



Making Cooperation Work

# COMCEC STRATEGY

For Building an Interdependent Islamic World

## COMCEC TRANSPORT and COMMUNICATIONS OUTLOOK 2017



Transport and Communications Working Group 11<sup>th</sup> Meeting

March 15th, 2018

Ankara, Turkey

# OUTLINE

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- **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

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- 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 Overall Infrastructure	Quality of Roads	Quality of Railroad Infrastructure	Quality of Port Infrastructure	Quality of Air Transport Infrastructure
World Average	4,06	4,05	3,38	4,04	4,41
OIC Average	3,62	3,79	2,82	3,77	4,08
OIC-Sub Saharan Africa	2,66	3,10	2,12	3,27	3,41
OIC-MENA	4,20	4,30	2,85	4,34	4,53
OIC-Asia	3,96	3,86	3,64	3,47	4,23
OIC Maximum	UAE	UAE	Malaysia	UAE	UAE
OIC Minimum	Mauritania	Mauritania	Albania	Kyrgyz Rep,	Yemen

Source: Global Competitiveness Report 2016–2017, WEF

# Logistics Performance Index 2016 (LPI)

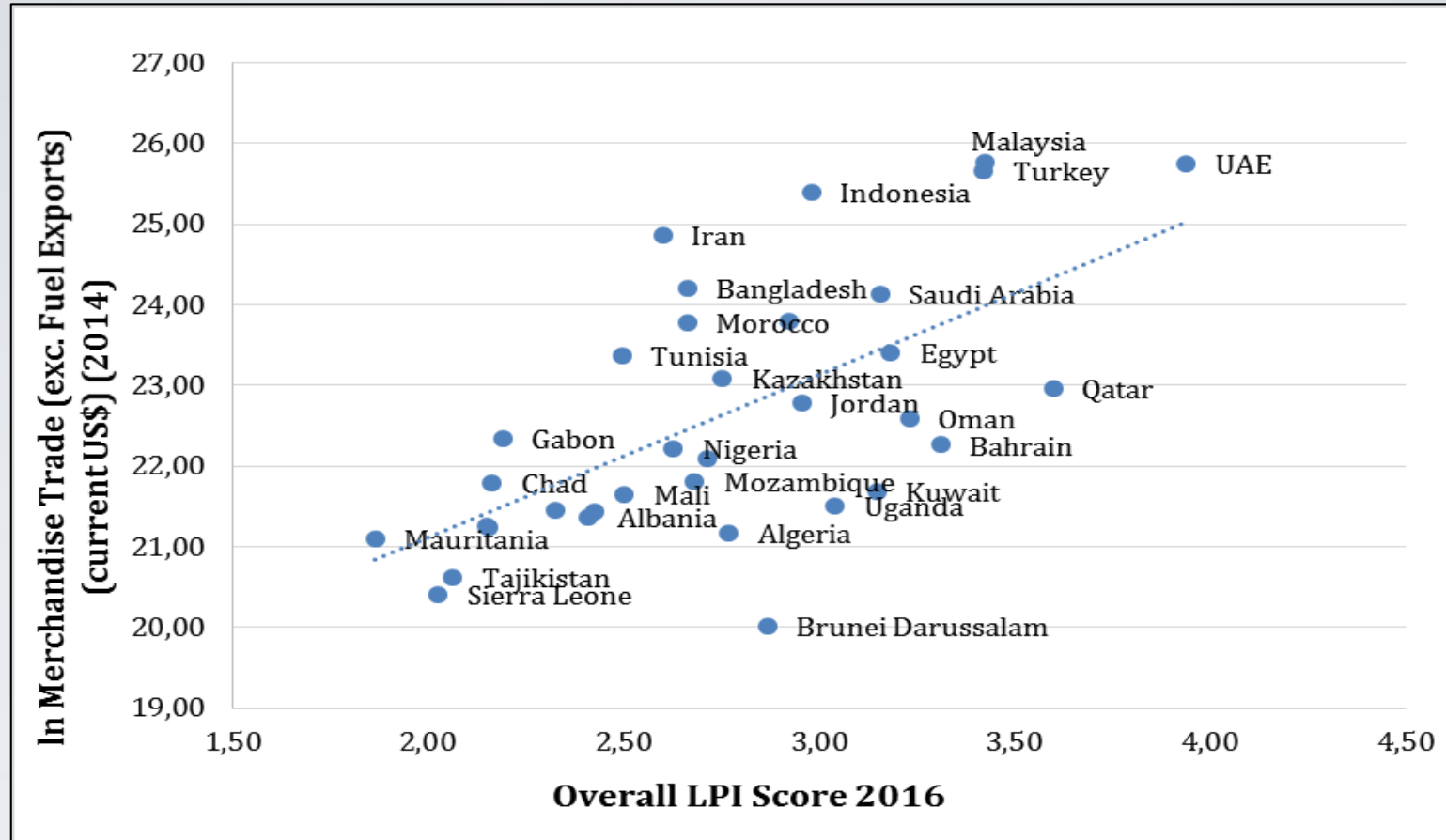
Regions	Overall LPI Score	Customs	Infrastructure	International Shipments	Logistics Quality and Competence	Tracking and Tracing	Timeliness
Germany	4,23	4,12	4,44	3,86	4,28	4,27	4,45
OIC Average	2,63	2,45	2,49	2,70	2,58	2,56	2,99
OIC-MENA	2,92	2,65	2,82	3,02	2,89	2,86	3,28
OIC-Asia	2,60	2,40	2,48	2,62	2,52	2,57	2,96
OIC-Sub Saharan Africa	2,39	2,30	2,19	2,45	2,33	2,28	2,75

Source: World Bank



# LPI Score and Trade

Total merchandise trade (exc. oil exports) and LPI scores in OIC countries (2016)

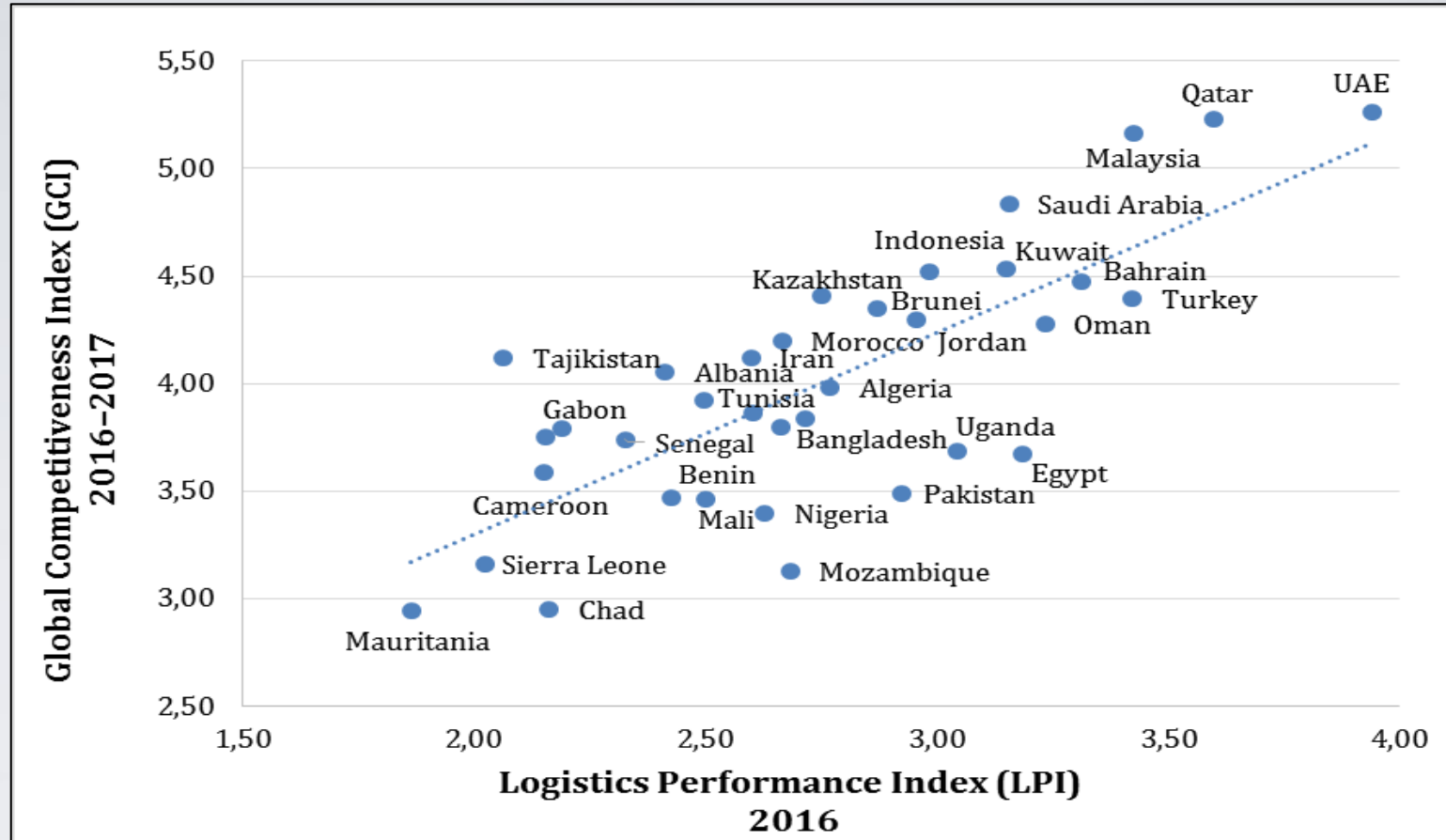


Source: World Bank World Development Indicators



# Logistic Performance and Competitiveness

2016 LPI scores and 2016-2017 GCI scores of the OIC countries



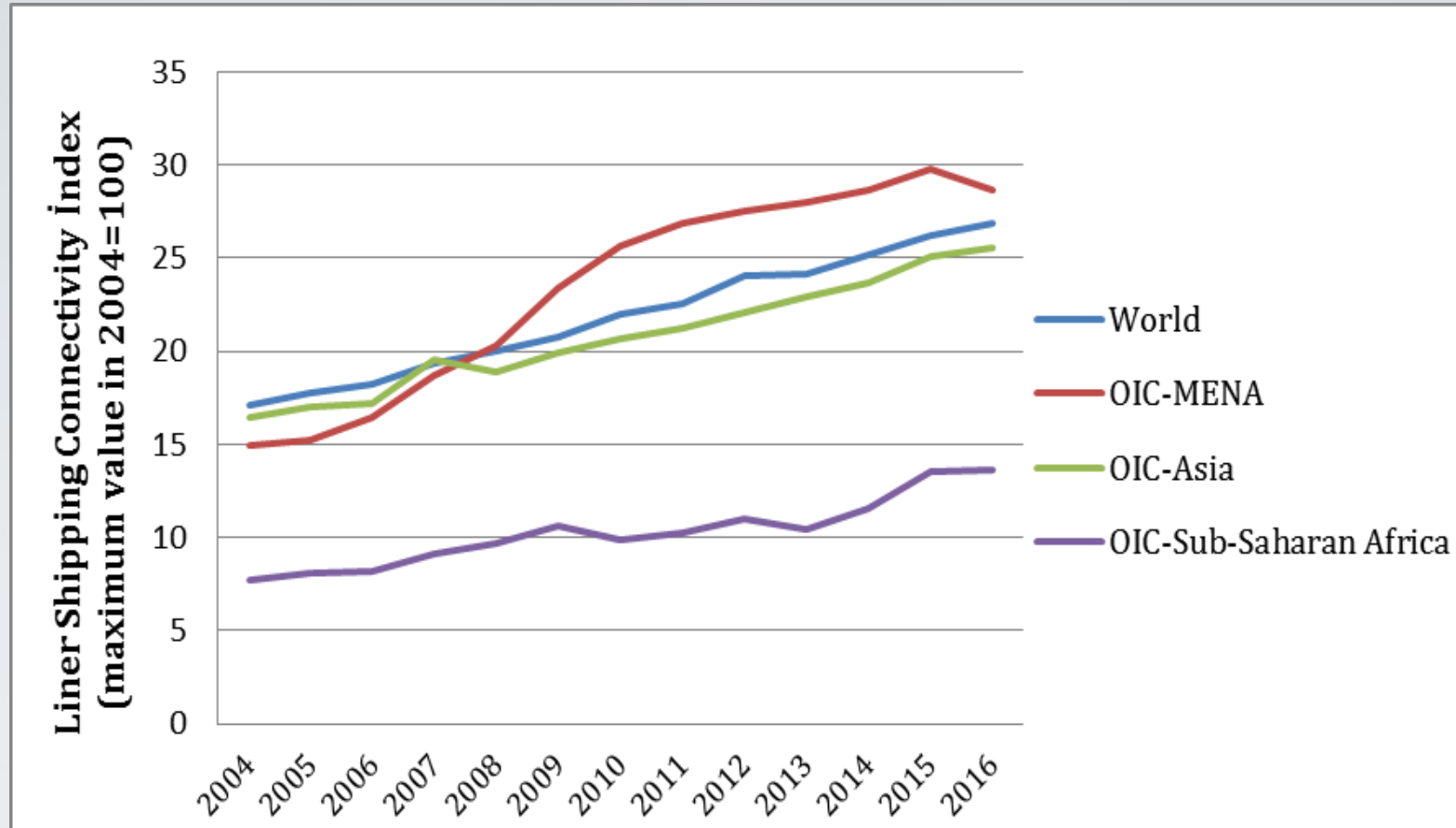
Source: World Development Indicators and World Economic Forum





# The Liner Shipping Connectivity Index

Average liner shipping connectivity scores by OIC regions (2004-2016)

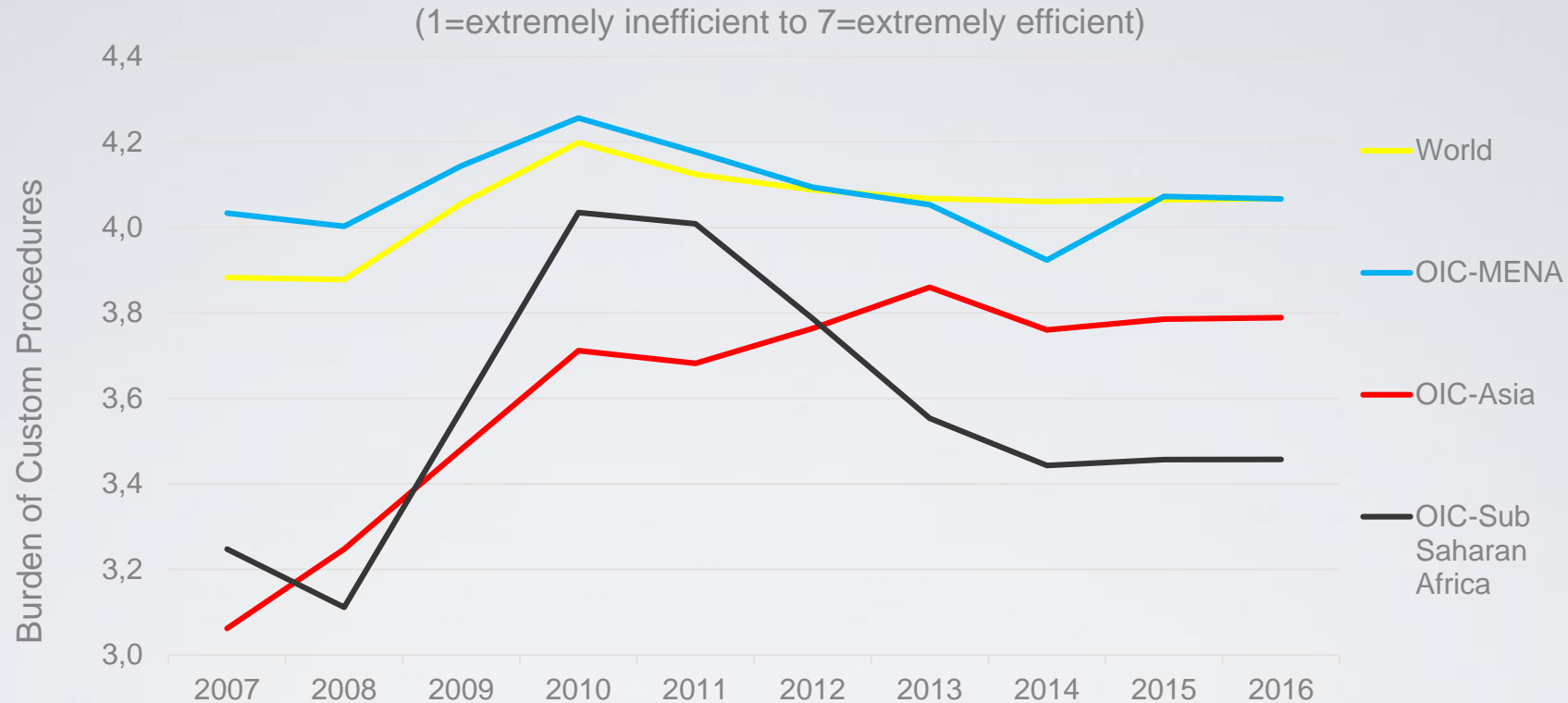


Source: UNCTAD Statistical Database



# Burden of Custom Procedures

Average burden of custom procedure scores by OIC regions (2007-2016)



Source: World Development Indicators

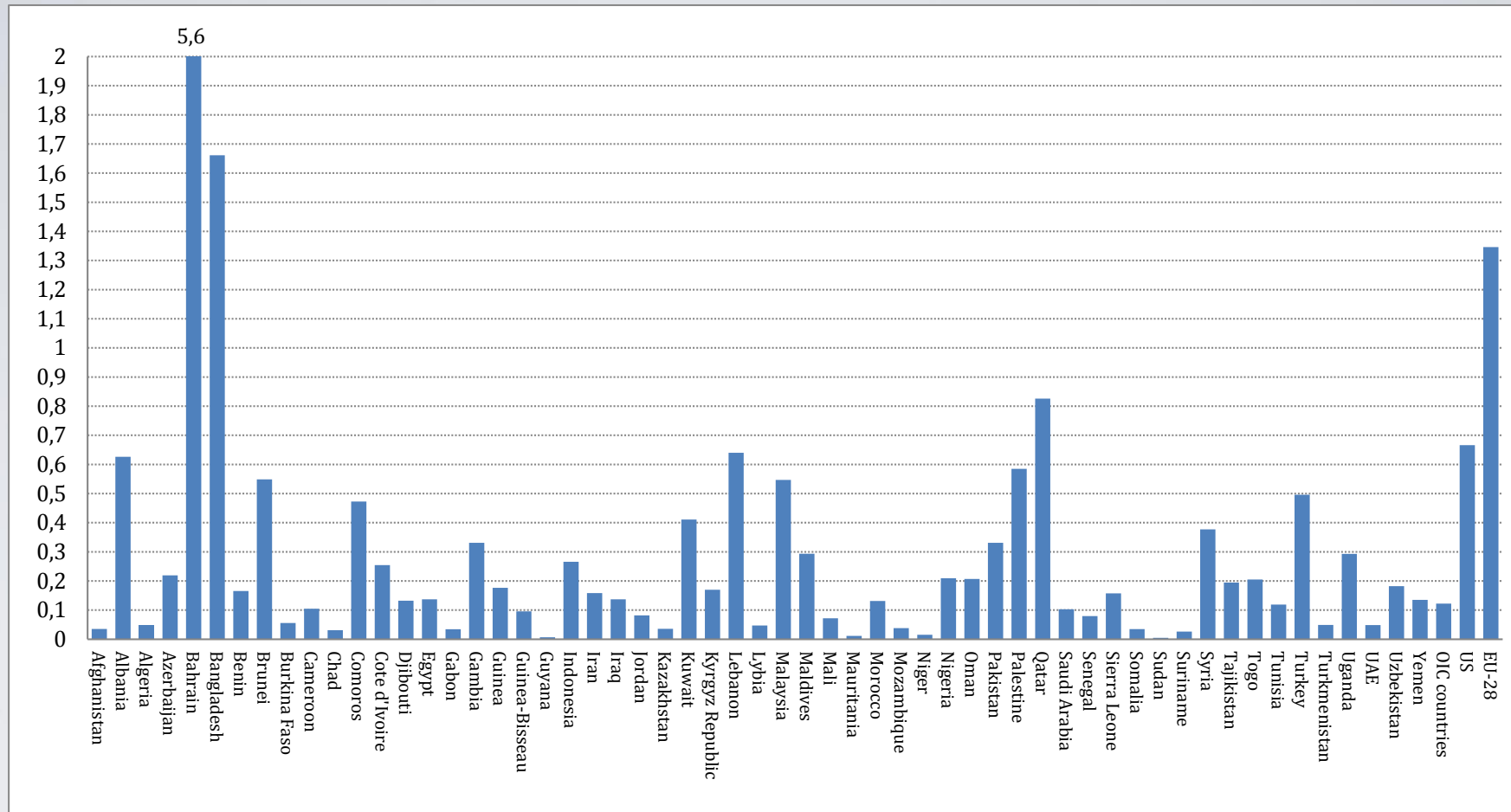


# Transport by Modes

# Road Transport



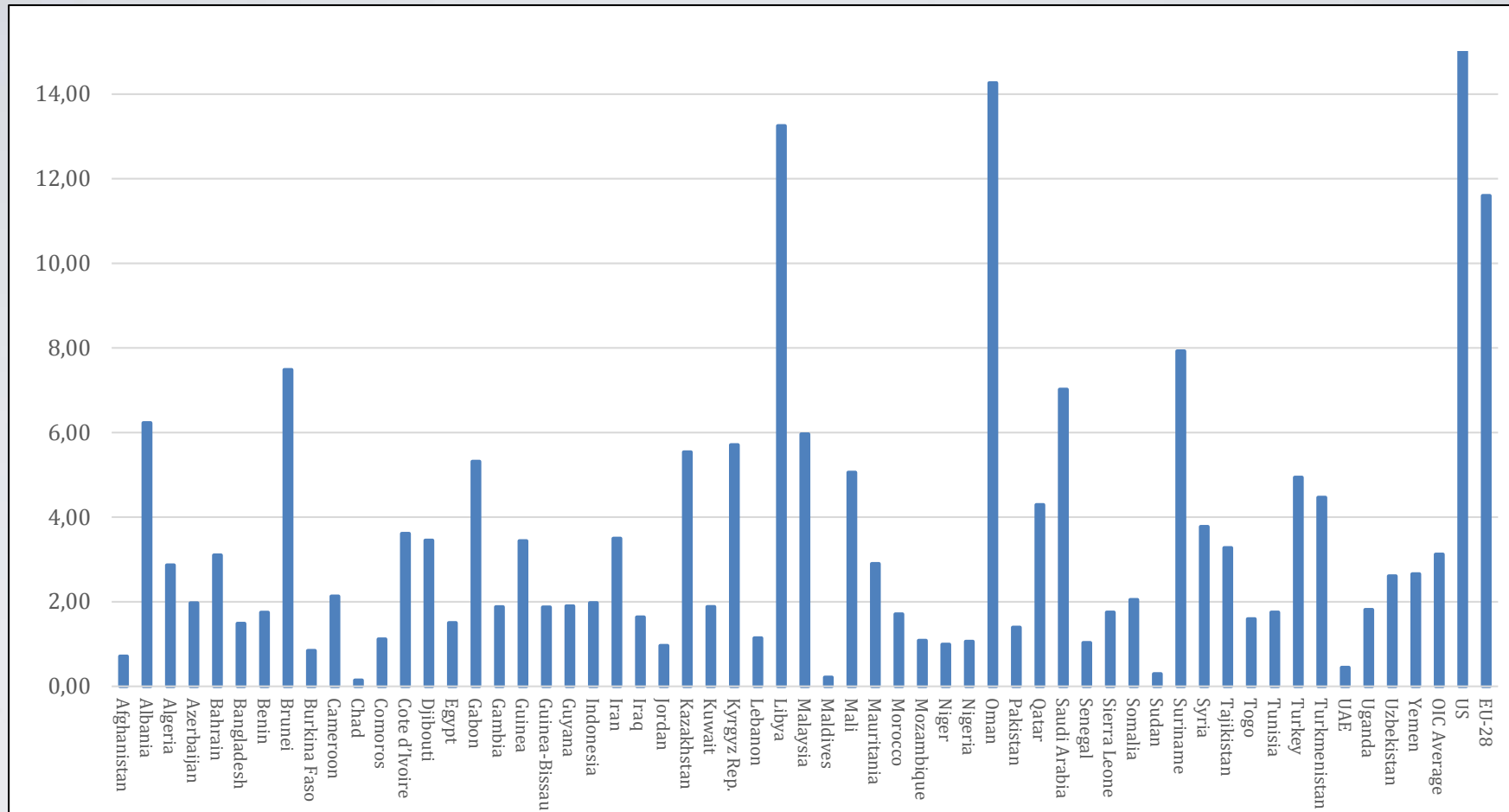
# Length of Road Network (km) / km<sup>2</sup> Area of Country



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



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



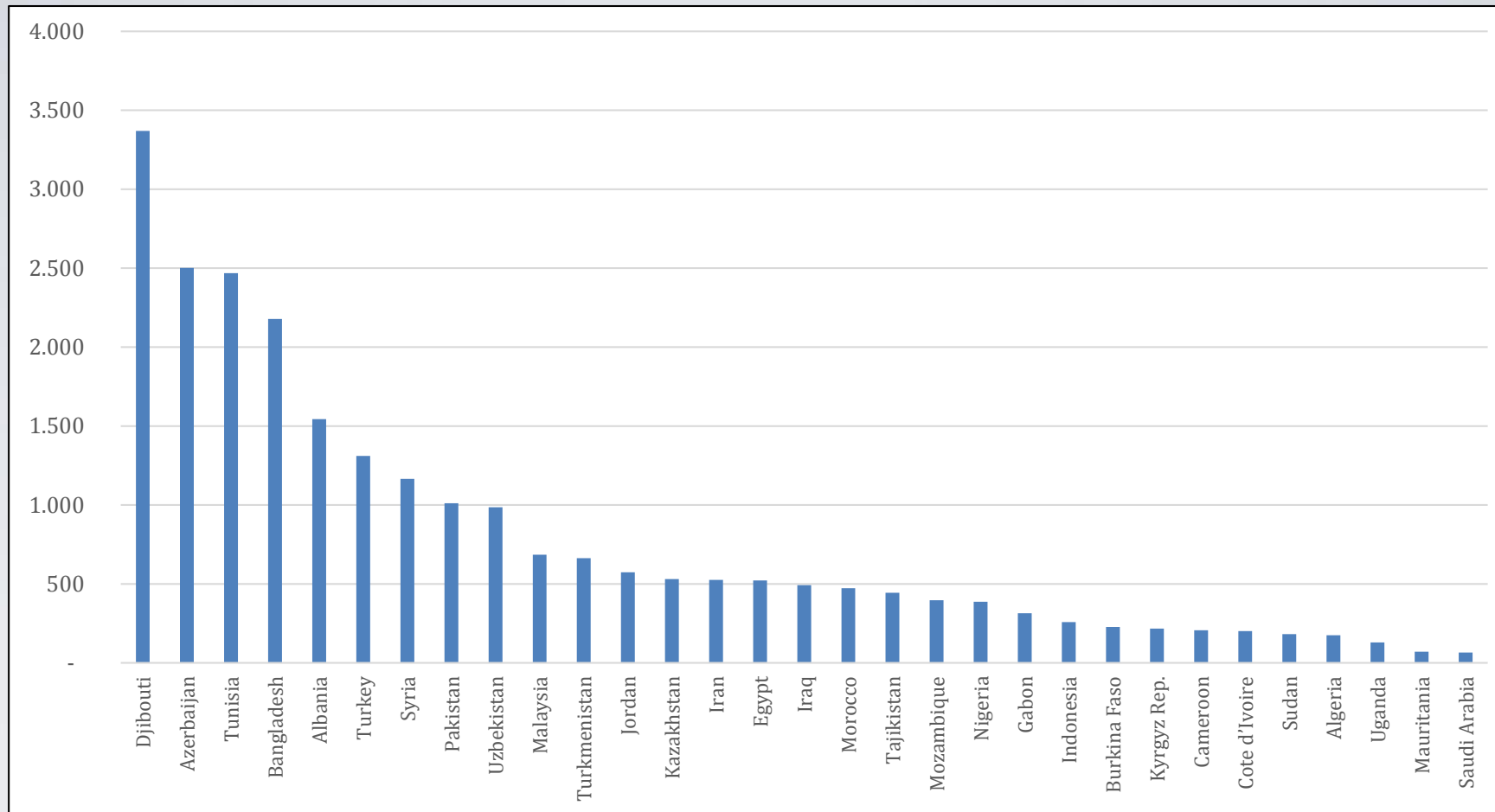
Source: COMCEC, Enhancing Road Maintenance in the OIC Member States, 2016



# Rail Transport



# Rail network density (km/100,000 km<sup>2</sup> land area)

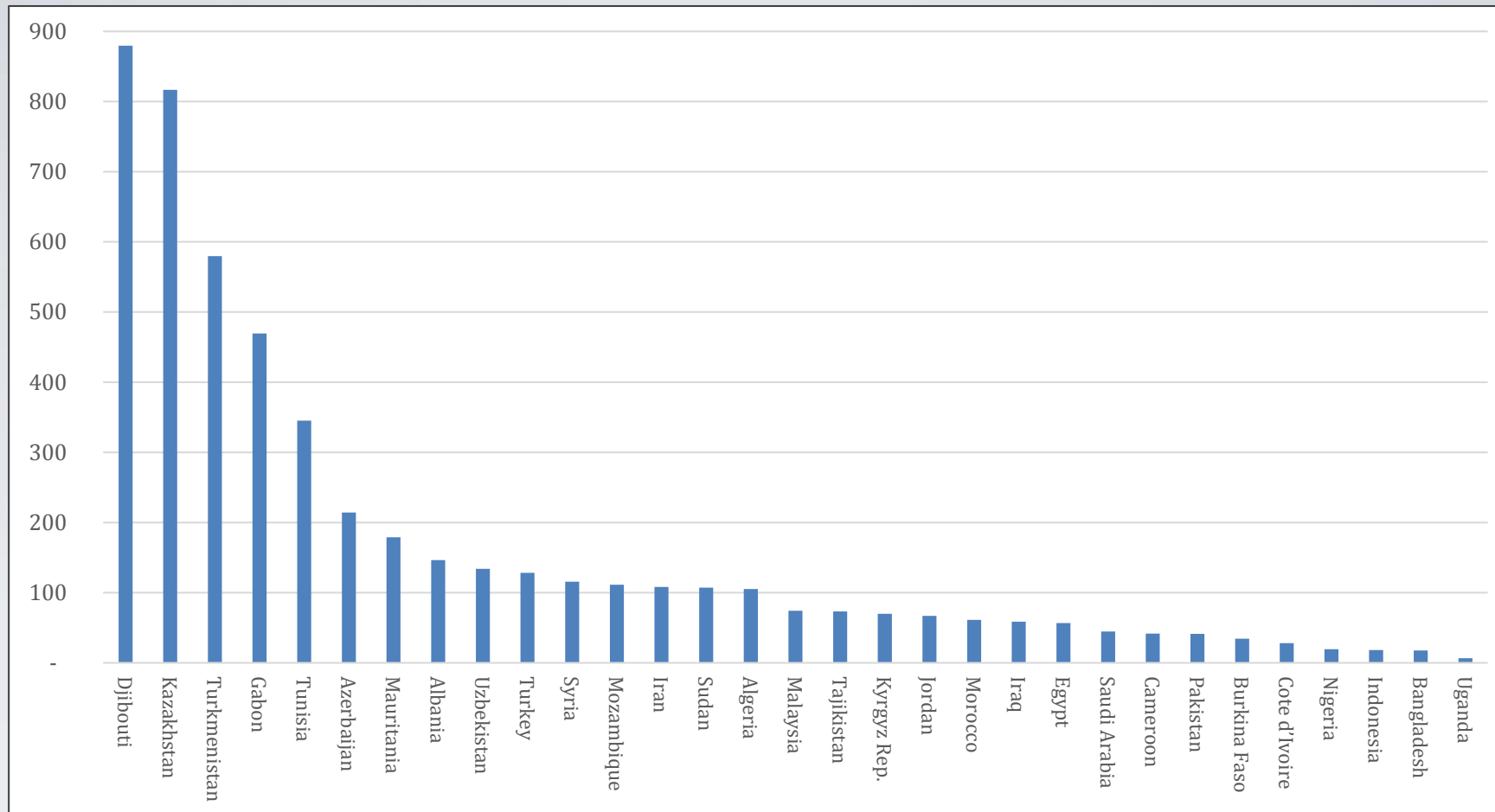


Source: World Bank World Development Indicators





# Rail network density (km/million population)

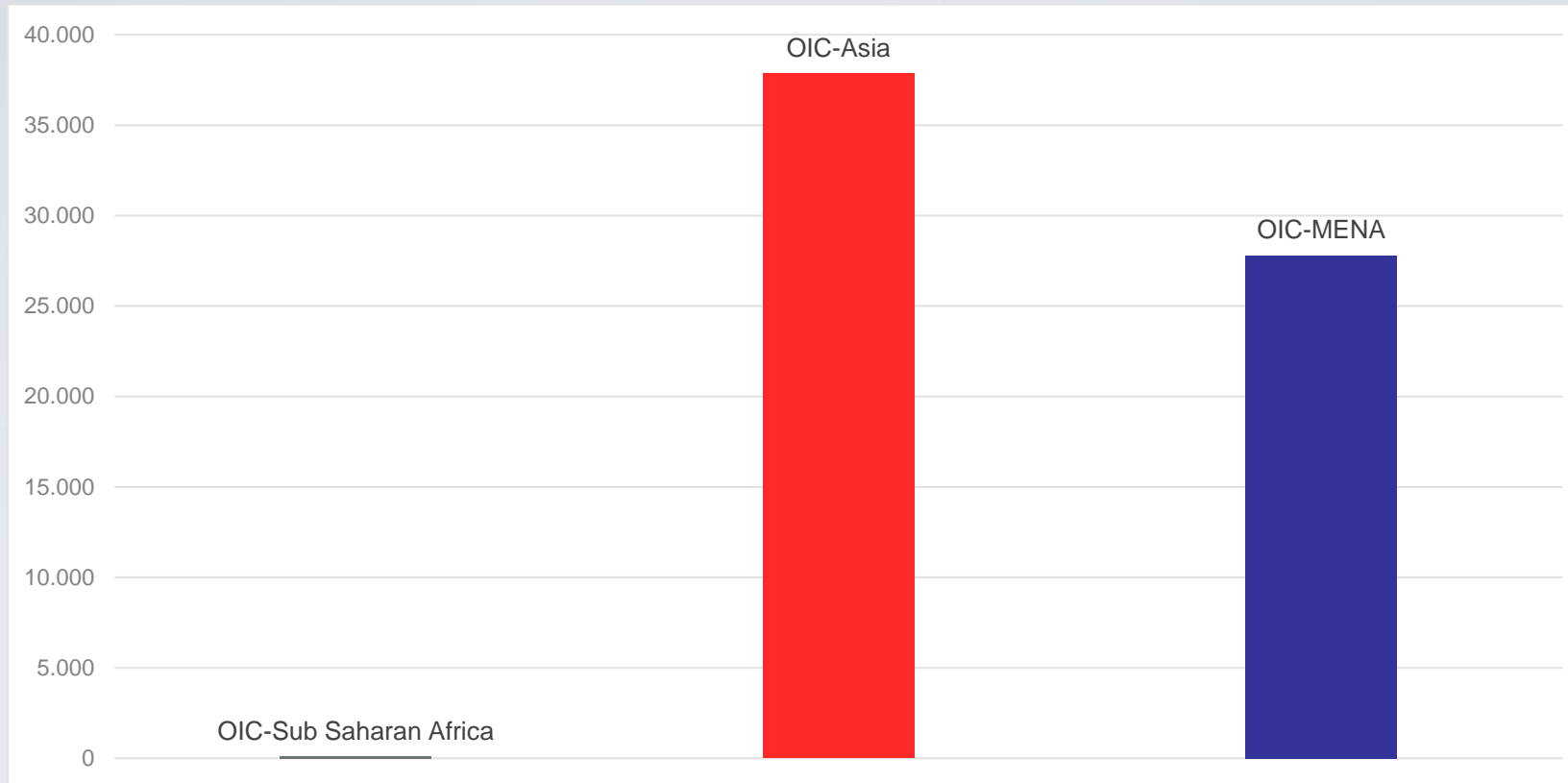


Source: World Bank World Development Indicators



# Rail Passenger Traffic

Rail passengers carried by OIC regions (million passenger-km) (2015)

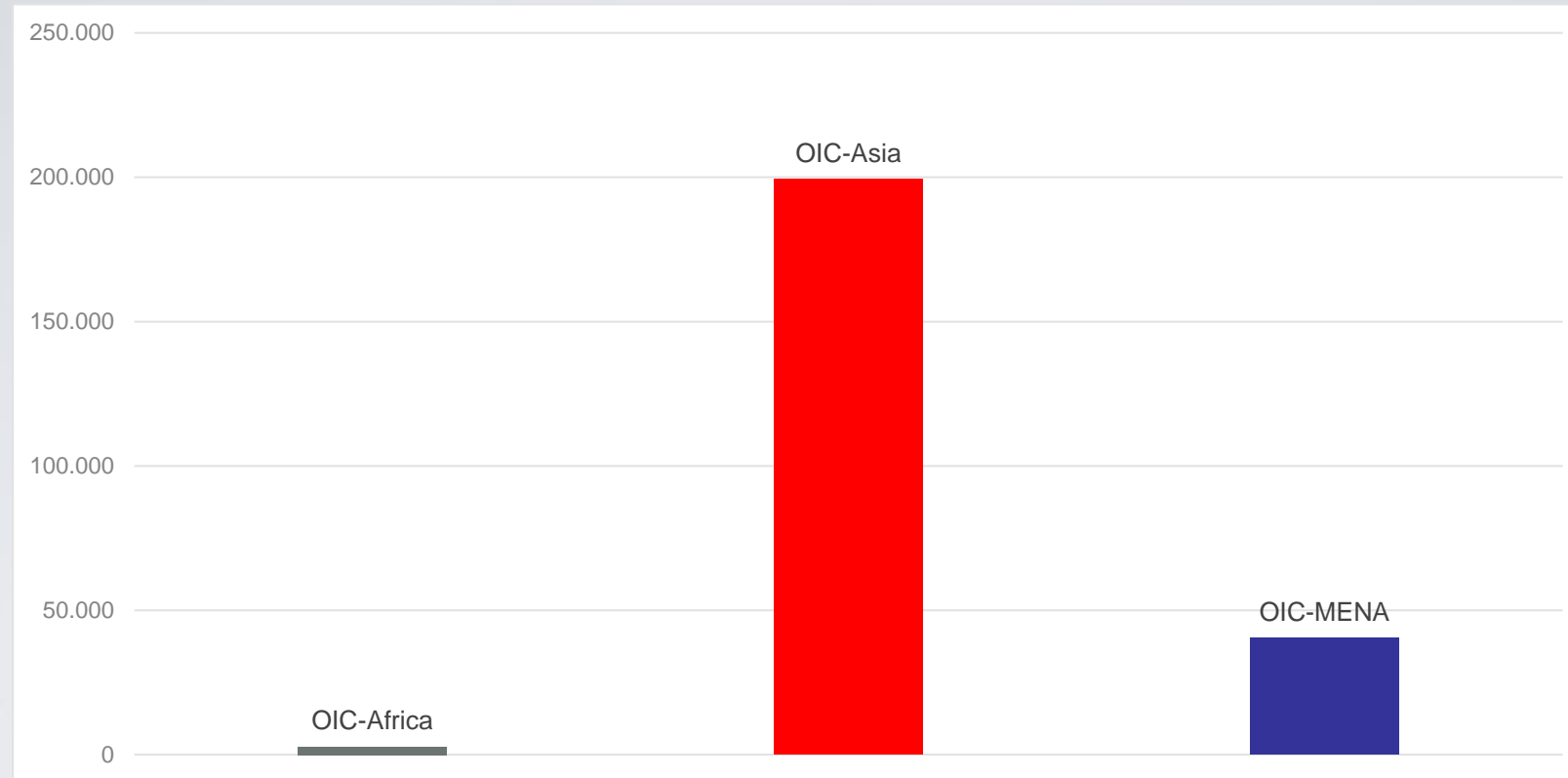


Source: World Development Indicators



# Rail Freight Traffic

Rail freight carried by OIC regions (million ton-km) (2015)



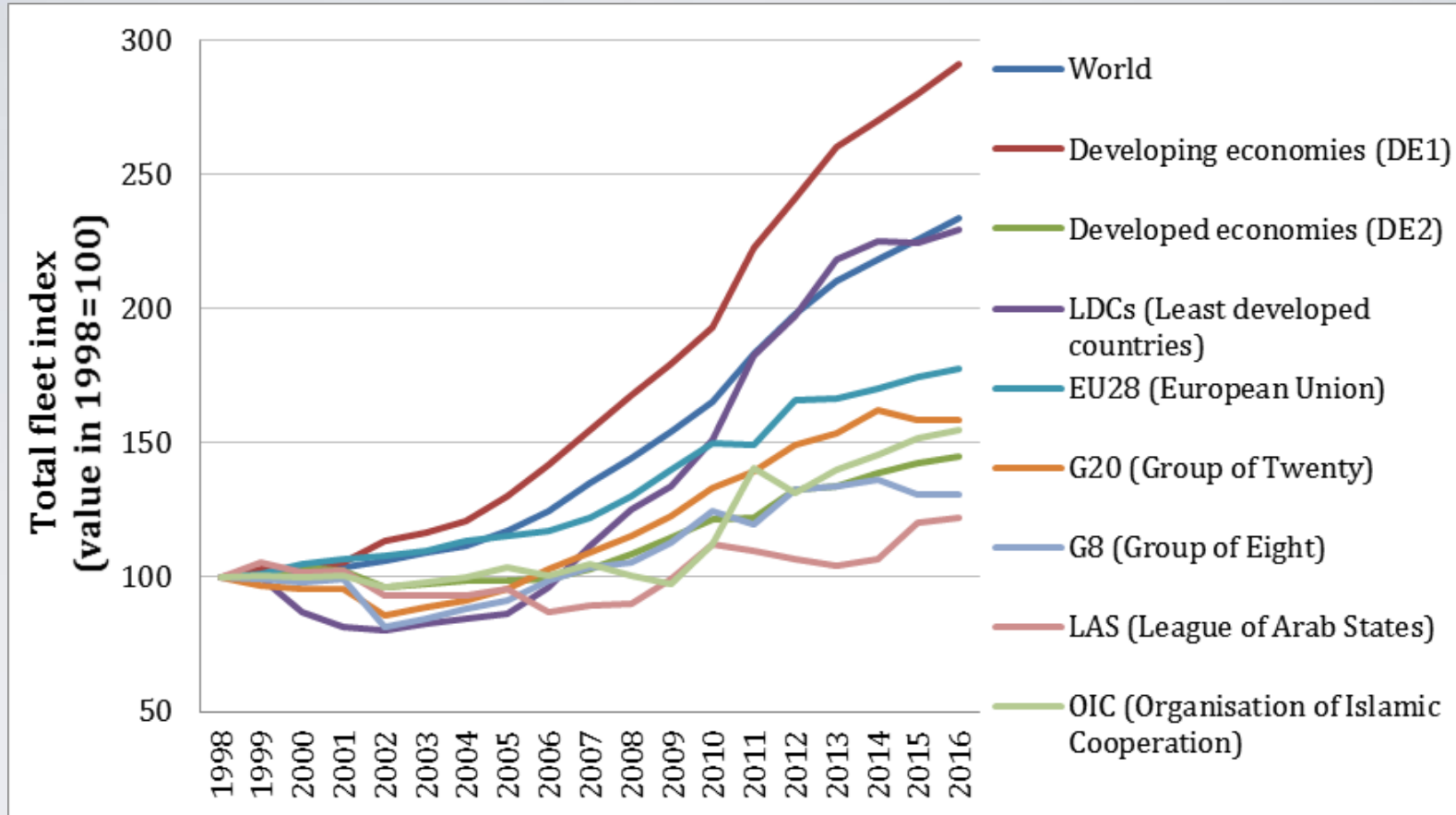
Source: World Development Indicators

# Maritime Transport



# Change in Total Fleet

Change in total fleet by flag of registration (in 1000 dwt) (1998-2016)

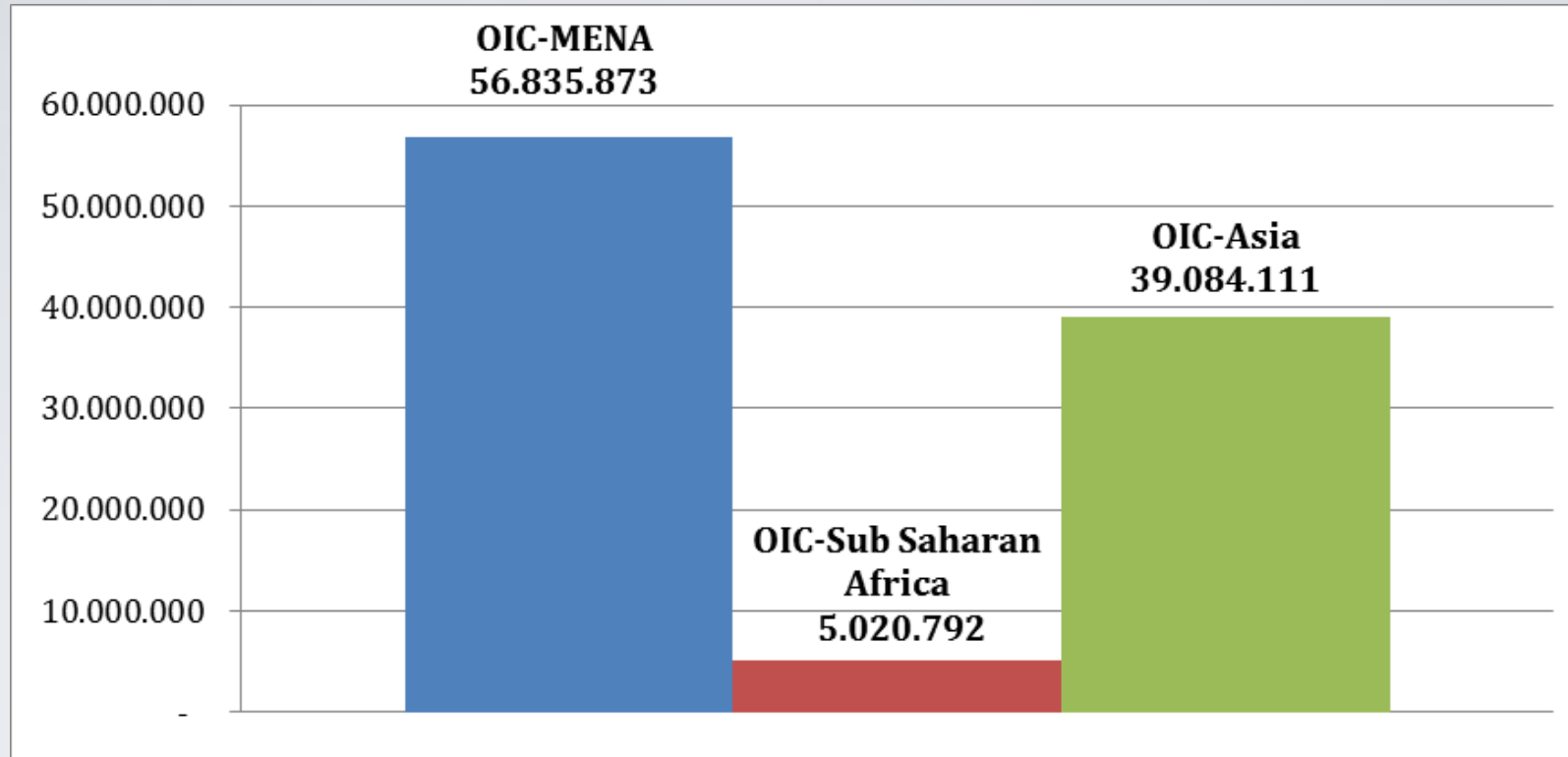


Source: UNCTAD Statistical Database



# Container Port Traffic

Container port traffic in the OIC regions (TEU: 20 foot equivalent units) (2014)



Source: World Development Indicators

# Container Port Traffic

Top 10 OIC countries in terms of container-port throughput (TEU) (2014)

Country	TEU
Malaysia	22.718.784
UAE	20.900.567
Indonesia	11.900.763
Egypt	8.810.990
Turkey	7.622.559
Saudi Arabia	6.326.861
Iran	5.163.843
Oman	3.620.364
Morocco	3.070.000
Pakistan	2.597.395

Source: Author from the World Development Indicators



# Container trade penetration in the OIC countries

Country	TEU/1,000 capita	Country	TEU/1,000 capita
UAE	2.300	Iran	66
Djibouti	882	Tunisia	55
Oman	855	Indonesia	47
Malaysia	760	Benin	39
Kuwait	340	Côte d'Ivoire	35
Brunei	307	Albania	34
Bahrain	274	Yemen	33
Lebanon	266	Senegal	31
Maldives	234	Mauritania	21
Qatar	205	Cameroon	16
Saudi Arabia	205	Pakistan	14
Jordan	121	Sudan	14
Gabon	117	Mozambique	12
Turkey	100	Bangladesh	10
Egypt	98	Algeria	9
Morocco	91	Nigeria	6
Libya	73		

Source: UNCTAD and World Bank

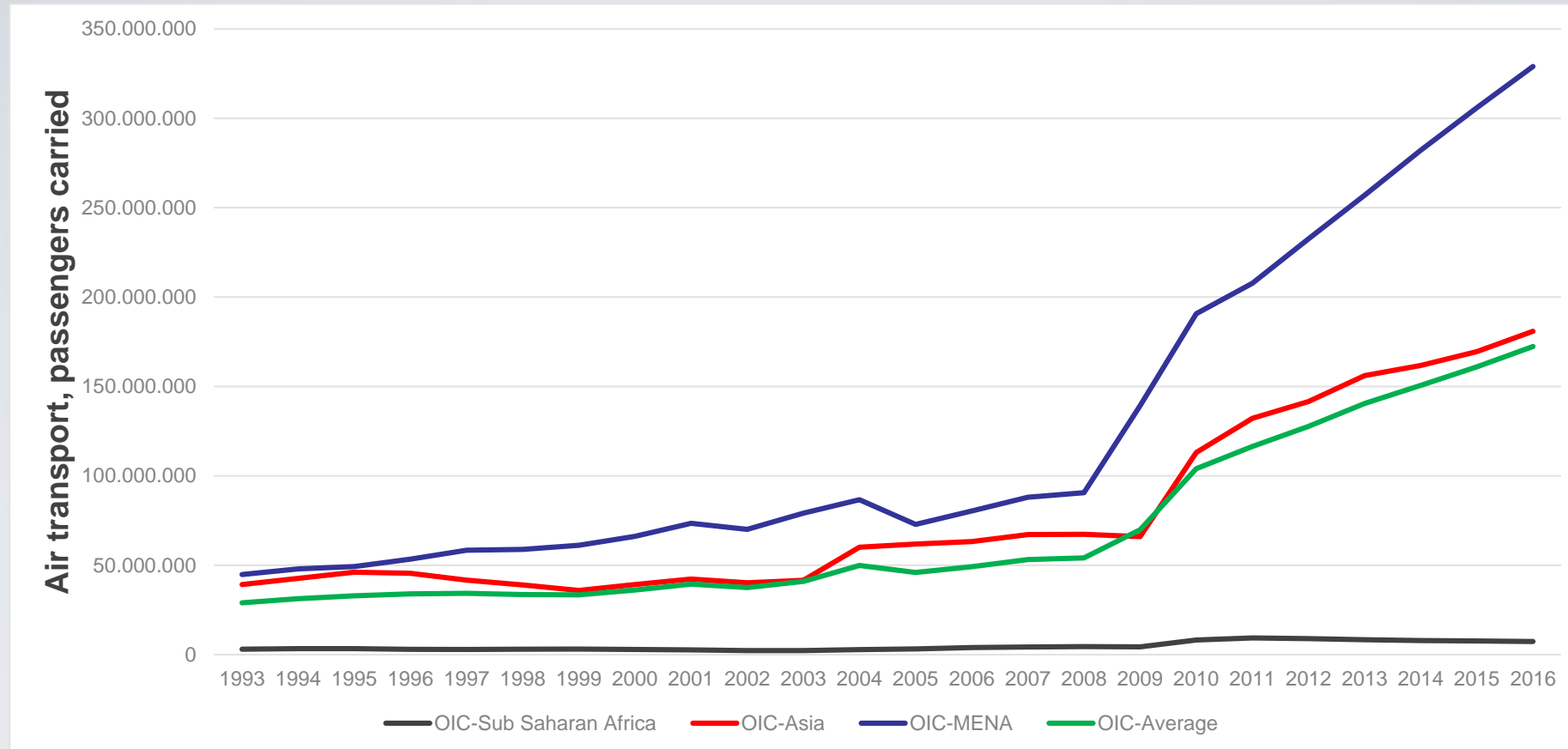




# Air Transport

# Air Passenger Traffic

Total air passengers carried in the OIC regions (1993-2016)



Source: World Development Indicators

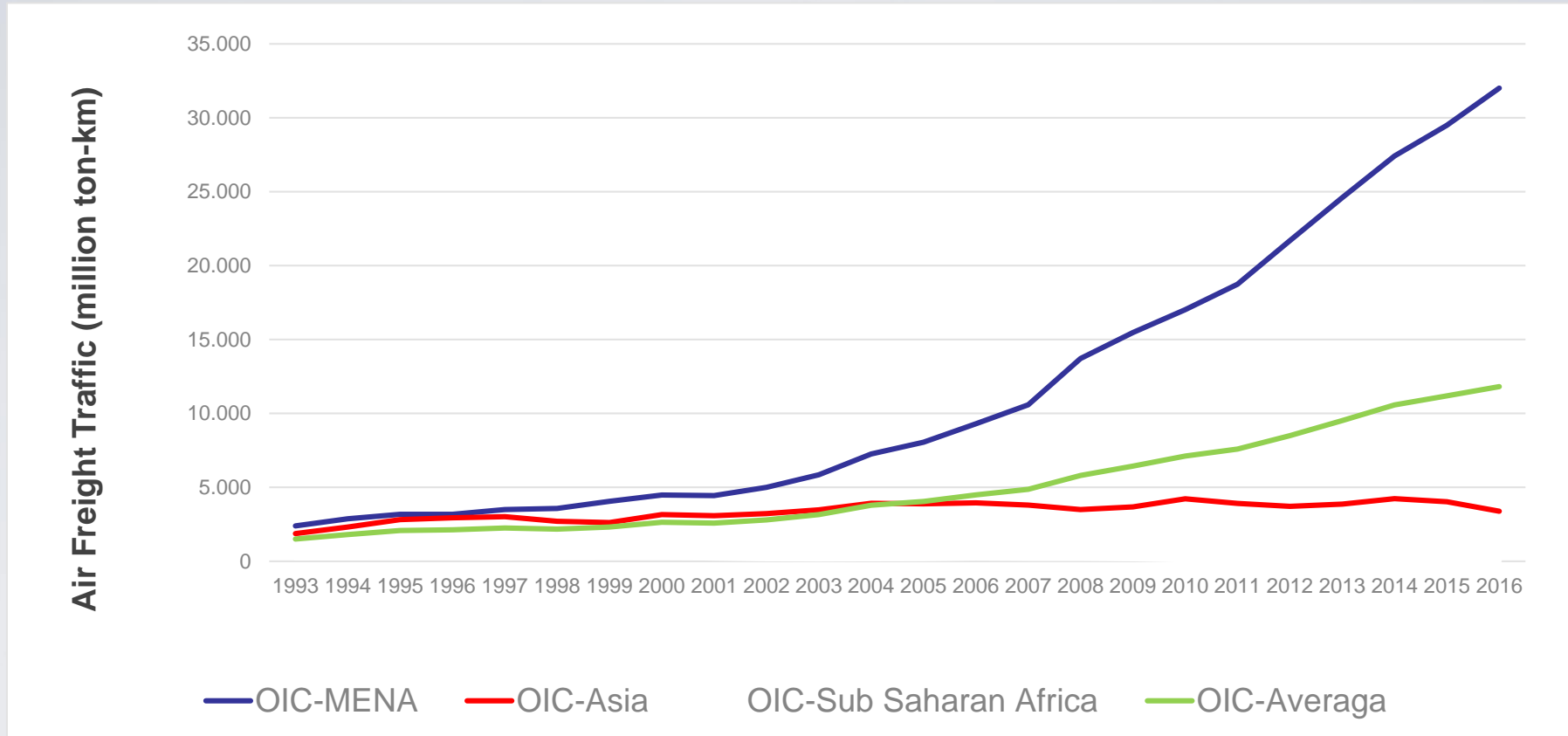
# Per capita air passengers at the OIC Countries (2016)

MENA		Sub-Saharan Africa		Asia	
Qatar	12,145	Mauritania	0,065	Maldives	3,377
UAE	9,942	Togo	0,062	Brunei Darussalam	2,761
Bahrain	3,663	Gabon	0,039	Malaysia	1,726
Oman	1,727	Nigeria	0,024	Suriname	0,480
Turkey	1,262	Mozambique	0,022	Indonesia	0,370
Saudi Arabia	1,069	Gambia, The	0,022	Kazakhstan	0,281
Kuwait	0,988	Cote d'Ivoire	0,018	Turkmenistan	0,233
Lebanon	0,441	Cameroon	0,015	Azerbaijan	0,201
Jordan	0,336	Burkina Faso	0,008	Tajikistan	0,119
Tunisia	0,316	Sudan	0,007	Kyrgyz Republic	0,096
Morocco	0,219	Uganda	0,001	Uzbekistan	0,075
Libya	0,204	Niger	0,001	Afghanistan	0,055
Iran	0,193	Senegal	0,001	Pakistan	0,050
Algeria	0,150			Bangladesh	0,023
Egypt	0,130				
Yemen	0,030				
Iraq	0,013				
Albania	0,009				

Source: World Development Indicators

# Air Freight Traffic

Total air freight carried in the OIC regions (million ton-km) (1993-2016)



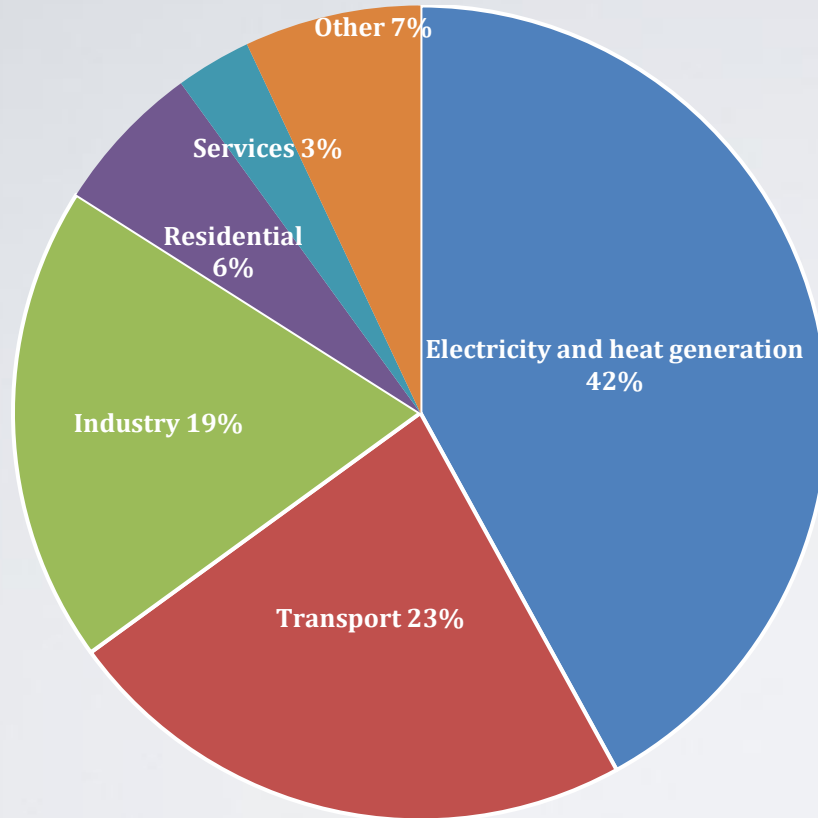
Source: World Development Indicators



# Environmental Effects of Transport Sector

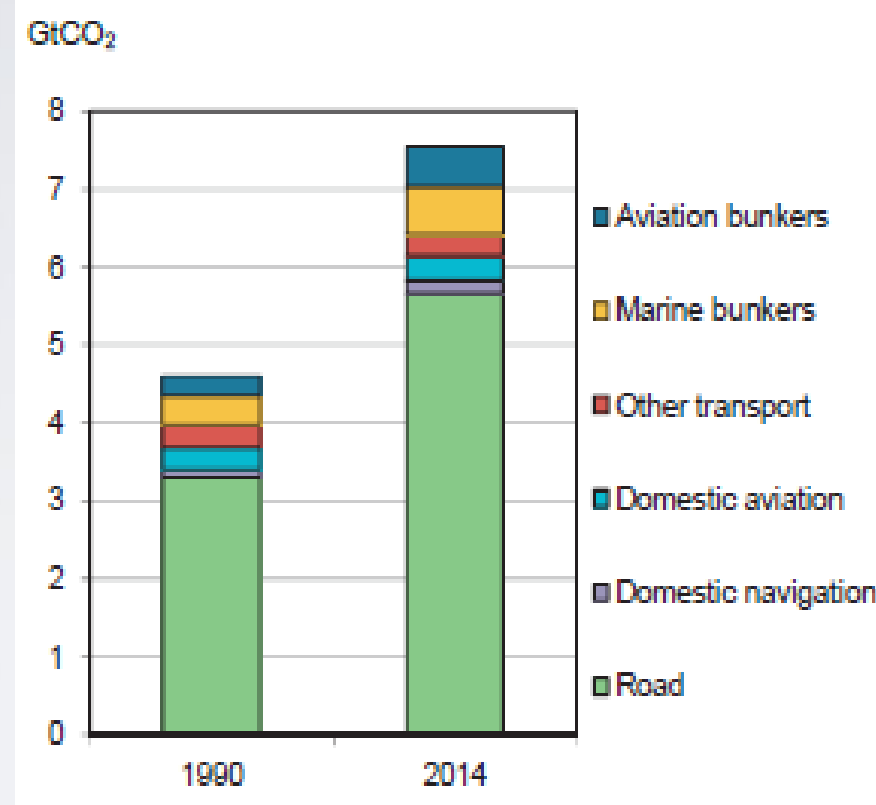
# GHG Emissions by Sector and Mode

World CO2 emissions by sector (2014)



Source: OECD/IEA (2016)

International trade related CO2 emissions by mode (2014)

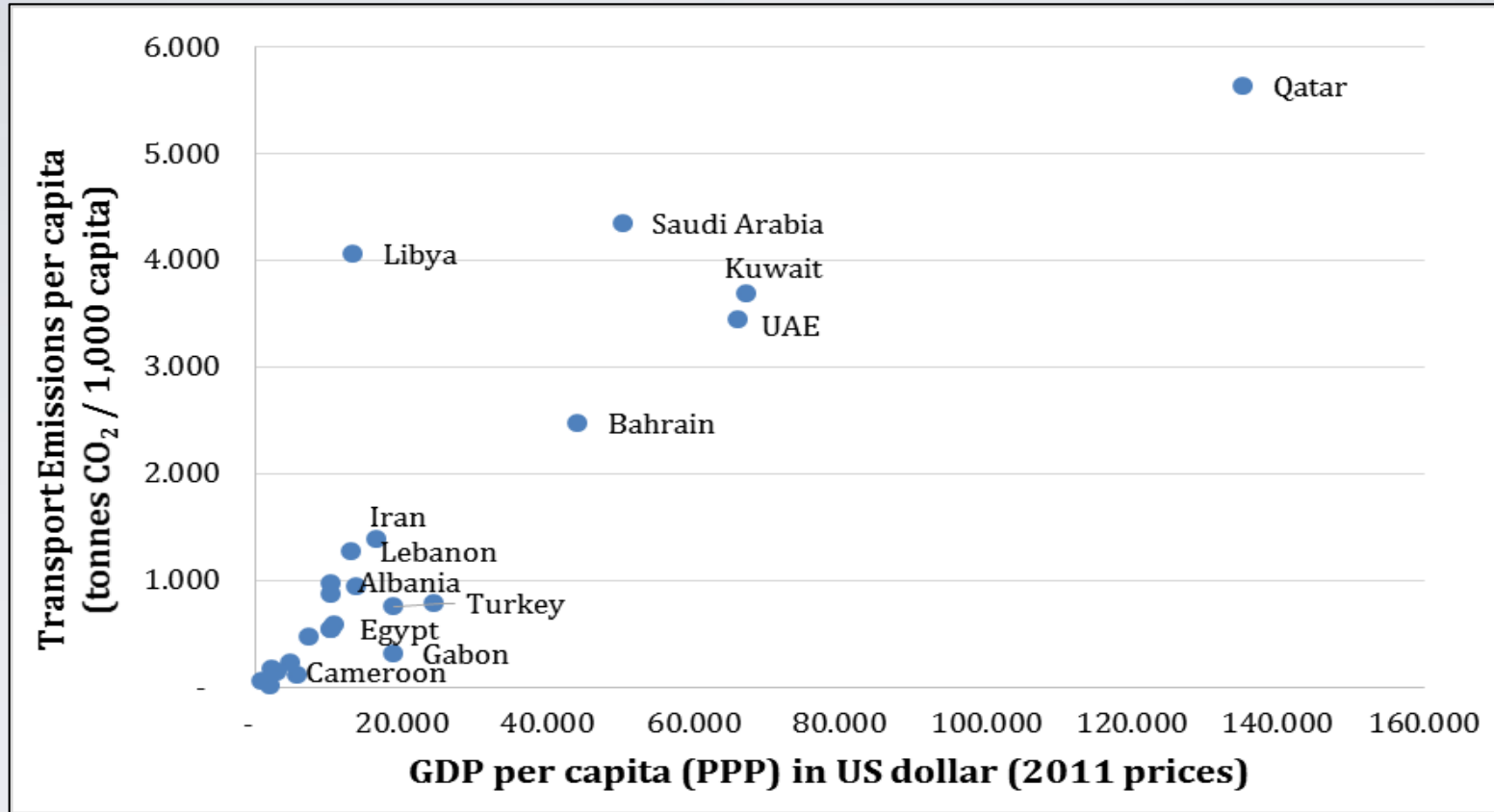


Source: OECD/ITF (2016)



# Transport CO<sub>2</sub> emissions and GDP p/cap

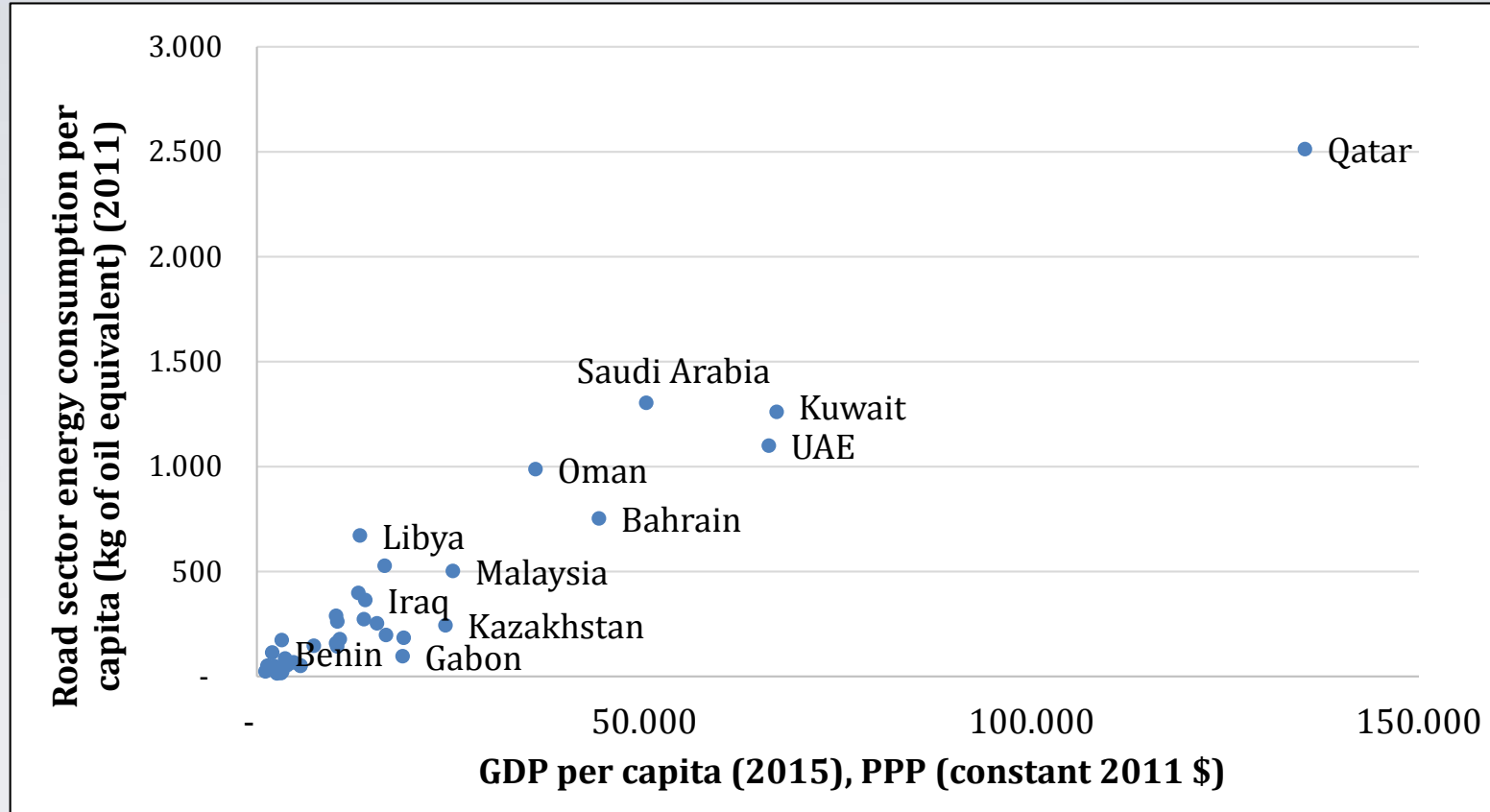
Transport CO<sub>2</sub> emissions and GDP per capita (PPP) in OIC Countries (2014)



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

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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 States: Concepts&Cases**



# Policy Recommendations

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- **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**



