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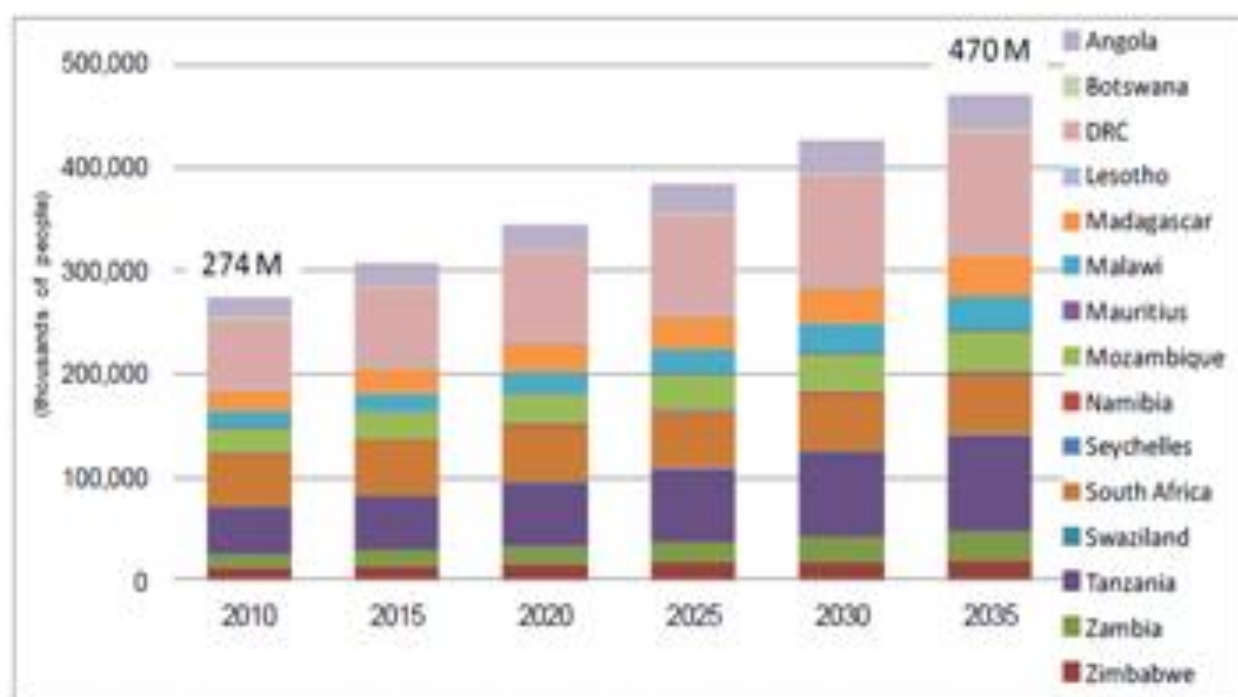
***Investment Opportunities in
SADC Ports and Corridors.***

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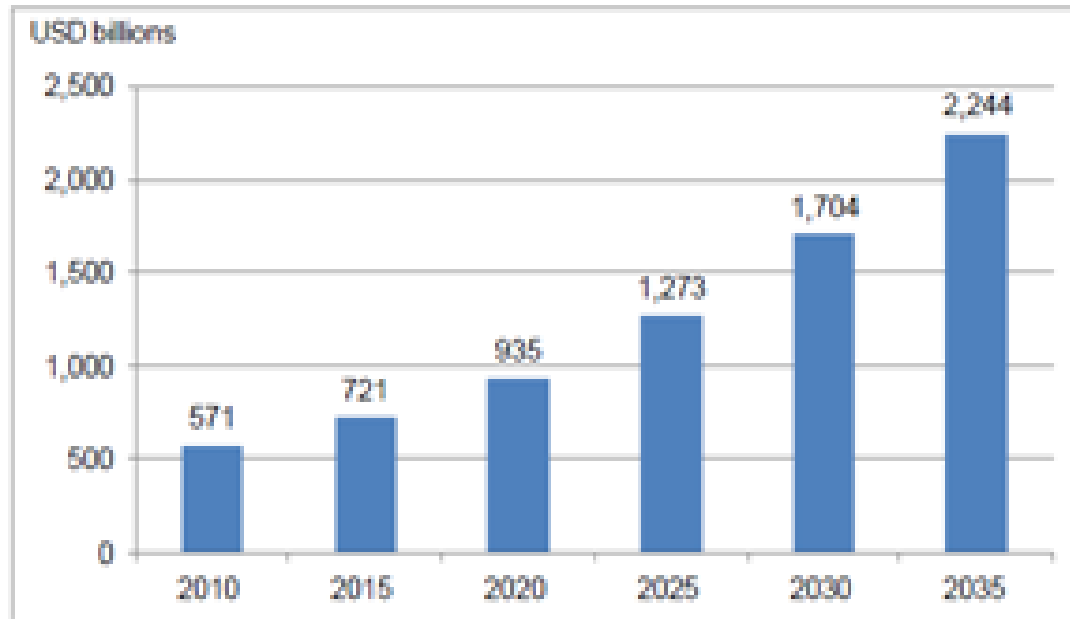
Key Messages

- 1. SADC is open to partnerships in ports and corridors**
- 2. Economic Infrastructure especially port and corridors regional priority.**
- 3. Regional Legal and planning framework in place**
- 4. National infrastructure strategies, policy and regulatory frameworks in place or under development**
- 5. Vast and diverse opportunities along transport value chain**
- 6. History of regional and global partnerships**
- 7. Legacy of successful implementation of hard and soft ports and corridor infrastructure projects**
- 8. Private sector role accepted**
- 9. Great return on investments**



Source: United Nations Population Division, *World Population Prospects: The 2010 Revision*

**Figure 2.10: Projections of Population Growth in Southern Africa, 2010-2035
(Medium-Fertility Variant)**



Abbreviations: GDP = gross domestic product, IMF = International Monetary Fund, PIDA = Programme for Infrastructure Development in Africa

Note: Projected GDP was calculated using the GDP figures in 2010 by the IMF and the annual GDP growth rates based on PIDA projections.

Sources: (i) IMF, *World Economic Outlook October 2012*; and (ii) PIDA, *Draft Africa Macroeconomic Outlook 2040*, July 2011.

**Figure 2.12: GDP Projections for the SADC Countries, 2010-2035
(in 2010 prices)**

Landlocked Countries in the SADC Region



Landlocked Countries:

Botswana, Lesotho, Malawi, Swaziland, Zambia and Zimbabwe

Semi-Landlocked Countries:

DRC

Coastal / Maritime Countries:

Angola, Madagascar, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Tanzania



SADC Transport Corridors



Eastern Corridors

1. Maputo
2. Limpopo
3. Beira
4. Shire Zambezi
5. Nacala
6. Mtwara
7. Dar es Salaam
8. Central Transport Corridor

North South

- North South (Durban)

Western

1. Trans Orange
2. Trans Kalahari
3. Trans Caprivi (Walvis Bay-Ndola-Lubumbashi)
4. Trans Cunene
5. Namibe
6. Lobito (Benguela)
7. Mulanje

*The Three 'I's-
Instruments, Institutions & Infrastructure
are interlinked*

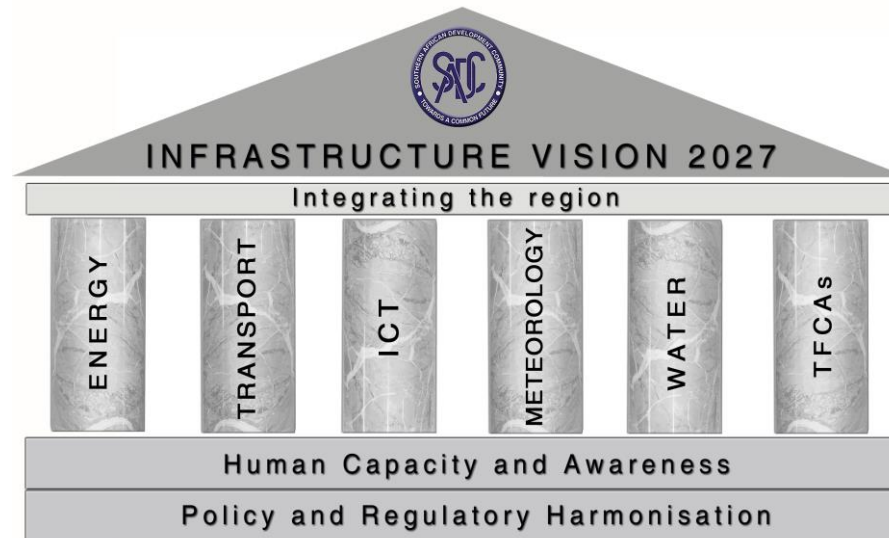


Legal & Planning Framework

- SADC Treaty
- SADC Transport Protocol
- SADC SDI / Transport Corridor Strategy
- Specific Corridor Agreements (Multilateral)
- Bilateral Transport Agreements
- Regional Infrastructure Development Master Plan (RIDMP)
- Declaration on Infrastructure to be signed by SADC Summit (2014)
- Project MoUs
- Project Studies/Fiches/Memoranda

SADC Regional Infrastructure Investment Master Plan

Figure 1: Regional Infrastructure Development Master Plan Vision



COMESA-EAC-SADC Tripartite Regional Infrastructure Projects Database

LIST OF PROJECTS (by Country)

KEY:

 Indicates a SADC RDMF project

 Indicates a SADC RDMF STAF project

ID	ProjectTitle/Name	Corridor(s)	REC Contact Name	2013 Status
Angola				
Airports				
 134	Catumbela Airport upgrading	Bas Congo Corridor	Mapotse Makwena (SADC)	Concept
 76	Catumbela Airport Construction	Luabulo Benguela Corridor	Mapotse Makwena (SADC)	Implementation
  133	Huambo Airport Upgrading	Luabulo Benguela Corridor	Mapotse Makwena (SADC)	Implementation
 137	Luanda 4th of February Airport Expansion	Malanje Corridor	Mapotse Makwena (SADC)	Implementation
 131	Luanda Sul Airport	Malanje Corridor	Mapotse Makwena (SADC)	Construction
 132	Lubango Airport Upgrading	Trans-Cunene Corridor, Namibe Corridor	Mapotse Makwena (SADC)	Completed
Bridge				
 86	Bridge over the Cobia River on route Mavinga - Rorungo	Namibe Corridor	Mapotse Makwena (SADC)	Concept
 89	Bridge over the Kullungo River in Calde	Walvis Bay - Namibe - Lubumbashi Corridor, Namibe Corridor	Mapotse Makwena (SADC)	Concept
 87	Bridge over the Kuito River in Ditrás	Walvis Bay - Namibe - Lubumbashi Corridor, Namibe Corridor	Mapotse Makwena (SADC)	Concept
Hydro Power Generation				
 418	Combamba II Hydro Power Project	Corridor Not Applicable	Ottala Mshupu (SADC)	Construction
Inland Container Depot				
 106	Luabulo Dry Port Construction	Luabulo Benguela Corridor	Mapotse Makwena (SADC)	Completed
 81	Namibe Port Construction of Dry Port	Namibe Corridor	Mapotse Makwena (SADC)	Concept
Petroleum & Gas Refinery				
 802	Luabulo Refinery	Corridor Not Applicable	Ottala Mshupu (SADC)	Implementation
Port				
 135	Construction of the Soyo Integrated Infrastructure	Bas Congo Corridor	Mapotse Makwena (SADC)	Concept
 85	Luabulo Port Upgrading	Luabulo Benguela Corridor	Mapotse Makwena (SADC)	Implementation
 137	Luanda Port Expansion	Malanje Corridor	Mapotse Makwena (SADC)	Concept
Railway				
 78	Benguela Railway Rehabilitation	Luabulo Benguela Corridor	Mapotse Makwena (SADC)	Construction
 81	Construction of new Link to Santa Clara Border Post	Trans-Cunene Corridor, Namibe Corridor	Mapotse Makwena (SADC)	Concept
Road				

Projects List



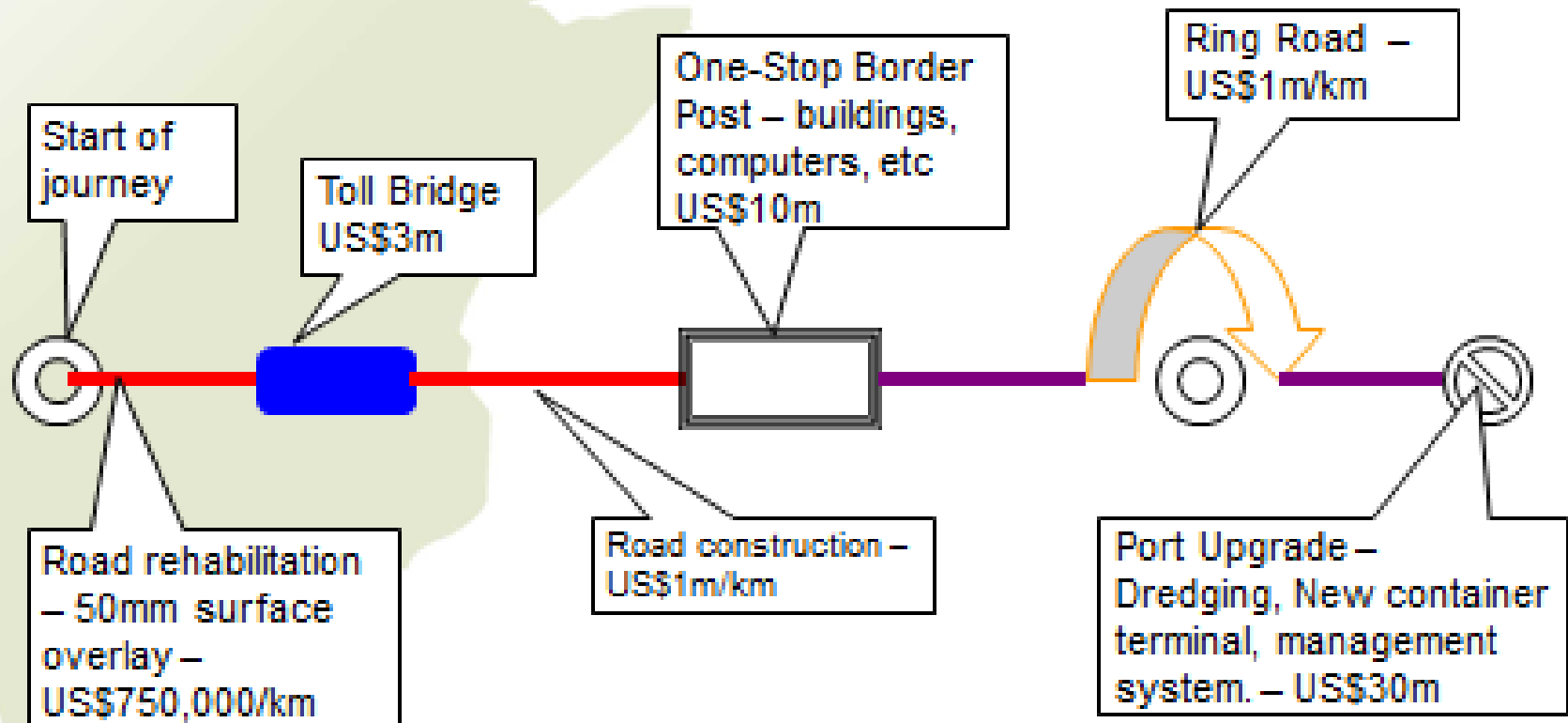
Project Fiches

The image shows a complex project fiche form with multiple overlapping instances. The form is organized into several sections:

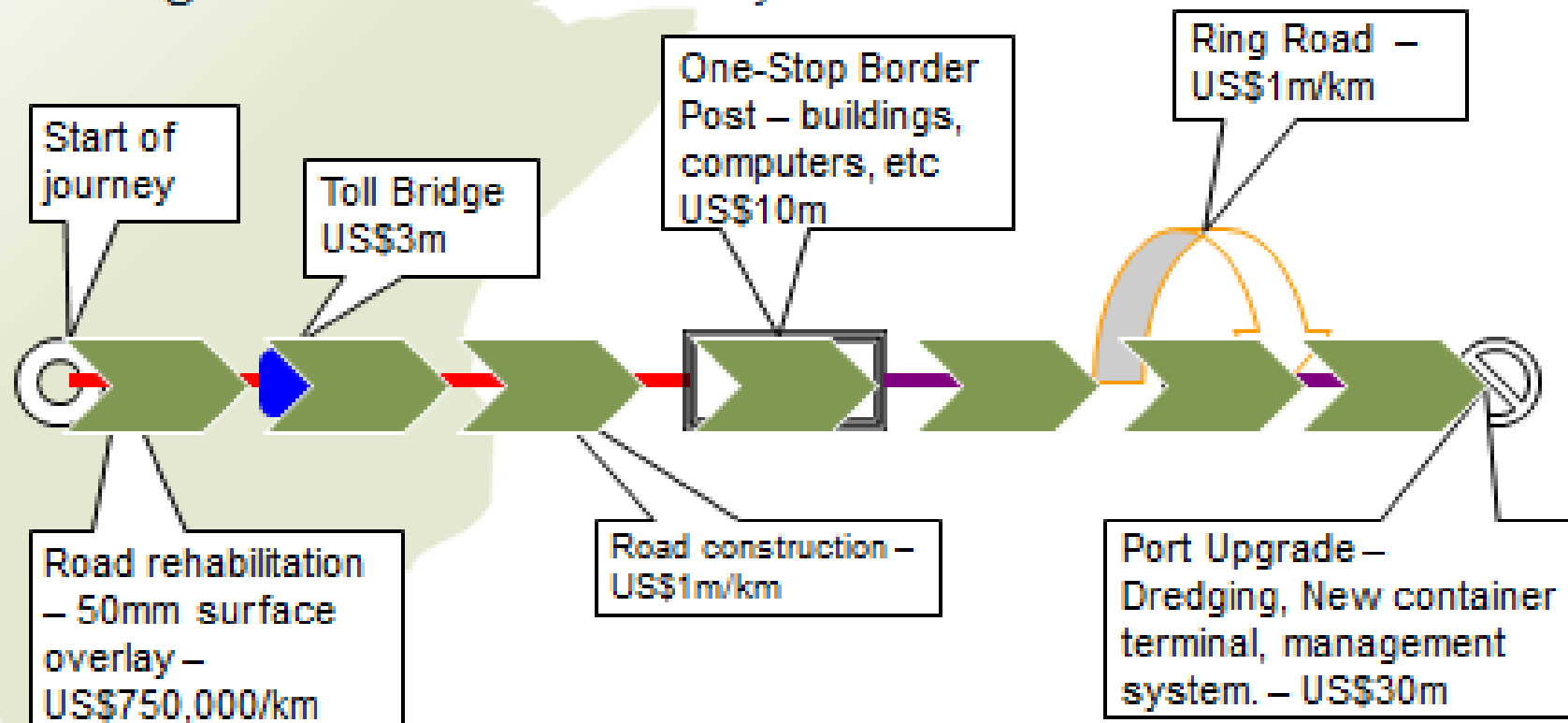
- Project Information:** Includes fields for Project Name, Project Number, and Project Status.
- Project Description:** A large text area for describing the project.
- Map:** A map showing the project location, with a red dot indicating the site. The map includes a legend and a scale bar.
- Project Details:** A table with columns for Project Name, Project Number, and Project Status.
- Project Funding:** A table with columns for Project Name, Project Number, and Project Status.
- Project Funding:** A table with columns for Project Name, Project Number, and Project Status.

The form is titled "Project Fiche" and is part of the "Tripartite Regional Infrastructure Projects Database".

Transport and Transit Corridors - the absolute importance of correct sequencing – not enough to just build the infrastructure



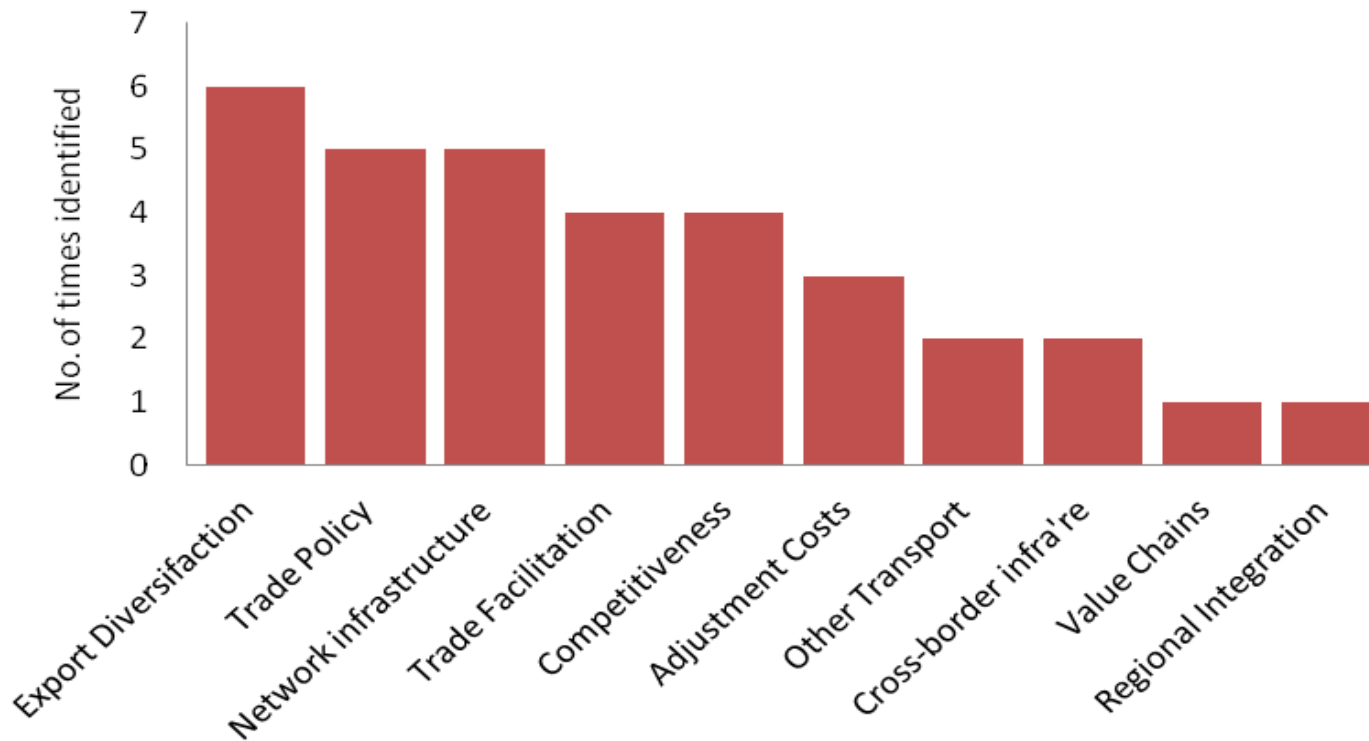
Transport and Transit Corridors – need to also put in trade facilitation measures and ensure transport is regulated and then goods will flow smoothly.



Trade Facilitation and Trade Regulation Measures

AfT Priorities

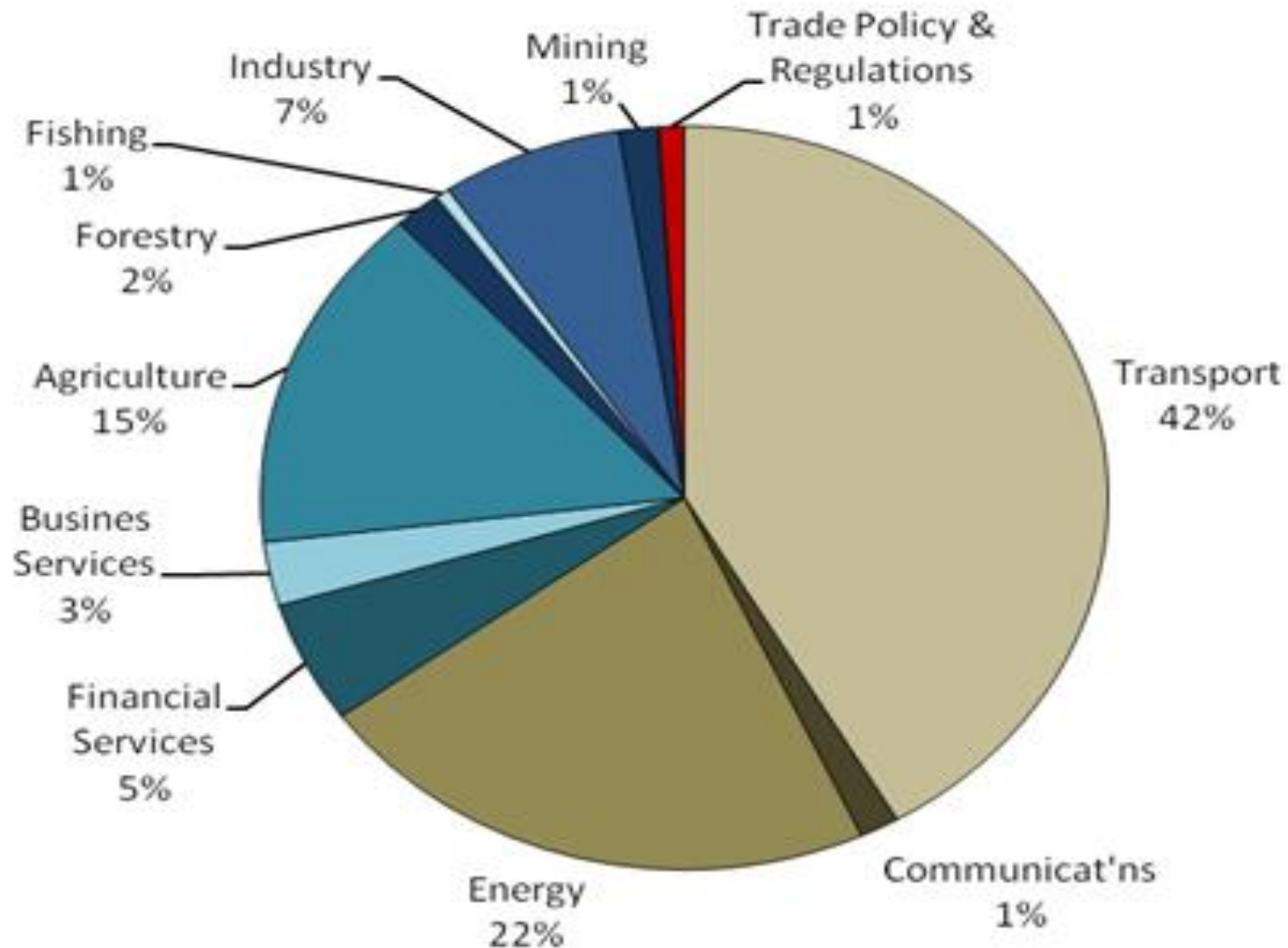
National AfT Priorities Identified by SADC countries



Source: WTO/OECD 2009 AfT Questionnaires for 11 SADC Member States

SADC AfT –sector distribution

Fig 2.2: Sector Distribution of SADC AfT, 2010



SADC Infrastructure Needs...

While 42 per cent of the \$3.8bn of AfT committed in 2010 went towards the transport sector – including roads, railways, ports, and storage – while a further 15 per cent went to the energy sector. However it is worth noting that even these amounts may not be sufficient to fill the infrastructure financing gap in the region.

The estimated requirements for the Priority RIDMP Short Term Action Plan (2012-2017) only is;

- Energy- \$13bn**
- Transport-\$20bn**
- ICT-\$21bn**

pause

SADC Corridors

Corridor- network of transport networks-road, rail and or inland waterways anchored on a port and linking production centres hinterland

- 1. SADC has 6/7 landlocked countries resulting in 18 regional corridors in four clusters-Eastern, Western, Southern and North South**
<http://www.tripartitegis.org/>
- 2. The 'corridors approach' has gained prominence as a way to link countries and create regional supply chains**
- 3. This approach emphasises tackling regional barriers to trade in an integrated and coherent manner, complementing trade and market liberalisation commitments with a combination of physical and 'soft' infrastructure investments to lower the costs of trading across borders.**
- 4. Increasingly, this approach also goes beyond infrastructure to promote investment and clustering in sectors such as agriculture, mining, manufacturing to boost productive capacity – SDI**
- 5. Tripartite of SADC, EAC & COMESA with DFID / TMSA support implementing the North South Corridor Aid for Trade Programme benefiting Botswana, DRC, Malawi, Mozambique, South Africa, Tanzania, Zambia and Zimbabwe.** <http://www.trademarksa.org/>

SDI Strategy

Spatial development initiative (SDI)- an integrated planning tool aimed at promoting investment in regions of the country that were underdeveloped but had potential for growth.

- 1. The methodology involves a process in which the public sector develops or facilitates conditions conducive to private sector investment and Public-Private-Community Partnerships.**
- 2. A number corridors in SADC are evolving or have ambitions to graduate to SDIs or Economic Corridors**
- 3. Both corridor and SDI provides a framework for joint planning, implementation, resource mobilisation and coordination of donor assistance**
- 4. The corridor /SDI framework provides a holistic and integrated framework based on a transportation value chain -from port to hinterland, across two or more state and multi-sectoral –transport, energy, water, ict, manufacturing development.**

SADC Transport Corridors

Roads, Ports and Border Posts



Eastern and Southern African Sea Ports

Main operating criterion is the depth of the access channel and quays. Container vessels on international routes are getting bigger. Ports now designated as feeder and hub ports, depending on the depth and volume of traffic. Depth standard now about 12m – 12.8m and the current tendency is toward a depth of at least 14m-16m to cater for the newer post Panamax vessels.



Maximum Port Depths

- 11 m and less
- 12 m and less
- 13 m and less
- 14 m and less
- 16 m and less
- 18 m and less
- 22 m and more

SADC Regional Infrastructure Development Master Plan

- 1. Infrastructure vision and blueprint for addressing projected (2027) needs in six sectors- water, energy, ICT, transport, meteorology, tourism <http://www.ridmp-gis.org/>**
- 2. Consensus document developed collaboratively and approved by Summit and supported by ICPs <http://invest-tripartite.org/concept-note/>**
- 3. Needs identified on basis of regional developmental frameworks- transport corridors ; power pool and electricity transmission networks; river basins and ICT networks**
- 4. Identifies both hard and soft infrastructure needs and proposes projects to address the needs**

SADC Transport Opportunities

- Based on traffic projections, the Transport Sector Plan increases capacity throughout the network and improves the condition of the infrastructure and operations to handle much higher volumes of traffic.
- The **TRANSIT TRAFFIC** capacity target is **35 million tons in 2020**, up from 12 million currently.
- The **Port capacity target is 500 million tons by 2027**, up from 92 million tons in 2009.
- Advanced logistics systems and one stop border posts that will enable fast, near continuous movement of cargo on the Region's corridors are also included in the Plan.

List of Port and Corridor Projects

- **List of projects Ports and Corridor Projects is presented separately**
- Tripartite Infrastructure Project Data Base-TRIPDA is currently in a pdf format on www.tripartitegis.org. The online version of TRIPDA is expected to be live by January 2014.
- The Tripartite Corridors eGIS platform is available at www.tripartitegis.org. For a video tutorial on how to use the platform, please see the video at this url: <http://youtu.be/VeWtZs9H520>
- To download the latest quarterly progress report of the North-South Corridor programmes, please visit this url: <http://trademarksa.org/publications/tmsa-ppiu-update-and-map-north-south-corridor-aid-trade-road-projects>
- Access to the North-South Corridor Monitoring System at the following url: <https://www.tmsa.informationplatform.co.za>. Username: **Wim** and Password: **NSCmonitoring**
- For a video tutorial on the use of the NSC Monitoring System, please visit this url: <http://youtu.be/YfHjE9Ru5hU>

Trade Facilitation

75% of costs and delays are a result of misalignment of transport and trade policies, laws and regulations at national and regional level.

25% attributed to poor infrastructure

In order to improve the efficiency of trade related infrastructure and reduce trade and transport transaction costs SADC is implementing the following

- 1. Trade Facilitation – simplification & harmonisation of laws, regulations, procedures and standards.**
- 2. Removal of non tariff barriers to trade. <http://www.tradebarriers.org/login>**
- 3. Coordinated border management**
- 4. Single window**
- 5. One Stop Border posts**
- 6. Harmonise Customs – laws and procedures**

Global Value Chains

- 1. By providing access to networks, global markets, capital, knowledge and technology, integration into an existing value chain can provide a valuable step to economic development that is easier than building a fully integrated value chain.**
- 2. Developing economies can integrate into value chains by opening their markets for trade and foreign direct investment, improving their business and investment environment and strengthening their domestic supply-side capabilities.**
- 3. Aid for trade can help these reform programmes.**
- 4. Analysis demonstrates that agri-food, ICT, textiles and apparel, tourism, and transport and logistics value chains highlights that developing country suppliers are integral to these value chains**

Value Chains continued

- 1. SADC countries can use their participation in global value chains to achieve growth, employment and poverty reduction objectives.**
- 2. Private Investments and Regional aid for trade has a critical role to play in boosting the participation of particularly low income and least developed countries in regional production networks, and in enabling them to connect and move-up value chains.**
- 3. Need to reduce barriers in regional production networks.**

What more needs to be done?

- 1. Promote and market infrastructure investment opportunities (RIDMP) through business missions / investment conferences/ media**
- 2. Secure funding for feasibility and project development . (SADC PPP Network /Project Owners and Sponsors)**
- 3. In collaboration with potential investors and ICPs to prepare projects to bankability.**
- 4. Implement Transport, Trade , Trade in Services and the Finance & Investment Protocols in order to provide enabling legal and regulatory framework.**
- 5. Harmonise investment laws and strategies to attract investments in infrastructure especially PPP**
- 6. Create regional funding and investment vehicles.**
- 7. Harmonise and enact laws & regulations to facilitate design, development and implementation of ports and corridors projects.**
- 8. Harmonise and enforce trade facilitation laws, regulations and standards**