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THE TRANSPORT SITUATION IN AFRICA

I. INTRODUCTION

Transport is an indispensable element of development and socio-economic growth. As engines of economic integration, transport infrastructure and service facilities constitute a precondition for facilitating trade and the movement of goods and persons. Long perceived as a tool for accessing national and regional trade in a radically changing global environment, transport infrastructure remains a pillar of development with a view to accelerating growth and reducing poverty. Given the challenges of globalization, Africa is lagging significantly behind in the development of regional trade, particularly because of the lack of reliable and adequate transport. Indeed, the existing transport facilities for trade are completely outward-looking with the result that transport infrastructure and services have been little developed and the physical network poorly integrated.

It was for this reason that at the instance of African countries, the United Nations proclaimed two Transport and Communication Decades in Africa (1978-1988 and 1991-2000) with a view to focusing the efforts of African States and their development partners on the specific issues of transport and communications in Africa. A review of those 20 years of effort devoted to transport showed that the existing transport infrastructure and services are still far from enabling Africa to achieve socio-economic development and integration.

Aware of the importance of this sector, African Ministers of Transport held on 6 April 2005 in Addis Ababa, a conference on the role of transport in achieving the Millennium Development Goals and adopted objectives and indicators whose achievement would enable Africa to make significant progress. The outcome document of that conference was adopted by the African Union Summit of Heads of State and Government held on 4 and 5 July 2005 in Sirte, Libya and subsequently transmitted to the Secretary-General of the United Nations.

Similarly, the New Partnership for Africa's Development (NEPAD) set the priority objective of accelerating regional integration and accordingly aimed at filling in the infrastructural gaps in Africa. The purpose of this report, therefore, is to describe the current situation of transport and the related challenges facing Africa. It seeks to inform policy-makers about the appropriate measures that need to be taken so that the transport sector can contribute effectively to the socio-economic development of Africa.

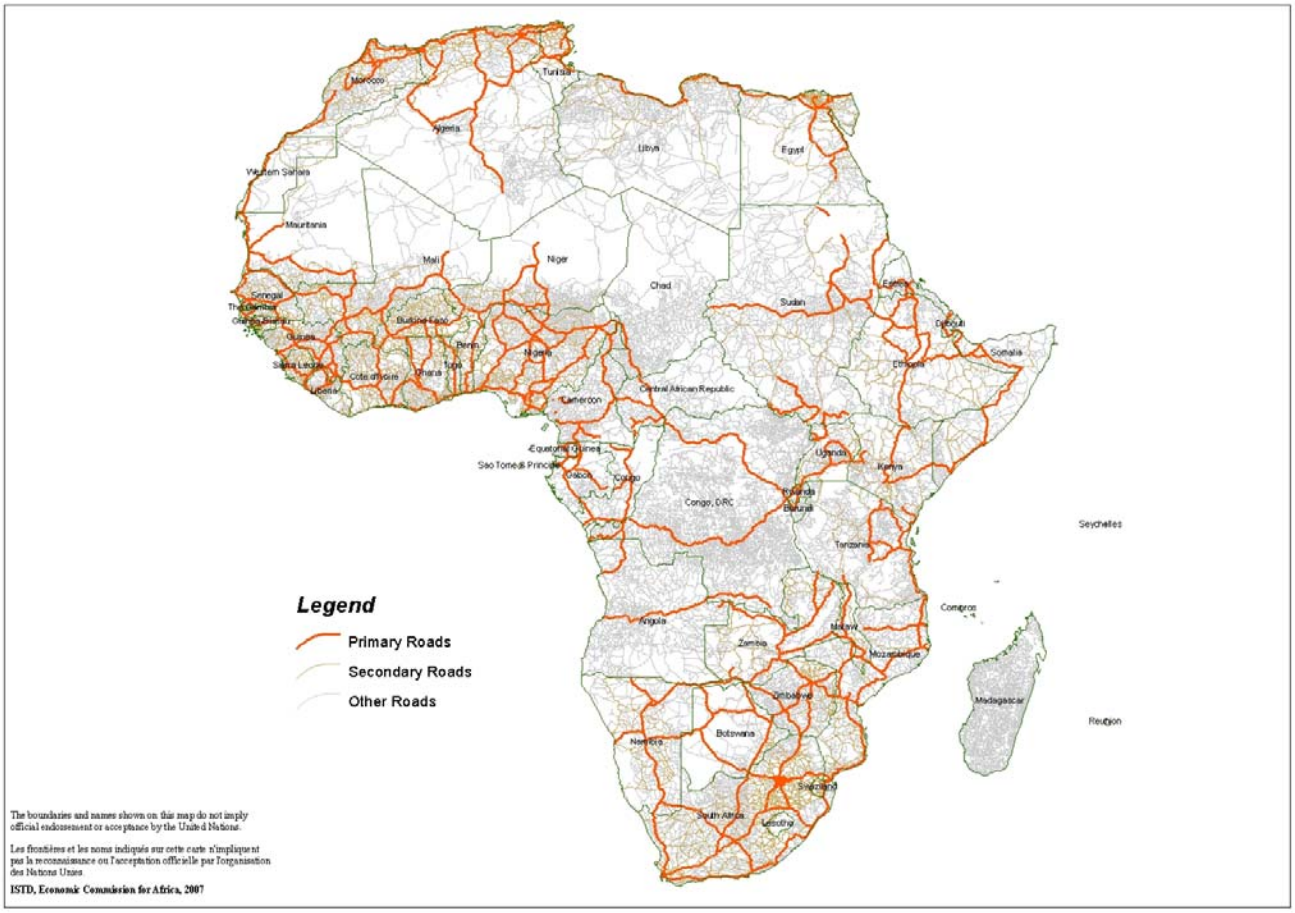
II. SITUATION OF THE VARIOUS TRANSPORT MODES

2.1 Roads and road transport

Roads have remained the dominant transport mode in Africa, accounting for 80 to 90 per cent of inter-city and inter-State transport of goods and persons. Generally, it is the only means of access to the rural areas and counts as the most flexible and appropriate transport mode in the economic and social life of countries or subregions.

Africa has a low road density, 6.84 km per 100 km2 as compared to Latin America's 12 km per 100 km2 and Asia's 18 km per 100 km2 (see map of the road network in Africa).

Map 1: Road network in Africa



Source : ISTD, ECA, 2007

The length of the tarred network accounts for approximately 24.56 per cent of the total network as shown in the table below.

Table 1: Subregional distribution of the road network in Africa

	Land area	Population	Tarred roads
	(Km^2)	**(106/capita)**	**%**
Central	3 021 180	29,654	4.1
Eastern	6 755 902	233,87	9.5
North	9 301 385	165,07	64.1
Southern	6 005 240	108,77	20.7
West	5 112 060		22.6
Total	**30 195 767**		**24.5**

Source: 2005 World Development indicators for transport sectors, World Bank Research Paper 3643, 2005

What is more, the network is poorly maintained, given the inadequacy of resource allocations. Less than half of the maintenance needs are met. For example, the ratio is 30 per cent in the ECOWAS subregion,

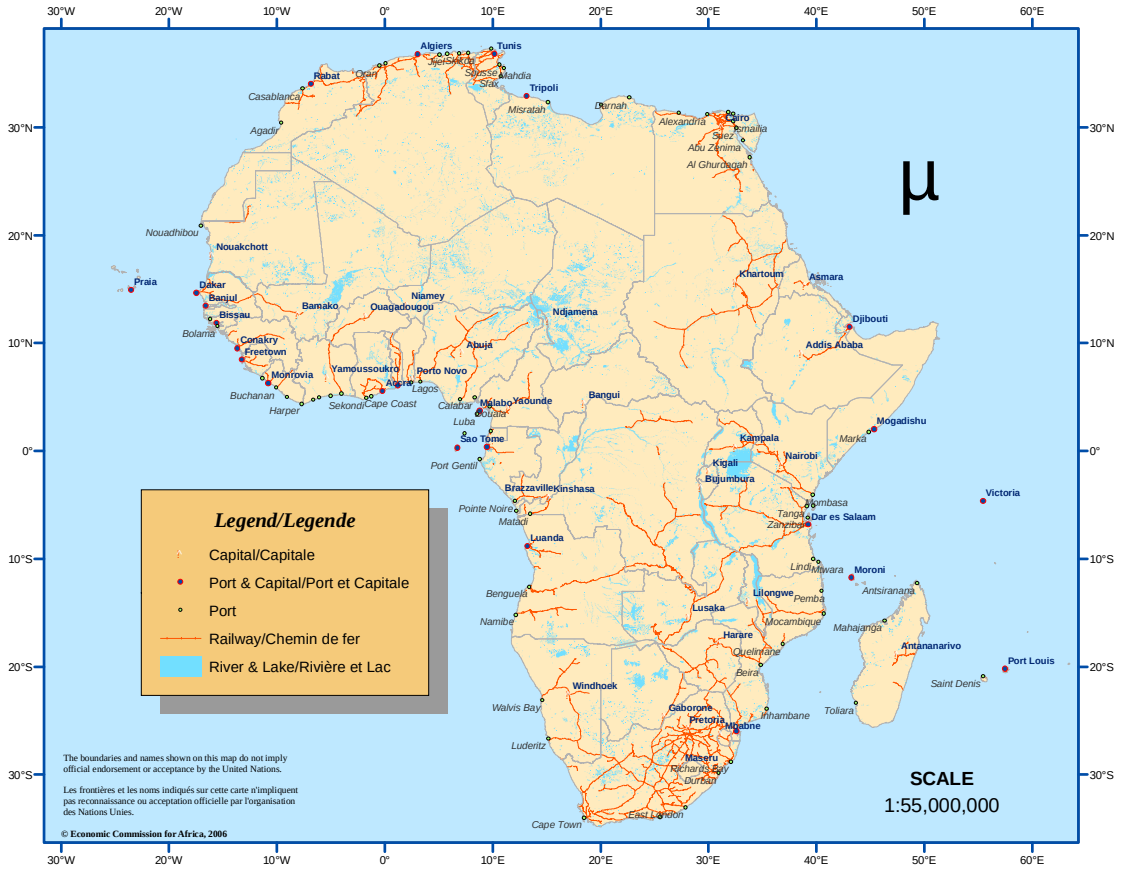
31 per cent in the COMESA subregion, 40 per cent in the SADC subregion and 25 per cent in the CEMAC subregion.

Of particular note is the overloading of road vehicles which reduces the life span of roads.

2.2 Rail transport

The African rail transport network is estimated at 89,380 km for a land surface area of 30.19 million km2 or at a density of 2.96 km per 1000 km2. The network shows very little interconnectivity, particularly in West and Central Africa, as can be seen in the map below:

Map 2 : Rail transport network in Africa



Source ECA: African railway network

Seventeen of the African countries have no railway. These are: Burundi, Cape Verde, Central African Republic, Chad, the Comoros, Equatorial Guinea, the Gambia, Guinea Bissau, Libya, Mauritius, the Niger, Rwanda, Sao Tome & Principe, the Seychelles, Sierra Leone (the railway no longer works) and Somalia.

Added to this is the heterogeneous nature of rail track gauges which differ within one and the same subregion.

Table 2: Types of rail gauge by subregion:

Central Africa	East Africa	North Africa	Southern Africa	West Africa
1.067	0.600	0.600	0.600	1.000
1.435	0.950	1.000	0.610	1.067
	1.000	1,055	0.762	1.435
	1.067	1.067	1.067	
		1.435		

Source: ECA, compiled from the World Fact Book 2006

In spite of the major investments made over the 1970s and 1980s in infrastructure and rolling stock, the role of railways, both in the transport of goods and of persons, has continued to decline nationally and subregionally.

The poor maintenance of rail infrastructure and the paucity of available rolling stock have contributed to the deterioration of rail service quality. In addition, railways are facing competition from road transport over the long haulage distances in which they enjoyed a comparative advantage. Moreover, railway companies were (and some still continue to be) characterized by bureaucracy, over-staffing and low productivity.

The situation called for reform in a number of African countries through privatization, commercialization or simply the closure of some railways. The railway companies in North Africa, on their part, have been revamped, giving them greater management autonomy.

2.3 Ports and maritime transport

Maritime transport is one of the most important modes for trade traffic between and within regions. Indeed, it accounts for 92 to 97 per cent of Africa's international trade. For that reason, the good performance of this subsector is vital not only for the regional economy but equally, if not more, for the world economy.

Africa has approximately 80 major ports which together account for 95 per cent of the international import and export trade of 53 African countries, six of which are island countries and 15 landlocked countries. These ports face problems of equipment, safety, environment (pollution and erosion) productivity and inadequate facilitation and technical capacity.

Eighty per cent of ships in Africa are more than 50 years old compared to 15 per cent as the global average. The table below describes the major container port traffic flows in Africa during 2004: three in north Africa, four in east Africa, four in southern Africa, one in central Africa and five in west Africa.

Table 3: Port and container traffic

Region/country	Country/territory	2003	2004	Annual percentage growth
North Africa				
Damiette	Egypt	955	1 263	32.25
Sokhna	Egypt	122	155	27.05
Casablanca	Morocco	448	492	9.82
East Africa				
Mombassa	Kenya	331	404	22.05
Djibouti	Djibouti	244	159	-34.84
Dar es Salam	Tanzania	204	260	27.45
Port Sudan	Sudan	157	206	31.21
North Africa				
Durban	South Africa	1 511	1 717	13.63
Cape Town	South Africa	533	570	6.94
Port Elizabeth	South Africa	274	323	17.88
East London	South Africa	56	60	7.14
Central Africa				
Luanda	Angola	210	235	11.90
West Africa				
Abidjan	Côte d'Ivoire	579	670	15.72
Lagos	Nigeria	486	444	-8.64
Tema	Ghana	350	340	-2.86
Dakar	Senegal	281	337	17.79
Lomé	Togo	166	185	11.45
Total African ports		**9 661**	**11 239**	**16.3**
Total world ports		**303 109**		
Share of Africa		**3.2%**		

Source: Containerization International Yearbook, 2006

2.4 Air transport

Air transport plays a very important role in the carrying of goods of high market value and passengers. It is crucial to the development of tourism and Africa is lagging significantly behind in this sector because its market share remains low. In 2004, Africa accounted for a mere 5.2 per cent of passenger traffic, 3.6 per cent of freight traffic and 8.5 per cent of air traffic flows in terms of departures. During the same year the sector created 470 000 jobs on the continent, generated an estimated revenue of $US11.3 billion and contributed 1.7 per cent of Africa's GDP.

The air transport subsector has indeed made significant progress since the adoption of the Yamoussoukro Decision in 1999. That Decision has resulted in the gradual liberalization of air transport market access in Africa and also led to reforms in the management of airports and airspace. Africa has 117 international airports operating regularly and 500 domestic terminals. However, a closer analysis of airports in Africa indicates that international standards are rarely applied.

Africa's international air traffic hubs and airports are characterized as follows:

- Serious infrastructural deterioration of runways and tarred surfaces due lack of maintenance;
- Outdated equipment which does not meet all international requirements;
- Inadequate security and safety standards.

Aircraft filling rates exceeded those of Latin America and the Caribbean at approximately 12 per cent below the world average. In contrast, the aircraft filling ratio estimated at 20 per cent below the world average, falls far behind that of other region. The table below the growth pattern of air traffic in 2004.

Table 4: Growth pattern of air traffic

	North	**East**	**West**	**Central**	**South**	**Africa**	**World**	**Part de l'Afrique**
Passengers (1000)	44 442	10 655	12 046	3 178	33746			
Subregional percentage	42.3%	10.1%	11.5%	4.0%	32.1%	**105067**	**1988328**	**5.3%**
Freight (tonns)	323 9222	357 898	143696	214438	352471			
Subregional percentage	23.3%	25.7%	10.3%	15.4%	25.3%	**1392698**	**38926634**	**3.6%**
Departures	533 192	359 219	273 589	167 769	801 638			
Subegional percentage	25%	16.8%	12.8%	7.9%	37.5%	**2 135 407**	**24 995 883**	**8.5%**

Source: ACI-ICAO (2004)

In order to dynamize the air transport subsector, several conferences of African ministers of air transport have been organized jointly by the African Union and the United Nations Economic Commission for Africa. The third such conference held in Addis Ababa from 7 to 11 May provided an occasion to recall the importance of the Yamoussoukro Decision with a view to imparting fresh impetus to the air transport sector. Discussion focused mainly on the following issues:

- The establishment of an executing agency as directed in the Yamoussoukro Decision;
- The harmonization of competition rules;
- The mechanism for settlement of disputes;
- Criteria for evaluating the implementation of the Yamoussoukro Decision; and
- Challenges and prospects of the Yamoussoukro Decision regarding the liberalization of air transport market in Africa.

Currently, airline operations have improved with regional alliances being formed although these have yet to attain the levels observed in Latin America. Many countries have set up independent civil aviation authorities and opted for concessionary management of their airports. Some countries and regional organizations have invested in the improvement of air navigation services but the issues of flight safety still remain a tremendous challenge. The same can be said for airport facilitation measures, more particularly the issuance of visas on arrival.

2.5 Inland water transport

The inland water transport mode is little used in Africa despite the fact that it is an excellent way of opening up remote areas. Africa has this cheap energy and environment friendly mode of transport but its development and exploitation have been slow over the past decade at a time when its importance in other regions of the world has increased. This is because Africa has only a few internationally navigable inland waterways in the Congo, the Nile and Zambezi basins while the greater part of its rivers have remained undeveloped with depths that vary seasonally and remain unpredictable. Lakes offer the best options for inland water transport, particularly in East and Central Africa.

The inland water transport industry is largely unstructured and little regulated with navigation aids and port facilities lacking. Ship and boat safety regulations are not enforced.

III. TRANSPORT DEVELOPMENT CHALLENGES

Given the transport situation described above, many challenges need to be met for transport to become an engine for Africa's economic growth. Among those challenges are:

3.1 The lack or inappropriate pursuit of transport policies

In recent years, African countries have made efforts develop and secure the sustainability of their infrastructural facilities. And yet, for lack of an appropriate policy framework and problems having to do with their existing institutional structure, transport sector growth and efficiency have not met expectations. Most policies for regulating and operating transport facilities and services in Africa fail to create an environment conducive to private sector participation and need to cover all transport modes as well as the building of peace and security.

3.2 Inadequate infrastructural network

The network of various transport modes in Africa is inadequate because of substandard segments and missing links particularly when it comes to trans-African highways, railway lines and air transport. As a result, all-weather travel within Africa is very difficult. To address this, the missing links will need to be built at the national, subregional and regional levels while appropriate maintenance procedures are formulated and the programmes of the various regional economic communities in this area, coordinated.

3.3 Inadequate financing

The financial needs of the transport sector are enormous and often linked to the expansion of infrastructure and maintenance in order to make sure that it lasts. Often, the costs of infrastructural renewal and expansion exceed the capacity of African countries, compelling them to borrow excessively. Currently, African Governments have problems generating and mobilizing resources for infrastructural renewal because foreign loans and grants for the construction of new infrastructure and maintenance are becoming very hard to secure and inadequate to meet all of Africa's development priorities. Recent estimates have it that the yearly infrastructural investment requirements in Africa will account for 5 to 6 per cent of GDP. This means meeting investment needs in excess of $US 250 billion over the next 10 years. Therefore, the private sector must genuinely become involved in the development and management of transport infrastructure. For that to happen, African Governments should create an enabling environment (appropriate policy and legal framework) for the private sector to participate. Financing mechanisms should be built around public – private partnerships.

The pursuit and adoption of innovative policies and measures for increasing financial resources has become indispensable as have the formulation of stable macro-economic policies and the adoption and enforcement of good governance practices.

3.4 Lack of appropriate human and institutional capacities

Human resources and institutional development are preconditions for the transport sector to develop and to participate in the process of globalization. In most African countries, however, the transport sector lacks the required human resource and institutional capacity and the technical efficiency for providing, creating and delivering adequate transport services. A case in point is the rail transport subsector, most of whose training centres have disappeared.

The measures to be taken should emphasize the sharing of knowledge and best practices, training and the building of appropriate capacity at the national and subregional levels. The strengthening of associations and the establishment of centres of excellence must form part of the priorities set.

3.5 Inadequate transport facilitation measures and high transport costs

Blocking market access are long and expensive administrative formalities and the lack of appropriate facilitation measures and policies. Inter-country transport activities are generally impeded by the lack of harmonized transit, customs and other transport rules and procedures which vary from country to country. This makes the costs excessive and lengthens transportation time. As indicated in table 5, transport and insurance costs feature prominently in import and export operations so efforts should be made to reduce significantly transport factor costs, if only to improve the competitiveness of African products on the world market.

Table 5: Transport and insurance costs for exports

	Landlocked LDCs	Landlocked countries	Coastal countries	Landlocked developing countries	Developing countries	OECD countries
Exports	32%	20%	15%	13%	8%	6%
Imports	25%	21%	10%	7%	5%	3%

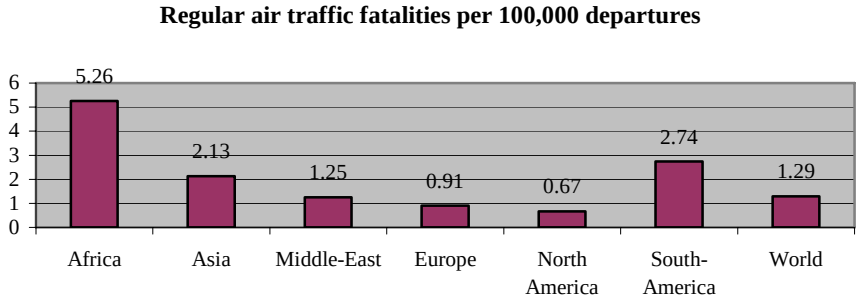
Source : OMD 2005

3.6 Inadequate safety and security

Safety and security are issues facing all the transport modes. In the case of road transport, the number of accidents in Africa is very high compared to other regions with the socio-economic cost estimated at about 2 per cent of GNP. Appropriate policies will have to be put in place. Because of the importance of road safety to national development, an Africa Road Safety Conference was held in Accra, Ghana from 5 to 8 February 2007 with the aim of highlighting the importance of road safety in Africa and particularly impressing upon policy makers the urgency of instituting preventive and emergency measures.

All transport modes need to address the safety of goods and persons. In air transport, for example, the accident rates remain particularly high in Africa as indicated in the table below.

Table 6 : Air transport accident rate



source : ICAO

3.7 Poor degree to which environmental issues and pollution control are taken into account

Environmental degradation has become an issue of major global concern. Transport infrastructure and transport facilities have a considerably negative environmental impact which must be curtailed. Air pollution, noise in major African cities and traffic congestion have increased in recent years. In addition, sea pollution risks are rising and the environmental problems caused can be expressed in terms of gas and noise emissions, oil spills and waste treatment.

Educational campaigns regarding the appropriate national, subregional and regional policies and measures adopted will help to bring the situation under control.

3.8 Under-use of information and communication technologies (ICTs)

The introduction of ICTs in the transport sector is the most fearsome challenge facing African countries because of their ageing equipment and instruments. ICTs have revolutionalized business and become powerful tools for trade expansion in the form of e-commerce. Africa is not fully taking advantage of these opportunities. The appropriate use of ICTs, training and knowledge acquisition will have to be pursued in the coming years.

3.9 Lack of reliable databases

The lack and paucity of appropriate data for monitoring, planning and evaluating transport sector performance have made it difficult for decision makers to formulate appropriate policies and to make required investments in the transport sector. High priority should be accorded to the establishment of national, subregional and regional databases with prior attention given to data harmonization and collection procedures including the setting of benchmarks.

3.10 Mainstreaming HIV/AIDS control and gender issues in transport policies and programmes

By nature, transport activity can become a vehicle for the transmission of many diseases because of human contact if appropriate precautions are not taken. Since transport is a cross-cutting sector affecting all areas of society and national economies, regardless of the transport policy adopted, it has gender implications.

The building of a road, the establishment of a bus network or the closing down of railway line can all affect women. For this reason, gender issues should be addressed in all transport development policies or strategies aimed at reducing poverty.

IV. INITIATIVES FOR DEVELOPING TRANSPORT INFRASTRUCTURE AND SERVICES

4.1 Efforts being made by the regional economic communities (RECs)

The RECs have instituted programmes for transport facilitation, infrastructural improvement and extension. All of them have a transport master plan and have indeed endeavoured to bring their member countries to develop their transport and communication infrastructure and to improve transport services with a view to achieving sustainable development. Among the transit traffic facilitation instruments or measures they have adopted can be cited:

- The COMESA third-party vehicle insurance scheme, harmonized axle-load limits and road transit charges as well as the COMESA customs declaration;

- The fact that transport between ECOWAS and UEMOA member States is principally governed by two conventions, namely the Inter-State Transport Convention (TIR) and Inter-State Road Transit Convention (TRIE) and by many bilateral agreements. A road insurance system has also been introduced;

- In Central Africa, transport is regulated under the inter-State multi-modal transport convention. TIPAC, an inter-State transit regime for road transport between States of this subregion, has been adopted; and

- In Southern Africa, SADC encourages the establishment of joint border posts, initiatives for transit development corridor with private sector participation and the establishment of transit transport facilitation committees. Priority is given to the building of missing links, addressing issues of transport facilitation, reducing border passage time as well as turnaround time in ports.

A REC Transport Coordination Committee has been set up to harmonize country work programmes and facilitate the sharing of experiences. The Committee's work programme covers the establishment of joint border posts for harmonizing and speeding up border passage formalities, the establishment of stations to monitor malpractices along transit corridors and the establishment of Transit Corridor Management Committees.

4.2 Sub-Saharan Africa Transport Programme (SSATP)

The SSATP work programme is a joint initiative which has been pursued since 1987 by ECA and the World Bank with African country participation. Currently, 35 countries and the RECs are involved in this programme funded by 11 donor agencies. The idea is to improve transport sector performance through policy reform and institutional transformation with a view to promoting sustainable economic growth and reducing poverty in the partner countries. The current programme is made up of the following components:

- Transport strategies;
- Road management and financing ;
- Appropriate transport services;
- Regional integration and transport;

- Road safety;
- Gender equality;
- Employment creation;
- Environment impact management; and
- HIV/AIDs control.

SSATP is currently preparing its 2008-2011 development programme (DP-2) on which it organized a Joint Workshop with the RECs on 19 and 20 July 2007 in Addis Ababa. The Workshop provided a forum for reviewing the progress made in the implementation of the 2004-2007 long-term development plan (LTDP). The aim of the Workshop was to prepare DP-2 and priority consideration was given to trade facilitation and regional integration, corridor administration and management as well as enhancing country and REC ownership of the process and partnership with donors.

4.3 New Partnership for Africa's Development (NEPAD)

Infrastructural development is one of the NEPAD priorities and the 20 priority projects include many transport projects, considering especially the Medium- to Long-term Strategic Framework (MLTSF)

With the objective of pursuing a coherent and strategic framework for monitoring the development of transport infrastructure, NEPAD emphasizes the formulation of subregional strategies and an Africa regional strategy.

Jointly financed by the African Development Bank and the Nigerian Technical Cooperation Fund, the study was considered at a Workshop held in Addis Ababa from 24 to 26 July 2007 in which brought together all the stakeholders to share a comprehensive approach to infrastructural issues to Africa and go on to evaluate the degree to which pilot transport projects had been implemented in terms of:

- Enhancing transport efficiency, safety and reliability;
- REC capacity-building and allied services;
- Proactive project planning and programming; and
- Developing facilitation projects for all transport modes.

4.4 Almaty Action Plan initiated by the office of the High Representative for Least Developed Landlocked Developing and Small Developing Island Countries (OHRLLS)

The Almaty Action Plan is a new comprehensive action framework for developing efficient transit systems for landlocked developing and transit countries. This programme was initiated by OHRLLS and one of its priorities is to develop transit transport infrastructure.
The major transit corridor listed below were selected within the context of the Africa Action Plan adopted at a preparatory meeting on the Almaty Action Plan from 5-7 May 2003 in Addis Ababa.

Table 7 : Major transit transport corridors

Corridor	Distances	Remarks
Dakar - Mali	1250 km	Rail
Abidjan - Burkina Faso - Mali	1200 km	Multimodal up to Ouagadougou, then road
Tema / Takoradi - Burkina Faso - Mali	1100 km up to Ouagadougou	Road
Lome - Burkina Faso - Niger / Mali	2000 km	Road

Corridor	Distances	Remarks
Cotonou – Niger-Burkina-Mali	1000 km up to Niamey	Multimodal
Lagos - Niger	1500km	Road
Port Harcourt-Chad		
Douala –Central African Republic - Chad	1800km	Multimodal
Pointe Noire – Central African Republic - Chad	1800km	Rail/waterway/Road
Lobito - DRC - Zambia	1300km	Not currently used
Luanda-DRC-Rwanda-Burundi		Not currently used
Walvis Bay - Zambia - DRC (Trans-Caprivi)	2100km up to Lusaka	Road
Walvis Bay - Botswana – South Africa (Trans- Kalahari)	1800km	Road
Durban - Zimbabwe - Zambia - DRC (North South Corridor)	2500km up to RDC	Multimodal
Maputo – South Africa	600km	Multimodal
Beira - Zimbabwe - Zambia - DRC		Multimodal
Nacala - Malawi - Zambia – DRC	1800km up to Lusaka	Multimodal
Mtwara - Malawi – Zambia - DRC		Not yet used for transit
Dar Es-Salaam - Zambia - DRC (Corridor de TAZARA)	2000km up to Lusaka	Multimodal options
Dar Es-Salaam – Rwanda – Burundi – Uganda - RDC (Corridor central)	1400km up to Kigali, 1600km up to Kampala	Multimodal
Tanga – Uganda	1500km	Not yet developed
Mombasa – Rwanda – Burundi – Uganda - RDC (North Corridor)	1200km up to Kampala, 2000km up to Bujumbura	Multimodal
Berbera - Ethiopia	850 km	Road
Djibouti - Ethiopia	900km	Multimodal
Assab - Ethiopia	900km	Not currently used
Massawa - Ethiopia		Not currently used
Port Sudan - Ethiopia		Not currently used
Lagos - Niger - Mali and Lagos - Chad Trans-Saharan highway project	8000 km	Multimodal Options

Source : ECA, Africa Plan of Action May 2003

These corridors cover road, river and rail transport. To develop them, account will have to be taken of the imperatives of the various transport modes and the construction of the necessary infrastructure and facilities.

V. CONCLUSION AND RECOMMENDATIONS

Africa is lagging far behind in transport infrastructure. For transport to sustain economic growth and economical integration and to promote Africa's economic and social development genuine policy commitment, tremendous and sustained efforts will have to be invested in this sector.

Accordingly, it is recommended that:

- An integrated approach to transport development policy should be adopted, taking all transport modes into consideration;
- The transport sector should be reformed;
- The building of missing links in transport infrastructure should be promoted;
- The financing of transport infrastructure should be promoted;
- A regulatory framework should be instituted providing for broader participation of the private sector in transport management and financing;
- Greater safety and security should be provided in all transport modes;
- Human institutional capacities should be strengthened and training institutions rehabilitated;
- Databases should be created for measuring progress made in transport sector development;
- Further use should be made of ICTs in transport development; and
- Gender, HIV/AIDs and STD control issues should be taken into account in transport policy and strategy formulation.

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