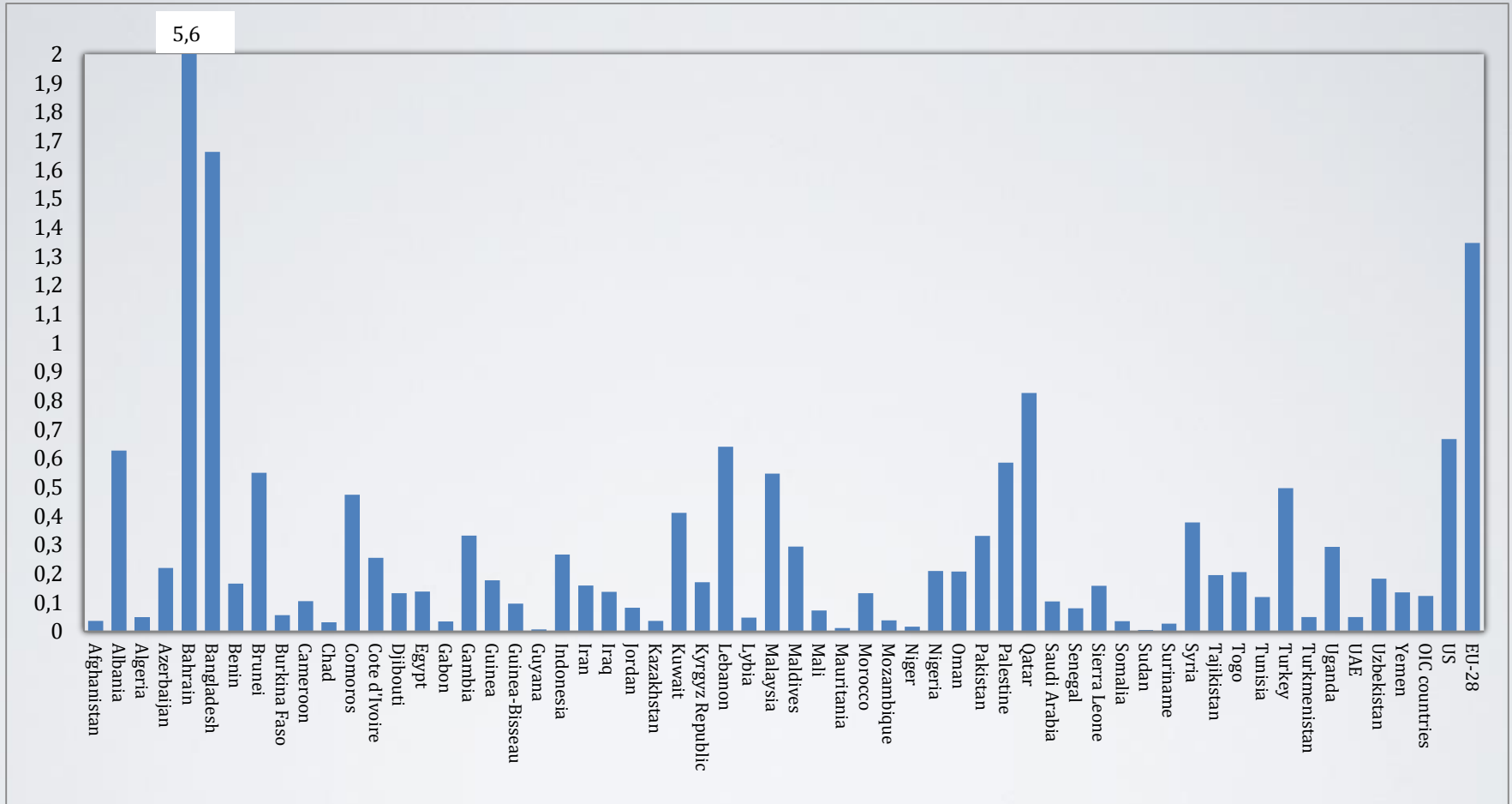


Transport by Modes

Road Transport

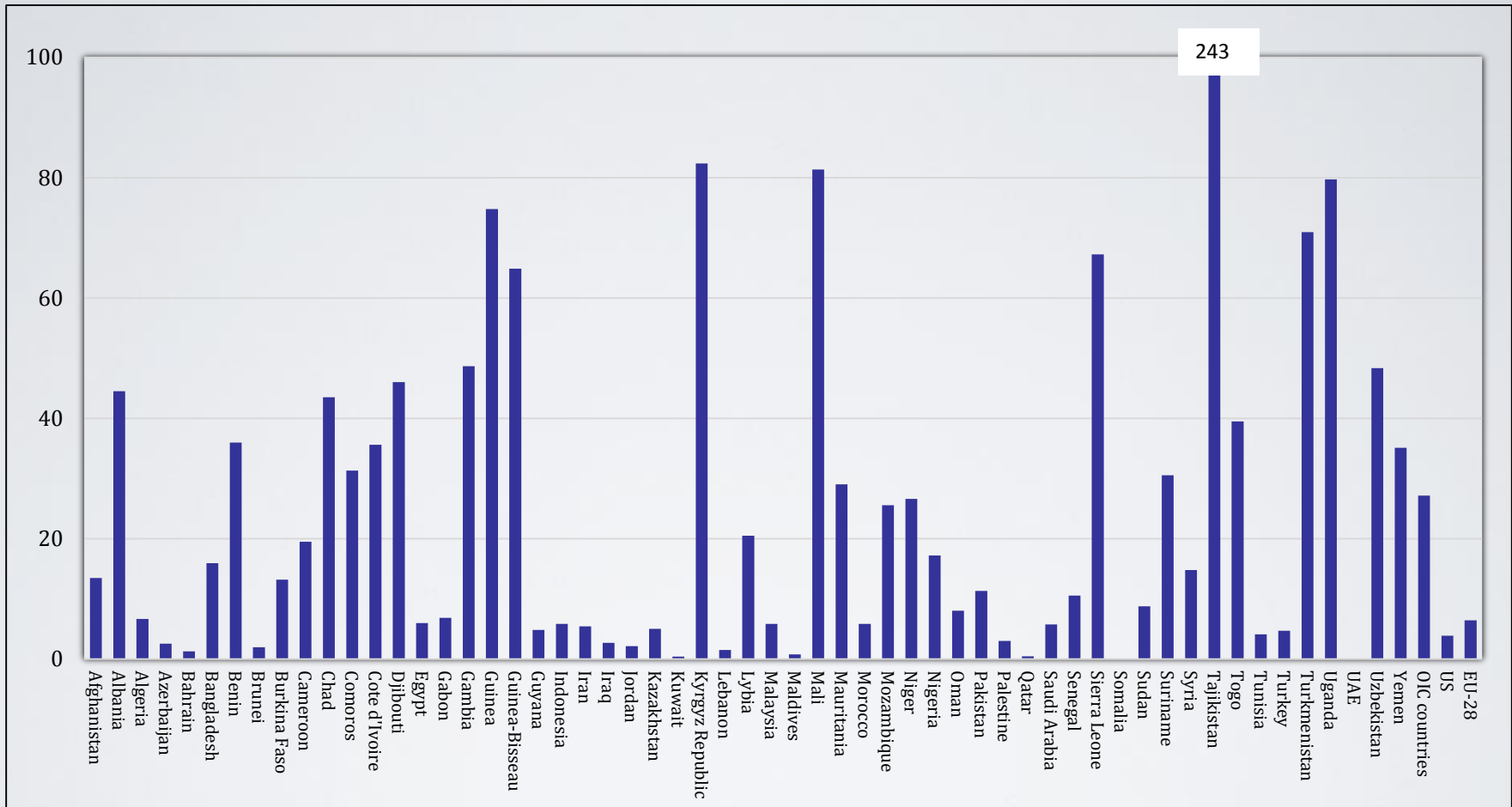


Length of Road Network (km) / km² Area of Country



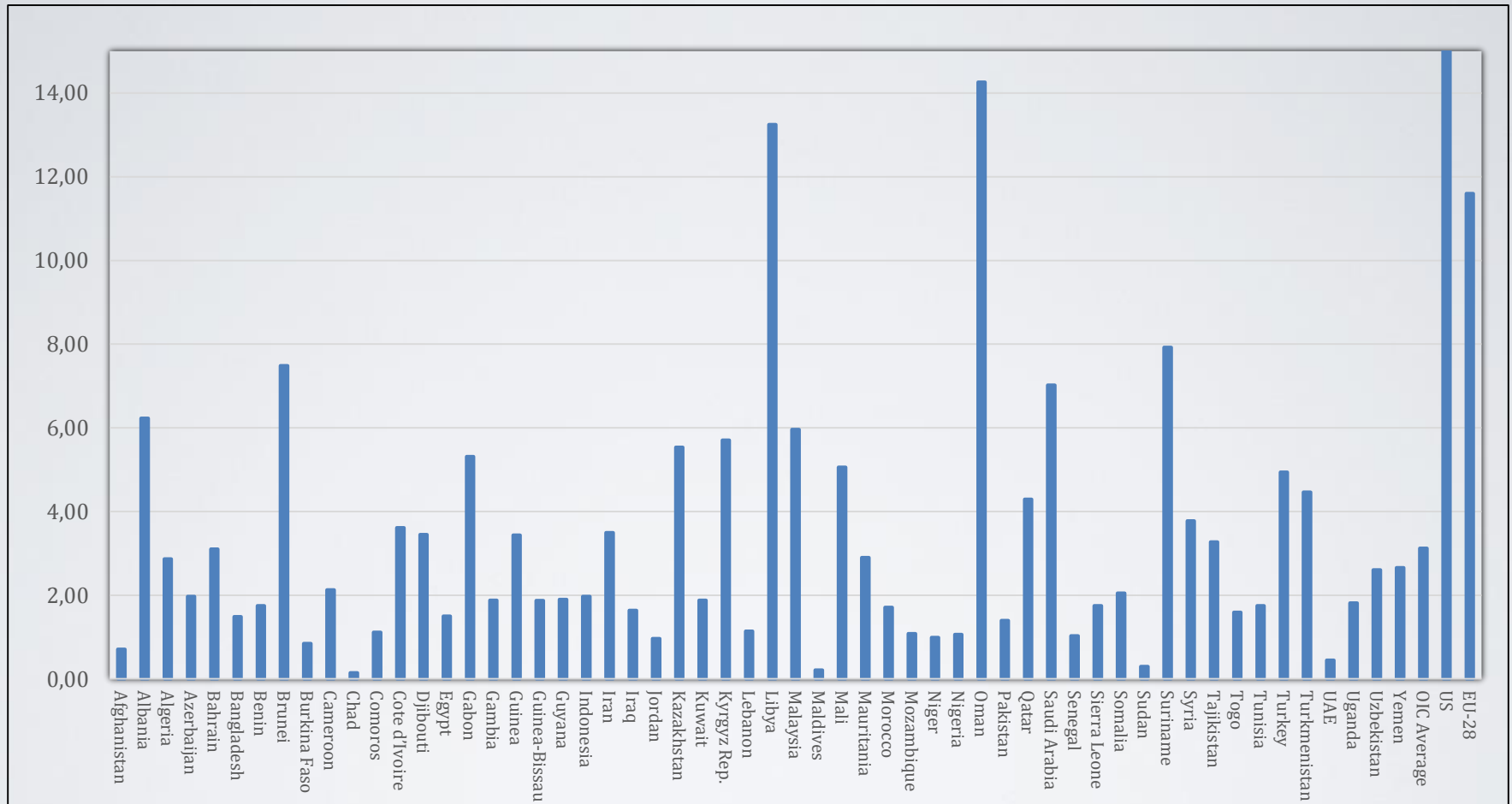
Source: COMCEC, Enhancing Road Maintenance in the OIC Member States, 2016

Length of Road Network (km) / USD 10 million GDP



Source: COMCEC, Enhancing Road Maintenance in the OIC Member States, 2016

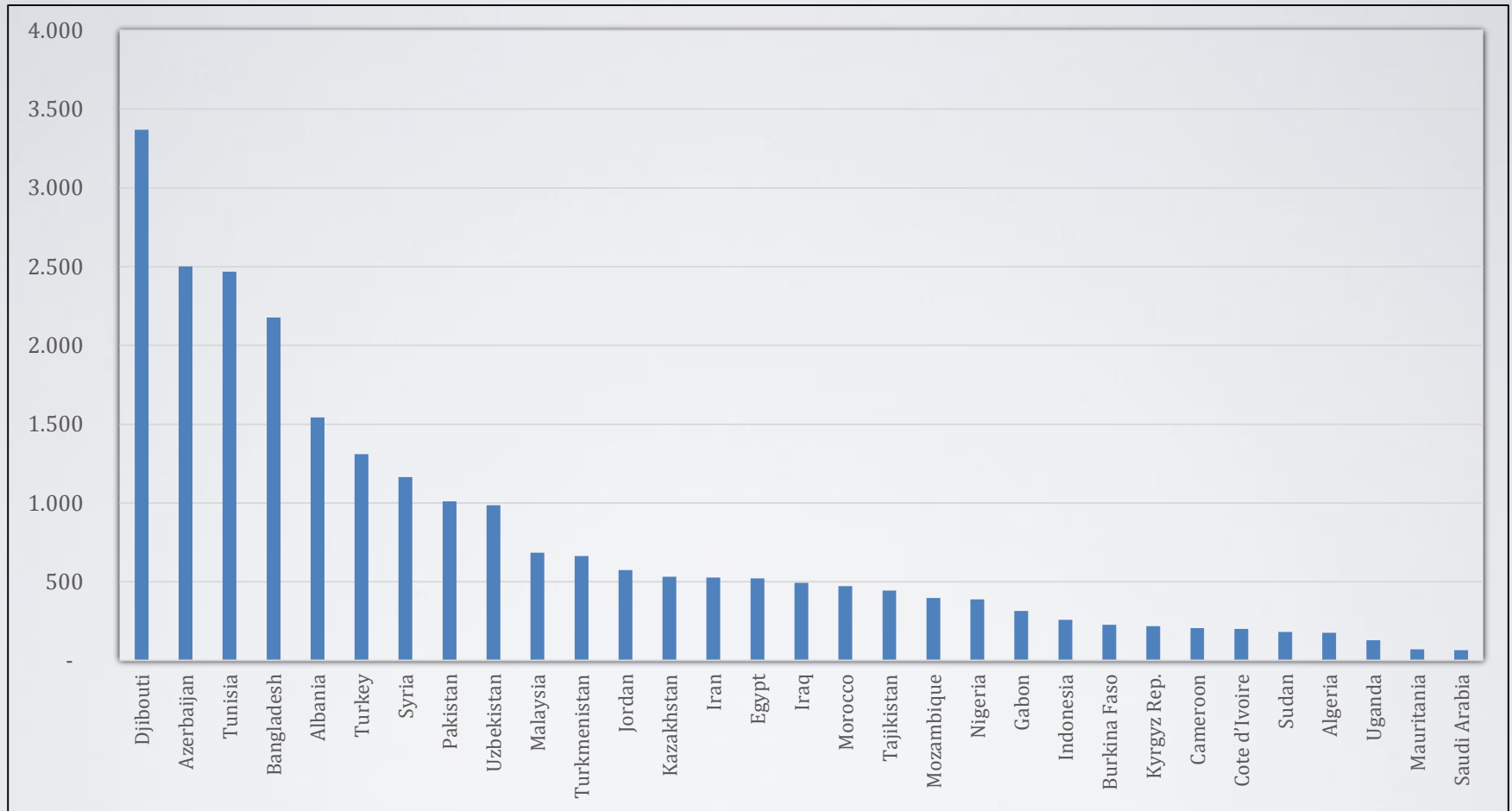
Length of Road Network (km) / 1,000 Population



Source: COMCEC, Enhancing Road Maintenance in the OIC Member States, 2016

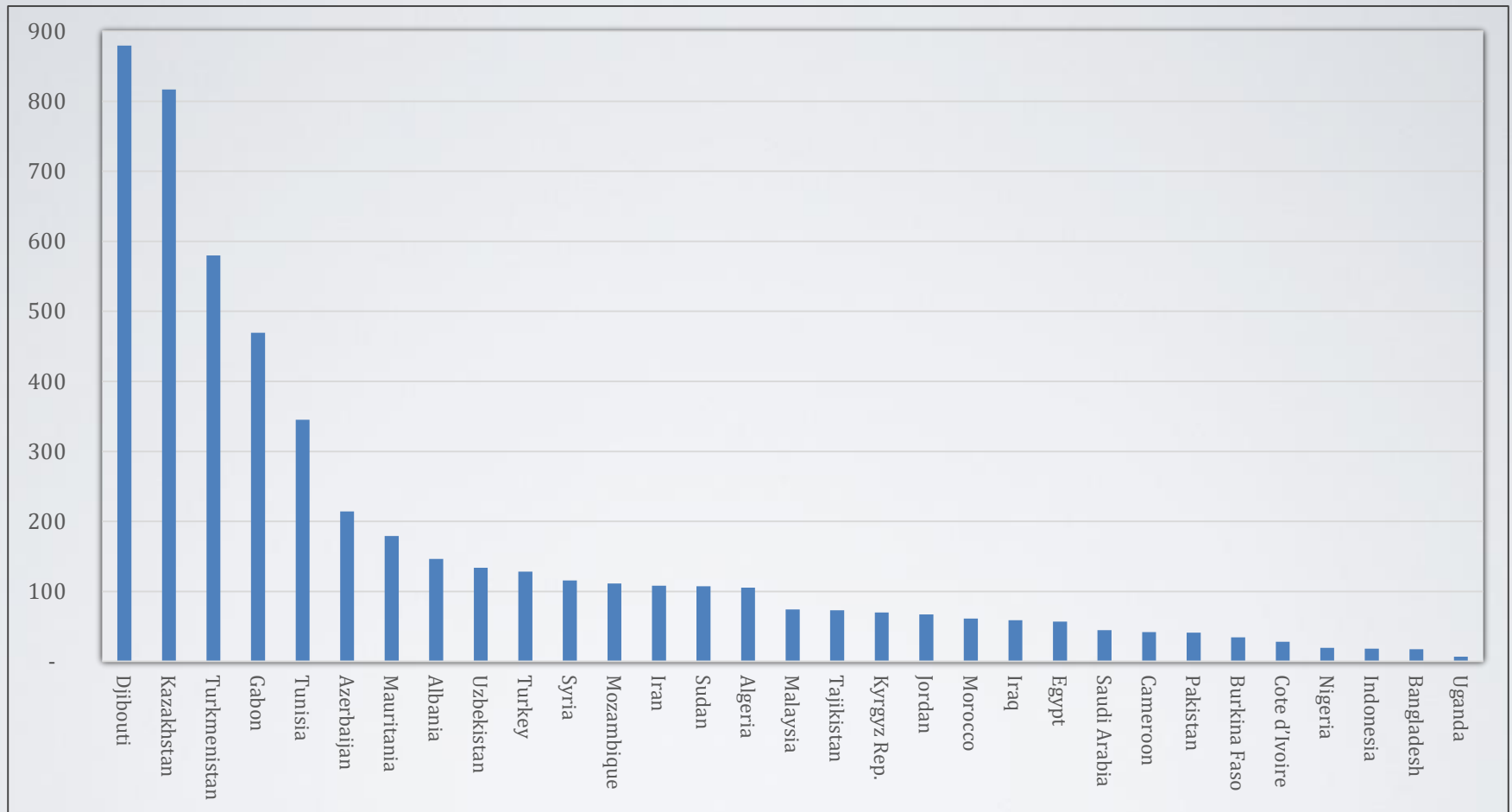
Rail Transport

Rail network density (km/100,000 km² land area)



Source: World Bank World Development Indicators

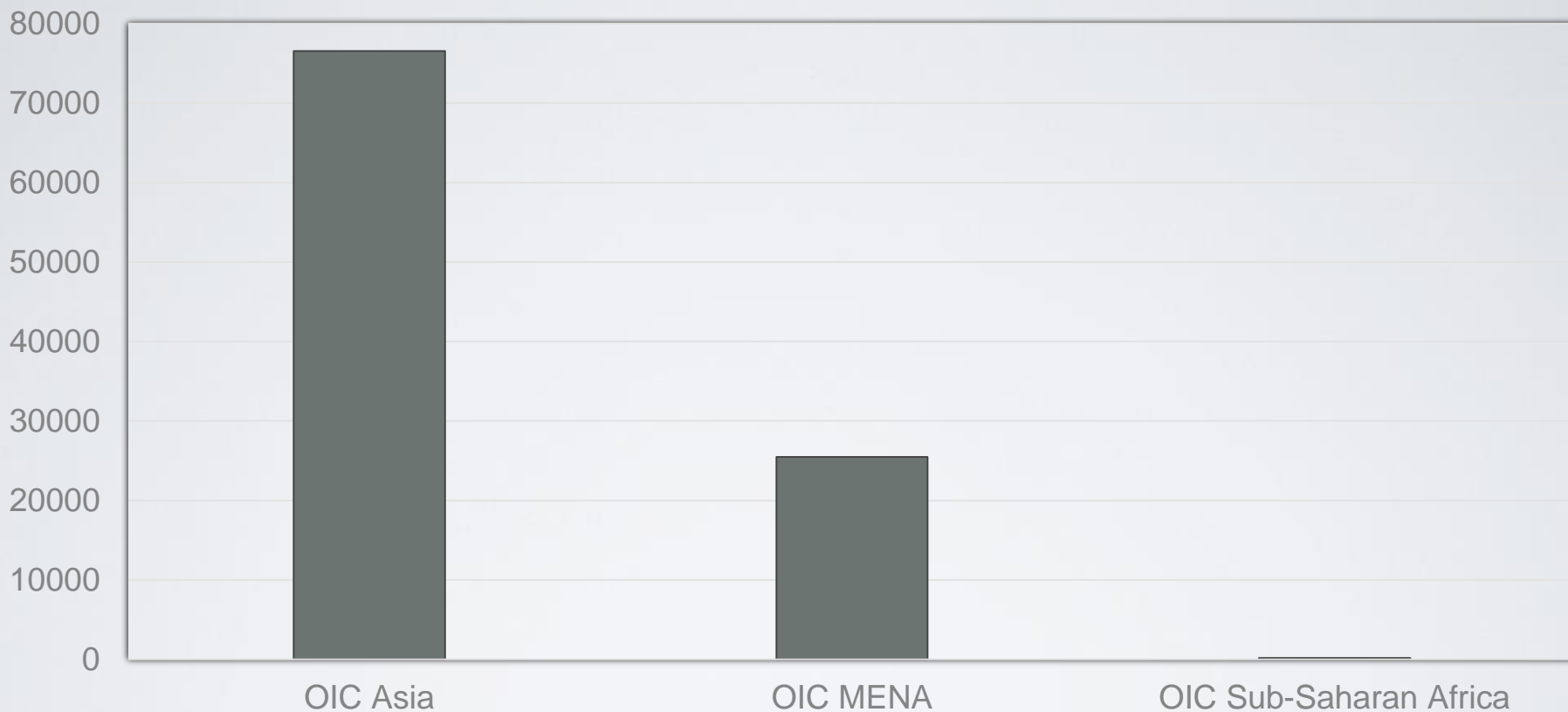
Rail network density (km/million population)



Source: World Bank World Development Indicators

Rail Passenger Traffic

Rail passengers carried by OIC regions (million passenger-km) (2017)

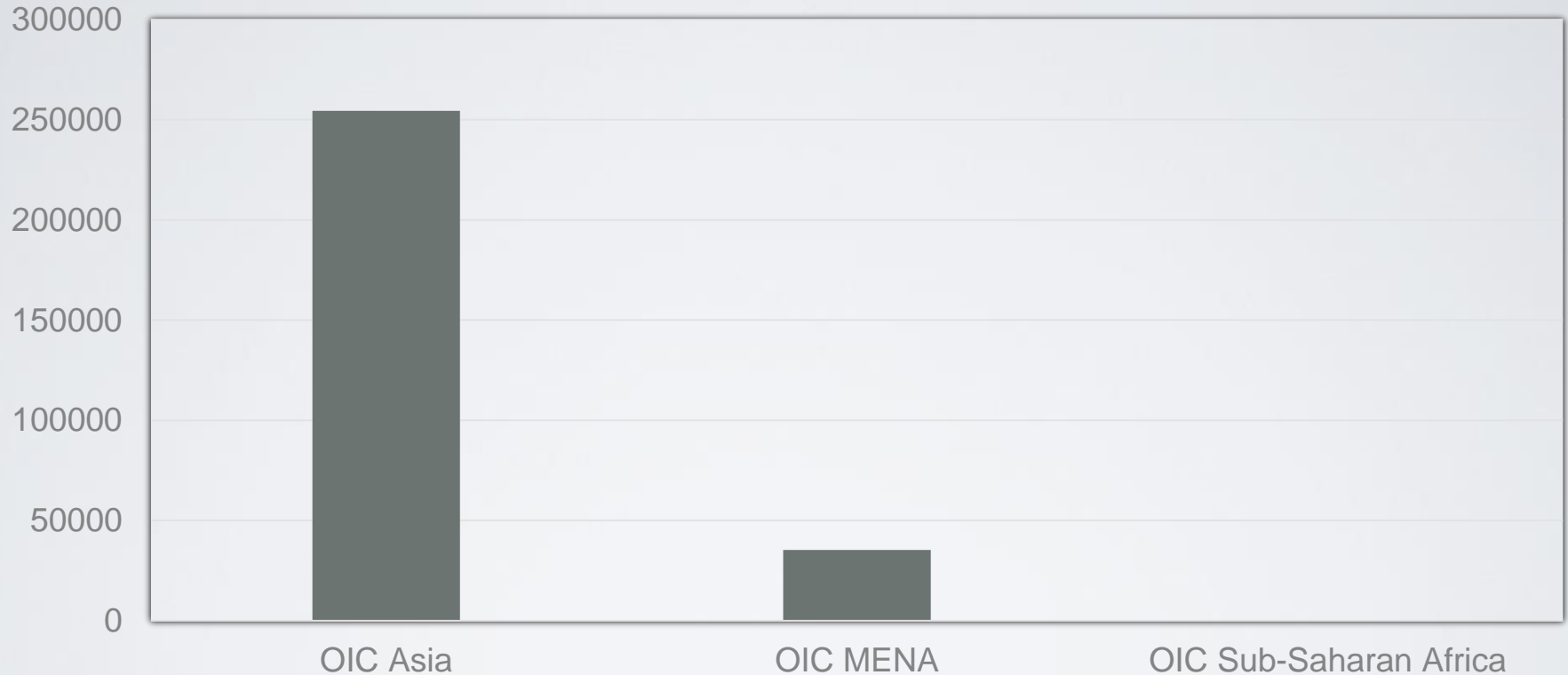


Source: World Development Indicators



Rail Freight Traffic

Rail freight carried by OIC regions (million ton-km) (2017)

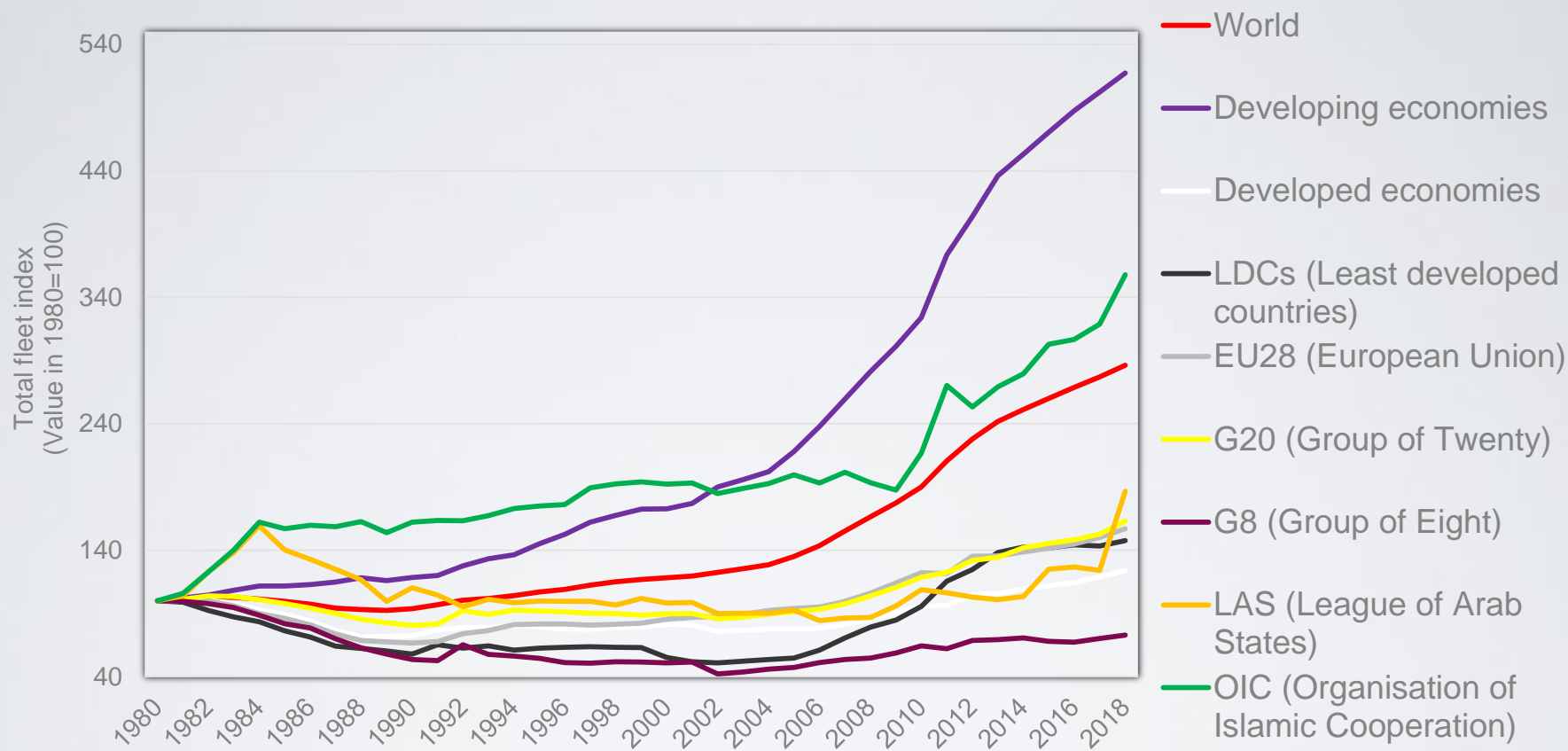


Source: World Development Indicators

Maritime Transport

Change in Total Fleet

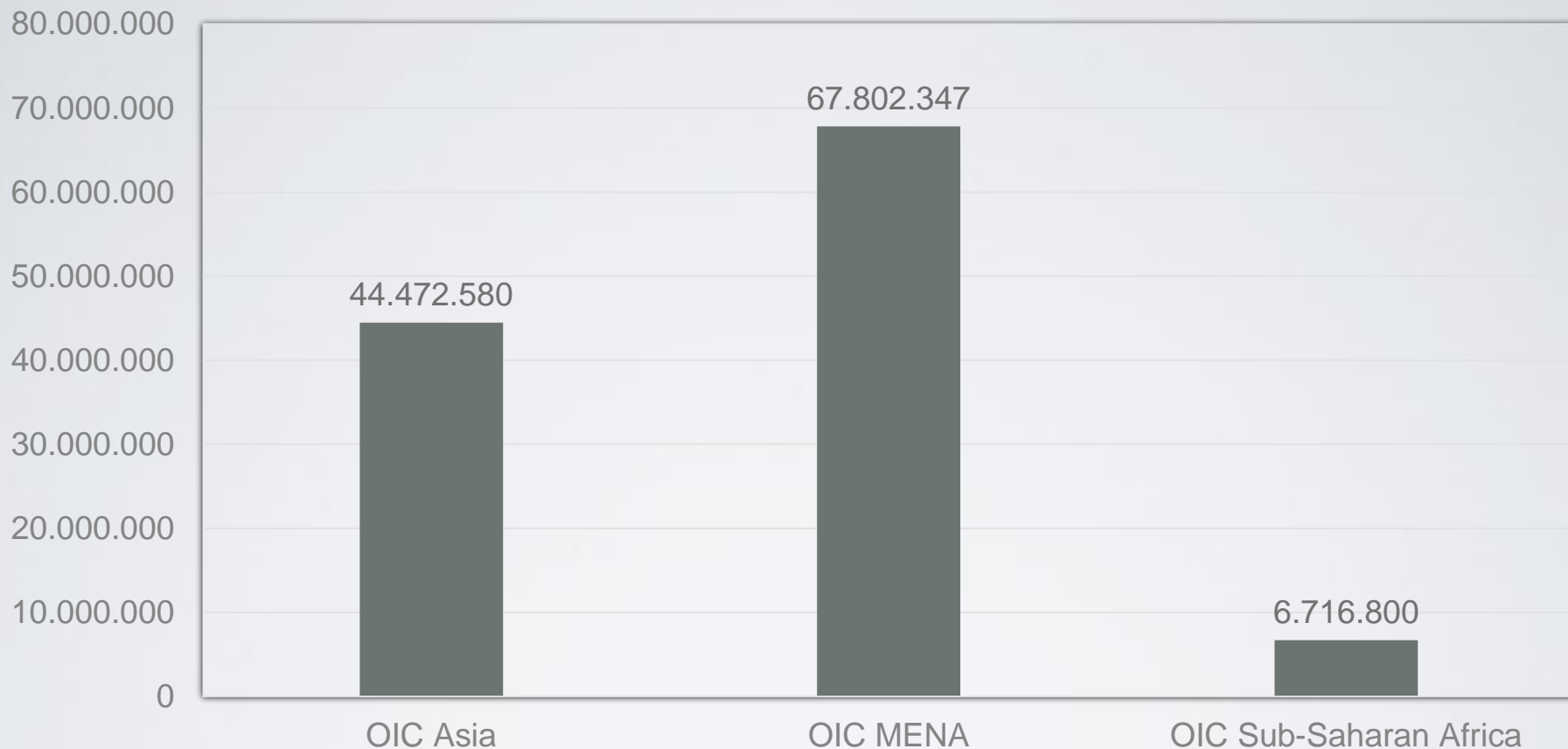
Change in total fleet by flag of registration (in 1000 dwt) (1980-2018)



Source: UNCTAD Statistical Database

Container Port Traffic

Container port traffic in the OIC regions (TEU: 20 foot equivalent units) (2017)



Source: World Development Indicators

Container Port Traffic

Top 10 OIC countries in terms of container-port throughput (TEU) (2017)

Country	TEU
Malaysia	24 719 000
UAE	21 280 900
Indonesia	13 859 500
Turkey	9 927 385
Saudi Arabia	8 404 000
Egypt	7 430 000
Oman	4 784 712
Morocco	4 570 000
Iran	3 091 000
Pakistan	2 985 600

Source: Author from the World Development Indicators



Container trade penetration in the OIC countries (2017)

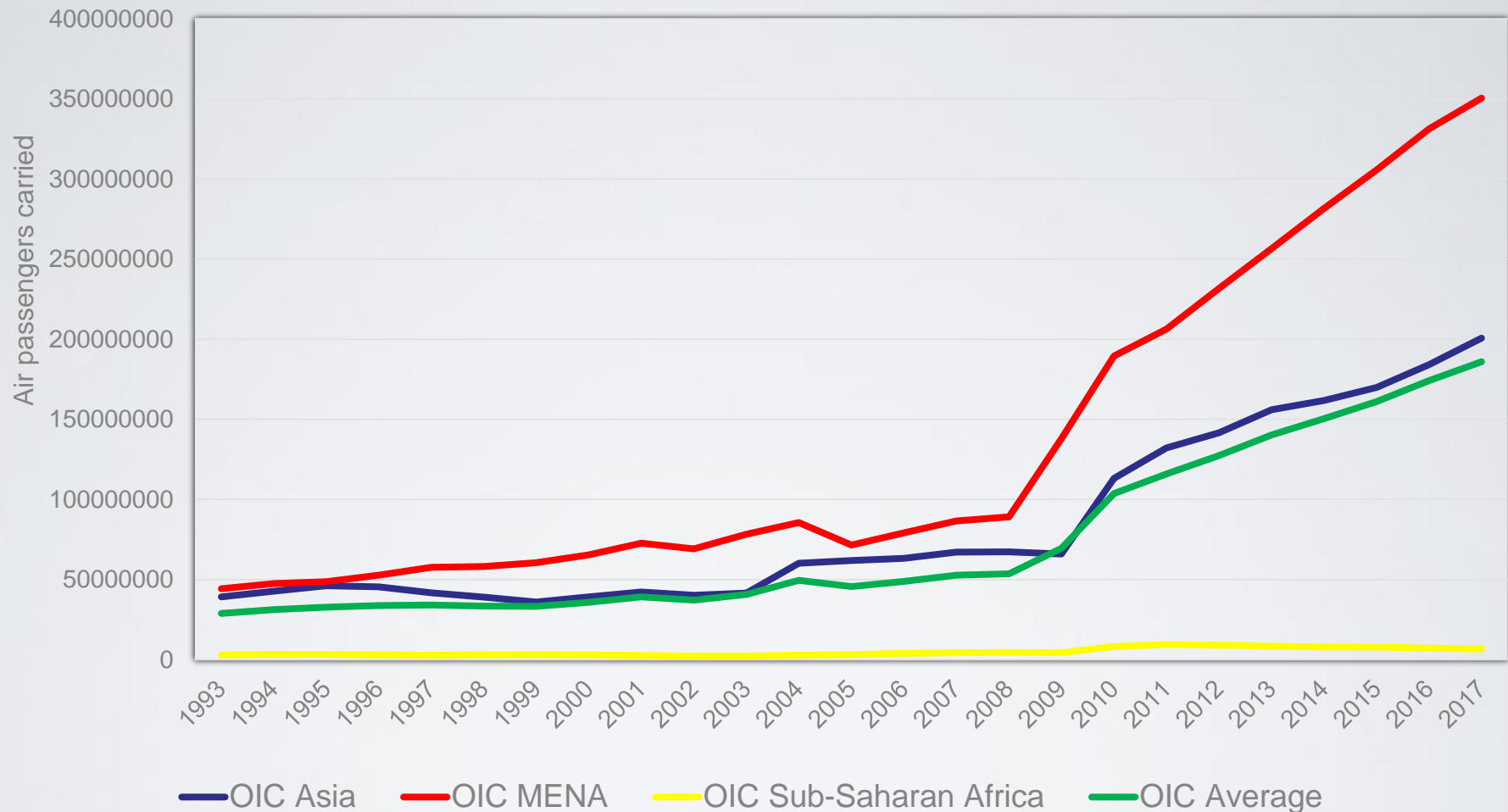
Country	TEU/1,000 capita	Country	TEU/1,000 capita
United Arab Emirates	2243	Guyana	67
Djibouti	1045	Indonesia	52
Oman	1025	Iran, Islamic Rep.	38
Malaysia	795	Algeria	34
Qatar	465	Senegal	32
Kuwait	325	Benin	32
Brunei Darussalam	294	Togo	31
Gabon	266	Gambia, The	28
Saudi Arabia	254	Cote d'Ivoire	27
Suriname	199	Mauritania	21
Lebanon	192	Yemen, Rep.	19
Bahrain	180	Bangladesh	16
Maldives	167	Cameroon	16
Morocco	128	Mozambique	15
Turkey	122	Pakistan	14
Tunisia	83	Sudan	14
Jordan	81	Guinea	13
Egypt, Arab Rep.	77	Sierra Leone	12
Libya	72	Nigeria	9

Source: UNCTAD and World Bank

Air Transport

Air Passenger Traffic

Total air passengers carried in the OIC regions (1993-2017)



Source: World Development Indicators



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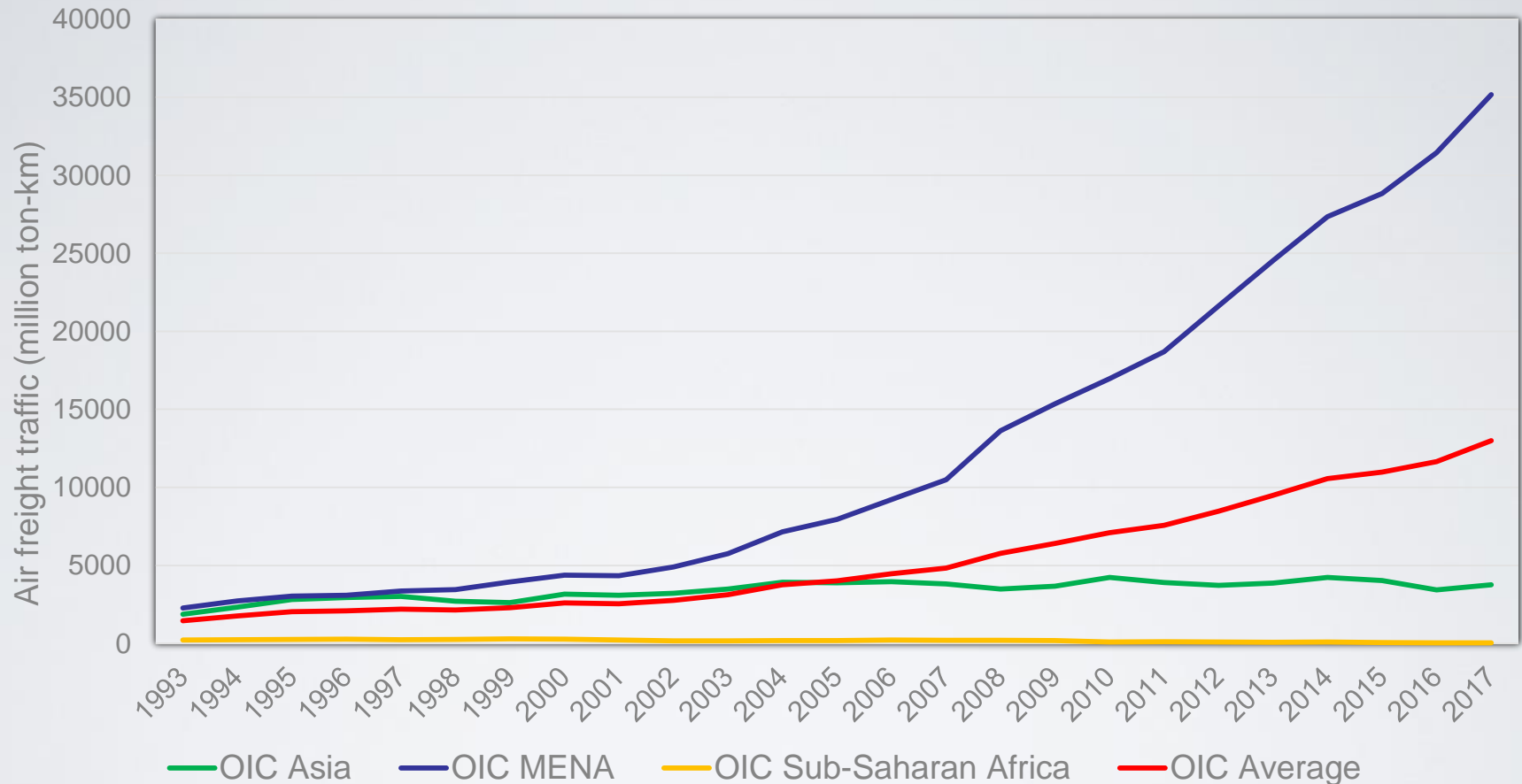
Per capita air passengers at the OIC Countries (2017)

MENA		Sub-Saharan Africa		Asia	
Qatar	10.9916	Mauritania	0.0978	Maldives	2.9930
United Arab Emirates	10.0458	Togo	0.0650	Brunei Darussalam	2.7615
Bahrain	3.4740	Cote d'Ivoire	0.0322	Malaysia	1.8707
Oman	1.9428	Gambia, The	0.0243	Suriname	0.4995
Kuwait	1.3772	Mozambique	0.0199	Indonesia	0.4166
Turkey	1.3306	Nigeria	0.0181	Kazakhstan	0.3134
Saudi Arabia	1.1331	Cameroon	0.0096	Azerbaijan	0.2366
Lebanon	0.4212	Sudan	0.0081	Turkmenistan	0.2223
Tunisia	0.3668	Burkina Faso	0.0076	Kyrgyz Republic	0.1819
Jordan	0.3458	Senegal	0.0014	Tajikistan	0.0897
Iran	0.2390	Uganda	0.0013	Uzbekistan	0.0797
Morocco	0.2371	Niger	0.0007	Afghanistan	0.0512
Libya	0.1803	Somalia	0.0003	Pakistan	0.0477
Algeria	0.1508			Bangladesh	0.0237
Egypt	0.1246				
Iraq	0.0578				
Albania	0.0359				

Source: World Development Indicators

Air Freight Traffic

Total air freight carried in the OIC regions (million ton-km) (1993-2017)



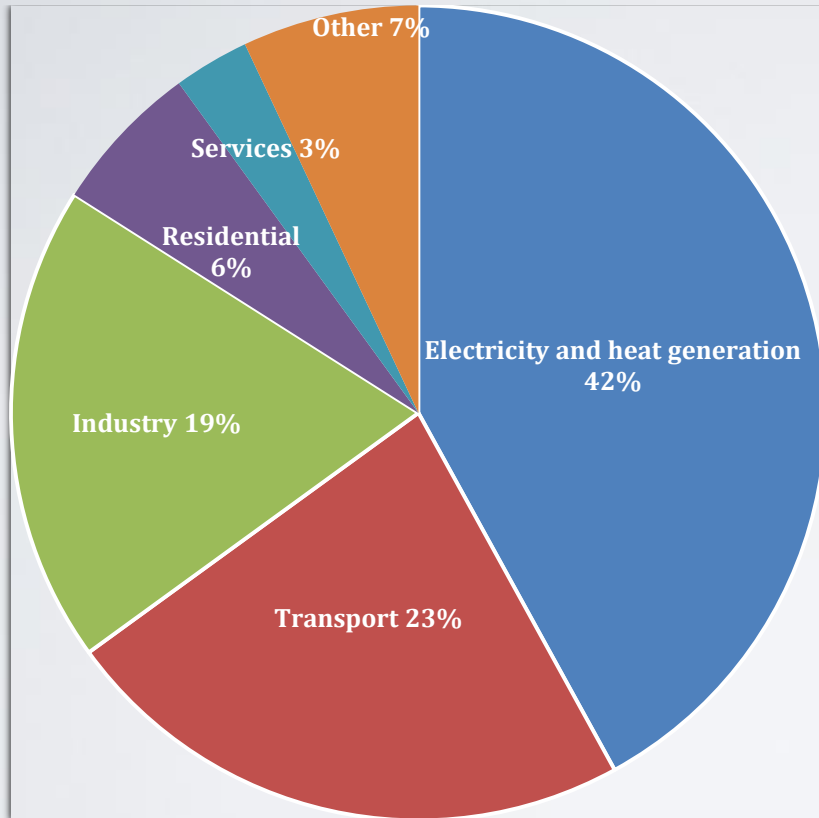
Source: World Development Indicators



Environmental Effects of Transport Sector

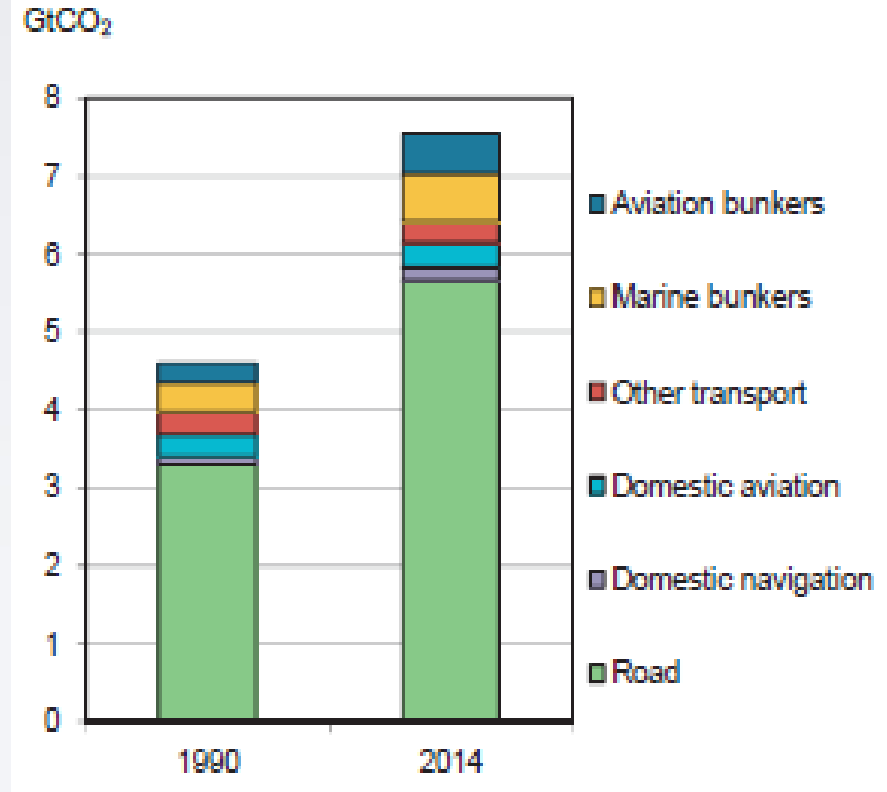
GHG Emissions by Sector and Mode

World CO2 emissions by sector (2014)



Source: OECD/IEA (2016)

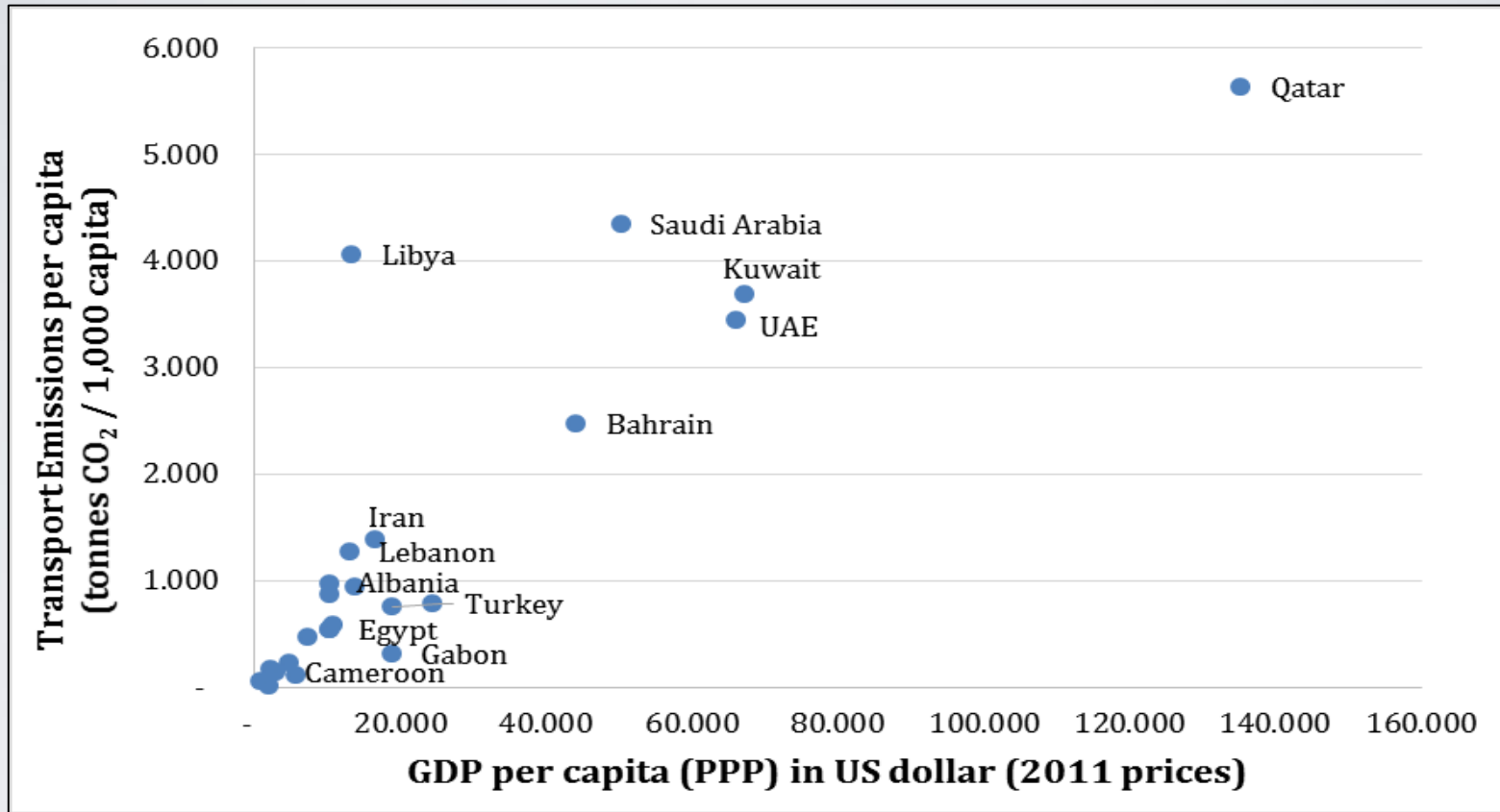
International trade related CO2 emissions by mode (2014)



Source: OECD/ITF (2016)

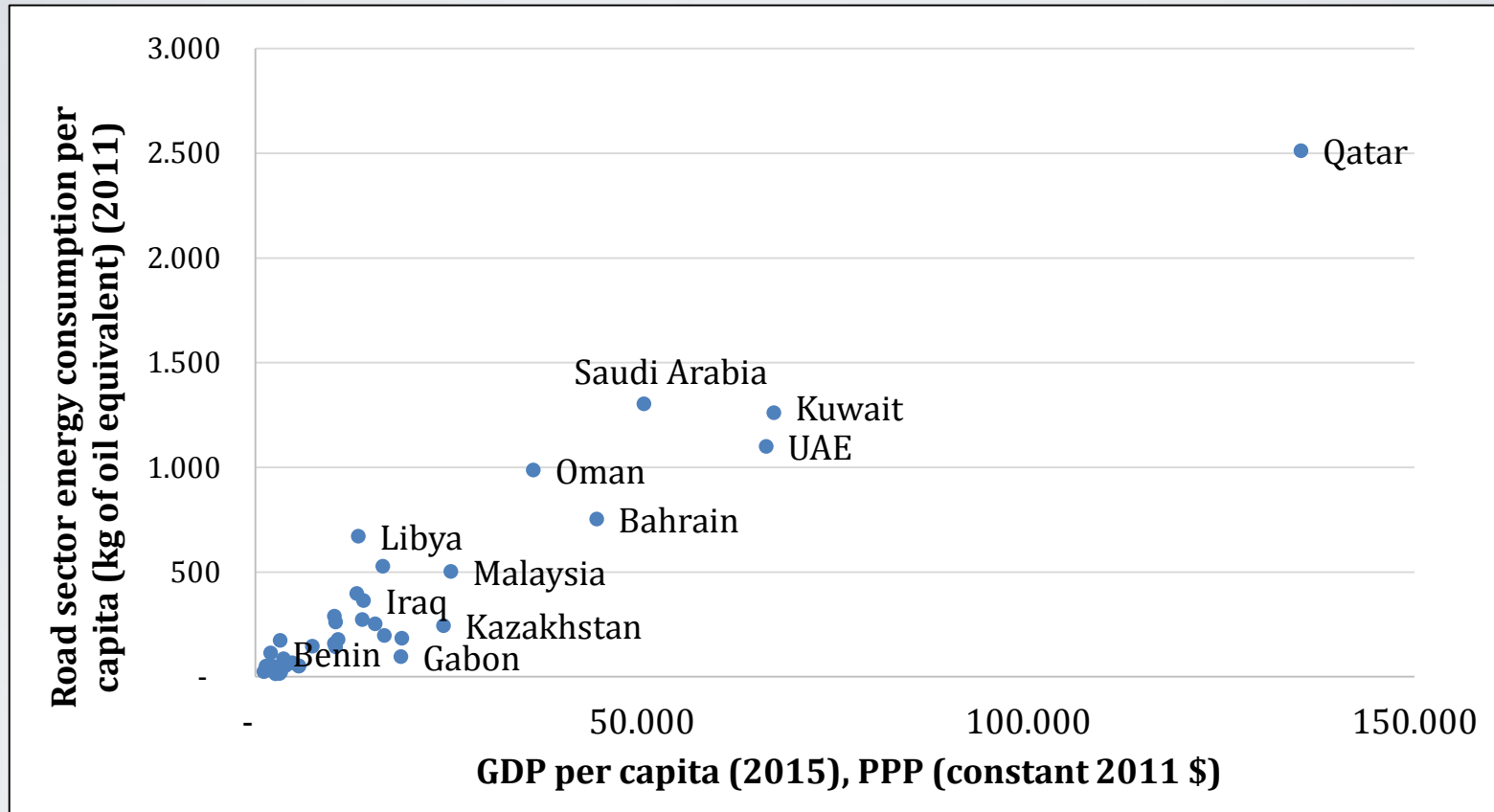
Transport CO₂ emissions and GDP p/cap

Transport CO₂ emissions and GDP per capita (PPP) in OIC Countries (2014)



Source: OECD/IEA (2015)

Road sector energy consumption and income per/c



Source: World Development Indicators



Previous Studies and Policy Recommendations



Previous Studies of TCWG

1. **Implementation challenges for transport PPPs in OIC member states**
2. **MFT among the OIC Member Countries I, II**
3. **Developing Air Linkages To Sustain Tourism Among The OIC Member States**
4. **Evaluating the Ownership, Governance Structures, and Performances of Ports in the OIC Member States**
5. **Urban Transport in the OIC Megacities**
6. **Enhancing Road Maintenance in the OIC Member States**
7. **Improving Road Safety in the OIC Member States**
8. **Improving Transnational Transport Corridors in the OIC Member Countries: Concepts & Cases**
9. **Governance of Transport Corridors in OIC Member States: Challenges, Cases and Policy Lessons**
10. **Planning of National Transport Infrastructure in the OIC Member States**
11. **Improving Transport Project Appraisals in the Islamic Countries**

Policy Recommendations

- Need to abstain from adopting “one size fits all” policies
- More holistic view that promotes intermodal transport
- More cooperation in transport and communications field
- Improved institutional structure
- Better use of PPPs
- Success factors:
 - adoption of a sound policy framework
 - feasible projects and well-planned project pipeline
 - right cooperative approach
 - institutional capacity and human resources development
 - accumulation of expertise



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Thank you for your attention...

COMCEC Coordination Office

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