



**5TH MEETING OF THE  
COMCEC TRANSPORT AND COMMUNICATIONS WORKING GROUP**

# **COMCEC TRANSPORT OUTLOOK**

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Ankara, Turkey**



# [ OUTLINE ]

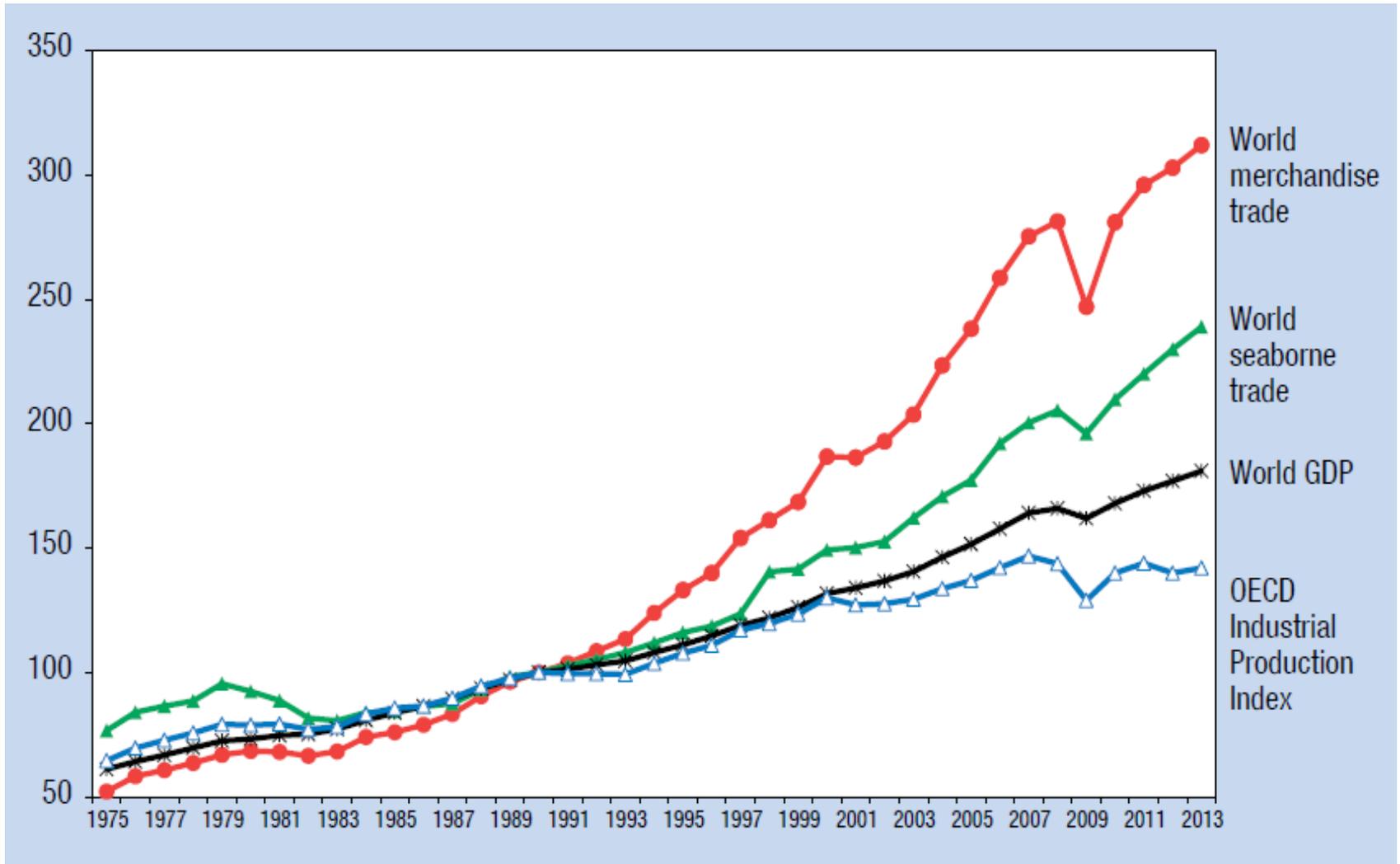
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- 1. Importance of Transport for COMCEC**
- 2. Trade and Transport**
- 3. Freight and Passenger Traffic**
- 4. Quality of Transport Infrastructure**
- 5. Private Sector Investments (PSP) in Transport Sector**
- 6. Transport and its Environmental Impacts**
- 7. Policy Implications**

# [ Importance of Transport for COMCEC ]

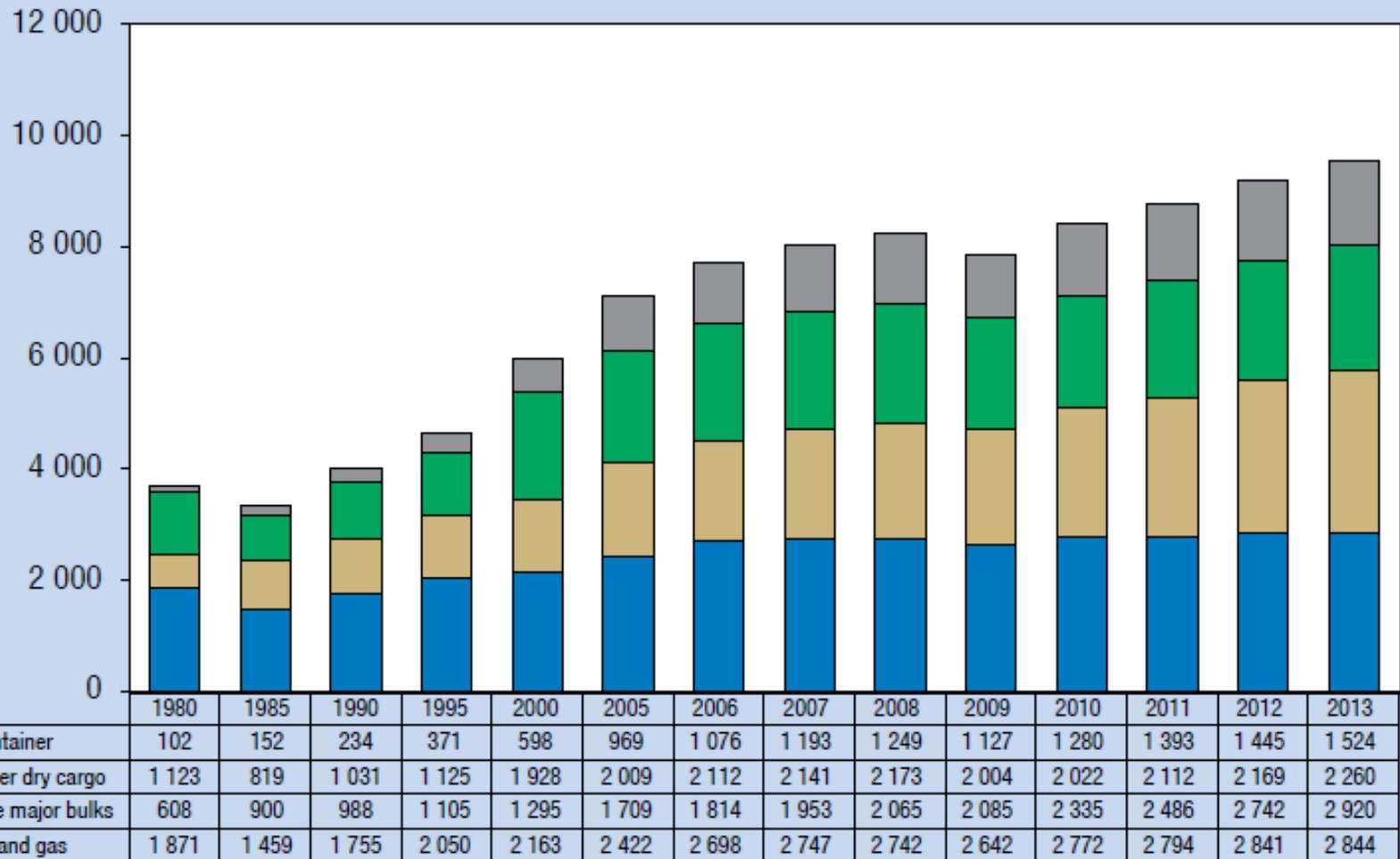
- One of the three principles of COMCEC Strategy is **enhancing mobility** (the other two are strengthening solidarity and improving governance)
- **Transport** is one of the three priority sectors for COMCEC together with agriculture and tourism
- **Transport** is one of the six cooperation areas (the others are trade, tourism, agriculture, poverty alleviation, and finance) specified by the COMCEC Strategy

# GDP and Trade Indices



# International Seaborne Trade

International seaborne trade, selected years (Millions of tons loaded)

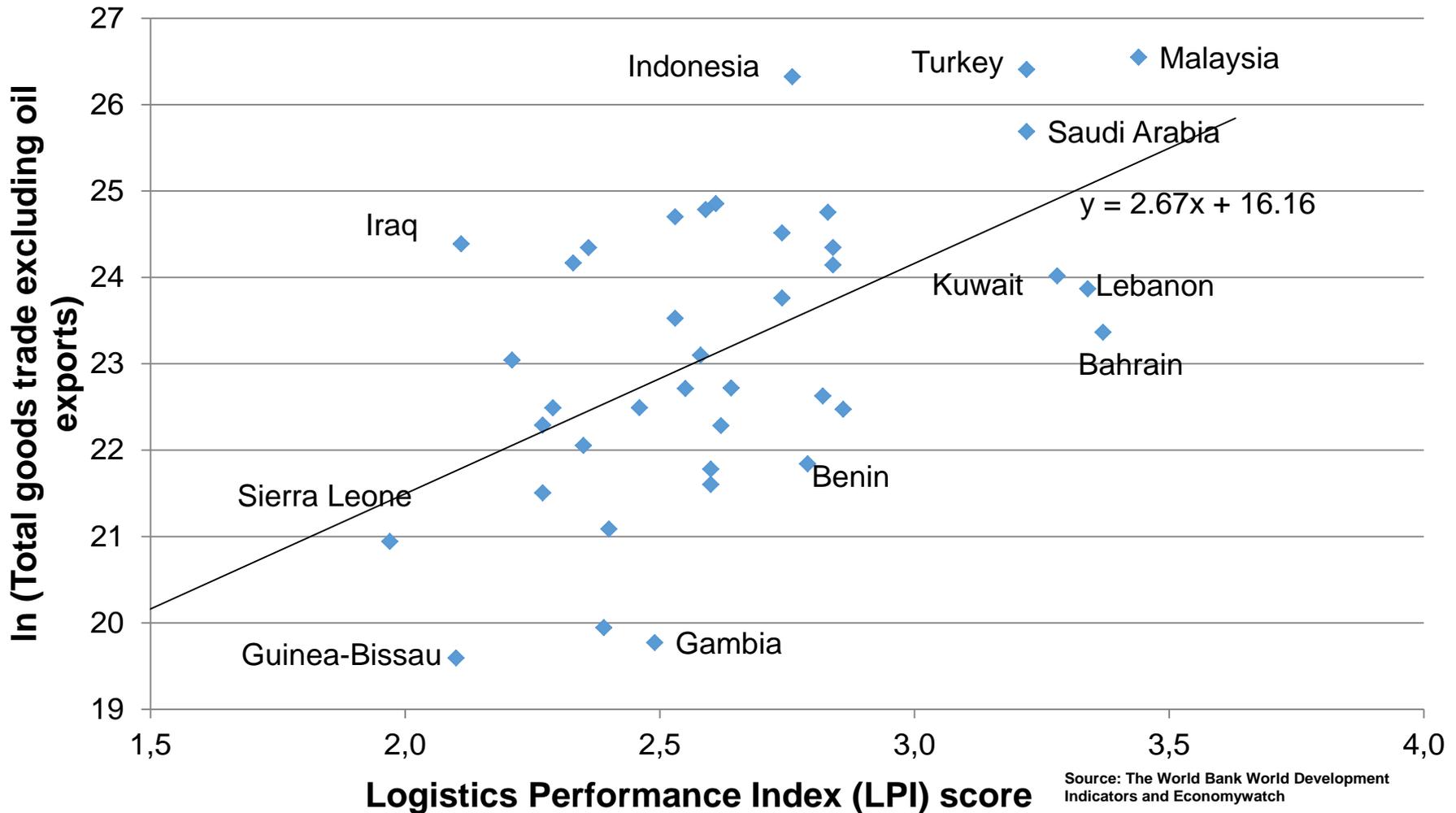


# Logistics Performance Index (LPI)

Regions	Overall LPI Score	Customs	Infrastructure	International Shipments	Logistics Quality and Competence	Tracking and Tracing	Timeliness
High Income OECD Average	<b>3.70</b>	<b>3.61</b>	<b>3.73</b>	<b>3.46</b>	<b>3.71</b>	<b>3.67</b>	<b>4.05</b>
OIC Average	<b>2,55</b>	<b>2,39</b>	<b>2,39</b>	<b>2,58</b>	<b>2,50</b>	<b>2,58</b>	<b>2,88</b>
OIC-MENA	<b>2,90</b>	<b>2,66</b>	<b>2,82</b>	<b>2,86</b>	<b>2,87</b>	<b>2,98</b>	<b>3,24</b>
OIC-Asia	<b>2,42</b>	<b>2,30</b>	<b>2,26</b>	<b>2,50</b>	<b>2,37</b>	<b>2,41</b>	<b>2,68</b>
OIC-Sub Saharan Africa	<b>2,39</b>	<b>2,25</b>	<b>2,16</b>	<b>2,42</b>	<b>2,31</b>	<b>2,40</b>	<b>2,74</b>

# LPI Score and Trade

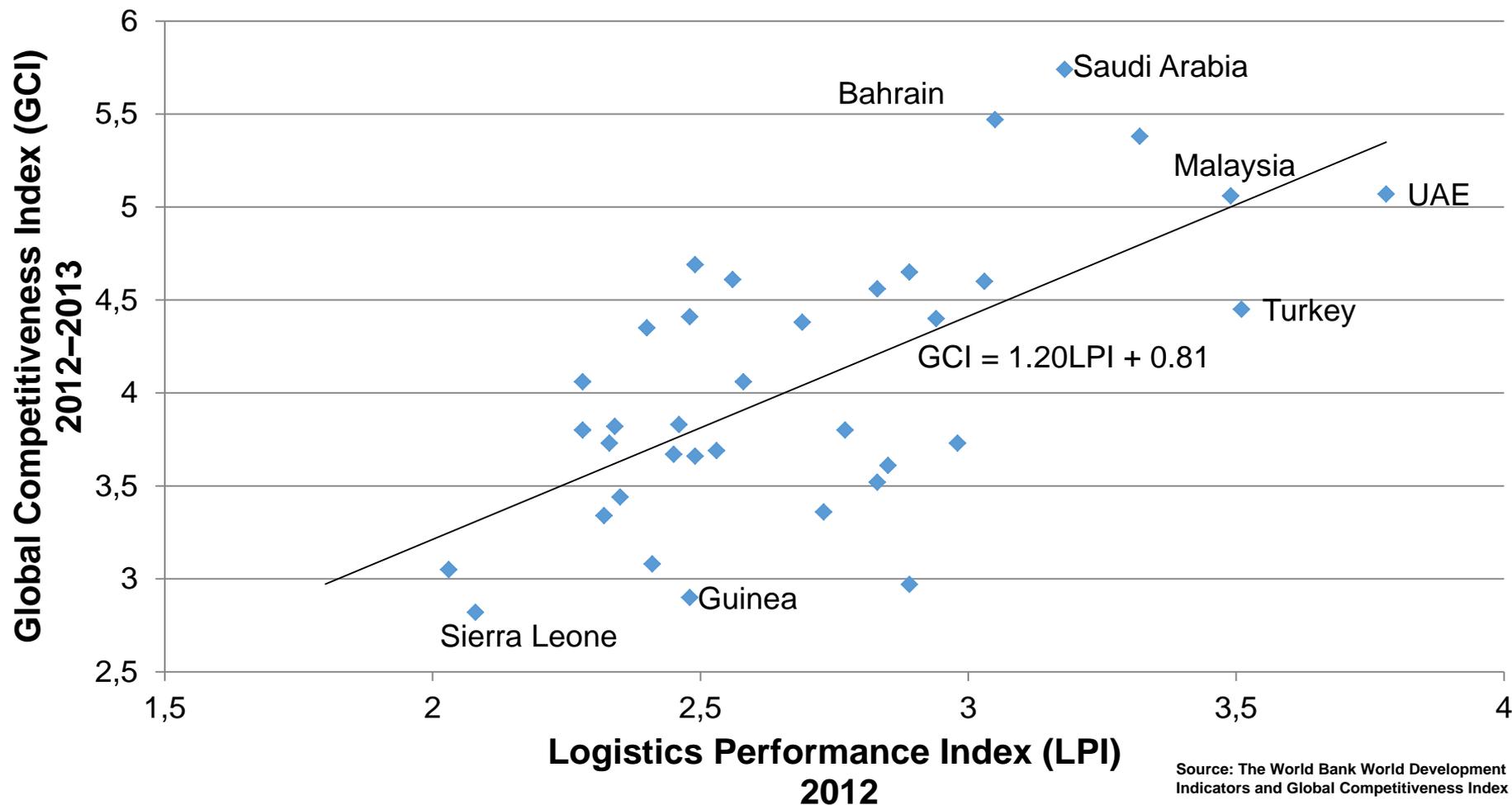
Total goods trades (excluding oil exports) and LPI scores of OIC countries in 2010



Source: The World Bank World Development Indicators and Economywatch

# [ LPI and GCI Scores ]

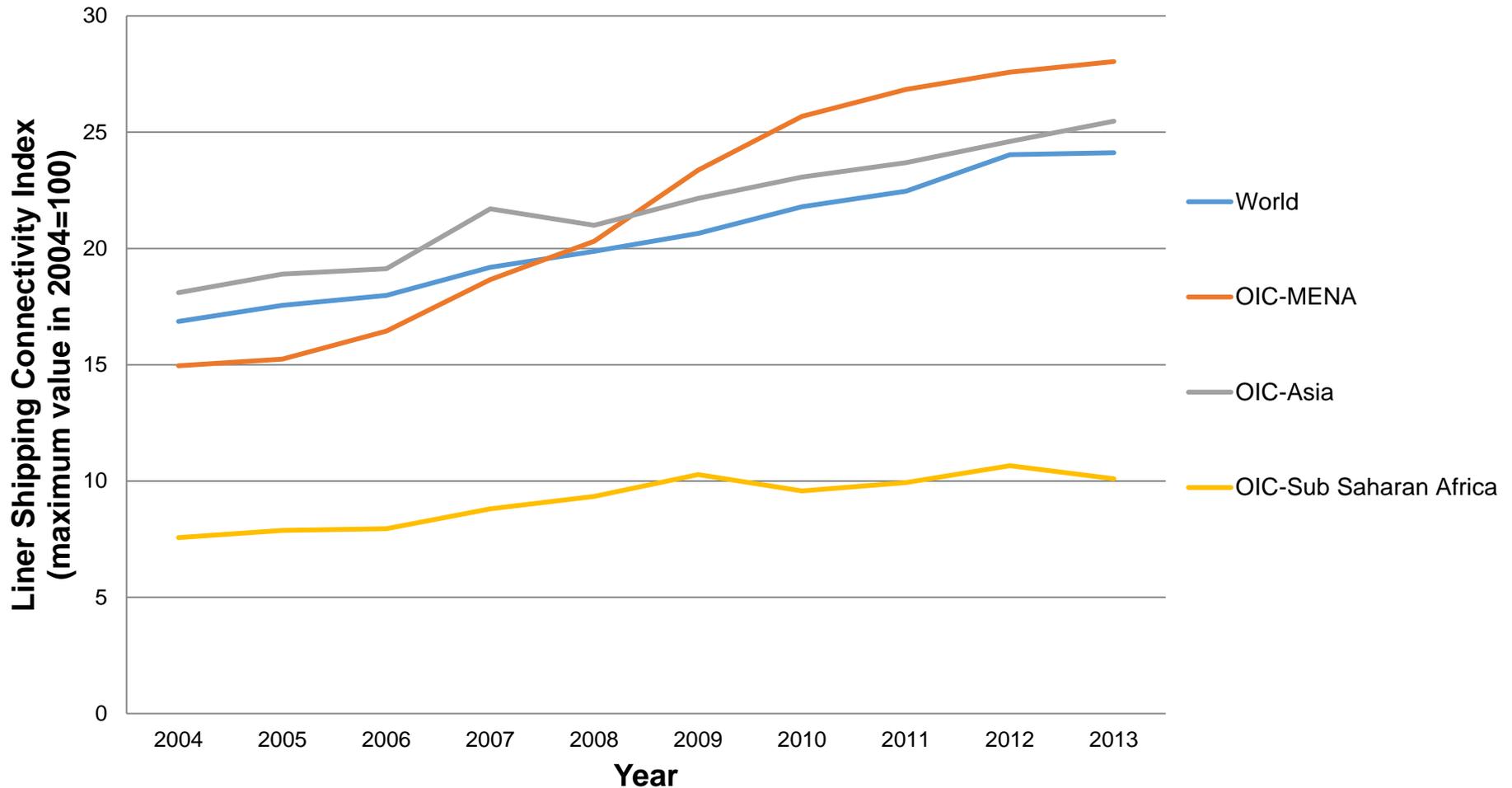
2012 LPI scores and 2012-2013 GCI scores of the OIC countries



Source: The World Bank World Development Indicators and Global Competitiveness Index

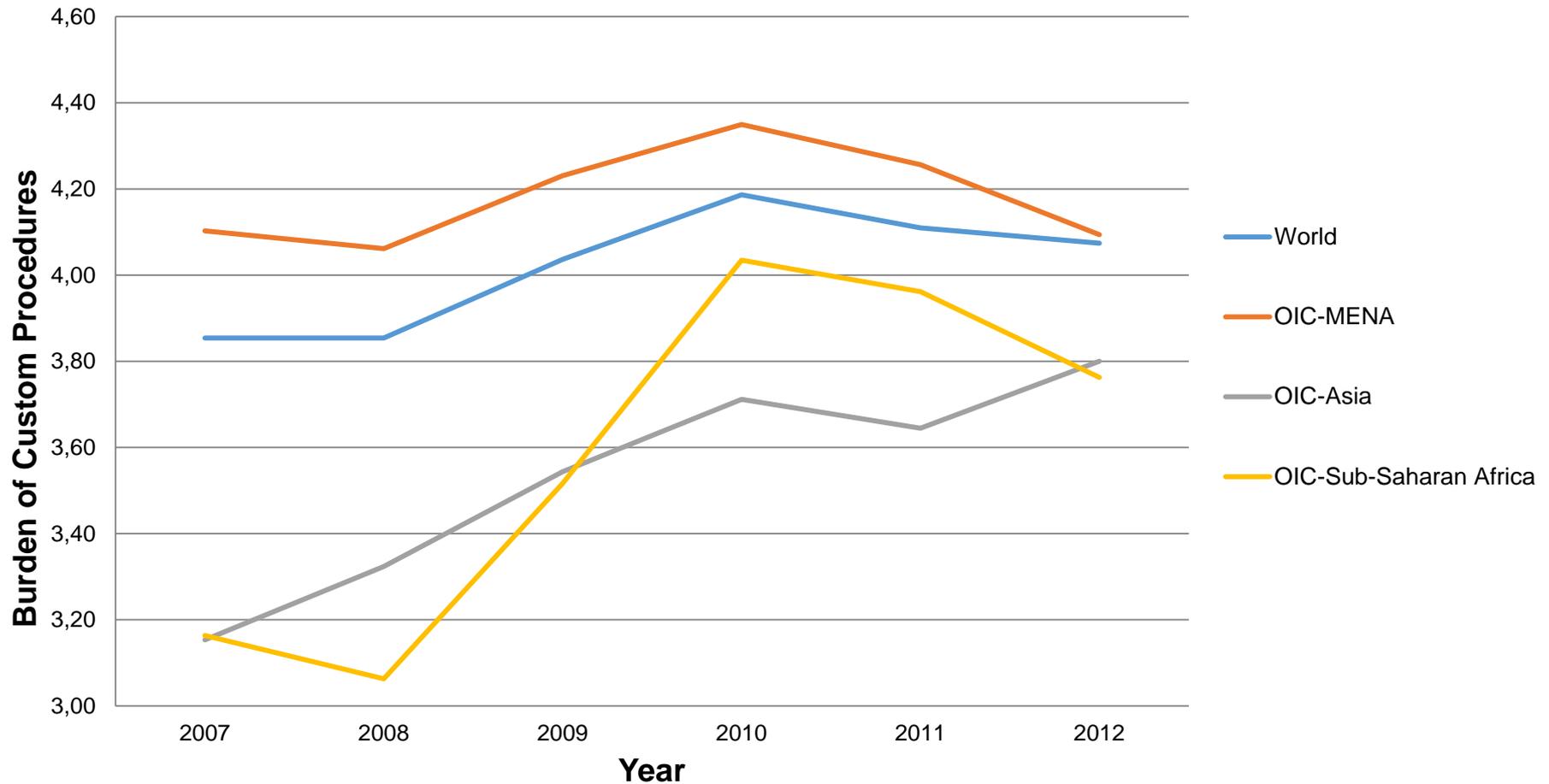
# The Liner Shipping Connectivity Index

The liner shipping connectivity index by OIC regions in the 2004-2013 period



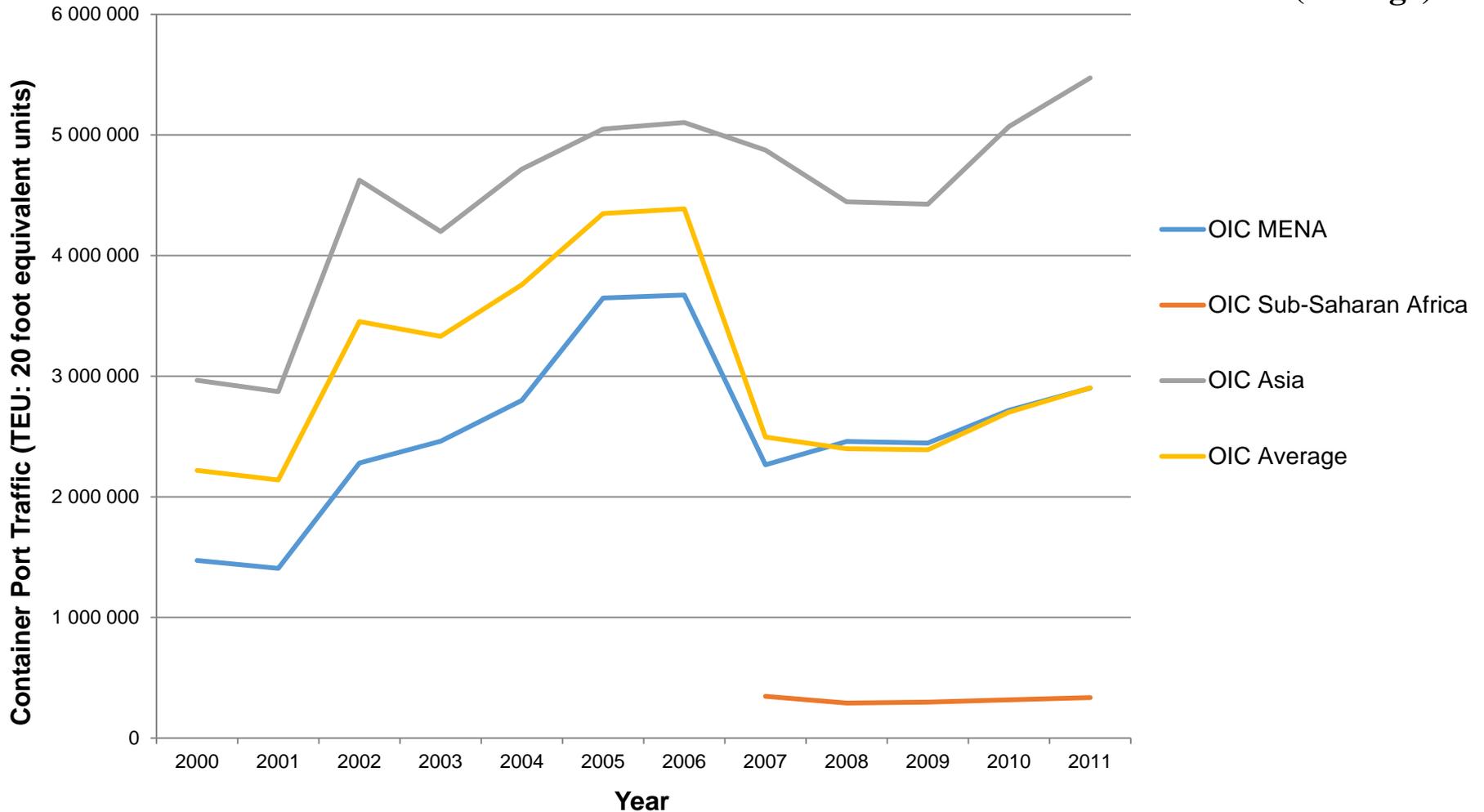
# Burden of Custom Procedures

The burden of custom procedures by OIC regions in the 2007-2011 period  
(1=extremely inefficient to 7=extremely efficient)



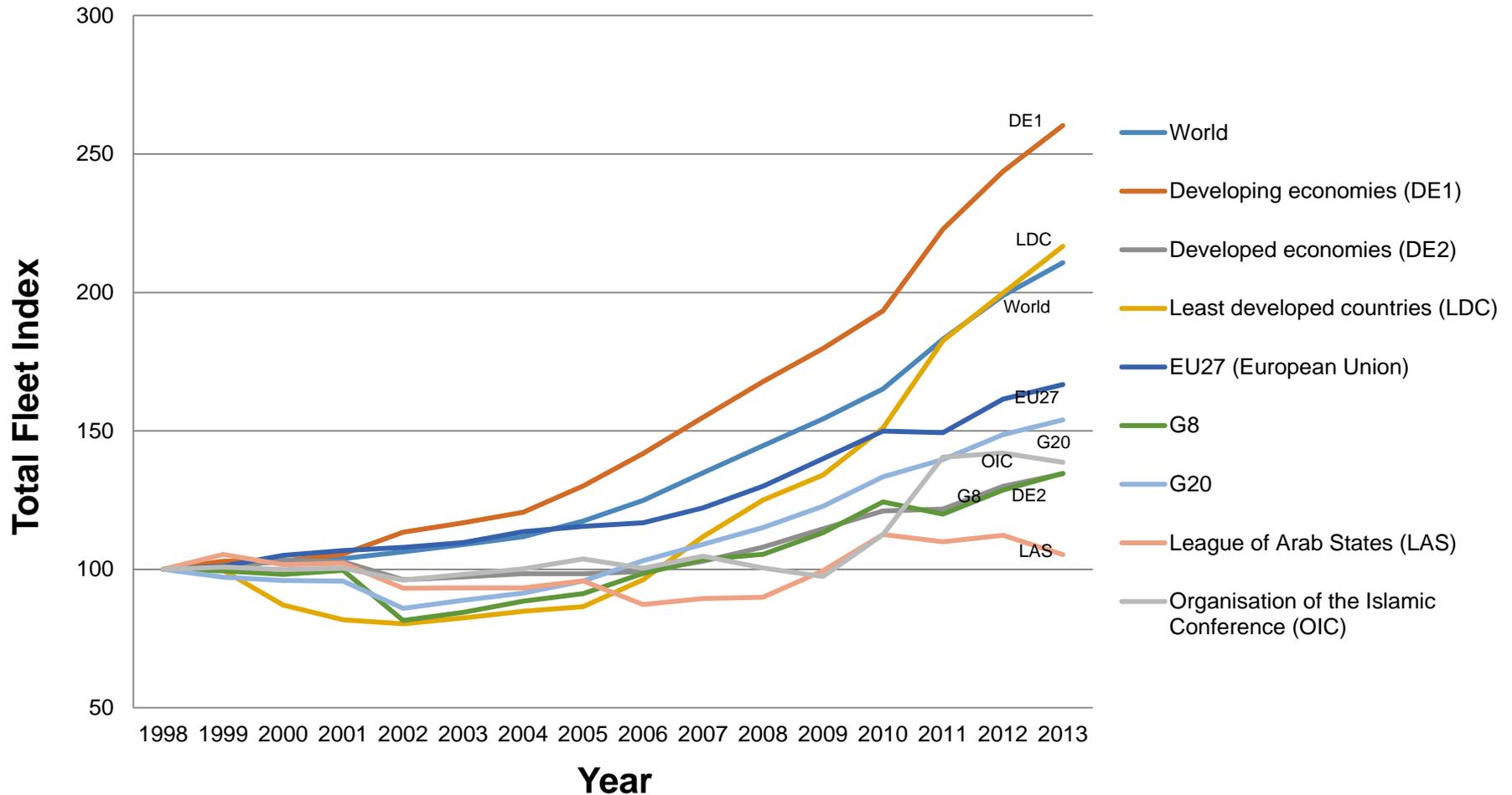
# Container Port Traffic

Container port traffic in the OIC regions in the 2000-2011 period  
(average)



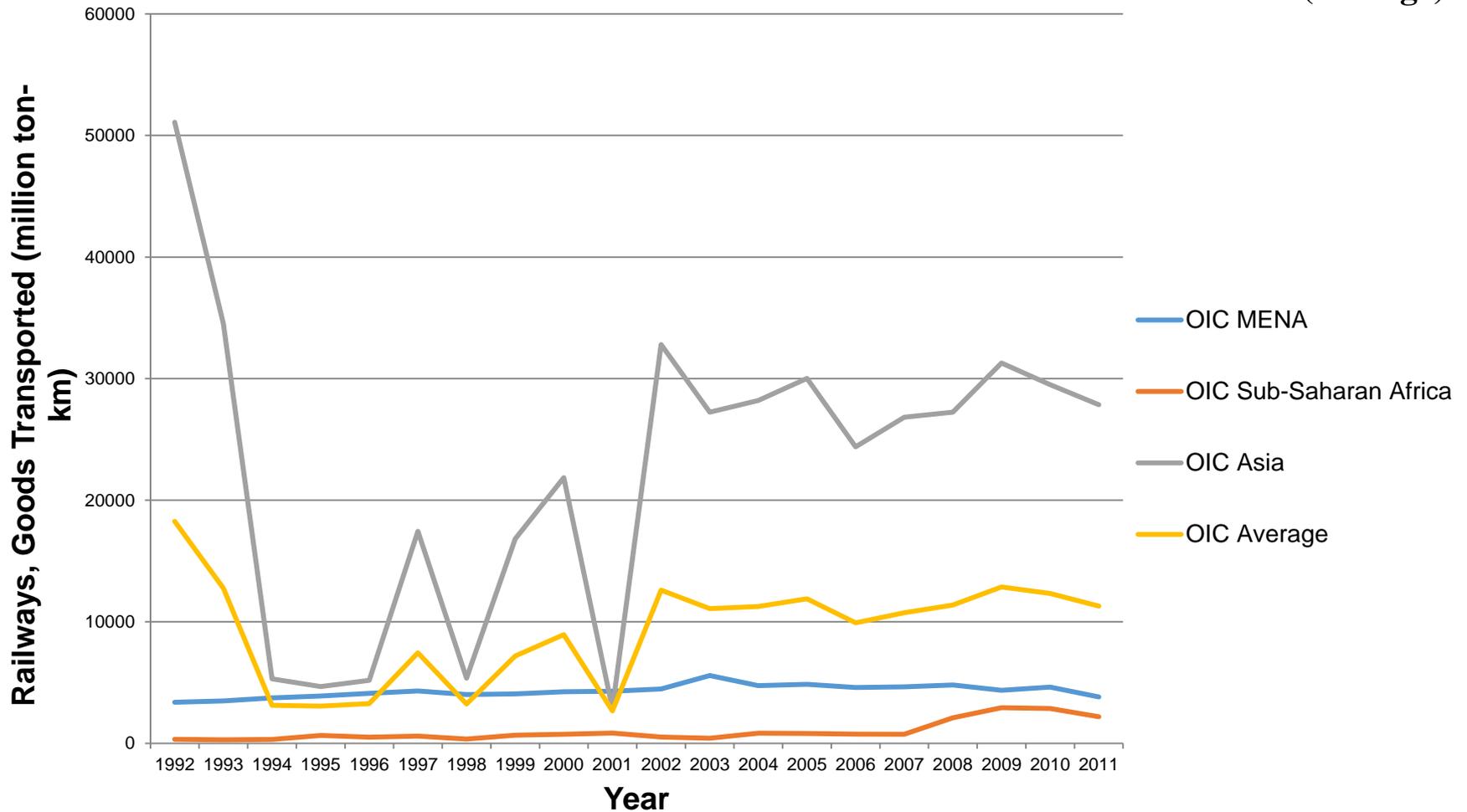
# Change in Total Fleet

Change in total fleet (thousand DWT) by flag of registration for the period 1998-2013 (value in 1998=100)



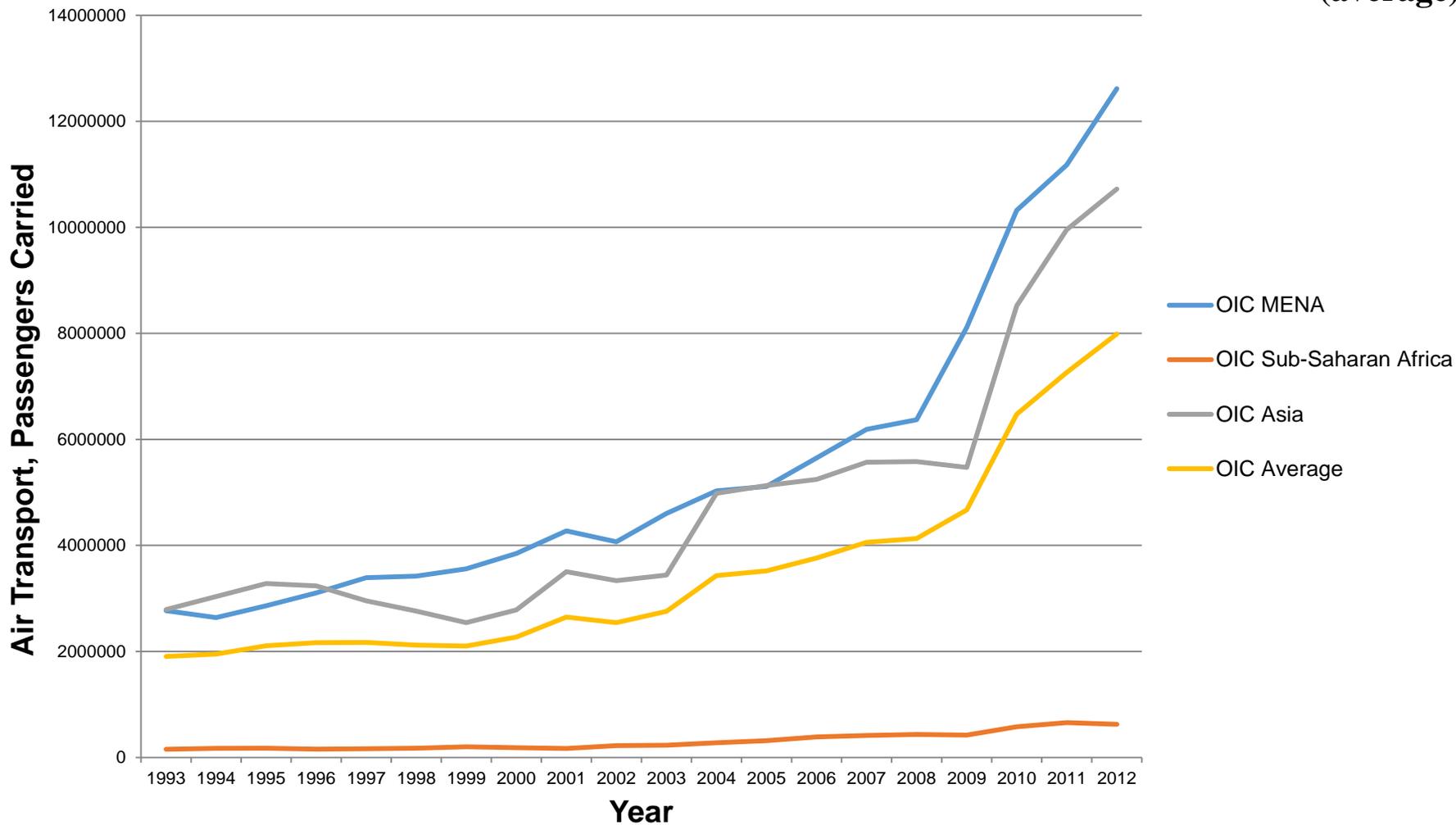
# Rail Freight Traffic

Rail freight carried in the OIC regions in the 1992-2011 period  
(average)



# Air Passenger Traffic

Air passengers carried in the OIC regions in the 1993-2012 period  
(average)



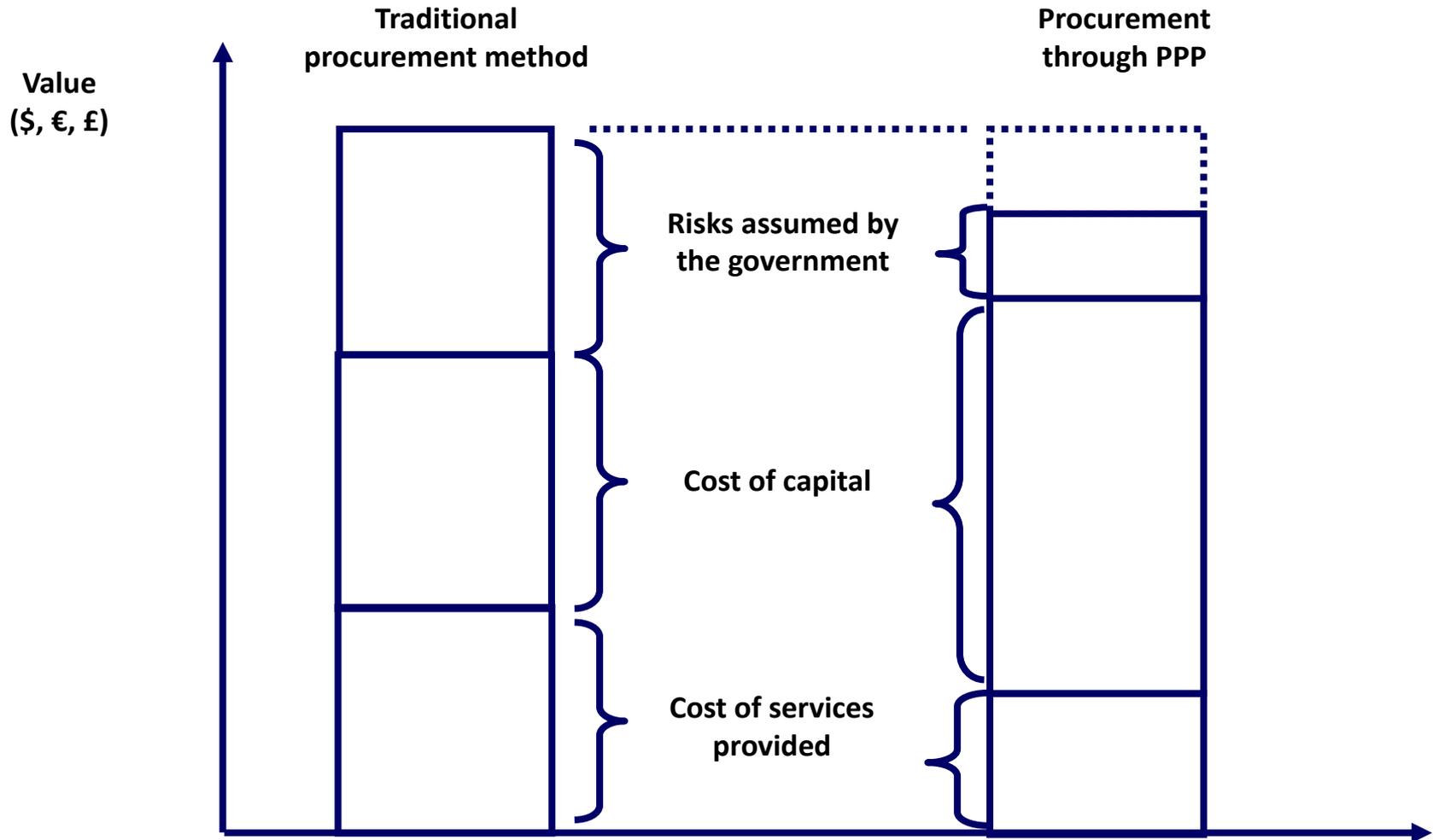
# Quality of Transport Infrastructure

## The indexes for the quality of transport infrastructure

Region	Quality of Overall Infrastructure	Quality of Roads	Quality of Railroad Infrastructure	Quality of Port Infrastructure	Quality of Air Transport Infrastructure
World Average	4.30	4.00	3.10	4.30	4.60
OIC Average	3.93	3.72	2.45	3.97	4.31
OIC-Sub Saharan Africa	3.26	3.00	1.89	3.79	3.73
OIC-MENA	4.56	4.48	2.59	4.44	4.89
OIC-Asia	4.00	3.68	3.11	3.52	4.31
OIC Maximum	6.40 (UAE)	6.50 (UAE)	4.90 (Malaysia)	6.4 (UAE)	6.60 (UAE)
OIC Minimum	2.10 (Guinea)	2.00 (Guinea)	1.00 (Lebanon)	1.50 (Kyrgyz Republic)	2.70 (Sierra Leone)
OIC Median	3.70 (Indonesia and Tajikistan)	3.30 (Algeria and Tajikistan)	2.10 (Brunei Darussalam)	3.90 (Egypt and Uganda)	4.20 (Indonesia and Tajikistan)

# PSP in Transport Sector (1)

The comparison of the traditional public procurement with PPP-type procurement



# PSP in Transport Sector (2)

## Distribution of PPP projects by infrastructure sectors in the 1990-2012 period

Sectors	Number of PPP Projects	Percentage Shares
Energy	2,653	45.8%
Telecom	843	14.5%
Transport	1,473	25.4%
Water and sewerage	814	14.0%
Total	5,783	100.0%

Source: The World Bank Private Participation in Infrastructure Database

# PSP in Transport Sector (3)

## Distribution of PPP in transport infrastructure by modes (1990-2011)

Subsector	Project Count	% Project Count	Total Investment (billion \$)	% Total Investment
Airports	158	10.7%	49,347	13.4%
Railroads	118	8.0%	68,537	18.6%
Roads	811	54.9%	186,57	50.8%
Seaports	388	26.3%	62,805	17.1%
Total	1475	100.0%	367,259	100.0%

Source: The World Bank Private Participation in Infrastructure Database

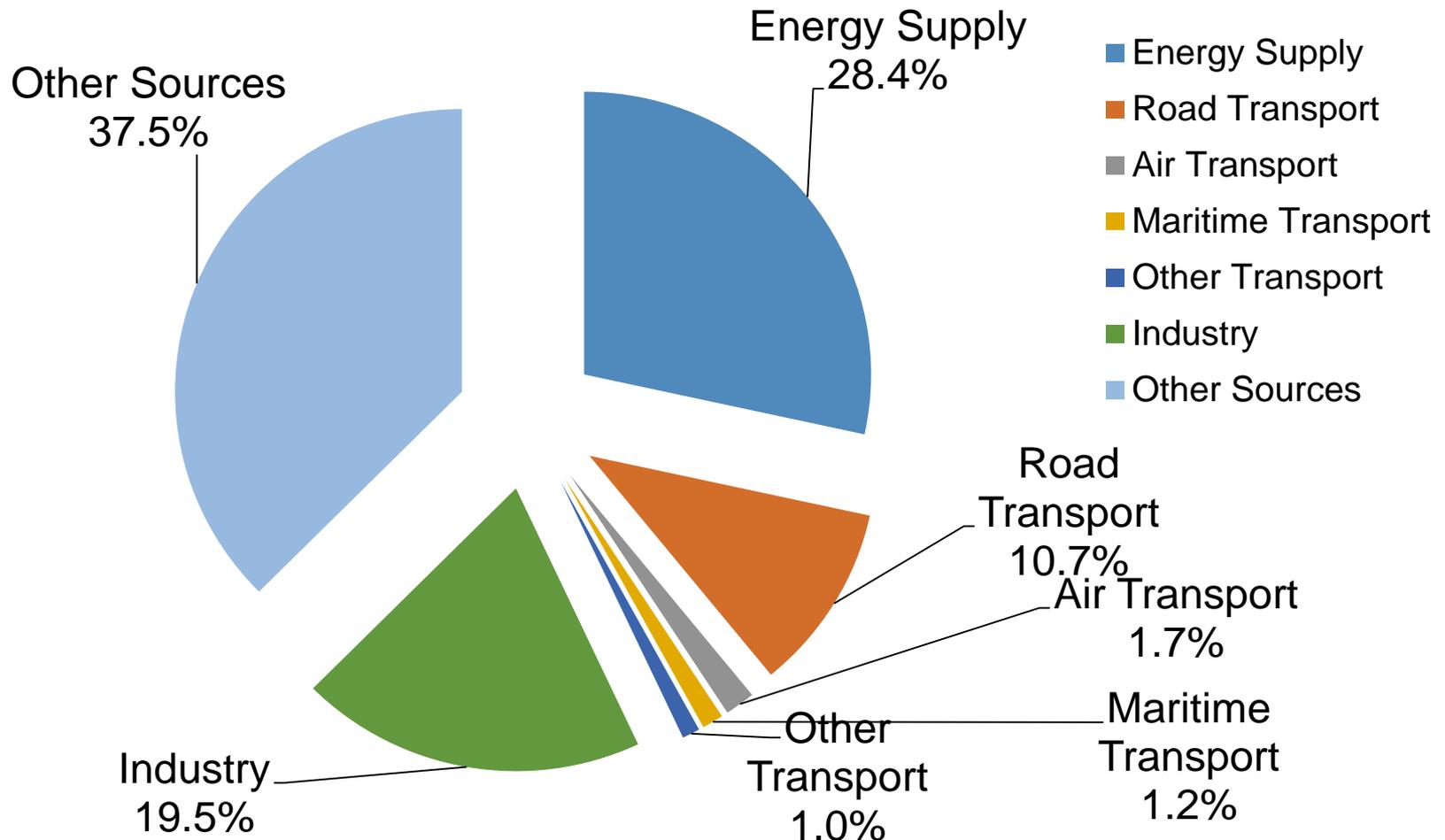
# **[ PSP in Transport Sector (4) ]**

**Successful implementation of a PPP project requires:**

- (1) Political and economic stability**
- (2) Sound legal framework**
- (3) Institutional capacity**
- (4) Political commitment and support**
- (5) Transparent and competitive tender procedures free from corruption**
- (6) Organized and developed domestic private entrepreneurship  
(including financial institutions and construction companies)**
- (7) Public acceptance and support**

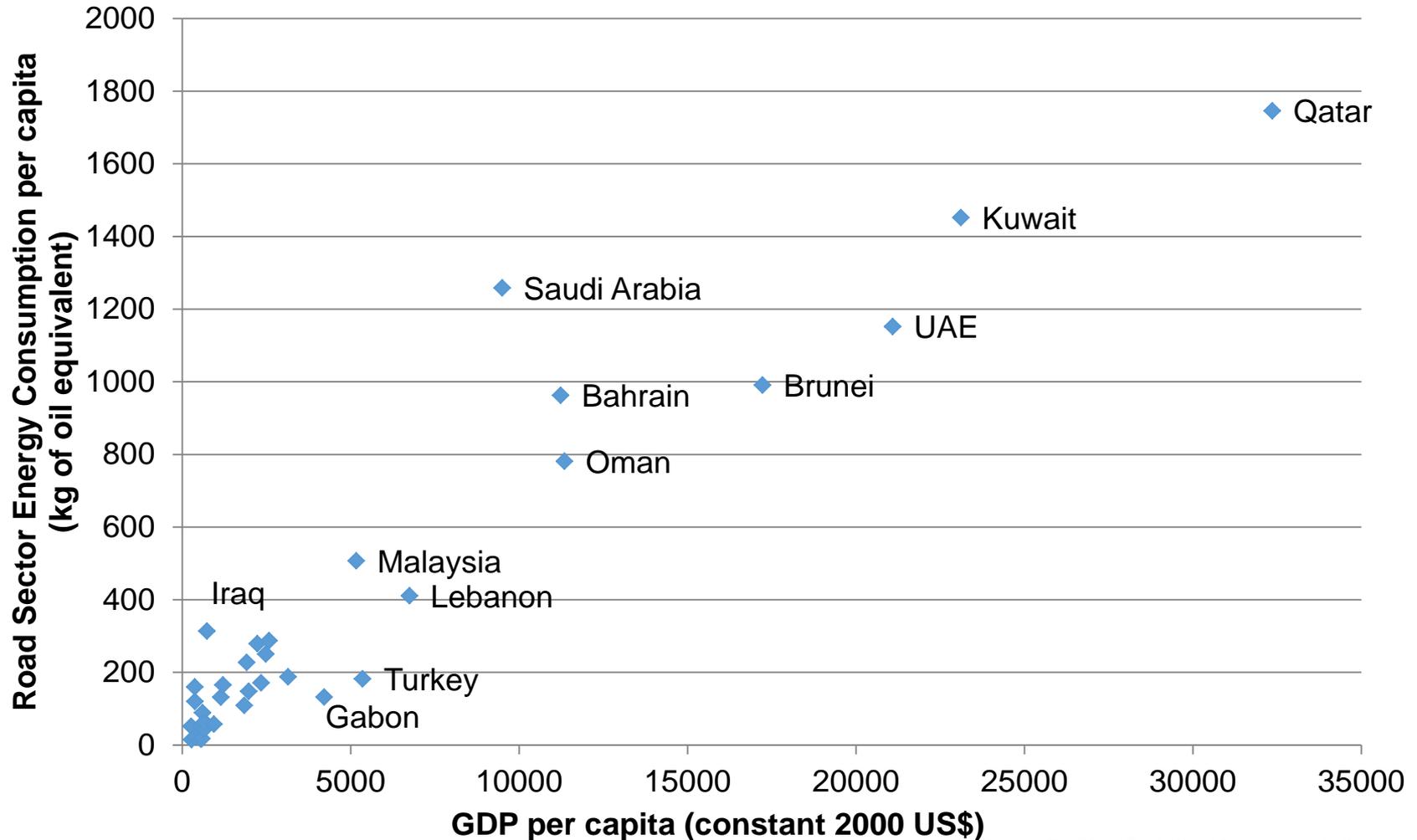
# GHG Emissions by Sources

GHG emissions by sources in 2005



# Road Sector Energy Consumption and GDP per capita

Road sector energy consumption per capita and per capita income in 36 OIC countries in 2010



# **Policy Implications**

- **A great diversification among the OIC countries: Need to abstain from adopting “one size fits all” type of policies and strategies**
- **Need for holistic view that promotes intermodal transport**
- **Considerable potential for cooperation in the transport industry**
- **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**



**Thank you for your attention...**

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