

DANIDA

ATWA Stage 1 Report

Part 1 – Introduction and Context

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Final Report

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List of Acronyms

AAEC	African Alliance for E-commerce
AfDB	African Development Bank
ALCO	Abidjan-Lagos Corridor Organisation
ASYCUDA	Automated System of Customs Data
ATWA	Accelerating Trade in West Africa
AU	African Union
BOA	Bank of Africa
CDP	Community Development Programme
CET	Common External Tariff
CILSS	Comité Inter-Etats pour la Lutte contre la Sécheresse au Sahel
CMHI	China Merchant Holding International
CNPC	China National Petroleum Corporation
CNUT	<i>Conseil des utilisateurs de transports public</i>
COMESA	Common Market of Eastern and Southern Africa
DfID	United Kingdom Department for International Development
EAC	East African Community
ECOWAS	Economic Community of West African States
EDF	European Development Fund
EPA	Economic Partnership Agreement
ETLS	ECOWAS Trade Liberalisation Scheme
GDP	Gross domestic product
GHA	Ghana Highway Authority
GIZ	Gesellschaft für internationale Zusammenarbeit
GPHA	Ghana Ports and Harbours Authority
GPS	Global positioning system
ICD	Inland container terminal
IDA	International Development Association

IFC	International Finance Corporation
ISRT (IST)	ECOWAS Economic Convention on Interstate Road Transit of Goods
JBP	Joint border post
JICA	Japan International Cooperation Agency
LDC	Least Developed Country
MCC	United States Millennium Challenge Corporation
MSC	Mediterranean Shipping Company
OECD	Organisation for Economic Cooperation and Development
OPA	Observatoire des pratiques anormales
OSBP	One-stop border post
PACITR	Programme d'actions communautaires des infrastructures et du transport routiers
PIDA	Programming for Infrastructure Development in Africa
PSI	Preshipment inspection
REC	Regional economic community
SWARIP	Support to West African Regional Integration Programme
TEU	Twenty-foot equivalent unit (container)
TFA	Trade Facilitation Agreement
TMEA	TradeMark East Africa
ToC	Theory of change
UEMOA	<i>Union économique et monétaire ouest-africaine</i>
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organisation
USAID	United States Agency for International Development
USD	United States dollar
WATIP	West African Trade Integration Promotion
WTO	World Trade Organisation

1. INTRODUCTION

1.1 ATWA: Rationale

Accelerating Trade in West Africa (ATWA) is a new initiative funded by the Danish International Development Agency (Danida) aiming to establish a durable, multi-donor vehicle dedicated to advancing regional integration, expanding trade and lowering costs along key trade routes in West Africa. Working alongside regional Commissions, national governments and the private sector, the scoping and design phase work to be undertaken by ATWA between January 2015 to October 2016 will cover both "soft" policy and trade facilitation issues and "hard" infrastructure constraints to ensure meaningful impact.

Trade facilitation and market integration issues have repeatedly been highlighted as the key to unlocking greater gains from trade in West Africa by Heads of States and Government of the Economic Community of West African States (ECOWAS). ATWA comes at a crucial moment for regional integration in West Africa. Amongst recent developments, the advent of the ECOWAS/UEMOA Common External Tariff (CET), on-going efforts to strengthen the free movement of goods in the region, and the introduction of several Joint Border Posts (JBPs) in the *Union Économique et Monétaire Ouest Africaine* (UEMOA) and ECOWAS are a positive signal that regional integration is moving forward.

ATWA seeks to build on that momentum. At present, donor support to regional trade and integration in West Africa is already substantial, but it is fragmented. This increases the complexity and transaction costs of regional efforts, for donors and recipients alike, and reduces the resources available for achieving meaningful results. ATWA rests on the idea that a more integrated, longer-term approach could achieve better results (see Annex II).

ATWA takes inspiration from East Africa, where eight donors (Belgium, Canada, Denmark, Finland, the Netherlands, Sweden, United States and the United Kingdom) have pooled their support and established a single non-profit organisation working across the East African Community (EAC) to further its integration agenda. The organisation, TradeMark East Africa (TMEA), currently has a budget of USD 650 million over 2011-2017 and works in the five EAC countries and South Sudan to reduce trade costs on major transport corridors and improve the business environment for trade and investment. TMEA is ATWA's technical partner.

1.2 About ATWA: Approach

ATWA, as a scoping and design exercise, is structured according to **three consecutive stages**:

- A **first stage** selecting one or several trade routes in West Africa that ATWA could focus on initially as regards to their potential for development. This includes a literature review and a preliminary round of consultations with regional organisations, national governments, private sector interests and donors already active in the trade and transport field in West Africa, in order to identify their interests, priorities, challenges, opportunities and existing initiatives that ATWA can build upon.
- A **diagnostic stage**, in which a set of studies will establish the sources of delays and costs in international and intra-regional transport along a defined group of trade routes in West Africa, and outline a number of interventions that ATWA could initially implement in order to improve trade flows. These studies will engage public, private and civil society stakeholders across the region in order to get a comprehensive picture of needs and priorities, opportunities and bottlenecks. The ATWA project team will also organise a study visit to the East African Community (EAC) by a West African delegation.

- A **final stage** which will include the development of a clear and costed programme document to be presented to regional and national authorities, as well as interested donors. As part of this stage, Danida and the project team will devise the budget, governance options and a roadmap for ATWA's implementation phase.

1.3 ATWA: Objectives and programme development

ATWA's objectives and possible interventions are presented in an initial outline Theory of Change (ToC) diagramme overleaf (Figure 1). Developing a ToC is meant to be an iterative process as consultations with potential partners advance and we learn more about the nature of the constraints on regional and international trade in the region. The ToC presented in Figure 1 below is therefore not final; it reflects an ongoing process of reflection and priority setting.

The two lower levels of the ToC are likely to evolve during Stage 2 and Stage 3 as more research is undertaken on the problems faced by private economic operators on focus corridors and as consultations with national governments, regional organisations, private sector and civil society progress. Hence they are listed as "potential intervention areas" and "potential activities" because we do not foresee having a definitive, stable, theory of change at these lower levels until the end of ATWA Stage 3.

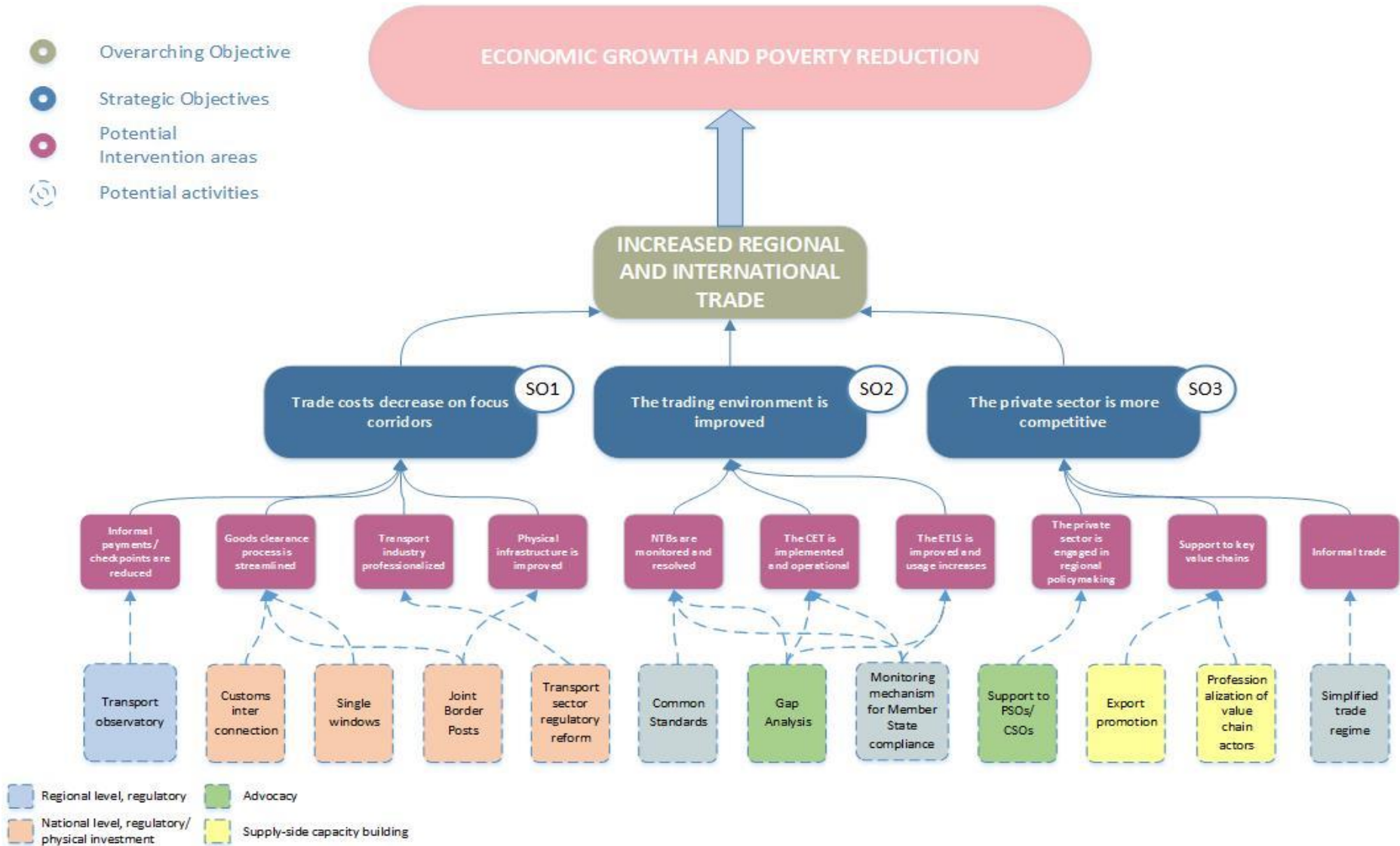
We have organised the draft ToC along three Strategic Objectives, as follows, drawing on the experience of TMEA:

- **S0 1: Reduction of trade cost on focus corridors.** This objective largely focuses on the transport, logistics and infrastructure of particular corridors. It picks up on four major drivers of increased cost of trade and transport across the ECOWAS region.
- **S0 2: Improvement of the trading environment.** This objective focuses largely on tariff and non-tariff issues that hamper the free movement of goods across West Africa, and includes region-wide external trade policy dimensions.
- **S0 3: Increased private sector competitiveness.** This is the more private sector oriented of all strategic objectives. It focuses on the role of private sector in public policy making on trade and working to ensure that the private sector can take advantage of an improving trading environment.

Specific potential intervention areas are placed below each Strategic Objective. These describe improvements that could be made to improve trade flows, whether it is infrastructure improvement, the customs clearance process, or the implementation of the ECOWAS Common External Tariff (CET).

Specific, definitive activities and intervention areas will be developed during Stage 2 and Stage 3 (October-September 2016). For now, we have grouped our illustrative list of activities with a shared focus together: activities dealing with the regulatory environment at the national level are shaded in blue, while the activities shaded in light red indicate regulatory activities to be undertaken at the regional level (i.e. they are not corridor-specific). Yellow-shaded activities engage with the private sector directly, while those shaded in green engage with civil society and private sector organisations (CSOs and PSOs) at large.

Figure 1: ATWA draft Theory of Change



2. ABOUT THIS REPORT

2.1 Objectives, scope, and methodology of this report

As is evident from the ToC presented above, some interventions that ATWA will be designing will be corridor or country specific: the development of JBPs, the professionalization of the transport industry, or the strengthening of single windows for example. These activities have to be undertaken “somewhere”. Others are not necessarily dependent on a specified geographical area: the development of a transport observatory, work on the ECOWAS CET or support to regional CSOs and PSOs can be undertaken at the regional level, without a national base.

This report therefore has two main objectives:

- Describing the context in which ATWA operates: the major players, issues and plans of various actors active in regional integration so as to help narrowing down potential non-corridor specific interventions.
- Delineating a geographical area and set of trade routes where ATWA could start.

This report is the result of five months of literature review, data collection and consultations at the national and regional levels. It has several components:

- A review of the regulatory environment at the regional level, and where relevant at the national level.
- A review of ECOWAS and UEMOA priorities and plans, including a more limited review of the plans of its Member States in the field of trade and transport.
- A review of the literature and data available on the region’s various corridors, and a prioritisation of potential focus corridors.
- A donor mapping of current support to regional integration and trade in West Africa.
- A draft Theory of Change.
- A broad, regional level Political Economy Analysis (PEA).
- A chapter describing the links between trade and poverty reduction, including informal cross border trade and women’s participation in trade in West Africa.

2.2 Structure of the Stage 1 report

The rest of this report is structured as follows:

- Part I below reviews the regional context: the plans of ECOWAS and UEMOA, the legal environment governing trade and transport in West Africa, customs, trade flows, port development, etc.
- Part II reviews every major corridor in West Africa, and sets out to delineate a geographical area for corridor-specific interventions.
- Part III reviews political economy factors of relevance to ATWA and details the links between trade and poverty reduction in West Africa.
- Annex I explains the ToC in greater detail
- Annex II gives a brief description of TMEA, ATWA’s technical partner in the EAC.

Feedback on an earlier version of this report was gathered from a meeting of selected key regional stakeholders and experts organised by the ATWA project team at the ECOWAS Commission in Abuja on Monday 12th October 2015.

PART I – CONTEXT

1. INTRODUCTION

This first section takes a closer look at some of the crosscutting issues of relevance to the growth of Accelerating Trade in West Africa (ATWA). Its main purpose is to contextualise the project and describe the environment in which it operates, and narrow down on non-corridor specific interventions. The dimensions we cover include:

- The priorities set out by the ECOWAS and the UEMOA in the field of trade and transport in their main policy documents.
- A review of the regulatory environment that govern trade and transport at the regional level.
- A review of Customs in West Africa: the systems used by different agencies, Joint Border Posts (JBPs), etc.
- A review of Ports and port development plans in West Africa.
- A comparative analysis of international and regional trade flows by value.
- A comparative analysis of international and regional trade and traffic flows by volume.
- A review of the transport industry in West Africa, and of its inefficiencies.
- A review of the road network in West Africa.
- A review of the rail network in West Africa.
- A comparative analysis of road governance issues in West Africa: the nature of roadblocks and checkpoints, and of their impacts.
- The activities of the most active donors support trade and regional integration in West Africa.
- A review of the functioning of three current or past transport observatories in West Africa.

Overall, because this section dives into the nature of the problems encountered on most West African corridors, it is key in informing the Theory of Change in Annex I. It also serves to position ATWA *vis-à-vis* the priorities of the ECOWAS and UEMOA Commissions, and *vis-à-vis* other projects and programmes supported by a variety of development partners.

Regardless of the corridor concerned, improving trade and transport performance in West Africa requires a broad range of actions of a different nature that can be undertaken regionally. Improving the design and functioning of regional legal instruments for example is not tied to a single corridor; neither is the setting up of a regional transport observatory. This Part examines some of these non-corridor specific issues more closely.

2. ECOWAS & UEMOA PLANS AND PRIORITIES

2.1 ECOWAS

ECOWAS' vision for the future is encapsulated in its 2020 vision statement: *“To create a borderless, peaceful, prosperous and cohesive region, built on good governance and where people have the capacity to access and harness its enormous resources through the creation of opportunities for sustainable development and environmental preservation.”*¹

At the Community level, the citizens envision an ECOWAS region in which by 2020 they will:

- Be living in a developed and integrated West Africa where all the 15 national economies have been fused into one integrated, competitive and resilient market, and everyone can operate freely anywhere;
- Have a dynamic regional economy driven by a regionally-inclined business community operating in an efficient and diversified regional production system sustained by modern infrastructural networks; and
- Have a highly skilled, flexible and mobile workforce; adequately resourced financial and capital markets; affordable and accessible health and educational systems; and political and economic governance mechanisms operating at regional and national levels that ensure peace, stability and personal security.

In particular, ECOWAS envisions, by 2020, a single unified regional market with a common currency supported by an integrated and efficient financial market and payment settlement system: an ECOWAS of people where trade and commerce are conducted efficiently and with ease.

In order to translate this vision into reality, ECOWAS has developed a Community Development Programme, which consists of 242 Projects in four priority areas with 12 strategic objectives.^{2, 3} An initial review of these priorities and projects suggests that ATWA would have a particular interest in the following areas:

- Strategic objective 2 (SO2): Turning people into real direct actors of regional integration and development;
- Strategic Objective 4 (OS4): Increasing intra-regional trade by creating a common market of ECOWAS;
- Strategic objective 7 (SO7): Improving the competitiveness of productive sectors of the economies in the region by enhancing the development at the regional level of good economic infrastructures to boost the integration process and reinvigorate initiatives for wealth creation;
- Strategic Objective 8 (SO8): Establishing sustainable food security and sovereignty by strengthening the modernization of agricultural production systems.

The table below summarizes the projects which ECOWAS has identified in areas that could be of interest to ATWA.

¹ ECOWAS Vision 2020 - Towards A Democratic And Prosperous Community, June 2010

² Draft ECOWAS Community Development Programme (CDP), Dec. 2012

³ Annex – CDP Priority Projects

Table 1 - ECOWAS priority projects of potential interest to ATWA⁴

Heading	Number of projects	Estimated cost	Available funding	Funding gap
		(Million USD)		
SO2 - Single multiple entry visa	1	2.0	-	100%
SO3 - Intra-regional trade	12	1,109.8	4.6	99.6%
SO7- Infrastructure: Air and sea	9	901.5	401.2	55.5%
Rail	6	2,149.4	505.4	76.5%
Road	33	6,721.5	1,002.6	85.1%
SO8 - Sustainable food security	64	5,195.1	606.3	88.3%
Sub-total	125	16,079.3	2,520.1	84%
All ECOWAS Priority Projects	242	28,440.57		75.4%

In March 2014, ECOWAS Heads of State from Benin, Côte d'Ivoire, Ghana, Nigeria and Togo signed a Treaty formally establishing the ECOWAS Abidjan-Lagos Corridor.⁵ The Treaty requires the five countries to construct and manage a 6-lane road and establish a corridor management authority with supra-national status. The five member states involved in the project agreed to contribute USD 50 million for preparatory activities for the project. This is the most ambitious road infrastructure project in the ECOWAS region to date. China announced in 2012 that it would support the coastal highway from Dakar to Lagos if all nine participating countries can agree on a comprehensive proposal.

2.2 UEMOA

In 2001 UEMOA adopted a Community Action Program for Infrastructure and Road Transport (*Programme d'actions communautaires des infrastructures et du transport routiers - PACITR*).

As part of that program, UEMOA defined eleven priority corridors as follows, which were to be upgraded:⁶

1. Abidjan – Yamoussoukro- Ferkessedougou - La Léraba - Ouagadougou – Kantchari-Makalondi – Niamey;
2. Abidjan – Yamoussoukro – Ferkessedougou – Zegoua – Sikasso- Bougouni-Bamako;

⁴ The title of each project and who is responsible for it can be found in the document “Annex – CDP Priority Projects”

⁵ ECOWAS Press release #066/2014 - ECOWAS Leaders Sign Abidjan-Lagos Corridor Road Project Treaty, April 1, 2014

⁶ DECISION N° 39/2009/CM/UEMOA Portant Creation et Gestion des Corridors de L'UEMOA

3. Cotonou –Malanville- Niamey – Gao;
4. Cotonou – Tindangou - Ouagadougou – Hérémakono - Bamako;
5. Lomé – Cinkansé- Koupéla – Kantchari - Makalondi-Niamey – Gao;
6. Lomé – Cinkansé - Ouagadougou – Hérémakono - Bamako;
7. Dakar – Diboli-Bamako – Hérémakono - Ouagadougou – Kantchari-Makalondi-Niamey;
8. Dakar –M'Pack- Bissau;
9. Bissau – Pirada - Tambacounda – Kédougou – Kita - Bamako;
10. San Pedro – Odienné – Bougouni - Bamako;
11. Abidjan – Bouna – Gaoua –Pa - Ouagadougou - Niamey.

The action programme also called for the construction of 11 JBPs and an Observatory of Bad Practices (*Observatoire des pratiques anormales* - OPA).

UEMOA is presently in the process of developing an updated community action program for infrastructure and road transport which is scheduled to be ready before the end of 2015.

3. LEGAL ENVIRONMENT

This section summarizes important legal instruments governing trade and transport in the ECOWAS region.⁷ ECOWAS is the only Regional Economic Community (REC) recognised by the African Union (AU) in West Africa. All UEMOA member states are also members of ECOWAS. UEMOA however often pioneers new initiatives, which are subsequently taken on by ECOWAS.

In general it is not appropriate legislation or regulations that are lacking in West Africa, but their effective implementation.

3.1 ECOWAS

The original ECOWAS Treaty, the Lagos Treaty, dates back to 1975.⁸ The aim of the Treaty was to promote cooperation and development for the purpose of raising the standard of living and fostering closer relations among the members of ECOWAS. For that purpose, ECOWAS was to do the following by stages:

- Eliminate Customs duties between Partner States;
- Eliminate quantitative and administrative restrictions on trade between Partner States;
- Establish a common tariff toward third countries;
- Abolish obstacles to the free movement of capital and services;
- Conduct joint development of transport infrastructure;
- Harmonize the economic, agricultural, industrial, and monetary policies of partner states.

⁷ Primary source: WB/SSATP A Review of International Legal Instruments Facilitation of Transport and Trade in Africa, second edition, March 2014

⁸ Economic Community of West African States

The ECOWAS treaty was revised and strengthened by the Treaty of Cotonou 1993.

3.2 UEMOA

UEMOA was established in 1994 as the successor to the West African Monetary Union, created in 1962.⁹ UEMOA's objectives include the establishment of a common market between partner states.

One of the features of UEMOA is that its instruments automatically take precedence over national legislation:

- Article 6: Instruments resulting from the Union, or issued by the Union, take precedence over any past, present, or future national legislation;
- Article 42: Regulations issued by UEMOA are directly enforceable in the partner states;
- Article 43: Directives indicate which results should be obtained, and as such are binding obligations on the partner states.

The following are some important legislative initiatives:

3.3 Trade

i) The ECOWAS Common External Tariff (CET) became operational in January 2015. This offers the potential for much deeper regional integration. It currently has several built-in flexibilities that allow member states to apply national rates on a number of tariff lines. These will be phased out in the years to come.

ii) The ECOWAS Trade Liberalization Scheme (ETLS) is the main ECOWAS tool for promoting the West Africa region as a Free Trade Area. Products approved under the ETLS can be traded within ECOWAS without having to pay duties. The process is cumbersome and complex and there are many gaps in its implementation.¹⁰

3.4 Customs and trade facilitation

Modern customs procedures are laid out in the Revised Kyoto Convention, which entered into force in February 2006. The following ECOWAS member states are contracting parties to this convention: Cap Verde, Côte d'Ivoire, Mali, Nigeria, Senegal and Togo.¹¹

However, as early as 2002 UEMOA adopted Recommendation 02/2002/CM/UEMOA relating to the simplification and harmonization of port procedures which, among other things, requires member states to ratify the Revised Kyoto Convention, and also to establish National Facilitation Committees, and to adopt the practice of pre-arrival clearance.

i) ECOWAS Decision A/DEC/13/01/03 *Relating to the Establishment of a Regional Road Transport and Transit Facilitation Programme in Support of Intra-Community Trade and Cross-Border Movements*:

This decision requires member states to do the following, among other things:

- Establish joint border posts;

⁹ Union économique et monétaire ouest africaine. Member states are: Benin, Burkina Faso, Côte d'Ivoire, Guinea-Bissau, Mali, Niger, Sénégal, Togo

¹⁰ USAID West Africa Trade Hub - ECOWAS Market Integration: A Gap Analysis (2009)

¹¹ See http://www3.wcoomd.org/Kyoto_New/Content/content.html

- Identify sites for the construction of JBPs;
- Make the national monitoring committees functional;
- Establish observatories to identify bad practices;
- Submit for publication a document on the official checkpoints on inter-state roads;
- Establish road safety units.

ii) Checkpoints: *Décision N°15/2005/CM/UEMOA Portant Modalités Pratiques d'Application du Plan Régional de Contrôle sur les Axes Routiers Inter-Etats de l'UEMOA.*

This decision spells out clearly that there should be no controls at all of transit traffic along inter-state roads and that all controls must be limited to the point of departure, border crossings and the point of arrival.

iii) Corridor management committees: *Décision N° 39/2009/CM/UEMOA Portant Création et Gestion des Corridors de l'Union.*

This decision defines 11 community corridors and the modalities for establishing corridor management committees, which will:

- Identify impediments to the flow of traffic and undertake all remedial actions;
- Ensure the application of the Community rules on road transport facilitation and transit on corridors;
- Assess the impact of all facilitation measures on the performance of corridors;
- Collect and disseminate all information relating to facilitation transport and transit on corridors;
- Ensure the promotion of corridors;
- Inform and educate users of any decision or measure likely to have an effect on corridors;
- Take the necessary steps to enforce the rules concerning the facilitation of transport applicable to corridors.

No corridor management committee has been established to date.

iv) Joint Border Posts: Supplementary Act /Sa.1/07/13 Relating To The Establishment and Implementation of the Joint Border Posts Concept within Member States of ECOWAS. This Act specifies, among other things:

- The establishment and objectives of joint border posts and the configuration of the common control zone from which border controls are effected.
- The legal principles to be applied in the conduct of joint border controls and functions by officers and forwarding agents of adjoining Member States and outlines the principles governing the exercise of dual jurisdiction by the adjoining Member States in the common control zone.
- The extra-territorial application of both the border control and criminal laws of the adjoining Member States in the common control zone.
- The underlying basis for the allocation and use of facilities and equipment in the common control zone for border control and other purposes.
- The institutional and management arrangements for the joint border posts.

- General provisions relating to temporary measures, dispute resolution and procedures for amendments and its entry into force.

3.5 Inter-state transport and transit

The two most important Conventions regarding road transport are the IST and the ISRT conventions, which define the conditions for Interstate Transport and Transit respectively:

i) The 1982 ECOWAS Convention A/P2/5/82 *Regulating Inter-State Road Transportation* (between ECOWAS Member States, referred to as the IST Convention).

This Convention establishes the conditions under which transportation by road is carried out between the Member States. Among other things, it stipulates:

- Allowable axle loads (11.5t per axle);
- Overall dimensions such as a maximum height of all vehicles (4m);
- The minimum period for mechanical examination, fixed as follows:
 - Every three months for passenger transport vehicles;
 - Every six months for goods transport vehicles;
- Carriage of persons and goods mixed together in one vehicle shall be forbidden between states of the Community (This clause causes great headaches for the transport of live animals which require people to travel with the animals, or specialized vehicles which are not used in West Africa);
- Vehicles taking part in inter-state transportation shall possess a bilingual Inter-State Transport Permit;
- The implementation of this system of transport shall be subject to the establishment and operation of freight offices;
- Vehicles shall possess a five-page waybill, and on demand the driver shall present the Inter-State Transport Permit and the waybill;
- The ECOWAS brown card: Inter-state insurance for motor vehicle liabilities.

ii) The 1982 ECOWAS Convention A/P.4/5/82 *Relating To Inter-State Road Transit of Goods* – referred to as the ISRT Convention. This Convention establishes the conditions under which cargo can be transited through member states. Among other things it defines

- The Inter-state Transit Declaration;
- How goods in transit shall be sealed;
- The financial security (Customs bond) referred to as the ISRT Guarantee (TRIE in French) to protect the transited country against loss of Duties and Taxes should the goods not exit its territory.

iii) Axle Load control. UEMOA Règlement N°14/2005/CM/UEMOA *Relatif à l'Harmonisation des Normes et des Procédures du Contrôle du Gabarit, du Poids, et de La Charge A l'Essieu Des Véhicules Lourds de Transport de Marchandises dans les États Membres de l'UEMOA*.

This regulation basically confirms the original axle load limit established by the 1982 ECOWAS IST Convention on Inter-State Road Transport, but with an implementation programme, which is now being brought into effect across the ECOWAS region.

3.6 Air transport

The Yamoussoukro Decision aims to liberalize air transport in Africa. It was first agreed in 1988 and came into force on August 12, 2000.¹²

UEMOA countries have fully implemented the Yamoussoukro Decision. As a result, all freedoms, including cabotage, have been granted, tariffs have been liberalized, and 44 percent of flights are operating under the Fifth and Seventh Freedoms.¹³

3.7 Electronic transactions

Ghana and Senegal, in 2008, both adopted laws and regulations relating to electronic transactions and electronic commerce.¹⁴ Having such laws and regulations is essential in order to implement and benefit from modern customs practices such as pre-arrival clearing, which is key to speeding up border crossing times both in ports and at land borders. We do not know if all ECOWAS member states have legalized electronic transactions.

3.8 Laws and regulations hindering the free movement of goods and people

Cargo sharing: Bilateral agreements among member states define the sharing of cargo between transporters from countries involved in either bilateral or transit trade. These agreements are usually accompanied by a first come first served system (*tour de rôle*) for matching cargo owners and transporters. These agreements and practices still exist but are only enforced on certain corridors, such as Cotonou-Niamey.

Restrictions on transit routes: These bilateral agreements also stipulate that transit cargo cannot pass through third-party countries where a port is located. For example: cargo leaving the port of Lomé for Niger cannot pass through Benin where the port of Cotonou is located. We do not know whether or how strictly this rule is enforced.

Compulsory Cargo Insurance: All three landlocked countries, Niger, Burkina Faso and Mali, require compulsory insurance of marine cargo imports¹⁵. This has the effect, at least in Burkina Faso where stakeholders have long complained about it, that cargo that has already arrived in Ouagadougou has to be insured by a Burkinabé insurer before Customs will release it.

3.9 Recent developments: WTO Trade Facilitation Agreement

Most West African countries are World Trade Organisation (WTO) members, whilst others (such as Liberia) are in the process of WTO accession. In December 2013, WTO members concluded negotiations on a Trade Facilitation Agreement (TFA) at the Bali Ministerial Conference, as part of a wider “Bali Package”. Following several rounds of further negotiations, the protocol to integrate the TFA into the WTO agreement was formally adopted at the WTO in Geneva in late November 2014, and it will enter into force once two-thirds of members have completed their domestic ratification process.

The TFA sets out commitments that promote clear rules and procedures which would reinforce West Africa’s own efforts to trade more efficiently among itself and support to

¹² Decision ECA/RCID/CM.CIV AC/99/RPT Relating To The Implementation Of The Yamoussoukro Declaration Concerning The Liberalisation Of Access To Air Transport

¹³ <http://www.icao.int/Pages/freedomsAir.aspx>

¹⁴ Ghana: Electronic Transactions Act, 2008, Act 772; Senegal: The Electronic Transaction law “No. 2008-08 of January 25 2008” – See Alliance Africaine For Electronic Commerce: Single Window Peer Review

¹⁵ FFSA Freedom Of Insurance; List Of Countries With Restrictives Measures In The Field Of Marine Insurance (2008)

reduce the costs to reach global markets. The Agreement consists of a range of technical measures on which each WTO member country will be assessed. They include trade-facilitating obligations related to transparency (publications, notification, advance rulings et al), appeals and review (administrative and or judicial), fees and charges (these must be cost based and published), release and clearance of goods (including pre-arrival processing, use of risk management tools among others), customs cooperation, transit, among others.

The Agreement allows member states to implement the technical measures based on a timetable determined by the country itself and further, offers even more flexibility than previous WTO Agreements by allowing developing countries to determine those technical measures that they are unable to implement without technical assistance and capacity building support. Importantly for West Africa, the TFA establishes three categories of commitments for developing countries and Least Developed Countries (LDCs). The first are the unconditional commitments (Category A), which must be notified to the WTO once the Agreement enters into force in the case of developing countries - or within one year in the case of LDCs. The second group of commitments are those which are conditional on a transition timetable determined by the country itself (Category B), and finally, Category C commitments are defined as those which are conditional on an indicative transition period and the receipt of implementation capacity through technical assistance and capacity building.

Although the Agreement clearly sets out proposed rules and procedures, enforcement of these rules appear to be based on a combination of binding and non-binding rules. To reflect this feature, the TFA contains provisions for an 'early warning system': A mechanism for WTO members to notify the Committee on Trade Facilitation of problems with implementation. Countries are also permitted to shift commitments between categories, moving commitments from Category B to Category C. Grace periods for the WTO's Dispute Settlement Understanding have also been adjusted under this Agreement, allowing two years for developing countries for Category A commitments while LDCs will be permitted six years for Category A commitments and eight years for Category B commitments.

As of September 2015, Senegal, Nigeria and Cote D'Ivoire have all notified their Category A commitments under the TFA to the WTO. So far, Niger and Togo have deposited their instrument of ratification of the TFA to the WTO.

4. CUSTOMS IN WEST AFRICA

Inefficient clearance procedures in ports and at border crossings are among the biggest barriers to the free flow of goods and people in West Africa. There are many reasons for this state of affairs, one of which is that import duties are still a very important source of government revenue, varying between 12 and 34 percent of total revenues among ECOWAS countries compared to 2 percent in the United States, for example.

Table 2 - Customs and other duties as % of tax revenue - selected ECOWAS countries

Country	2010	2011	2012
Benin	26.2	24.1	27.2
Burkina Faso	17.0	16.0	16.6
Cote d'Ivoire	37.1	30.5	34.1
Ghana	23.3	24.1	?
Mali	13.9	14.6	12.1

Niger	?	?	?
Nigeria	?	?	?
Senegal	15.2	15.8	14.2
Togo	24.9	24.6	23.5
United States	2.2	2.1	2.0

Source: <http://data.worldbank.org/indicator/GC.TAX.IMPT.ZS>

High customs duties and taxes, not surprisingly, lead to shippers and importers to try to avoid them. West African customs authorities therefore try hard to counteract attempts to defraud the system and have instituted a multitude of procedures and practices to do so – procedures and practices that are however usually cumbersome and time consuming and often of doubtful effectiveness, such as:

- **High incidence of physical inspection:** A very high proportion of shipments, often 100%, are physically inspected, sometimes by different agencies at different times. In developed countries physical inspections are usually limited to fewer than 10% of shipments thanks to effective risk management.
- **Pre-shipment (PSI) or destination inspections:** Most if not all West African countries use these inspections to assist with the classification and valuation of imported goods. They are time consuming and costly for the countries – usually the inspection company receives a percentage of the declared value for its services. The purpose is primarily to fight corruption within Customs administrations and avoid collusion between custom agents and shippers. However the WTO Trade Facilitation Agreement prohibits the use of PSI by members for purposes of customs classification.
- **Convoys:** Customs authorities in countries being transited are very concerned about diversion of the transit goods to local markets, and fraud. This in spite of the fact that there is a customs guarantee system in place (ISRT/TRIE¹⁶), which compensates customs authorities for lost revenues should transit goods not exit the country. It is not clear how big an issue this is in reality, but it is the justification for obliging transit trucks to travel in convoys.
- **Escort of transit documents:** Customs authorities generally do not trust truckers to carry the transit documents with them. Therefore transit documents are often transported separately by a customs “escort” from the port to the border and again from one border post across the border to the next. It appears that Ghana may be an exception to this practice.

Not many years ago, convoys and escorts were the rule, but in recent years several customs authorities have introduced GPS tracking for transit trucks and have stopped using convoys and escorts, thus eliminating an important bottleneck to transit traffic. With convoys, trucks had to wait, sometimes for several days, for scheduled departures, and many trucks arriving in a convoy at the same time at a border crossing caused serious congestion.

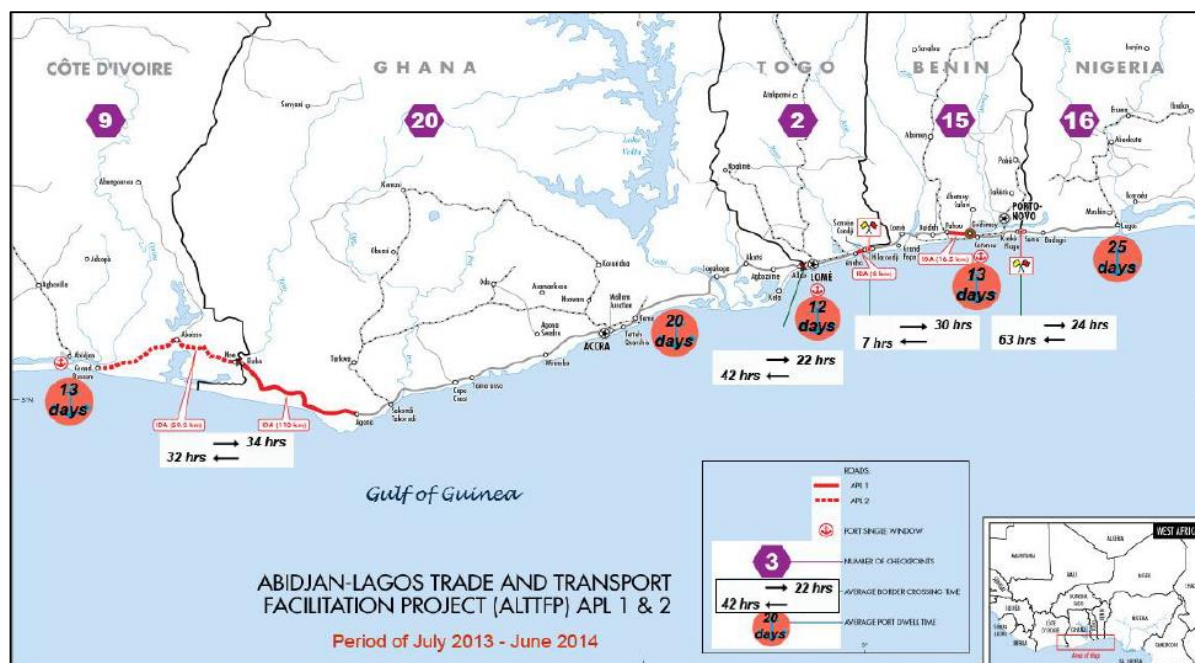
4.1 Border crossing times

The very real difficulty for commercial trucks to transport goods from one country to another in West Africa is confirmed by the excessively long time which it takes to cross most land

¹⁶ ISRT - TRIE are the English and French acronym for the ECOWAS convention which defines the custom bond system, namely the CONVENTION A/P.4/5/82 RELATING TO INTER-STATES ROAD TRANSIT OF GOODS

borders, particularly along the Lagos-Abidjan corridor.¹⁷ The time to cross borders, and dwell time in ports, is shown in the map below prepared by the Abidjan-Lagos Corridor Organization (ALCO). According to ALCO surveys clearing a truck coming from Seme, Nigeria in Krake, Benin takes on average 63 hours¹⁸.

Figure 2 - Abidjan-Lagos corridor: border crossing time and port dwell time



Source: ALCO - RAPPORT AN 4: JUILLET 2013 – JUIN 2014

Border crossing times along the Abidjan-Lagos corridor have also been surveyed by the Borderless Alliance. Both reports cover total crossing times, whether the time is used for clearance processing or for truckers' discretionary reasons. However, the Borderless survey also includes a breakdown of how the time at the border is spent which identifies "waiting time before submitting documents for clearance" and "waiting time after release but before departure", i.e. time spent "waiting to be served" or at the drivers' discretion. The Table below summarizes how time is utilized at the 6 borders posts included in the Borderless Survey.

¹⁷ It should be noted that for private vehicles with papers in order, crossing borders in West Africa is confusing - there are rarely signs to guide the traveller, and often many people milling around trying to sell their services - but not difficult. The writer has personal experience from crossing borders between GH-TG, TG-BN, BN-BF, BF-GH, BF-ML, BF-CI, CI-GH with a Ghana-registered vehicle and it has consistently been free of harassment and has usually taken about 30 minutes per border.

¹⁸ The Borderless sample is much smaller - 40 versus 570 - than that used by ALCO, which may explain the differences in measures.

Table 3 - Time utilization at border crossings along the Abidjan-Lagos corridor

Border crossing	Discretionary		Processing time (hh:mm)				Discretionary		Total crossing time	
	From arrival to document submission to forwarder		From Customs documentation to truck examination		From Examination to release		From release to departure			
	Exp.	Imp.	Exp.	Imp.	Exp.	Imp.	Exp.	Imp.	Exp.	Imp.
Seme, NG	12:14		7:11		2:03		4:10		25:38	
Krake, BJ	17:08	9:23	1:03	0:57	1:07	1:09	3:59	4:18	23:17	15:47
Kodjoviakope, TG	6:43	3:27	0:12	0:24	0:48	11:29	2:00	0:20	9:43	15:40
Aflao, GH	3:41	2:00	0:55	2:37	1:28	1:45	7:52	12:44	13:46	19:08
Elubo, GH	1:49	1:02	2:23	13:54	0:47	1:07	2:26	5:35	7:25	21:38
Noé, CI	5:14	3:09	1:06	2:01	4:44	1:13	0:28	2:53	11:32	9:16
Average	7:45	3:48	2:08	3:59	1:50	3:21	3:29	5:10	15:12	16:18
Total average processing time for export: 5h58 or 39% of total; and for import: 7h20 or 45% of total										

Compiled by author from Borderless Alliance Technical Report on Border Crossing Times at Selected Borders (Nov 2013)

If the survey is representative, average processing time is 39 percent of total time spent at borders for exports, and 45 percent for imports. In other words, more than half the time spent at borders is either “waiting to be served” or at the discretion of the drivers. The survey says nothing about why the drivers spend so much discretionary time at borders. Some common problems include not having the correct or complete paperwork, or not having sufficient money, or the right currency, but this aspect of border crossing delays has not been studied.

In several cases average processing times would be quite acceptable if it were not for the “outliers” – highlighted in bold red in Table 3 – which make the average border crossing time excessive. Detailed understanding of the causes of bottlenecks is therefore essential in order to design appropriate interventions.

Crossing borders to and from landlocked countries appears easier and faster than along the Abidjan-Lagos corridor, but that may be because these borders have less overall traffic and therefore seem less congested. It is difficult to compare from existing data as the United States Development Agency (USAID) corridor studies only report processing time.

Border crossing time on the Tema-Ouagadougou-Bamako and Lome-Ouagadougou corridors as documented by the West Africa Trade Hub are summarized in the table below which shows that processing imports takes from 2.5 to 10 hours, which is still much longer than it should take; while exports are usually dealt with in less than 3 hours.

Table 4 - Border crossing times Ghana-Burkina; Burkina-Mali; Togo-Burkina

	Paga, GH	Dakola, BF	Faramana, BF	Koury, ML	Cinkasse, TG	Bitou, BF
North-bound - Import to BF, ML from Tema Text black	↑	↑	↑	↑	↑	↑
Standard time and delays	1-2h	2.8-6.9h	0.9-6.4h	2.5- 8.3h	1.1-2.2h	3.6-8.6h
South-bound - Export from BF, ML to Tema	↓	↓	↓	↓	↓	↓
Standard time and delays	3.3-10.1h	2h	1.8-3.2h	0.3h	0.7-1.3h	0.5-1.3h

Source: USAID Transport and Logistics Costs on the Lomé-Ouagadougou Corridor (2012) and USAID Trends in Transport and Logistics on the Tema-Ouagadougou-Bamako Corridor (2013)

For more details on border crossing times along the Abidjan-Lagos corridor, see the sub-section on that corridor.

4.2 Agencies other than customs involved with the clearance of goods

Border crossing difficulties are usually blamed on customs authorities as the term “customs” is used to cover all agencies that are involved in clearing goods and enforcing national regulations at borders. Other agencies however may be the cause of many difficulties and delays blamed on “customs”. These agencies can be numerous as shown in the table below, put together by the Japanese International Cooperation Agency (JICA).

Table 5 - Agencies which may be present at borders

Institutions	Role
Customs	Pursues revenue collection, trade facilitation, social and environmental protection
Immigration	Regulates entry and exit of persons, issuance of visas, permits and border passes, maintenance of border security
Police/Security	Controls security, law and order
Interpol	Pursues intelligence gathering (mainly stolen vehicles)
Bureau of Standards	Formulates and enforces national standards, implements standards through product certification and import and export inspections
Environmental Management Agency	Ensures compliance with environmental laws
Drug Enforcement Commission	Controls the importation, exportation, production, possession, sale, distribution, and use of narcotic drugs and psychotropic substances.

Ministry of Agriculture	Regulates the importation and exportation of agricultural products for the purpose of controlling the spread of plant diseases and regulating sanitary and phyto-sanitary issues.
Forestry Department	Regulates the import and export of plant or timber of all forestry production.
Ministry of Livestock and Fisheries	Regulates the import and export of livestock, livestock products, fish and fish products. Controls spread of animal diseases.
Port Health	Enforces international health standards, prevention and suppression of diseases and protecting the public against health hazards and fraud in the sale and use of food, drugs, cosmetics, and medical devices.
Road Transport and Safety Agency/Road Authority	Enforces vehicle standards, licenses, driving permits, mechanical condition and collects road tolls.
Vehicle Examination Department	Operates the weighbridges to control overloading and inspects outward or inward vehicles
SERVICE PROVIDERS	
Clearing and forwarding agents and transporters representatives	Provide the private sector service of transport and clearing goods
Insurance companies	Sell third party insurance
Inland container depots and bonded warehouses	Provide logistics services, storage and services

Source: JICA One Stop Border Posts Source Book (2011)

4.3 Customs systems in West Africa

Of the 15 ECOWAS countries, 13 are using ASYCUDA, a free software package developed and maintained by the United Nations Conference on Trade and Development (UNCTAD), while two, Ghana and Senegal, have other systems.

Table 6 - Customs systems in West Africa

System	Countries
ASYCUDA	Benin++, Burkina Faso (W), Cap Verde++, Cote d'Ivoire (W), Gambia++, Guinea (W), Guinea-Bissau++, Liberia (W), Mali (W), Niger++, Nigeria++, Sierra Leone++, Togo++
Other	Ghana: GCNet Senegal: GAÏNDE 2010 with ORBUS (Single Window) and CORUS (Payment module)

Source: ASYCUDA and local customs' websites

ASYCUDA used in West Africa comes in two versions: “++” and “W” for ASYCUDA World. ASYCUDA World is the latest version and is web-based, allowing customs administrations and traders to handle their transactions – from customs declarations to cargo manifests and transit documents – via the Internet.

ECOWAS is working on a regional automated transit system (ALISA) and an eventual single regional customs automation system (SAMBA), but we do not know the current status of this project.

4.4 Joint border posts (JBP)¹⁹ – *Postes de contrôles juxtaposés (PCJ)*

In order to reduce border-crossing times, ECOWAS and UEMOA have endeavoured to establish JBPs at land border crossings, and single window systems at ports²⁰. The idea behind JBPs is to achieve efficiency by bringing together in one place the agencies on both sides of a border so as to simplify procedures, share intelligence, jointly handle risk management and carry out inspections, when required, by all affected agencies at the same time, and once only.

At some JBPs, but not yet in West Africa, one country uses the other country's import formalities as its own export formalities²¹. As of 2014, four JBPs had been built, or were in the process of being built, in ECOWAS as per the table below.

Table 7 - Joint border posts in West Africa²²

Location	Border Crossing	Status
Cinkansé	Togo/Burkina Faso	Operational as of 2011, but no inter-connection and few benefits
Seme	Nigeria/Benin	Construction interrupted
Noepe	Togo/Ghana	Built and awaiting equipment
Malanville	Benin/Niger	Built and awaiting equipment

ECOWAS announced in May 2015 that an additional JBP will be constructed on the Noé, CI - Elubo, GH border crossing on the Abidjan-Lagos corridor for an estimated cost of USD 20 million²³ (JBPs do not come cheap).

In addition, ECOWAS is seeking funding for the following JBPs²⁴:

Bénin-Togo,	EUR 16 million
Guinée-Mali,	EUR 16 million
Ghana-Burkina Faso,	EUR 16 million

¹⁹ Joint Border Posts are often referred to elsewhere as One-Stop-Border-Posts (OSBP).

²⁰ DECISION N°08/2001/CM/UEMOA Portant Adoption et Modalités de Financement d'un Programme Communautaire de Construction de Postes de Contrôle Juxtaposés aux Frontières entre les Etats Membres de l'UEMOA

²¹ Chirundu border crossing Zambia/Zimbabwe: OSBP procedures were developed to allow all exit and entry formalities to be performed in sequential order in a one facility enabling clients to stop once at the border in either direction. OECD Aid-For-Trade: Case Story Zimbabwe, Jan 2011

²² Source: ALCO - Passage des postes frontières de Malanville-Gaya (Benin/Niger), Krake-Seme (Benin/Nigeria) et Aflao-Kodjoviakope (Ghana-Togo) de camions chargés de marchandise, Sept 2014; JICA: Etude sur les procédures et opérations douanières du corridor Lomé-Ouagadougou, février 2014

²³ <http://news.abidjan.net/h/551138.html>

²⁴ ECOWAS Infrastructure Planning - EC Continental Seminar on Infrastructure In Africa, Oct 1-4, 2013 Addis-Ababa, Ethiopia by David Kamara

A JBP is also being built at Mfum and Ekok on the Cameroon-Nigeria border. This is part of the rehabilitation and construction of the Bamenda-Mamfe-Abakaliki-Enugu road corridor project linking the two countries, at total estimated cost of USD 455 million²⁵.

ECOWAS and UEMOA have developed a legal framework for JBPs, which is a pre-requisite. Everything else in regard to establishing JBPs in West Africa seems to have been done in reverse as simplified procedures have not been agreed and the different customs authorities' IT systems are not yet inter-connected. As a result JBPs have not been designed for simplified operations and none of the JBPs is yet operating with the benefits expected. JICA concluded in its report on the Lomé-Ouagadougou corridor that²⁶:

“...the size of the OSBP buildings and facilities should comply with the simplified transit procedure at borders which is driven by the interconnection of customs systems and the Single Guarantee. This means that OSBPs do not always need large buildings. This should be considered for other OSBPs projects.”

The idea of Joint Border Posts in West Africa goes back about 20 years and already in 2001 UEMOA had identified 11 JBPs on their priority corridors²⁷ - highlighted in green in table below. The list has since grown and ECOWAS and UEMOA now have a list of 19 planned JBPs.

Table 8 - Planned One Stop Border Posts in the ECOWAS region

	Border	Proposed Site	Country of Location
1.	Burkina-Togo	Cinkasé	Burkina Faso
2.	Burkina-Cote D'Ivoire	La Léraba	Cote D'Ivoire
3.	Burkina-Mali	Hérémandono	Mali
4.	Burkina-Bénin	Koualou	Bénin/Burkina
5.	Burkina-Niger	Kantchari/Makalondi	Burkina/Niger
6.	Niger-Mali	Labézanga	Mali
7.	Niger-Bénin	Malanville	Bénin
8.	Bénin-Togo	Sanvee-Kondji	Togo
9.	Mali-Sénégal	Diboli	Mali
10.	Sénégal-Guinée-Bissau	Mpack	Sénégal
11.	Mali-Cote d'Ivoire	Zégoua	Mali
12.	Burkina-Ghana	Paga	Ghana
13.	Burkina-Niger	Pétékolé	Niger

²⁵ <http://www.panapress.com/Contract-to-build-Cameroon-Nigeria-joint-border-post-to-be-awarded-July--13-755597-18-lang4-index.html>

²⁶ JICA – Etude sur les Procédures et Opérations Douanières du Corridor Lomé-Ouagadougou (2014)

²⁷ DECISION N°08/2001/CM/UEMOA Portant Adoption et Modalités de Financement d'un Programme Communautaire de Construction de Postes de Contrôle Juxtaposés aux Frontières entre les Etats Membres de l'UEMOA.

14.	Mali-Sénégal	Moussala	Mali
15.	Sénégal- Guinée	Boundou Fourdou	Sénégal/Guinée
16.	Cote d'Ivoire-Ghana	Noé-Elubo	CI/Ghana
17.	Bénin-Nigeria	Sémé-Kraké	Bénin/Nigeria
18.	Togo-Ghana	Noépé	Togo
19.	Mali-Guinée	Kouremalé	Mali/Guinée

Source: *Atelier Régional sur la Mise En Œuvre des Projets des Postes de Contrôle Juxtaposés (PCJ)*, 2012 – présentation de M. Nomao.

4.5 Single windows – *Guichet unique*

Single windows in ports are similar to JBPs in that their role is to coordinate all agencies, including the port authority, involved in the goods clearance process. There is growing interest in single windows in Africa as demonstrated by the facts that:

- The African Alliance for e-Commerce (AAEC) has developed a Single Window Guide²⁸; and
- Three international conferences on single windows have taken place in Africa since 2011 with a fourth scheduled for October 2015 in Brazzaville, Congo.²⁹

In West Africa, Single Windows were first established in Tema and Takoradi ports in Ghana where GCNet has operated since 2002, and in Dakar, Senegal where ORBUS has been in place since 2006. Since 2013, additional Single Windows have been established in the ports of Abidjan, Cotonou, and Lomé as public-private partnerships.

Table 9 - Status of single windows at West African ports

Country	Single Window Status
Nigeria	No single window in place. Being studied since 2012.
Benin	A single window is operational since 2013 and managed by SOGET (Société d'Exploitation et de Gestion du Guichet Unique), which has a 10-year concession. SOGET is made up of the group Bureau Veritas / Soget with 70 percent share as against 30 percent for Benin stakeholders (CAP SOBEMAP, CNCB, CNERTP, CCIP). See https://guce.gouv.ci
Togo	A single window - SEGUCE (La Société d'Exploitation du Guichet Unique pour le Commerce Extérieur) - was officially launched in February 2014, managed by Bureau Veritas BIVAC BV – SOGET SA. Additional modules will become operational in 2015. See https://segucetogo.tg
Ghana	Section 1.01 Ghana's Community Network System (GCNet), was incorporated in 2000, and became operational in 2002. It is

²⁸ AACE_guide_pratique_Guichets_Uniques_2013

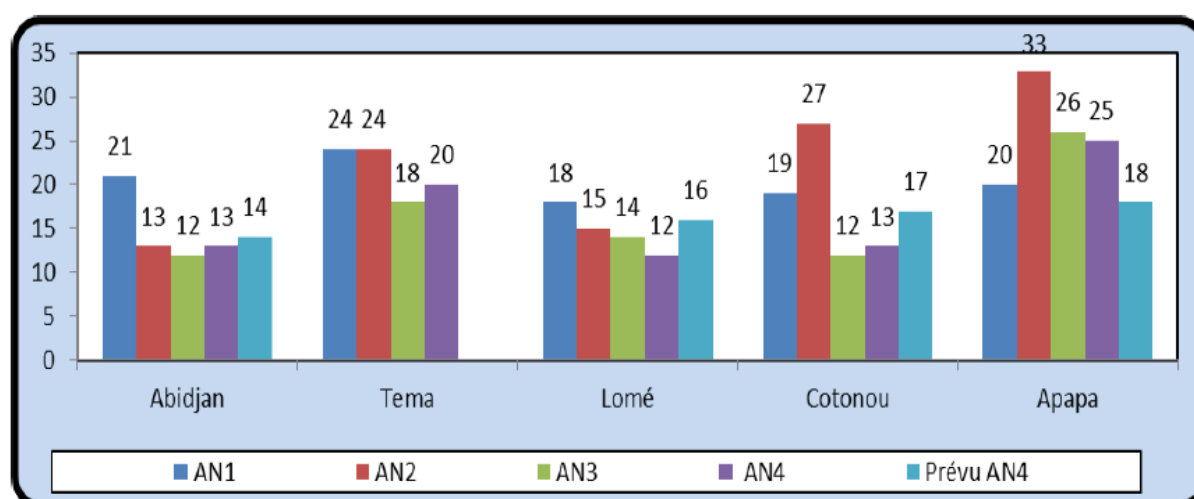
²⁹ <http://www.conferencesw.org>

	<p>to our knowledge the first Single Window in West Africa.</p> <p>Section 1.02 The Ghana Revenue Authority is currently using the GCMS with some agencies connected to it, but does not provide information to all stakeholders on a common platform. Documentation has to be done repetitively in order to complete process.³⁰</p> <p>See http://www.gcnet.com.gh/ & GHANA: AACE Single Window Peer Review (2014)</p>
Cote D'Ivoire	<p>The National Single Window for Foreign Trade in Ivory Coast was launched in 2013 and appears to be a work in progress.</p> <p>See https://guce.gouv.ci</p>
Senegal	<p>Senegal's single window, ORBUS, became operational in 2006.</p> <p>See http://www.gainde2000.sn/2014/fr/window.php & Senegal: AACE Single Window Peer Review (2014)</p>

Source: ALCO: *Projet de Facilitation du Commerce et du Transport sur le Corridor Abidjan-Lagos, Rapport An 4: Juillet 2013 – Juin 2014* & Single Window websites Juillet 2013 – Juin 2014 & Single Window websites

In spite of the recent progress with Single Windows, dwell times in ports are still excessively long as shown in the chart below.

Figure 3 - Port dwell time development from 2010 to 2014



Source: ALCO: *Projet de Facilitation du Commerce et du Transport sur le Corridor Abidjan-Lagos, Rapport An 4: Juillet 2013*

Reasons for long dwell times include:

- Little use of pre-arrival clearance;
- Poor risk management, with a high proportion of physical inspections, or scanning;
- Port used for cheap storage by cargo owners;³¹
- Single windows may not be as efficient as they could be as they are relatively new and, hopefully, still improving;

³⁰ GRA Communication

³¹ Raballand et al, *Why Does Cargo Spend Weeks in Sub-Saharan African Ports?* World Bank (2012)

- Agencies other than customs which do not generate revenue may not be as well organized and equipped as customs, and
- Not all agencies are connected to the Single Windows.

4.6 Customs inter-connectivity

Connectivity between national customs systems – something that is yet to happen – would allow for the electronic transfer of documents, pre-arrival clearance and better risk management, and thus speed up the clearance of transit traffic at borders while also eliminate the concern about documents being tampered with or falsified in transit.

Countries need to legalize the use of electronic documents - some have done so, but we do not know if all have.

National customs authorities still using ASYCUDA++ should upgrade to ASYCUDA World, which is designed for the Internet, in order to facilitate inter-connection.

Stakeholders have complained that reliable power and Internet connectivity at borders is often lacking, which delays processing.

5. PORT DEVELOPMENTS IN WEST AFRICA

West Africa is well equipped with ports as the many coastal countries each have at least one.³²

These ports have quasi monopolies on their home country markets but compete for transit cargo to the three landlocked countries, Niger, Burkina Faso and Mali, and for transshipment traffic to other ports.

The lack of competition for traffic to neighbouring countries is partially because of the difficulties involved in crossing land borders, but there may also be laws against it. This was at least the case in Côte d'Ivoire until August 2014, and may still be the case in other countries.³³ In fact, bilateral transport agreements between ECOWAS landlocked and coastal states in general forbid transit cargo passing through third-party countries where a port is located. For example, cargo leaving the port of Lomé for Niger cannot pass through Benin where the port of Cotonou is located.³⁴ These agreements date back to the 1970s and 1980s and may or may not be enforced.

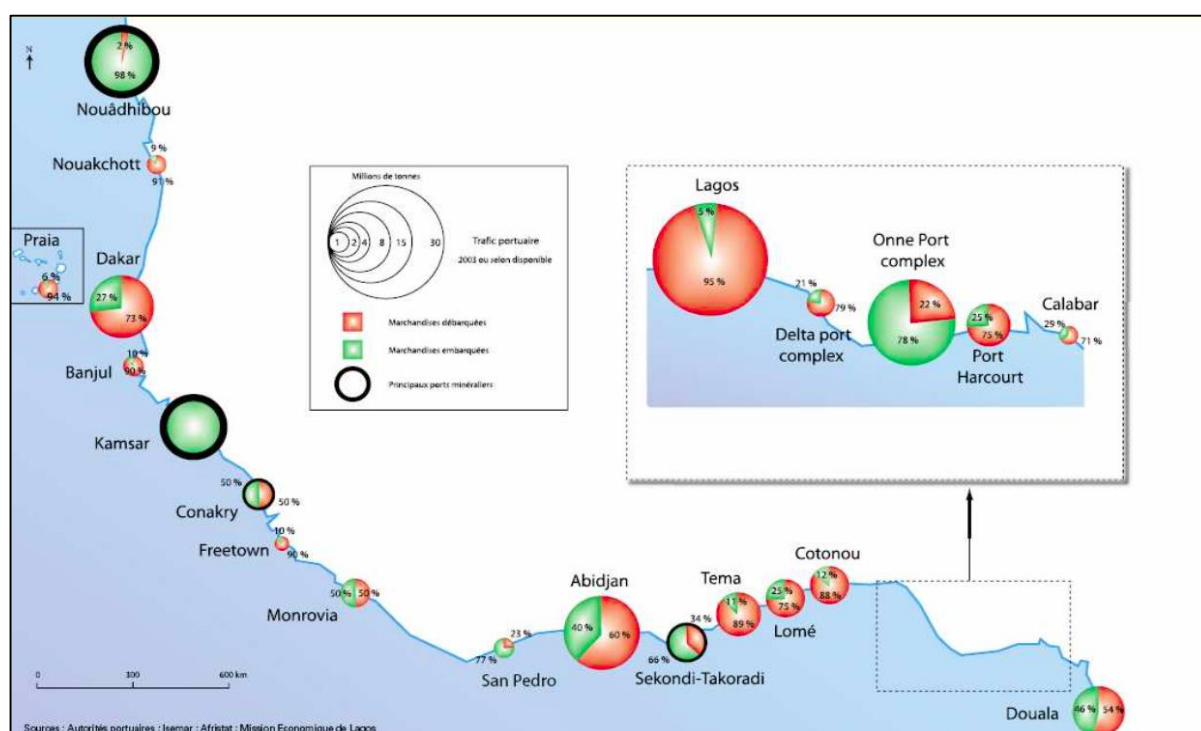
This section focuses on container terminal developments. A brief description of the major ports and related traffic statistics can be found in the section on specific corridors.

³² Source: Intégration régionale croissance et réduction de la pauvreté en Afrique de l'ouest - stratégies et plan d'action, ECOWAS & UEMOA Déc. 2006

³³ <http://vibeghana.com/2014/09/24/cote-divoire-repeals-embargo-on-non-ecowas-cargo-import/>

³⁴ JICA Traffic Survey (2012) section 7.2

Figure 4 - Ports in West Africa



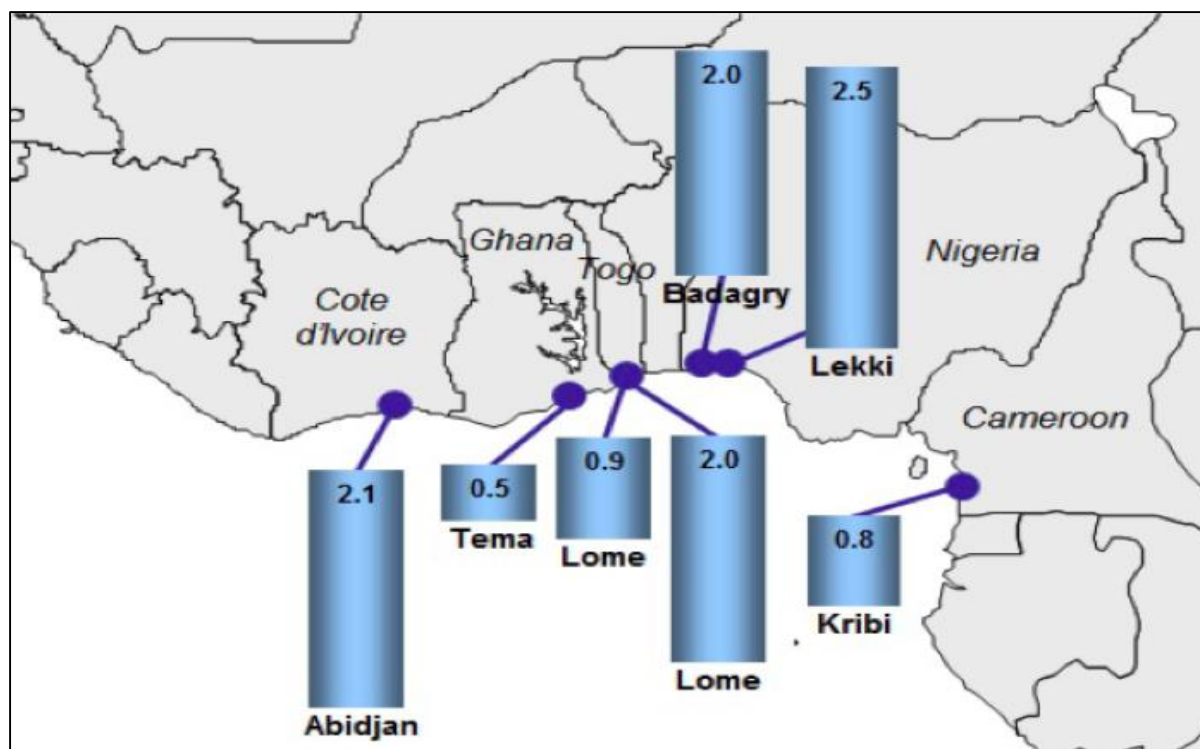
Note: Red = imports; green = exports; black circle = mineral ports

5.1 Container traffic

Containership tonnage worldwide is estimated at 1.53 billion tonnes in 2013, representing about 40 percent of world maritime dry cargo. Containership tonnage has been growing faster than other maritime transportation segments and grew on average 7.4 percent per year between 2000 and 2013, while tanker cargo growth averaged 2.3 percent; main bulk commodities, 6.0 percent; and non-containerized dry cargo, 1.4 percent.

Many of the world's trade lanes are not balanced directionally. Finished products fill the available capacity in one direction, but there are fewer goods to take up the capacity in the opposite direction. Capacity on return trips is therefore available at low prices. Taking advantage of this directional capacity surplus, shippers are transporting many bulk and low-cost goods as containerized cargo, instead of as maritime bulk cargo. For example, in 2013, soybeans, motor vehicles, waste and scrap metals, and cotton were the top commodities by weight shipped on containerships from the United States to China³⁵.

³⁵ Boeings' World Air Cargo Forecast 2014–2015.

Figure 5 - Container terminal expansion projects

5.1.1 Container terminals in West Africa³⁶

The focus on container traffic reflects the fact that most general cargo is transported in containers. Container traffic is also an area in which there is potential for more port competition. Container traffic in West Africa is estimated to grow by 7-12 percent per year, depending on the individual port, until 2020.

What is striking is the great number of very large and important port development projects under way in West Africa as shown in the table below.

Table 10 - Summary of major container terminal projects in West Africa

Port	Country	New Capacity	Draft	Completion
Nigeria	Badagry	600000 teu	17m	2019
Nigeria	Lekki Port	600000 teu	Initial 14.5m up to 16.5m	End 2018
Lome	Togo (Bollore Terminal)	600000 teu	15m on new 3 rd berth	2015
Lome	Togo (Lome Container Terminal)		17m	2014

³⁶ Information in this section is based primarily on the 2013 report Market study on container terminals in West and Central Africa by MLTC/CATRAM.

Tema	Ghana	600000 teu	17m	2018
Abidjan	Ivory Coast	600000 teu	18m	2018

Terminal operators who are investing billions of dollars in new container capacity are clearly very optimistic about growth prospects in West Africa.

The new, or upgraded, terminals will have longer berths and deeper draughts and thus be able to receive larger, more efficient vessels and, on the landside, will have more efficient handling equipment. This will increase productivity and eliminate the need for older, smaller and less efficient container vessels equipped with their own handling gear, which in many cases are still serving African ports.

5.1.2 Containers

Containers, a major reason for the success of the current wave of globalization, have many advantages over other means of transport:

- **Less damage**, loss and theft of goods. As goods remain in the container while moved between modes of transport (vessel, rail, truck), they are less likely to be lost or stolen, or damaged in transit through handling, or exposure to the elements.
- **Less truck overloading**. Currently most containers arriving in West Africa are unloaded in ports and the content re-loaded onto general-purpose trucks as break bulk for onward transportation to final destinations. Transporters have a tendency to load as much as they can in order to increase revenues – sometimes the content of 3 twenty-foot equivalent units (TEU) or more on one truck. If containers are used for inland transportation or transit, overloading is much less likely, or likely to be less severe, as the maximum allowable mass of 20' or 40' containers is 32,500 kg while average mass is usually around 15t to 20t, and only one 40' or two 20' containers can be loaded on one truck.
- **Fewer illegal activities**. Containers that remain sealed from origin to destination are more difficult to manipulate for illegal activities.

The table below shows projected handling capacity per port up until 2030.

Table 11 - Container handling capacity per port³⁷

TEUs	Traffic			Capacity		
	2011	2011	2015	2020	2025	2030
Dakar	416 000	600 000	600 000	600 000	600 000	600 000
Port du futur?					500 000	500 000
Banjul						
Conakry	160 000	200 000	450 000	450 000	650 000	650 000
Freetown						
Monrovia						
Abidjan	546 000	900 000	1 100 000	1 100 000	1 100 000	1 100 000
Terminal 2				500 000	1 000 000	1 500 000
San Pedro	118 000	120 000	120 000	620 000	620 000	620 000
Tema	750 000	600 000	800 000	800 000	800 000	800 000
Takoradi	57 000	60 000	60 000	200 000	200 000	200 000
Lome/ quai 3	350 000	350 000	850 000	850 000	850 000	850 000
LCT			400 000	1 000 000	1 000 000	1 500 000
Cotonou	210 000	220 000	400 000	600 000	750 000	750 000
Seme-Kpodji					?	?
Lagos						
Apapa	600 000	850 000	850 000	850 000	850 000	850 000
Tin Can	395 000	450 000	600 000	600 000	600 000	600 000
Lekki				500 000	1 000 000	2 000 000
Badagry				750 000	1 500 000	3 000 000
Total (million TEU)	3.60m	4.35m	6.23m	9.42m	12.02m	15.52m

Source: Totals calculated by author

This compares to the forecast made by the Programme for Infrastructure Development in Africa (PIDA) which expects growth in container traffic to outpace that of total tonnage.³⁸ Container growth will average 10.6 percent per year to 2020 (including some suppressed demand released by corridor improvements) and 7.9 percent from 2020 to 2040 on a sustained basis (with all suppressed demand released). The net result will be an increase in container traffic to 38 million TEUs by 2020 and 176 million TEUs by 2040, a 14-fold increase, for all of Africa. With West Africa counting for about 18 percent of total African

³⁷ Port Strategy explores the growing container handling capacity of West African ports, 10 Feb 2015

³⁸ Programme for Infrastructure Development in Africa (PIDA) - Africa Transport Sector Phase III Report (2011)

tonnage, PIDA expects container traffic in West Africa to reach about 7 million TEU by 2020 and about 35 million TEU by 2040.

5.2 Container terminal concessions and competition

Although West Africa has many ports, competition is generally limited to transit and transshipment traffic, which represents only about 10 percent of total traffic. Also, West African container terminals are operated by a very limited number of terminal operators, the most important ones being Bolloré, APMT (an independent business unit within the Danish-based Maersk Group) and the Mediterranean Shipping Company (MSC) in partnership with China Merchant Holding International (CMHI), each of which have several terminal concessions. The Dubai-based DP World has one concession: The Dakar container terminal. Competition is further limited by the fact that Bolloré and APMT have joint ventures in Tema and Abidjan. It is not clear whether this is negatively affecting prices for users; but it could become a concern.³⁹

Table 12 - Container terminal concessions

Ports	Operator	Date of Concession	Length	Remarks
Dakar	DP World	2008	25	
Conakry	Bolloré	April 2011	25	
Freetown	Bolloré	February 2011	25	
Monrovia	APMT	End of 2010		
San Pedro	MSC	2011		
Abidjan	Bolloré (60%), APMT (40%)	2004	30	
Takoradi				Oil & Gas
Tema (MPS)	APMT (35%), Bolloré (35%) GPHA (30%)	2007	20	
Lome	Bolloré	2010	35	
Cotonou	Bolloré (SMTC, including 35% GETMA)	2010	25	New Terminal
	APMT (Coman)			
	SOBEMAP			No containers
Lagos Apapa	APMT	2006	20	45% of market
Lagos Tin-Can (TICT)	Bolloré (55%), China Merchants (45%)	June 2006	20	35% of market

Source: Market Study on container Terminals in West and Central Africa.

³⁹ The World Bank is in the process of finalizing a study on port competition in West Africa, which is due for publication sometime in the summer/autumn of 2015.

The added container terminal capacity means that several ports are attempting to become hub-ports where containers are unloaded and transhipped to neighbouring ports by smaller vessels.

5.3 Cabotage

The Nigerian NEXIM Bank recently signed an agreement with the African Development Bank (AfDB) for a USD 302,000 financial grant under the Nigerian Technical Cooperation Fund to facilitate the establishment of the Sealink Project. The objective of the Sealink Promotional Company Ltd (SPCL) is “*to create a profitable private sector company capable of delivering excellent cabotage services to West and Central Africa coastal countries on a regular and reliable scheduled service*”⁴⁰. Sealink is proposing three routes:

- A western circular route for passengers and freight: Freetown-Conakry-Bissau-Banjul-Dakar;
- An eastern circular route for passengers and freight: Cotonou-Calabar-Douala-Libreville; and
- A circular freight only route: Libreville - Dakar covering major ports along the route.

Whether or not the Sealink proposals will become a reality one day is unknown at this stage.

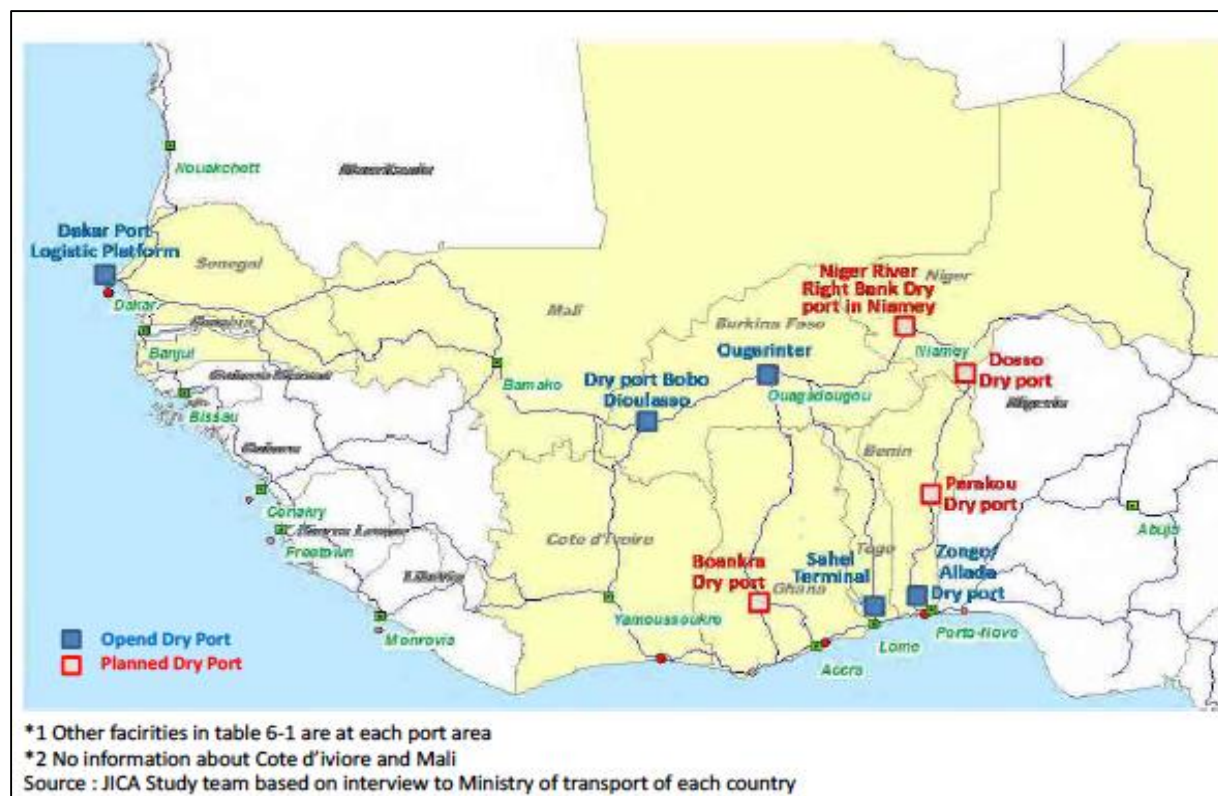
5.4 Dry ports or inland container terminals (ICD)

Dry Ports, or Inland Container Terminals (ICD), are extensions of sea-ports and serve to de-congest ports and to improve container handling up-country and in land-locked countries. At the time of the JICA 2012 Traffic Study, there were five ICD’s built in the UEMOA region with an additional four planned.

ECOWAS priority port projects focus particularly on the development of smaller ports in countries between Senegal and Côte d’Ivoire – Cap Verde, The Gambia, Guinea Bissau, Liberia and Sierra Leone - which have not yet seen much development. However so far funding is only available (up to 80 percent) for the development of a regional logistic and commercial platform in Cape Verde.

⁴⁰ <http://starconnectmedia.com/2015/02/27/nexim-bank-signs-302000-deal-for-sealink-project/>

Figure 6: Location of dry ports



Source: JICA Traffic Study (2012)

5.5 Issues and recommendations – Ports, generic

Port gateways suffer from six categories of inefficiencies⁴¹:

- Port and city interface;
- Port congestion;
- Organization of port operations;
- Allocation of cargo for inland transport;
- Customs organization;
- Container stripping.

Port and city interface: Access to and from ports is often difficult owing to poor roads, heavy city traffic and congestion, lack of appropriate parking in and outside the port, and poor control of traffic in and out of ports.

Port congestion: Most West African ports suffer from congestion because of poor port access control and yard activities, such as container stripping and cargo consolidation, carried on within the port area. Also, many shippers leave their cargo in the port because it is convenient, and cheaper than storing it in warehouses outside the port.

Inefficient organization of port operations: Port operations systems are often inadequate.

⁴¹ Mostly from the World Bank report “Logistics Cost Study of Transport Corridors in Central and West Africa, by Nathan Associates (2013)”;

Inefficient matching of cargo and transporters for inland transport: Transit cargo may still be shared between coastal and landlocked country transporters according to set rules, and cargo allocated to trucks on a first come first served basis (*tour de rôle*). However, many countries/ports, such as Ghana, have relaxed or abandoned such procedures. Still, even where there is an open market for transport services there are no effective systems for matching transporters and cargo owners.

Inefficient organization of clearance procedures: The lack of coordination of the many agencies involved in the clearance of goods, the lack of electronic payment methods and lack of interconnection between customs systems in different countries are some of the reasons why it usually takes many days, sometimes weeks, to clear goods through ports.

Container stripping: Approximately 80 percent of containers arriving with transit traffic in West Africa are stripped in or near the ports and the content loaded – often overloaded – onto general trucks for onward transportation. Stripping containers and overloading trucks is a common practice on all corridors for several reasons:

- To reduce the transport price;
- To avoid demurrage charges for empty containers that are returned late;
- Lack of container handling equipment at destination;
- Lack of return cargo. Almost all containers that leave the ports loaded return empty. Even products coming from the hinterland, such as cotton, which are ultimately shipped in containers, are loaded into containers at the ports rather than at origin.

6. TRADE FLOWS

6.1 A. Trade by value

High volumes of bi-national and intra-regional trade flows are indicative of an existing demand for improved corridor transport and logistics, but a lack of such flows could be indicative that they are being suppressed by high transport and logistics costs or lack of appropriate infrastructure. Trade assessments have been made for fourteen ECOWAS member states⁴². Four aspects of each country's international trade (in value) are considered below:

- Total exports by product
- Total exports by destination
- Exports by each country to those connected along the same corridor
- Total intra-regional trade between each West African country connected by each corridor.

It should be noted that informal trade, which may represent 75% of intra-regional trade, is by definition not included in this sub-section,

6.2 Total exports by product

Total merchandise exports are an overall indication of the demand for transport and logistics services. The allocation of that demand between ports, airports and land transport depends on the export products and destinations (ports only being relevant for international

⁴² Cap Verde is not included as it is an Island state

destinations, airports only for products of high value or products that are highly time sensitive, and land transport only for regional exports).

Merchandise exports (that is, excluding exports of services) for the fourteen countries in 2013 were about USD140b, of which about 65% were Nigeria's exports, and of that about 31% was oil and petroleum products. Of total merchandise exports only about 9.4% was intra-regional. Cote d'Ivoire imports from Nigeria make up 23.7% of its total imports, and of that 76.7% is petroleum, that is to say just under 20% of Cote d'Ivoire imports are petroleum from Nigeria. In contrast, only 2.5% of Ghana's imports come from Nigeria, and of this only 59% is crude petroleum.

About 35% of exports from the region were minerals and ores. Their transport to a deep-water port can have a positive impact by providing the base load for railway services in a trade corridor; but if they are transported by road they are likely to have a negative impact by resulting in road congestion in port cities.

After petroleum and its derivatives and minerals, the next largest group of export products is foods, making up about 15% of exports by value. This category includes cocoa beans and their derivatives. These make up 29% of Cote d'Ivoire and 17% Ghana's exports, being the world's two largest cocoa producers.

Table 13 - Total merchandise exports for West African countries⁴³ (USD Million)

Country	Total Merchandise exports (2014)	Food	Aggregate Raw Materials	Fuels	Ores and Metals	Manufactures
Benin	2,010	30%	45%	0%	4%	20%
Burkina Faso	2,436	27%	43%	12%	9%	11%
Cote D'Ivoire	12,783	52%	9%	22%	0%	16%
Gambia, The	87	49%	0%	0%	3%	48%
Ghana	12,548	32%	4%	43%	4%	17%
Guinea	1,428	n.a.	n.a.	n.a.	n.a.	n.a.
Guinea-Bissau	162	n.a.	n.a.	n.a.	n.a.	n.a.
Liberia	583	n.a.	n.a.	n.a.	n.a.	n.a.
Mali	2,100	20%	52%	0%	3%	24%
Niger	1,500	11%	1%	27%	46%	12%
Nigeria	98,000	5%	3%	88%	1%	3%
Senegal	2,812	39%	3%	19%	5%	35%
Sierra	1,886	n.a.	n.a.	n.a.	n.a.	n.a.

⁴³ This data comes from a different source (World Bank database) to that for exports by destination (Observatory of Economic Complexity).

Leone						
Togo	1,350	23%	9%	1%	3%	64%
Total	139,685	14%	6%	69%	3%	8%

6.3 Crude oil exports

Seven West African countries have oil refineries. Of these only Cote d'Ivoire and Senegal also import significant amount of crude petroleum. Cote d'Ivoire imports all of it from Nigeria (94%) while Ghana's crude petroleum imports are now only 2.1% of its total imports (it now produces most of its own crude petroleum) and 'only' 70% of that is from Nigeria. Despite its relatively large oil refining capacity, Nigeria's crude petroleum imports still make up more than 14% of its total imports.

Table 14 - West Africa oil refining capacity and crude petroleum imports (2012)

Country	Refining (bbl/day)	Capacity	Crude Share of imports	Nigeria Share of imports
Cote D'Ivoire		78,000	23.8%	94.0%
Ghana		48,000	2.1%	70.5%
Niger		20,000	0.0%	0.0%
5Nigeria		465,000	1.4%	0.0%
Senegal		27,000	10.1%	0.0%
Regional Total		638,000		

Source: Author's analysis based on data from Observatory of Economic Complexity

6.4 Regional trade

Exports to other West African countries account for about 9.8% of their total exports and imports from other West African countries accounts for about 13.0% of total imports.

Table 15 - Intra-regional exports and imports

Exports from	To the Region	To the World	Regional % of Total	Share of Regional Total	Imports to	From the Region	From the World	Regional % of Total	Share of Regional Total
Nigeria	6,517	98,000	6.7%	47.6%	Cote D'Ivoire	3,038	9,770	31.1%	23.7%
Cote D'Ivoire	2,845	12,783	22.3%	20.8%	Ghana	1,881	13,578	13.9%	14.7%
Ghana	1,828	12,548	14.6%	13.3%	Nigeria	1,512	35,873	4.2%	11.8%
Benin	88	2,010	4.4%	0.6%	Benin	372	2,316	16.1%	2.9%
Burkina Faso	278	2,436	11.4%	2.0%	Burkina Faso	1,094	4,365	25.1%	8.5%

Gambia	1	87	0.7%	0.0%	Gambia	116	891	13.0%	0.9%
Guinea	39	1,428	2.7%	0.3%	Guinea	238	3,077	7.7%	1.9%
Guinea Bissau	6	162	3.7%	0.0%	Guinea-Bissau	72	289	24.9%	0.6%
Liberia	22	583	3.7%	0.2%	Liberia	695	7,016	9.9%	5.4%
Mali	280	2,100	13.3%	2.0%	Mali	1,004	3,463	29.0%	7.8%
Niger	296	1,500	19.8%	2.2%	Niger	234	1,685	13.9%	1.8%
Senegal	1018	2,812	36.2%	7.4%	Senegal	1,303	6,434	20.3%	10.2%
Sierra Leone	14	1,886	0.7%	0.1%	Sierra Leone	106	1,274	8.3%	0.8%
Togo	463	1,350	34.3%	3.4%	Togo	1,163	8,804	13.2%	9.1%
Region	13,695	139,685	9.80%	100.00%	Region	12,828	98,835	13.0%	100.0%

Source: Calculation based on World Bank WITS Database

6.4.1 Exports to the region

Exports to other West African countries were about USD 14 billion in 2012, accounting for about 9.8% of total exports from the region.

The country with the most exports to the region is Nigeria, with its USD 6.5 billion accounting for more than 47% of the total. Other significant exporters to the region are Cote d'Ivoire with US\$2.8b billion (20.6% of the total) and Ghana with USD1.8 billion (13.3% of the total). The countries with the largest share of their exports going to the region are Togo (34.3%), Senegal (36.2%) and Cote d'Ivoire (22.3%).

Nigeria's exports to the region are mostly to Cote d'Ivoire (about 40%), Ghana (about 20%) and Cameroon and Senegal (about 15% each). The exports are predominantly petroleum and its products, making up about 94% of its exports to Cote d'Ivoire, 95% to Ghana, 94% to Cameroon and 85% to Senegal. For these four destinations petroleum exports are by sea, so the land transport corridors are only impacted when the crude petroleum is refined in the destination country and some it re-exported within the region.

The five countries bordered by Cote d'Ivoire, Mali and Senegal – The Gambia, Guinea, Guinea Bissau, Liberia and Sierra Leone - as a group export the least to the region (USD 82m or 0.6% of total regional export). However, of Guinea Bissau's total imports, almost 25% is from the region.

6.4.2 Imports from the region

Imports from the other countries of the region are by definition the same as exports to the region that is about USD 14 billion. But as a % of total imports they were rather more at 13.0%.

Cote d'Ivoire's imports of USD 3.0 billion are the highest for the region accounting for more than 23% of the total; Ghana and Nigeria are the second and third largest importers from the region with USD 1.8 billion and US\$ 1.5 billion respectively, these being about 15% and 12% of the total imports from within the region. Cote d'Ivoire also has the highest share of imports from the region (31.1%) followed by Guinea Bissau (24.9%)

The five countries bordered by Cote d'Ivoire, Mali and Senegal – The Gambia, Guinea, Guinea Bissau, Liberia and Sierra Leone - as a group import USD 1,227 or 9.6% of total regional import, which is about average.

7. TRADE BY WEIGHT & VOLUME

International trade flows in the ECOWAS region are made up of traffic to and from the region, which is almost all maritime trade, and intra-regional trade among ECOWAS member countries, which is almost all by road. The table below, which summarizes maritime traffic through the major West African ports and transit to the land-locked countries, shows that total maritime imports and exports through the major ports amounted to 163 million tonnes in 2012. Meanwhile, air cargo traffic amounted to 1.7 million tonnes in 2013, or about 1 percent of the volume of maritime traffic. Air cargo however typically represents 35 percent of trade value⁴⁴.

Table 16 - Selected countries and port traffic

Selected Port Countries	Population ⁴⁵	GDP per capita ⁴⁶	Port throughput ⁴⁷	Import	Transit & Transhipment	TEU ⁴⁸	Comment
Unit	(Million)	(USD)	(Million tonnes)			('000)	
Nigeria, Lagos	175	2,884	77.1	46.2	-	995	Largest ports in West Africa
Benin, Cotonou	10	794	7.4	2.9	3.4	210	More than 50% transit
Togo, Lomé	7	584	7.8	3.5	3.3	350	Transit important – 1 Mt clinker to Ghana
Ghana, Tema	27	1,474	18.8	11.8	2.5	750	Large container port – 80% of Ghana imp.
Ghana, Takoradi			5.3	2.4	-	61	Oil & gas service port – 80% of Ghana exp.

⁴⁴ Boeings World Air Cargo Forecast 2014–2015

⁴⁵ ECOWAS website – the population of all of the 15 member states is about 340 million

⁴⁶ ECOWAS website

⁴⁷ Ports' & Shippers Councils' statistics (2012), except for Niger (2011)

⁴⁸ Market study on container terminals in West and Central Africa (2013) MLTC/CATRAM – 2011 data

CI, Abidjan	24 ⁴⁹	1,302	24.9	12.5	3.3	546	Second largest port in WA
CI, San Pedro			3.2	0.4	1.8	246	Trans-shipment 2/3 of port traffic
Guinea, Conakry	11	1,082	7.0	3.3	0.1	144	Closest port to Bamako
Senegal, Dakar	14	1,057	11.9	7.1	2.9	600	Fourth Largest Port
Sub-Total	268	163.4	90.1	17.3	3,902		
<u>Landlocked Countries</u>							
Niger	17.1	399	1.9	1.7			Export estimated at 10% of import
Burkina Faso	17.3	790	2.4	2.2			
Mali	14.5	631	4.1	3.7			
Sub-Total	48.9		8.4	7.6		10.5	

Source: Compiled by author

Coastal countries' maritime cargo volumes are approximately proportional to country populations, the biggest importer being Nigeria followed by Côte d'Ivoire and Ghana. Exports from coastal countries are equivalent to about 40 percent of imports, reflecting the structural imbalance in trade in West Africa. Imports to landlocked countries account for less than 10 percent of total WA imports and about 50 percent less per capita compared to coastal countries, reflecting the relative poverty of land-locked countries. More detailed statistics can be found in the section dealing with the individual ports and corridors.

PIDA forecasts that traffic volumes in West Africa will grow from 7 million tonnes (mt) in 2007 to 176mt in 2020, to 300mt in 2030 and to 556mt in 2040⁵⁰.

Most of the available information concerning inter-regional trade volumes and traffic flows along the corridors comes from a 2012 study by JICA: "*Data Collection Survey on Traffic for International Port and International Corridor in Western Africa*"⁵¹ or the "*JICA Traffic Survey*" for short. In this Survey, JICA counted vehicles at 20 points in the UEMOA region and Ghana, and interviewed drivers as to the type and volume of cargo they carried and its origin

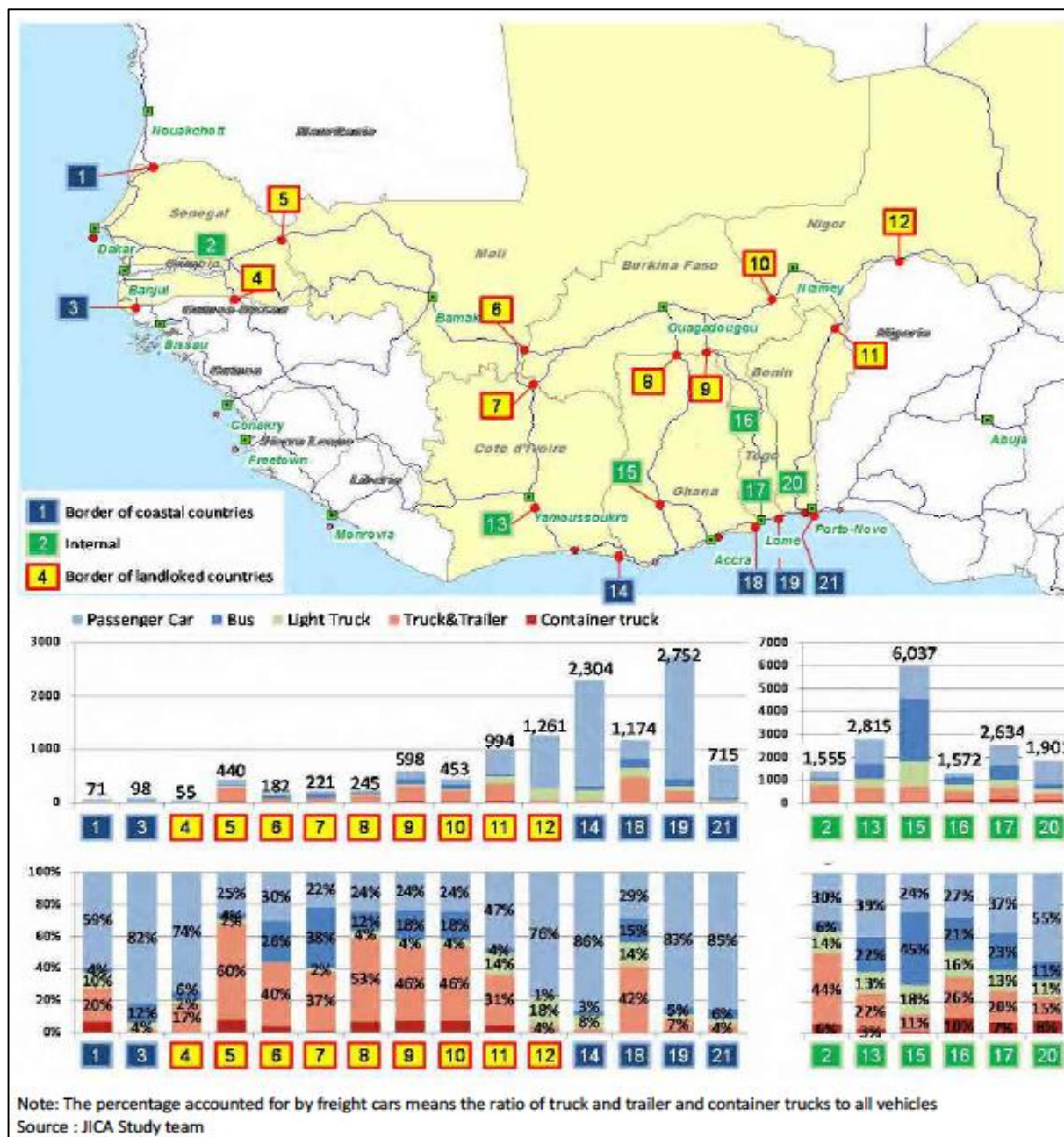
⁴⁹ 2014 estimate - Wikipedia

⁵⁰ Programme for Infrastructure Development in Africa (PIDA) - Africa Transport Sector Phase III Report

⁵¹ The JICA Traffic Survey can be found on the Borderless website

and destination. The survey points are shown in the Figure below as well as the average daily number and type of vehicles. At each survey point, JICA counted vehicles and interviewed drivers for a period of 4 days.

Figure 7 - Average daily traffic and percentages accounted for by each vehicle type



Observations:

- The heaviest traffic in the region is in the southern half of the coastal countries, which is also where most people live and most economic activity takes place. The busiest road is near Kumasi, GH (point 15) with more than 6,000 vehicles per day of which 11 percent (664) are heavy trucks; followed by Yamoussoukro, CI (point 13) with 2,800 vehicles per day of which 27 percent (760) are heavy trucks.
- As for transit traffic, the busiest corridor is Cotounou-Niamey (point 11) with 1,261 vehicles per day of which 31 percent (391) are heavy trucks counted at the

border crossing. The second busiest corridor is Lomé-Ouagadougou (point 9) with 598 vehicles per day of which 46 percent (275) are heavy trucks; the third being the Senegal/Mali crossing (point 5) with 440 vehicles per day (264 heavy trucks). All other landlocked border crossings registered fewer than 250 vehicles and not more than 130 heavy trucks per day.

- The Abidjan-Lagos corridor is dominated by people travelling by bus or private vehicles. The busiest crossing is between Benin/Togo (point 19) with 2,752 vehicles per day of which 83 percent were private vehicles and only 7 percent (193) were heavy trucks. The second busiest crossing is at Elubo between Ghana and Cote d'Ivoire (point 14) with 2,304 vehicles per day of which 17 percent (391) are heavy trucks.

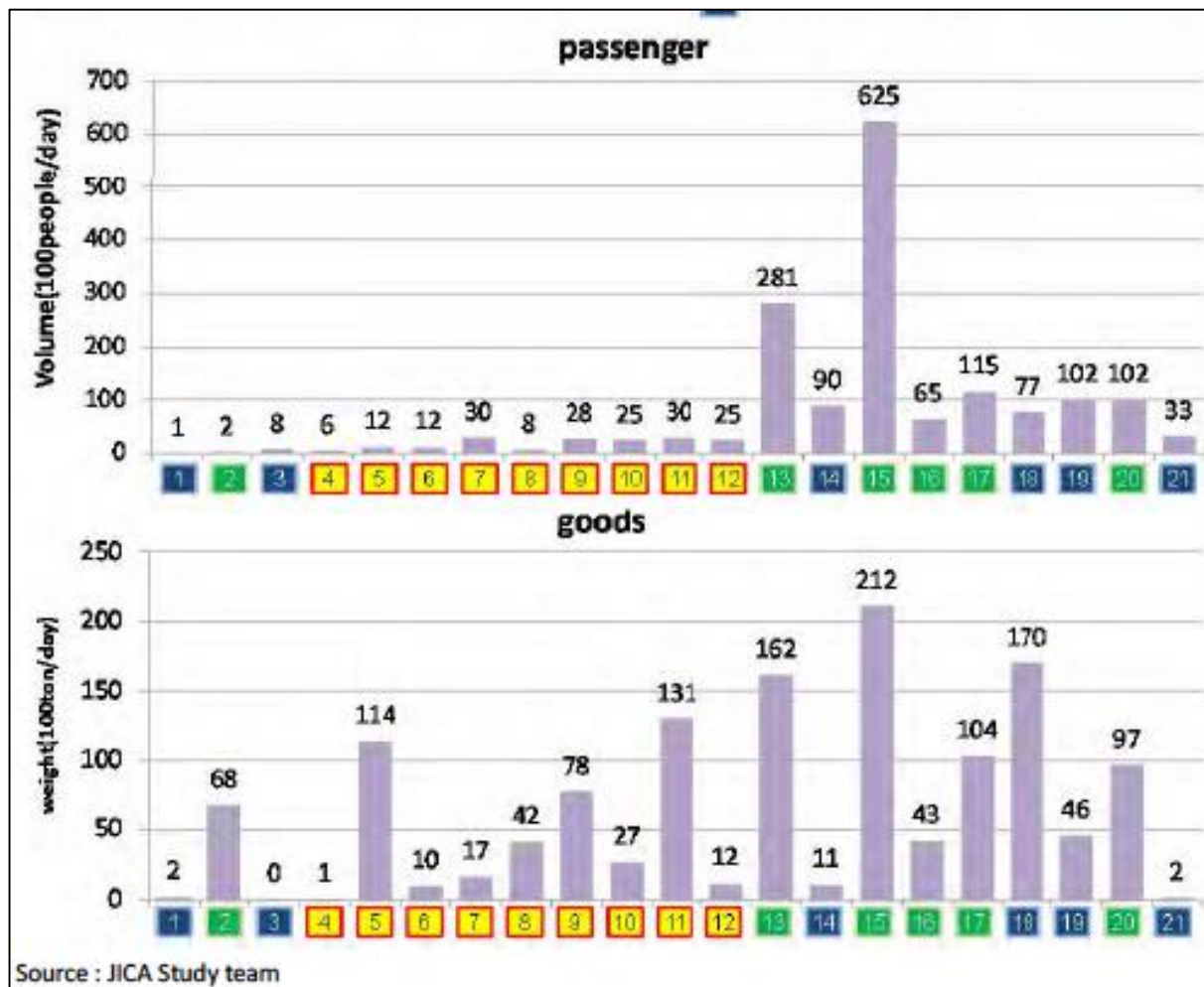
Table 17 - Daily international traffic along selected corridors

Corridor	Survey point	Vehicles Total	Trucks	Cargo (tonnes)	Passengers	Transit/ Intra-regional	Empty Trucks Export
Dakar-Bamako	5	440	264	11,400	1,200	18/82 %	
Bamako-Ouaga	6	182	73	1,000	1,200	16/84 %	
Abidjan-Ouaga	7	221	82	1,700	3,000	39/61 %	74%
Tema-Ouaga	8	245	130	4,200	800	54/46 %	61%
Lomé-Ouaga	9	598	275	7,800	2,800	51/49 %	75%
Ouaga-Niamey	10	453	208	2,700	2,500	33/67 %	
Cotonou-Niamey	11	994	308	13,100	3,000	64/36 %	
<u>Abidjan-Lagos</u>							
CI-GH	14	2,304	69	1,100	9,000		
GH-TG	18	1,174	493	17,000	7,700		
TG-BJ	19	2,752	193	4,600	10,200		
BJ-NG	21	715	29	200	3,300		

Source: JICA Traffic Study - Compiled by author

The figure below shows the number of people and the volume of cargo per day at the various JICA control points.

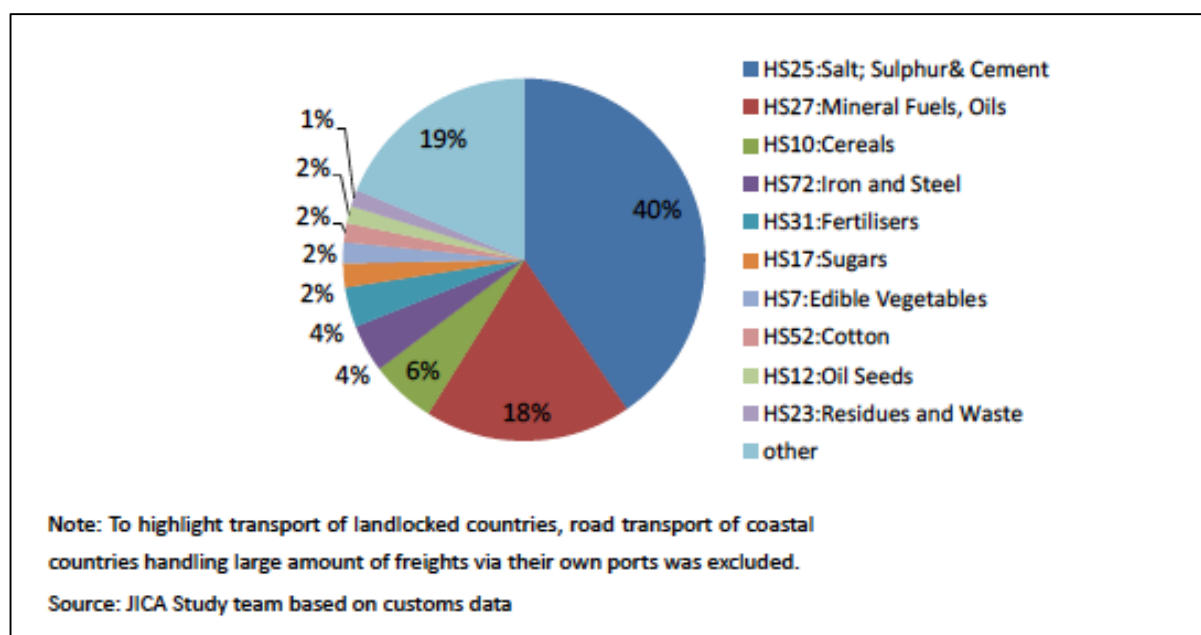
Figure 8 - Average daily passenger and cargo traffic



Observations:

- Most passenger and cargo traffic is in the lower coastal countries with the busiest survey point being near Kumasi, Ghana (point 15) with 62,500 people and 21,200 tonnes per day followed by the survey point near Yamoussoukro in Côte d'Ivoire.
- Transit corridors in general have little passenger traffic. The one with the heaviest cargo traffic is Cotonou-Niamey (point 11) with 13,100t per day followed by Lomé-Ouagadougou (point 9) and Dakar-Bamako (point 5).
- Passenger traffic along the Abidjan-Lagos corridor (points 14, 18, 19 and 21) is about 10,000 people per day while cargo traffic vary considerably between a low of 200t per day at the Benin/Nigeria border and a high of 17,000t per day at the Ghana/Togo border.

Figure 9 below shows the average daily cargo traffic per commodity type.

Figure 9 - Average daily cargo traffic per commodity type

Less than a million tonnes of cargo per year is currently moved on the railway corridors Abidjan-Ouagadougou and Dakar-Bamako.

8. ROAD TRANSPORT SERVICES

Since the end of the 1980s, the organization of road transport in West Africa has undergone far-reaching changes, including for example the liberalization of transport. The transport services markets, which are open and highly competitive, are thus occupied by a multitude of private informal transport operators. Access to the profession is open and prices have been deregulated. To protect their interests and those of the profession, the professional transport operators have therefore formed national associations and trade unions, and regional transporters' cooperatives.⁵²

With its low wages, Africa's transport costs and prices should be low - probably the lowest in the world - since the trucking industry is a labour-intensive activity. But instead the cost of transport (to users) in West Africa is among the highest in the world. For example, in 2007, average transport prices were three times higher in West Africa than in Pakistan. Paradoxically, Africa's high transport prices are accompanied by poor service quality, on average below other regions in the world.⁵³

However, in contrast to prices, transport costs in Africa are not excessively higher than in Western Europe. Variable costs in Africa are higher because of:

- High fuel costs;
- The age of truck fleets, which leads to higher maintenance costs and fuel consumption; and
- Road conditions that are probably the worst in the world.

However, offsetting high variable costs, fixed costs are much lower in Africa than in Europe because of much lower wages and the lower capital costs associated with old trucks.

⁵² Teravaninthorn & Raballand, Transport prices and costs in Africa: A review of the main international corridors (2009)

⁵³ Ibid - USD 0.02 per tonne-kilometer (t-km) compared to USD 0.07/t-km on the Lomé-Ouagadougou corridor

According to the World Bank Report “*Transport prices and costs in Africa*”, the high transport prices are mainly a result of high profit mark-ups - up to 80 percent - which are possible due to the oligopolistic nature of the industry. A USAID report reviewing this hypothesis agreed that some corridors, particularly those leading to Niger, suffered from cartels and oligopolies as described in the World Bank report, but in other cases, such as corridors starting from Abidjan and Tema, oligopolies and cartels had limited impact.⁵⁴ The USAID report also found that profit margins were more around 20 percent, and that transporters in fact had a hard time making ends meet without overloading their trucks.

The high costs of transport to land-locked countries in West Africa can to a large extent be explained by the following inefficiencies:

- Low level of truck utilization, which results in few revenue-tonne-kilometres. Although the travel times on most corridors are about 4-5 days, which is long but not extremely so for distances of about 1,200 km (average speed of 30-40 km/h), turn-around times for trucks are on average often 3 to 4 times longer because of excessive waiting times in ports and inland terminals (see table 18 below).
- Unbalanced trade with import volumes often being four times those of exports, which results in little or no backhaul cargo. In fact, efficient operators do not bother to look for backhaul cargo as they consider it a waste of time.
- In the too rare cases that containers are used for the transit leg, many trucks have to wait until the goods have been cleared and the container emptied so that they can return it to the shipping line before demurrage charges are imposed.
- The many checkpoints, which cause delays and increase costs because of the bribes that are expected, or offered. This is particularly bad for trucks carrying perishable agricultural products.
- The lack of effective freight exchanges to match shippers and transporters.
- Bad road conditions, which oblige trucks to drive very slowly and increase the incidence of breakdowns. However, in recent years many international corridors have been upgraded or re-built and are now, in general, in fair to good condition. As road maintenance funds seldom are sufficient to meet actual needs, this positive situation may not last.
- Transit highways have many speed bumps and few bypass towns, villages and hamlets along the way.
- Congestion is a serious issue, particularly in the southern part of the coastal countries and in and around larger towns and port cities. This situation is getting worse as people with improved living standards buy more cars. Furthermore, wherever there is congestion, street hawkers appear making the congestion worse and traffic more hazardous.
- Most trucks are excessively old – 25 years and older - which results in frequent breakdowns and high maintenance costs.
- Transport companies are too small and unprofessional. In Benin for example, two-thirds of all transporters own only one truck.
- The failure of vehicle inspection organizations to prevent old dilapidated trucks, which are prone to breakdowns, from being used.

⁵⁴ USAID West Africa Trade Hub - Trucking To West Africa's Landlocked Countries: Market Structure and Conduct (2010)

Table 18 - Average travel and truck turn-around time⁵⁵ for imports

Corridor	Distance (km)	Average travel time & Range (days)	Average turn-around time & range (days)	Travel/Total
Lomé-Ouaga	1,020	4.5 (2-7)	22 (9-47)	21%
Tema-Ouaga	1,057	4.3 (1-9)	23.6 (14-37)	18%
Abidjan-Ouaga	1,228	5.2 (4-8)	14.5 (7-46)	36%
Abidjan-Bamako	1,238	4.6 (4-6)	13.6 (3-37)	34%
Dakar-Bamako	1,387	4.1 (3-5)	14 (7-23)	29%

Source: West Africa Trade Hub Corridor Road Governance Reports – Compiled by author

ALCO conducted a study, funded by the World Bank, on the transport industry in Niger and Benin in 2014 and found that in Niger (mainly Niamey), 122 large companies with 4,241 trucks dominate the transport sector.⁵⁶ They coexist with a large number of companies with only a few trucks. In Benin the total truck fleet was reported to be 35,404 vehicles with about 10,000 owners having just a single truck, 4,500 small transporters operating with an average of 2.5 trucks each, and 1400 medium-sized operators having an average of 10 trucks each. The 16 largest transport companies have fleets of an average of 84 trucks each.

The fleets of Niger and Benin are generally very old and dilapidated, with an average age of the Nigerien fleet over 25 years and that of Benin over 27 years. Few transporters have their own storage or warehousing facilities and generally use public areas for parking their trucks. Access to the profession is open: All that is required in Niger, for example, is for the owner to a) be over 21 years of age, b) not be a government employee, c) have obtained an authorisation to transport goods, and d) be registered with the commercial registry “*registre de commerce*”.

Reform of the road transport sector is essential in order to increase efficiencies and lower transport costs. To that effect, the World Bank agreed in May 2015 a Development Policy Operation with the governments of Côte d’Ivoire and Burkina Faso whereby the two governments commit to implementing transport sector reforms in return for a USD 50 million loan to each country⁵⁷. This project focuses on professionalizing the trucking industry.

9. ROAD NETWORKS

More than 90 percent of the movement of freight and passengers in the ECOWAS region takes place by road. Still, the ECOWAS region only has about 4.7km of road per 100km², which is lower than the average of 6.8km for the African continent as a whole⁵⁸.

⁵⁵ “Turnaround-time” here I defined as waiting in port before departure, travel to land-locked country, and waiting at inland terminal before departure for return trip. It does not include the travel time of the return trip itself (about 2-3 days)

⁵⁶ ALCO, l’Industrie du transport au Niger et au Benin (Dec 2014)

⁵⁷ WB, Burkina Faso and Republic of Cote d’Ivoire - First Regional Trade Facilitation and Competitiveness Development Policy Operation Project (May 2015)

⁵⁸ ECOWAS Community Development Program Draft1 (2012)

West Africa's trunk road network comprises strategic trading corridors linking deep-sea ports to economic hinterlands. These corridors, which carry about USD 200 billion of trade a year, include about 15,000 km of road.

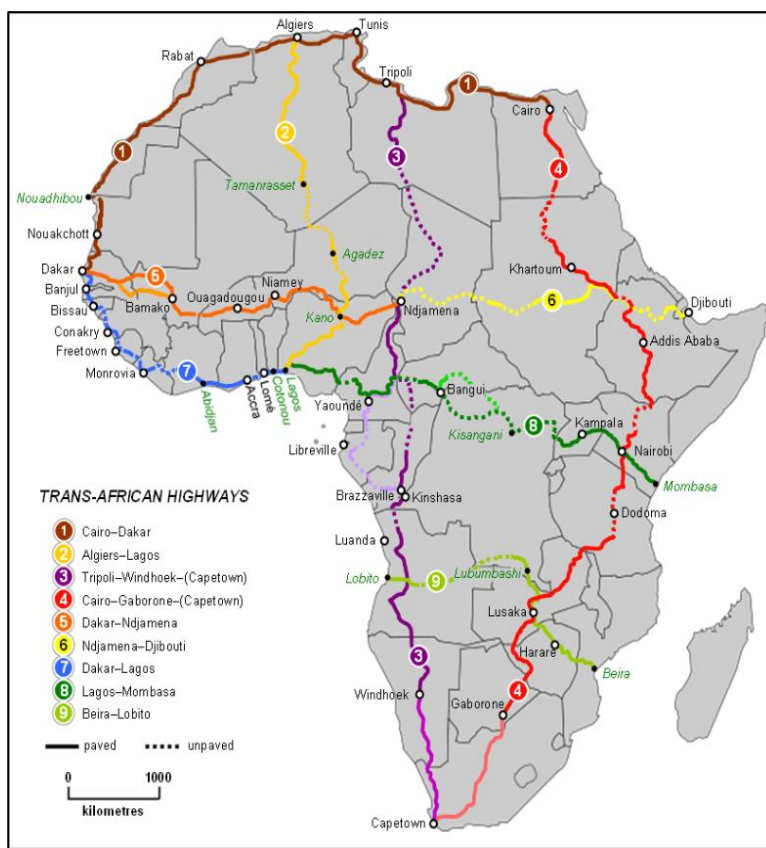
The concept of an intraregional trunk network, or Trans-African Highway, remains a distant reality because of missing links and poor maintenance on key segments. Between 60,000 and 100,000 km of road are required to provide such intra-continental connectivity. Africa's national road density is substantially lower than that in other developing regions: only 204 kilometres of road per 1,000 square kilometres of land area, with only one-quarter paved, compared with a world average of 944 kilometres per 1,000 square kilometres, with more than half paved. That density is less than 30 percent of the next-lowest region, South Asia. Relative to GDP, however, Sub-Saharan Africa has a large road network. In Madagascar, Malawi, Mozambique, and Niger, the asset value of the road network exceeds 30 percent of GDP, an indication of the consequently large economic burden of maintenance⁵⁹.

The West African regional network comprises the Trans-Coastal Highway (4,000km) between Dakar and Lagos, the Trans-Saharan Highway (5,400km) between Dakar and Ndjamena of the Trans Africa Highway system, and the interconnecting roads, which link up the coastal countries with their land-locked neighbours.

The national road systems are briefly summarized below, from East to West.

Nigeria has a total road network of 193,200 km, of which the Federal government owns 17 percent while the States and Local Government Councils own 16 and 68 percent respectively. Almost 20 percent of the main roads are paved. The most recent visual and qualitative condition assessment of Federal roads (March 2011) revealed that only 26.5 percent of the Federal roads were rated as being in a good condition. The average annual expenditure on road maintenance between 2008 and 2010 was USD 329 million, which represents just 50 percent of the amount required⁶⁰.

Figure 10 - The Trans-African Highway Network



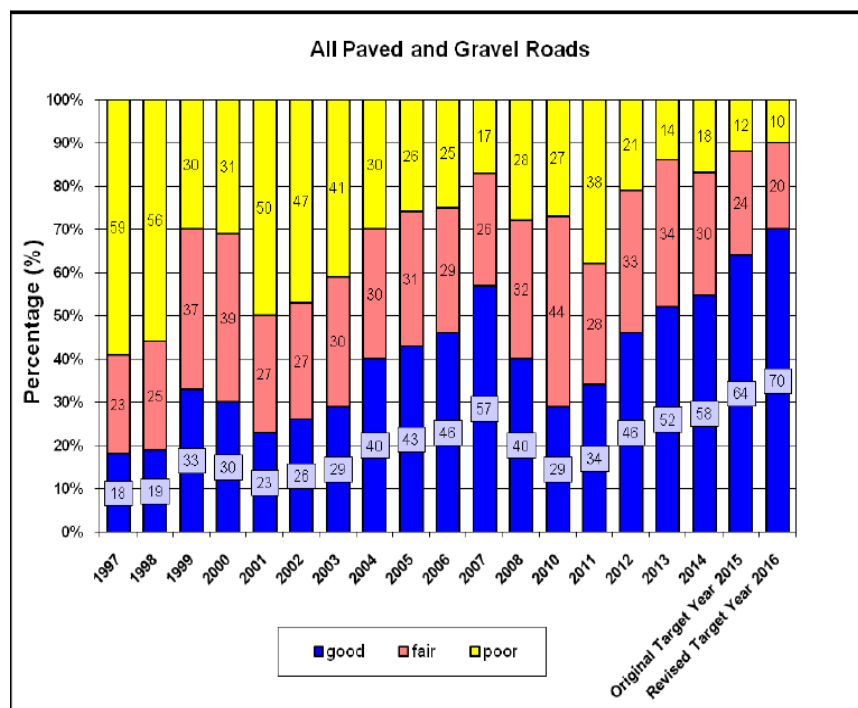
⁵⁹ Foster & Briceño-Garmendia - Africa's Infrastructure - A Time for Transformation, AFD/WB (2010)

⁶⁰ Federal Ministry of Works Draft Green Paper on Federal Roads and Bridges Tolling Policy (2013); and <http://dlca.logcluster.org/display/public/DLCA/2.3+Nigeria+Road+Network;jsessionid=54C83399113FF11260C5F544206BAE0D>

In **Benin**, the total length of the national road network amounted to 5,945 km in 2011. Paved roads account for 37 percent (2,212 km) of the total length.

Togo's road network has about 11,750 km classified as national paved roads 1,750 km; unpaved roads 1,600 km; urban roads 1,400 km; classified rural roads 1,000 km, and unclassified rural roads 6,000 km. The percentage of roads in "good condition," was 33 percent for the national paved roads in 2005 but fell to 5 percent in 2012⁶¹.

Figure 11 - Road condition in Ghana



Ghana: The road network in Ghana was 68,053 km at the end of 2010. 19 percent was trunk roads, 62 percent feeder roads and 19 percent urban roads. In 2010, 21 percent of the total road length was paved. Ghana also has a limited rail network in the southern half of the country, which has deteriorated considerably, and an underdeveloped inland water transport system on Lake Volta.

The Ghana Highway Authority (GHA) 2013 Road Condition report shows how the quality of Ghanaian trunk roads has been on a roller coaster over the last ten years. The proportion of trunk roads in good condition improved from a low of 25 percent in 2001 to a relatively high 57 percent in 2007 after which it deteriorated considerably to 27 percent until 2010 and then improved again to the extent that in 2013, 52 percent of roads were considered good, with 34 percent in fair and 14 percent in poor condition.

In **Côte d'Ivoire**, the Road Maintenance Fund mobilizes resources for the national road maintenance program and the *Agence de Gestion des Routes* evaluates and controls maintenance work. On the Abidjan-Ouagadougou corridor, according to a field survey and interviews with truckers, 70 percent of road sections are in good or fair condition and 30 percent (307 km) are in poor condition.

In **Burkina Faso**, road maintenance is managed by a government agency, the *Fond d'Entretien Routier du Burkina*.

Personal experience of road conditions in West Africa: During the summers of 2013 and 2014 and in Spring 2015 two of the authors had the opportunity to drive about 10,000 km through Ghana, Togo, Benin, Burkina Faso, Mali and Côte d'Ivoire and noted that road conditions had improved dramatically since 2009, particularly along the Abidjan-Lagos corridor from Accra to just before Cotonou, and from Accra to Kumasi. Road conditions were also in general very good in the northern parts of coastal countries and in Burkina Faso and

⁶¹ JICA Traffic Survey

Mali (except for the Bamako-Segou stretch which is very bad). The Tema-Ouaga corridor's roads are also in very good or satisfactory conditions.

Even the road in northern Côte d'Ivoire from the border with Burkina Faso to Yamoussoukro was quite good except that it had hardly any shoulders, a problem when trucks break down. Driving on these roads one has to be constantly vigilant, as even good roads may have surprise stretches of potholes, which happen without warning. Although a road is good this year it may not be so good next year, because of damage by overloaded trucks and/or inadequate maintenance.

9.1 Road conservation and axle load control

Middle-income countries and those with high fuel levies tend to spend more on maintenance without incurring higher road expenditure overall. This finding shows that timely attention to maintenance reduces the expenditure needed to sustain the road system in the long term⁶². Good governance is critical for safeguarding road quality through budget finance and a professionally competent public sector implementation agency.

Countries with road funds and high fuel levies are substantially more successful at raising finance that translates into higher road maintenance expenditures. Countries with road funds and quasi-independent road agencies show substantially higher quality on main road networks.

The AfDB has reviewed the cost of building roads in Africa and found the following median cost in USD per lane-km for roads exceeding 100 km⁶³:

- Construction of Paved Roads
USD 2.3 million
- Rehabilitation of paved roads
USD 0.8 million
- Periodic maintenance of paved roads
USD 0.6 million
- Periodic maintenance of unpaved roads
USD 0,1 million

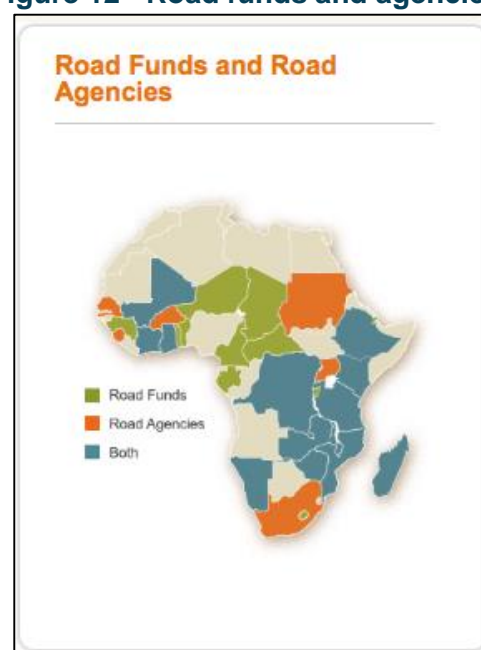
In other words, periodic maintenance is less expensive than rehabilitating paved roads, and a lot less expensive than constructing new roads.

West African governments follow a two-pronged strategy for conserving roads. One is to ensure funding for maintenance through road maintenance funds and special road agencies, which receive financing through fuel levies and road tolls. The other is to avoid premature wear, tear and outright damage by controlling the allowable axle load.

9.2 Funding road maintenance

Finding the necessary funds to maintain existing roads is a perennial problem in Africa. In order to solve this critical issue, a number of countries, with the support of the World Bank,

Figure 12 - Road funds and agencies



Source: World Bank - ECOWAS's Infrastructure A Regional Perspective (Dec 2011)

⁶² WB - Africa's Infrastructure - A Time for Transformation, 2010

⁶³ AfDB - Study on Road Infrastructure Costs: Analysis of Unit Costs and Cost Overruns of Road Infrastructure Projects in Africa, May 2014

have established independent road funds, which are financed by fuel levies or tolls. However not all countries have such funds and in those which do, the fund is seldom adequate. In Ghana for example the Ministry of Roads and Highways estimates that its fund covers about 50 percent of the required expenditures.

9.3 Axle load control

One of West Africa's persistent road transport problems is the prevalence of severely overloaded trucks travelling on the transit corridors, in spite of the fact that as early as 1982 the ECOWAS IST Convention specified a maximum axle load of 11.5t.

The extent of the problem is illustrated in the table below which shows that in 2008 on the Burkinabé Route Nationale 5, the main road to Ghana, 84 per cent of heavy trucks were overloaded with an average load 52 percent above the allowed limit. The maximum axle load measured was 30t per axle, and the heaviest truck carried a load of 142t. In fact, Ghanaian trucks were known in the region to have been specially reinforced to carry extra heavy loads. Trucks overloaded to such an extent present a great hazard to traffic in general as brakes and steering functions are not designed for such loads, and they cause great damage to the roads.

The situation was so bad that the EU, which finances many new roads in the UEMOA sub-region, threatened to stop financing new roads if the countries did not find a way to correct the situation.

Table 19 - Overloaded trucks in Burkina Faso

RN	% PL en surcharge	% moyen de la surcharge	Poids essieu maxi (tonne)	Poids total maxi vehicule (tonne)	Type Vehicule (essieu maxi)	Pays d'immatriculation vehicule le +charge
RN5	84	52	30	142	SR6	Ghana
RN1	47	41	28	141	SR7	Ghana
RN4	74	38	27	104	SR6	Togo
RN8	58	43	22	94	SR4	Burkina

Source: Consia/Sittrass Etude des Impacts de la Reduction des Charges des Vehicules Poids Lourds, Oct 2008

UEMOA responded to this challenge with a regulation "Règlement 14/2005/CM/UEMOA" which re-confirmed the ECOWAS maximum axle load of 11.5t per axle, and also provided a plan for its implementation. Progress has been slow, but ten years after introduction of the Regulations, most countries have installed weighbridges and started to control axle loads, or overall loads when axle loads cannot be measured directly.

There are still many remaining problems with the control of axle loads such as:

- Some weighbridge operators accept bribes to ignore overloaded trucks;
- The acceptable tolerance is not harmonized among UEMOA member states and Ghana;
- Transporters complain that weighbridges are poorly calibrated so that a truck that passes one weighbridge is found at the next to be overloaded, and fined;

- A shortage of weighbridges and mobile axle load monitoring devices;
- Truck drivers find ways to circumvent the weigh stations.

The situation in selected countries is reviewed below.

Nigeria: The Ministry has drafted new regulations ‘*Federal Highways Control of Dimensions, Weights and Axle Load of Goods Regulations, 2014*’, whereby states are expected to equip road corridors with weighing facilities within 6 months and to sensitize all stakeholders. The Ministry is currently constructing 15 weighbridges along major arterial roads while the Road Sector Development Team of the Ministry is also in the process of procuring axle load control and weigh stations⁶⁴.

Benin started implementing UEMOA axle load regulations⁶⁵ in 2010 and reports continued improvements, with the number of overloaded trucks falling from 83 percent in 2011 to 37 percent in 2014 and with the number of trucks with axle loads above 20t falling from 10 percent in 2011 to 2 percent in 2014⁶⁶.

Niger reports the following extent of overloading at three weighbridges in 2015:

- Makalondi 80 percent (near the border with Burkina Faso at Kantchari).
- Sorey 65 percent (near Niamey on the road south to the Benin border).
- Konni 78 percent (on the border with Nigeria halfway to Maradi).

Togo: The table below shows the results obtained in May 2015, which is typical for all months of 2015. Approximately 40 percent of trucks are overloaded but on average only by 6 percent. No truck should have an overall weight of more than 51 tonnes but the heaviest truck controlled in May remarkably weighed as much as 112.5t.

Table 20 - Statistics from the Djerehouye weighbridge 180 km north of Lomé

	Trucks weighed	% Overloaded Trucks	Average extent of overload	Heaviest loaded truck	Heaviest axle load
May-15	9 434	37,63	6%	112,5t	26,08t

Source: *Workshop on Axle Load Control, Ouagadougou June 17-18, 2015*

The largest axle load at 26t was more than twice the legal limit of 11.5t. In January 2015 the heaviest truck weighed in at 117t and in March 2015 the heaviest axle load was 29t.

Ghana was the first country in the ECOWAS region to take axle load control seriously. At first it attempted to enforce the maximum of 51t gross weight for 6-axle trucks in accordance with ECOWAS rules and UEMOA regulations.⁶⁷ However neighbouring countries such as Benin, Togo, Niger and Burkina Faso are enforcing 68 tonnes for the 6-axle trucks. So as a compromise Ghana is currently enforcing 60 tonnes for 6-axle trucks. Loads in excess of the allowable limits are offloaded. Ghana has 15 permanent weighbridges and 8 mobile weighing units. There has been a significant decline in the overloading trend from about 14

⁶⁴ Delmas - TRADE-WATCH ISSUE 42 | NOVEMBER 2014

⁶⁵ Règlement N°14/2005/Cm/UEMOA relatif à l'harmonisation des normes et des procédures du contrôle du gabarit, du poids, et de la charge à l'essieu des véhicules lourds de transport de marchandises dans les états membres de l'UEMOA

⁶⁶ Présentation - Réunion du comité de pilotage chargé du suivi et de l'évaluation de la mise en œuvre du programme d'actions communautaire des infrastructures et du transport routiers (PACITR) – Ouagadougou 17-18 June 2015

⁶⁷ Règlement 14/2005/CM/UEMOA

percent in January 2014 to less than 3 percent in December 2014. Total overloading penalties collected during the year under review (2014) amounted to GHS 3,010,562.93 (about one million USD).⁶⁸

According to the Ghana Ministry of Roads and Highways, the axle load situation could be much better if the following challenges are addressed:

- Low level of commitment on the part of UEMOA countries to implement the limits specified by ECOWAS;⁶⁹
- Corruption at weighbridge stations;
- Inadequate parking space along the corridors for overloaded vehicles to shed excess loads;
- The threat of increased cost of haulage and its effect on prices of goods and services, as well as diversion of transit cargo;
- Lack of vehicles for the use of supervisors;
- Tendency for overloaded trucks to abscond (speed off) - Lack of commitment from police, budgetary constraints.

Burkina Faso reports that during the 5 quarters from Q1 2014 to Q1 2015, almost 154,000 trucks were controlled of which about 9,000 were overloaded. There seems to be a positive trend in that the proportion of overloaded trucks went from close to 8 percent in Q1 2014 to less than 3.5 percent in Q1 2015.

Table 21 - Burkina Faso - Results from weigh stations from Q1 2014 to Q1 2015

Localite	T1-2014	T2-2014	T3-2014	T4-2014	T1-2015	Total
Bittou	729	740	527	479	282	2,757
Dakola	278	366	352	221	164	1,381
Faramana	121	162	72	69	76	500
Koloko	305	242	189	241	271	1,248
Niangoloko	383	569	446	258	182	1,838
Ouessa	264	365	228	157	197	1,211
Véhicule en surcharge	2,080	2,444	1,814	1,425	1,172	8,935
Total véh contrôlés	26,705	33,156	29,246	29,601	34,685	153,393
% en surcharge	7,79	7,37	6,20	4,81	3,37	5,82

Mali introduced *l'Instruction inter-ministerielle No 9003* dated August 5, 2009 *fixant les modalités de contrôle de la charge à l'essieu* in which the acceptable axle load was set at 14t, about 22 percent above the ECOWAS limit of 11.5t.⁷⁰ We do not know the current status of implementation.

Côte d'Ivoire started reporting axle loads and applying fines for overloaded trucks rather late, in November 2014. There are currently 5 weigh stations along roads in the south. The first and busiest weigh station is Alokoi on the A3 Highway going north. During the 1st

⁶⁸ Ministry of Roads & Highways - Status of Axle Load Implementation Programme Annual report 2014, Jan 2015

⁶⁹ Supplementary ACT/SP. 17/02/12 Relating to the Harmonization of Standards and Procedures for the Control of Dimensions, Weight and Axle Load of Goods Vehicle within member states of ECOWAS

⁷⁰ <http://www.arfer-mali.net/>

quarter of 2015 it controlled about 16,000 vehicles per month and consistently found that about 65 percent were overloaded, but the amount of overloading is not reported.⁷¹ Côte d'Ivoire has plans to install six weigh stations and to use mobile units at the borders while Joint Border Posts are being built.⁷²

CI has identified 84 enterprises generating more than 200,000t of annual traffic and which therefore require permanent weighbridges. Of these enterprises, 31 have their own weighbridges but none is equipped to control axle weights.

The CI ports, Abidjan and San Pedro, have until September 2015 to become operational regarding axle load control. Abidjan port has three mobile axle load units on order which were supposed to have been delivered by the end of June 2015.

Senegal. In 2012, the government of Senegal awarded a 20-year contract to Africa Weighing SA, for the concerted and progressive control of axle loads. Sixteen fixed weighbridges are planned and eleven are operational. Of these eleven, eight are fixed and three are mobile units. The concessionaire will complete the construction of all 16 fixed posts in late December 2015.⁷³

Senegal is working on the following measures in support of the axle load control programme:

- Replacing 1600 heavy trucks. A pilot phase is underway for the renewal of 202 units for XOF 15 billion (about USD 30 million) with funding from the Bank of Africa (BOA) and the Banque Nationale pour le Développement Économique (BNDE);
- Training road transport stakeholders in the techniques of proper loading and load distribution;
- Reducing fuel prices: discussions are underway between the road transport stakeholders and ministries involved.

9.4 Funding road building

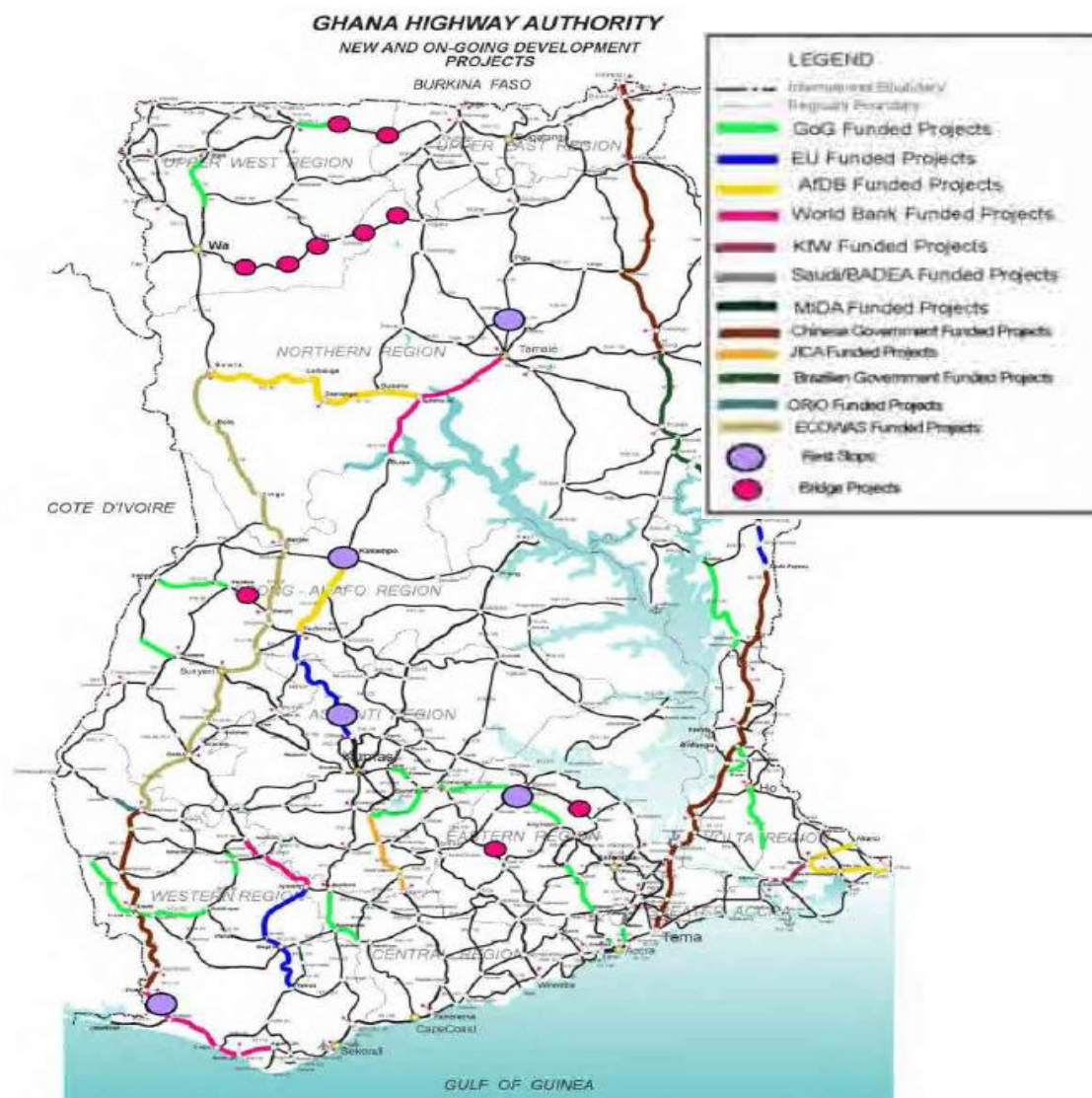
Building roads is expensive and the funding can be complex. The Figure below illustrates the many players involved in the funding road constructions using Ghana as an example where no less than 12 development agencies are contributing. The situation in other countries is presumably equally complex.

⁷¹ Overload is defined as exceeding the UEMOA stipulated maximum total load of 51t plus 20% tolerance

⁷² CI Presentation at the Ouagadougou June 17-18 workshop 2015

⁷³ SG Presentation at the Ouagadougou June 17-18 workshop 2015

Figure 13 - Ghana road funding



Source: JICA – Traffic Survey 2012

9.5 Road issues – general across the region

- Road and highway density is low;
- Road maintenance funds inadequate (Ghana's & Nigeria's cover about 50% of needs);
- Most highways have only one lane in each direction and many have no, or too narrow, shoulders;
- Few city bypasses, i.e. highways go through most towns and villages causing congestion, pollution and safety hazards;
- Much commercial trade goes on along highways in towns and cities;
- Speed bumps are frequent and not always well marked;
- Significant numbers of trucks are still overloaded;

- Inadequate facilities for parking trucks;
- Excessive number of checkpoints causing delays and leading to demands for bribes.

There is a dire need to plan – and acquire the necessary rights-of-way – for a West Africa inter-states highway system, which bypasses villages and urban centres.

10. ROAD GOVERNANCE, CHECKPOINTS AND CONTROLS

Checkpoints and controls along West African trade corridors have been a subject of considerable debate and attention for years. The issue of checkpoints and road governance is so much talked and complained about that one can easily get the impression that if only West African countries managed to rid themselves of all these checkpoints and associated rent-seeking, their transport problems would be solved. This is probably because it is such a visible problem which a large number of road users is subjected to.

However, for “legal” trucks - defined as trucks meeting all legal requirements, driven by a driver with all papers in order both for himself and for the cargo - while checkpoints may be a big problem for the drivers, they are mostly an irritant for the shipper. The overall costs in bribes along roads seldom exceeds USD 100 per voyage compared to a total cost of about USD 4,000 and delays, including border crossings, are seldom more than 5 hours and sometimes as little and one.

For drivers however the checkpoints and controls are very stressful as they may involve confrontations and for them USD 100 is a lot of money. Drivers are usually given a certain amount of money to cover expenditures along the route and the more they are obliged to pay in bribes the less remains for them.

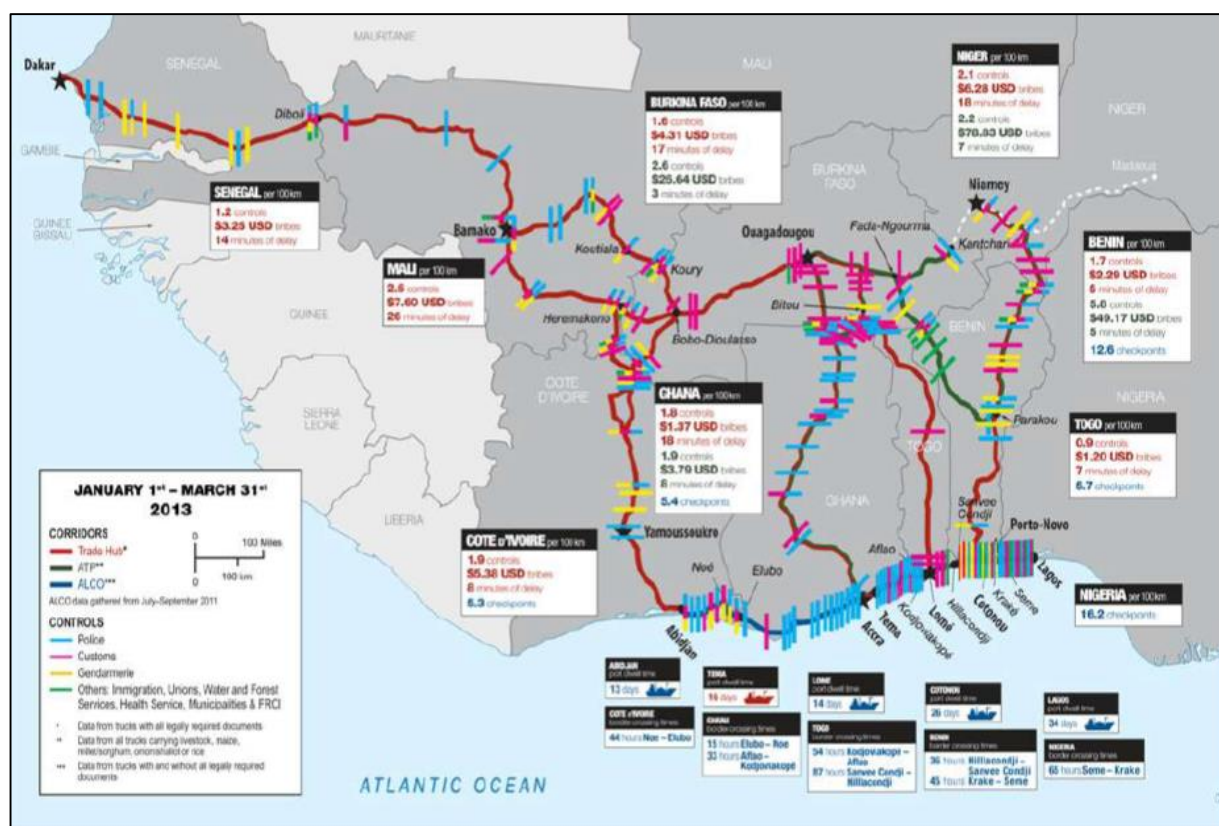
Also, for perishable goods transported by informal operators, the bribes at checkpoints are a real problem and a crippling expenditure, often 3-4 times what “legal” trucks pay and in extreme cases up to twenty times more than a legal truck would pay.

The excessive number of checkpoints and controls along international and inter-state roads in West Africa has been, and still is, an important barrier to the free movement of goods and people. Agents from the police or gendarmerie, customs, forestry departments, and other government agencies usually man these checkpoints, but one also finds transporters' associations and municipalities erecting checkpoints to collect dues or taxes.

The justifications for the road checkpoints usually include the issues of security, diversion of transit cargo, smuggling, carriage of illegal cargoes such as arms and drugs, the need to verify that drivers' and trucks' papers are in order, and to make sure that trucks meet legal requirements. These are all real concerns, but they are seldom resolved by the checkpoints.

ECOWAS and UEMOA have both tried to resolve the checkpoint problem along the region's roads, and in 2005 UEMOA ruled that inter-state road traffic could be controlled only at the point of departure (i.e. a port), at border crossings, and at the point of arrival (i.e. where goods are cleared for consumption). In addition, the Decision specified which agencies can legitimately inspect the goods and means of transport⁷⁴.

⁷⁴ DECISION N°15/2005/CM/UEMOA Portant Modalites Pratiques d'application du Plan Regional de Controle dur les Axes Routiers Inter-Etats de L'UEMOA)

Figure 14: OPA road governance map 1st quarter 2013

In order to achieve that goal both UEMOA and ECOWAS have called for the establishment of “observatories for bad practices”. UEMOA with the assistance of USAID established *l’Observatoire des pratiques anormales* (OPA) in 2008, which started reporting quarterly in the 1st quarter of 2007 until the end of the USAID West Africa Trade Hub project in June 2013⁷⁵. National field agents hosted by either the national shippers’ councils or Chambers of Commerce collected the data directly from truck drivers. UEMOA is still financing the national agents except for Ghana, but there have been no resources for managing the program or publishing the results since the autumn of 2013.⁷⁶ UEMOA wishes to see OPA continue and is looking for support to that end.

OPA collects data from drivers on “legal” trucks. UEMOA reasoned that there were no reasons for cargoes, drivers and trucks meeting all legal requirements to be stopped and harassed and wished to know how such trucks were treated at checkpoints in order to have strong arguments in discussions with the authorities manning the checkpoints. The USAID Agribusiness Trade Promotion (ATP) at the same time collected road harassment data on certain agricultural value chains and ALCO documented the number of checkpoints observed along the Abidjan-Lagos corridor. The OPA report included all these data and the map below shows the result of both OPA and ATP from the last complete report.

Note on checkpoints versus controls: OPA reports the number of controls a truck is subjected to during a voyage whereas ALCO reports the number of checkpoints that are observed along a given corridor. This means that the results from the two monitoring exercises are difficult to compare as trucks are not necessarily stopped at every checkpoint and some checkpoints can be manned by multiple government services – see list of

⁷⁵ OPA has published 24 quarterly reports until the 2nd quarter of 2013 which are available on the Borderless website <http://www.borderlesswa.com>

⁷⁶ After the closure of the West Africa Trade Hub, JICA financed the publication of OPA report #24 which covered the 2nd quarter of 2013, the last quarter in which data was collected by the Trade Hub.

Checkpoints in Mali below.⁷⁷ OPA makes a distinction between border controls, which are admissible and controls along the road, which are not.

Table 22 - List of checkpoints in Mali

Section 1.03 heckpoints	Section 1.04 requency of Stops	Section 1.0 verage bribe (CFA)	Section 1.0 verage control time (min)	Section 1.07 endarmerie	Section 1. olice	Section 1.0 ustoms	Section 1. thers
Diboli Frontiere	100%	3390	38	X	X	X	X
Kati	100%	2931	30	X	X	X	X
Kayes Ba(Kayes Ouest)	100%	2008	22	X	X	X	X
Kayes Ndi (Kayes Est)	100%	1762	19	X	X	X	X
Diema	93%	1189	9	X	X	X	
Kolokani	71%	1052	8	X		X	
Sandaré	34%	1184	9	X		X	
Segala	27%	1194	9	X		X	
Bamako Nord (Samé)	13%	974	2	X			
Diboli Village	8%	3875	33	X	x	x	x
Terminus: Bamako Korofina	3%	800	3	x			

Having multiple controls at each checkpoint is particularly common in Mali. The purpose is to “rationalize” the controls. Mali thus has “only” 11 checkpoints on the Dakar-Bamako corridor, but a potential of 31 controls. In Senegal there are 33 checkpoints and a potential of 45 controls with only 12 checkpoints having more than one control. On a journey from Dakar to Bamako a driver is controlled on average 15 times in Senegal and 12 times in Mali making a total of 27 controls over four days, or almost five per day.

In the region, the number of controls per voyage varies from a high of 37 on the Abidjan-Bamako corridor to a low of 11 on the Cotonou-Niamey corridor⁷⁸. On average a loaded truck carrying transit import is controlled 23 times while a truck returning to a port city, often empty, is on average controlled 14 times. The table below summarizes data collected by OPA including data on truck travel times and turn-around times.

⁷⁷ USAID West Africa Trade Hub, Dakar-Bamako Corridor Road Governance Reports, May 2013

⁷⁸ Cotonou-Niamey has few controls for import transit because the truck has a military person in the truck while in Benin. On the return trip however, the driver is on his own and the average number of controls increases to 14. Bribes too on this corridor are higher on the return trip, the only corridor where that is the case.

Table 23 - Corridor performance – As reported by “legal” drivers (OPA)⁷⁹

Corridor	Corridor Length (km)	Check points	Controls Road + Border	T	Bribes Road + Border ('000 cfa)	T	Delays Road + Border (min)	T	Travel time (days)*	Turnaround time (days)
Cotonou-Niamey	BJ – 770	36	3+0=3	11	2.2+0=2.2	15,1	19+0=19	98	?	?
	NE – 271	11	6+2=8		11.2+1.7=12.9		71+8=79			
Niamey-Cotonou	NE – 271	11	2+1=3	14	3.0+0.8=3.8	19.0	13+5=18	72	?	?
	BJ – 770	36	10+1=11		14.4+0.8=15.2		48+6=54			
Lomé-Ouaga	TG – 746	32	8+3=11	19	5.9+1.9=7.8	15.6	32+26=58	122	4.5	9 - 22 - 47
	BF – 274	18	5+3=8		3.4+4.4=7.8		44+20=64			
Ouaga-Lomé,	BF – 274	18	3+2=5	10	0.8+1.9=2.7	7.0	18+19=37	78	2.6	4 – 12.6 – 21 (L) 1 – 2.4 – 6 (E)
	TG – 746	32	3+2=5		2.1+2.2=4.3		12+29=41			
Tema-Ouaga	GH – 881	45	16+2=18	24	3.9+1.3 = 5.2	13.5	66+102=168	265	4.3	14 – 26.3 – 37
	BF – 176	10	3+3=6		3.2+5.1= 8.3		14+83=97			
Ouaga -Tema,	BF – 176	10	2+2=4	19	2.3+3.7 = 6.0	10.1	3+121=124	300	2.6	?
	GH – 881	45	13+2=15		3.7+0.4 = 4.1		28+148=176			
Abidjan-Ouaga	CI – 718	34	19+3=12	21	23.9+3,5 = 27.4	39.3	71+27=98	165	5.2	9 - 15.3 - 28
	BF – 510	15	5+4=9		4.2+7.7 = 11.9		27+40=67			
Ouaga-Abidjan	BF – 510	15	0+2=2	16	0.2+6.6 = 6.8	27.3	0+13=13	52	2.6	7 – 14.5 – 47 (L) 2 - 2.4 – 6 (E)
	CI – 718	34	13+1=14		17.8+2.7 = 20.5		34+5=39			
Abidjan-Bamako	CI – 776	36	15+2=17	37	15.9+5.3 = 21.2	47.8	51+36=87	234	4.6	3 - 13.6 - 39
	ML – 462	11	16+4=20		18.6+8.0 = 26.6		91+56=147			
Bamako-Abidjan	ML – 462	11	3+1=4	13	5.3+1.5 = 6.8	23.0	20+5=25	53	2.4	2 - 2.8 – 5 (E)
	CI – 776	36	8+1=9		6.7+9.5 = 16.2		15+13=28			
Dakar-Bamako	SG – 682	33	12+3=15	27	10.2+10.5= 20.7	40.0	50+76=126	316	4.1	7 - 14 - 23
	ML – 700	11	9+3=12		9.2+10.1= 19.3		118+72=190			
Bamako- Dakar	ML – 700	11	4+2=6	12	13.4 + nil = 13.4	16.0	193+114=307	396	3.0	4 - 6.4 – 9 (E)
	SG – 682	33	5+1=6		2.6 + nil = 2.6		26+63=89			
Ouaga-Bamako (Northern route)	BF – 488	17	3+3=6	29	4.3+6.7=11.0	50.2	21+51=72	241	3.3	10 – 19.4 – 29 (L)
	ML – 547	30	19+4=23		26.9+12.3=39.2		123+46=169			
Bamako- Ouaga via Koury	ML – 547	30	14+4=18	26	16.2+5.6=21.8	30.6	41+26=67	124	4.0	7 - 18.6 – 38 (L)
	BF – 488	17	6+2=8		5.3+6.5=8.8		32+25=57			
Ouaga-Bamako (Southern route)	BF – 502	17	4+3=7	19	5.3+8.1=13.4	48.7	28+55=83	261	3.2	
	ML – 547	30	8+4=12		21.9+13.4=35.3		114+64=178			
Bamako- Ouaga via Heremakono	ML – 432	30	10+3=13	22	12.7+5.9=18.6	29.1	32+19=51	103	3.9	10 – 16.9 – 28 (L)
	BF – 502	17	6+3=9		4.8+5.7=10.5		32+20=52			

⁷⁹ Note 1: A “Legal” driver has his papers in order, drives a truck meeting all requirements and carrying cargo correctly documented. Source: USAID West Africa Trade Hub, Corridor Road Governance Reports, May 2013; and OPA 23rd report, May 2013 – compiled by author. Note 2: E=Empty; L=Loaded; I=Import, E=Export. T=total. Note 3: * = Average travel time - all trucks, loaded and empty. “Travel time” is the time it takes a truck to drive from origin, say Tema port, to destination, say OuagarInter, the inland terminal in Ouagadougou. Note 4: Turnaround time includes waiting for loading at departure, travel, and waiting at destination.

10.1 Observations on bribes and delays

As shown in Table 23, bribes for import in transit vary from a low of XOF 13,500 (about USD 27) on the Tema-Ouaga corridor to a high of XOF 50,200 (about USD 100) on the Ouagou-Bamako corridor closely followed by the Abidjan-Bamako corridor at XOF 47,800. The average for import in transit is XOF 28,550⁸⁰ while for the return trip it is XOF 17,067 with the lowest being XOF 7,000 on the Ouaga-Lomé corridor.

The average delay, including border-crossing times, is 200 minutes for import in transit and 158 minutes for return trips. The lowest delay for import is 98 minutes on the Cotonou-Niamey corridor and the highest 316 minutes on the Dakar-Bamako corridor. Oddly enough delays on return trips are higher than import on the Bamako-Dakar (396 minutes) and the Ouaga-Tema (300) corridors. We are not sure why that is the case.

One of the reasons that delays are so relatively short in spite of the many controls is that drivers often offer a bribe – without being asked - while presenting their papers and thus are let go quickly.

The average travel time for import vary from 4.1 to 5.2 days and for return trips from 2.4 to 3.0 days. This is somewhat high for distance of 1,050 to 1,400km but not excessively so. The real problem is the excessively slow turn-around times.

The average turn-around time for import is 15,2 days and for return trips the figure stands at 13.5 for loaded trucks and 3.5 days for empty trucks. This means that trucks are spending only about 30% of their time earning money, with obvious implications for profitability, investment and fleet maintenance.

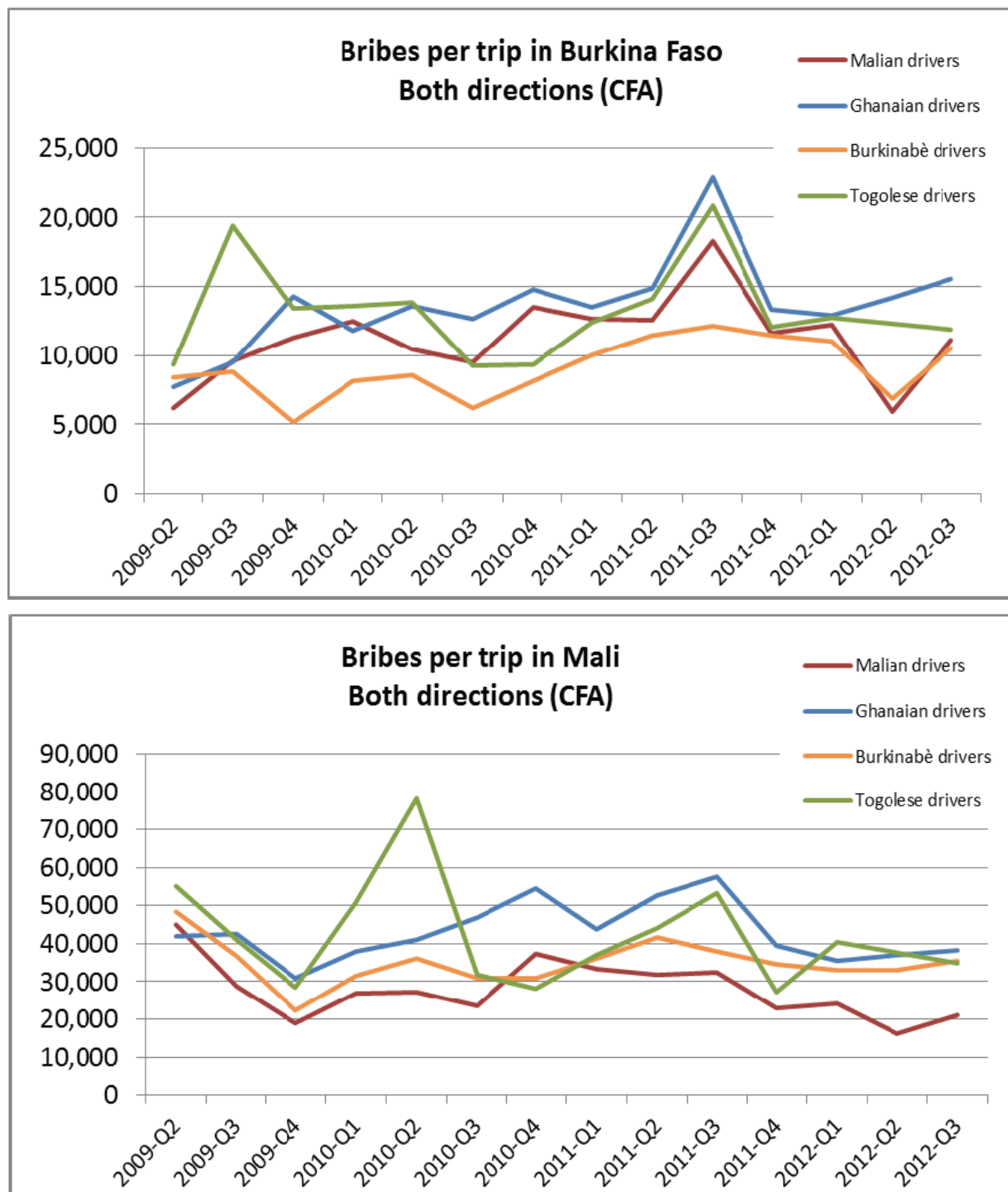
10.1.1 Other factors influencing harassment

In addition to reporting on checkpoints, controls, delays and bribes, OPA looked at other factors that might have an influence on road harassment such as whether foreign drivers are treated worse than local ones. This does indeed appear to be the case as shown in the figures below which shows that Burkinabé drivers are the “least” harassed in Burkina Faso and Malian drivers the “least” harassed in Mali⁸¹.

⁸⁰ The Ouaga-Bamako and Bamako-Ouaga corridors are not included in the averages because it is not clear which are import and which are return trips.

⁸¹ USAID West Africa Trade Hub, Ouagadougou-Bamako Corridor Road Governance Reports, May 2013

Figure 15: Bribes paid by nationality on the Bamako-Ouaga corridor



11. RAIL

The total length of West Africa’s rail network is 10,188km. This network comprises 12 national networks, six of which are for sub-regional use. Just as is the case for road transport, rail infrastructure is generally dilapidated and unsuitable for the needs of modern rail transport. Furthermore, the network has three different gauges – 1,435mm (1,179km), 1,067mm (4,536km) and 1,000mm (4,473km), thereby making railway interconnections

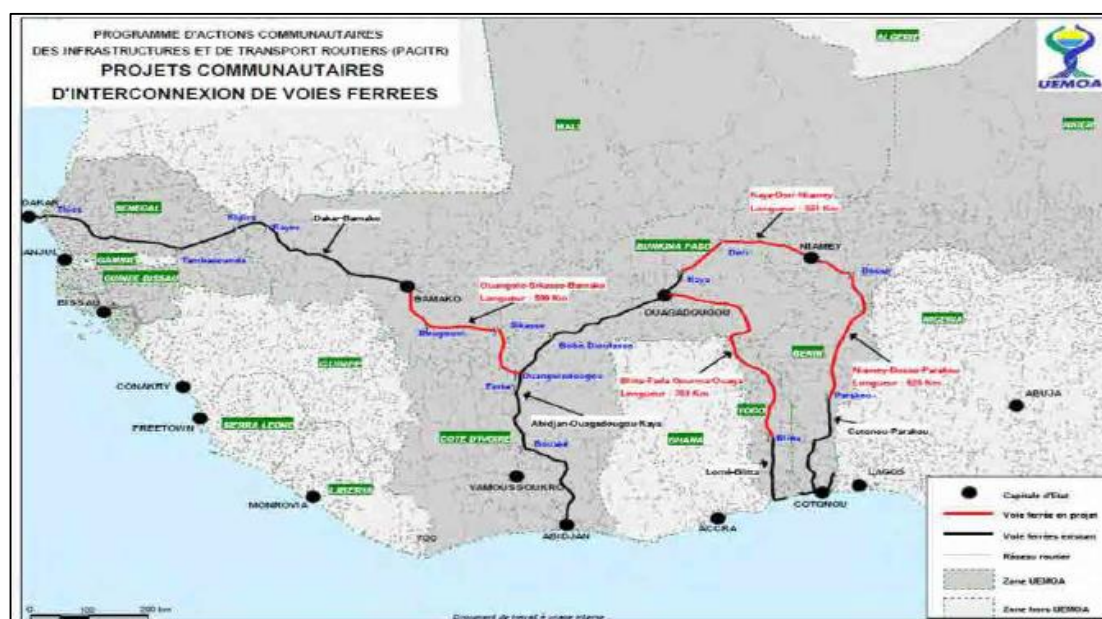
difficult and expensive.⁸² The Figure and Table below show railways in UEMOA member states.

Table 24 - List of major operating railways in West Africa

Section	Total Length	Operator	Operational Status
Dakar- Bamako (Senegal-Mali)	1286 km (Total) -644 km (SG) -642 km (ML)	TRANSRAIL	(Freight) 1 train/day *Target: 2 trains/day (Passenger) 3 trains/week
Abidjan-Ougadougou-Kaya (Cote d'Ivoire-Burkina Faso)	1260 km (Total) -638 km (CI) -622 KM (BF)	SITARAIL	(Freight) 1 train/day *Target: 4 trains/day (Passenger) 3 trains/week No operation between Ougadougou and Kaya
Lome-Blitta (Togo)	276km (Only domestically in Togo)	Togo Rail (Only for freight)	Railroad exclusive for phosphate rock transport
Cotonou-Parakou (Benin)	438km (Only domestically in Benin)	OCBN (Only for freight)	3 trains per week

Source: Based on the railroad strategy of UEMOA and the result of an interview survey.

Figure 16: UEMOA's vision for an inter-connected railway system in its territory



⁸² ECOWAS Community Development Programme (Dec 2012)

11.1 Rail – Development projects

Cotonou-Niamey Railway. (EUR 1.07 billion) Bolloré with other partners have committed to building a railway from Cotonou to Niamey. Work began in April 2014 on the 574 km stretch to join Niamey to Parakou. From Parakou there is an existing rail link to Cotonou, which will be upgraded to international standards⁸³. The line will form part of a planned 2,800 km network joining up Ivory Coast, Benin, Burkina Faso, and Niger. Bolloré Africa Logistics, which already operates the Sitarail line from Abidjan to Ouagadougou will

Figure 17 - Niamey – Ouaga – Abidjan railway project



contribute 40 percent of the billion-dollar investment and then operate the concession for 20 years.⁸⁴

Although there does not seem to be sufficient traffic in West Africa to justify heavy investment in railways, there are several other ambitious rail projects under way, such as:

- The Lagos-Kano line which has started with the recent completion of the 186 km Abuja-Kaduna link;
- Reconstruction of the western railway line in Ghana for which 40 percent of the funding seems to be in place.
- From the shippers' point of view rail transport offers many advantages such as⁸⁵:
 - No customs escort expenses;
 - No ISRT guarantee (a total of 0.5 percent of the value of the goods) is required: this is an advantage especially for high value goods;
 - No harassment at road checkpoints;
 - More flexible customs procedures;
 - Shorter processing times at borders.

12. RECENT AND CURRENT PROJECTS – MULTILATERAL AND BILATERAL DONORS

Many financing institutions and donors have partnered with ECOWAS and UEMOA, national governments, private sector operators and civil society stakeholders to support development

⁸³ Reuters: Benin, Niger finalize terms of Bolloré's one billion euro rail link, April 7, 2015

⁸⁴ JA Abidjan-Lomé : la boucle est bouclée, 15 avril 2014

⁸⁵ PCE Dakar-Bamako corridor

in West Africa. Some of the major initiatives related to trade, transport and regional integration that could be of interest to ATWA are summarized below.

12.1 African Development Bank

The AfDB has financed the construction of roads, building of bridges and establishment of joint border posts across the ECOWAS region. More recently, in addition to national level operations, the AfDB has developed a dedicated West Africa regional strategy, which has included a strong emphasis on transport and trade facilitation as drivers of regional trade and economic integration. Many AfDB road infrastructure projects incorporate trade facilitation and social development aspects. Some recent or ongoing projects include:

- Dakar-Bamako corridor, southern route;
- Toll road in Dakar;
- Trans-Gambia highway, bridge and border posts;
- 280 km of roads in the Manu River countries (Cote d'Ivoire, Guinea, Liberia);
- Trans-Sahara Highway in Niger, Chad and Alger, missing links;
- Abidjan-Lagos corridor, missing links;
- Ouagadougou-Niamey northern route with a joint border post;
- Transport Sector and Economic Governance Reform Program in Nigeria;
- San Pedro-Bamako corridor;
- Roads in Benin, Burkina Faso & Ghana.

12.2 World Bank Group

The World Bank Group is an important multilateral financier of policy reforms, institutional capacity building and infrastructure development related to trade and transport facilitation in West Africa. The Bank closed the West Africa Regional Transport and Transit Facilitation Project in June 2015. This long-term project involved road upgrading and facilitation measures along the Tema-Ouagadougou-Bamako corridor in Ghana, Burkina Faso and Mali. Other important World Bank projects include:

Abidjan-Lagos Trade and Transport Facilitation Project (USD 257 million, close 30-Sep-2016);

- Nigeria Federal Roads Development Project (USD 365 million, close 31-Dec-2016);
- Transport Services Reforms - Regional development policy operation (DPO) in Côte d'Ivoire and Burkina Faso (USD 50 million per country). This project aims to professionalize the transport industry in the two countries with a new and innovative approach; and
- 13 smaller projects under the Trade Facilitation Facility.

The World Bank also produces many excellent analytical reports and toolkits, often focused on Sub-Saharan Africa, and has announced that a report on competition between ports and a guide to transport services in West Africa are in preparation.

Looking forward, West African countries will also be able to access funding to support implementation of their commitments under the new WTO Trade Facilitation Agreement via the World Bank Group's Trade Facilitation Support Programme (TFSP) which was

established in 2014 with funding from the USA, Norway, Australia, Canada and the European Union.

12.3 China

Since 2000 China has emerged as Africa's largest trading partner. Chinese direct investment in and lending to African countries has grown rapidly as well. At end-2012 China's share of FDI in Africa was on the order of 3 percent. While its investment may be growing rapidly, it is still a small player, and the vast majority of FDI in Africa still comes from Western sources.

China announced in 2012 that it would support the coastal highway from Dakar to Lagos. The modalities of the agreement are unclear, but China has stated that its financial contribution is contingent on a comprehensive proposal from all nine participating countries. Also, the China National Petroleum Corporation (CNPC) has committed to invest about USD 200 million in road infrastructure connecting Niger and Chad

12.4 The Netherlands

The Netherlands has an interesting project with the aim to formalize informal agricultural trade between Benin and Nigeria. However some projects in Benin were temporarily suspended following the discovery that the Benin Ministry of Water had embezzled EUR 4 million, but they are set to resume shortly.⁸⁶ Port of Amsterdam International (PoAI) has been contracted by the Netherlands Embassy in Benin to help revitalize the Port of Cotonou. PoAI will assist the Dutch Embassy in developing a strategic master plan in conjunction with an action plan and technical specifications for the port's renovation and restructuring of operations.⁸⁷

12.5 European Commission

Through the current Regional Indicative Programme (2014-2020) under the 11th European Development Fund (EDF), the EC will make EUR 1.15 billion available to the region with priorities centred on regional integration. The priorities are:

- Peace, security and regional stability;
- Regional economic integration and support for trade and private sector; and
- Resilience, food and nutritional security and natural resources.

The previous EDF Regional Indicative Programme for West Africa was allocated a budget of EUR 595 million and focused on two main sectors:

- Regional integration, competitiveness and the Economic Partnership Agreement;
- Political governance and regional stability.

The EU has committed a minimum of EUR 6.5 billion in support of West Africa's Economic Partnership Agreement Development Program (PAPED) for the 2015-2020 period.⁸⁸ The PAPED is an essential element of the Economic Partnership Agreement (EPA) negotiated with West Africa, and will provide funding for projects linked to trade, industry, transport and energy infrastructure in the region, as well as through support to civil society.

Some specific on-going EU-funded projects include:

⁸⁶ <http://www.government.nl/news/2015/07/09/ploumen-demands-action-on-corruption-in-benin.html>

⁸⁷ <http://worldmaritimeneews.com/archives/150143/benin-seeks-dutch-expertise-on-port-de-cotonou-project/>

⁸⁸ Programme APE pour le Développement (PAPED) de l'Afrique de l'Ouest.

- West Africa Competiveness Support Programme; (2014-2018); EUR 20 million.
Objective: Improving regional private sector competitiveness through the facilitation of trade and investment, and the establishment of a regional quality infrastructure system in the West African region - Implemented by the International Finance Corporation (IFC) and the United Nations Industrial Development Organization (UNIDO);
- Support To Regional Economic Integration and Trade; (2014 – 2018); EUR 22 million (EU 20m, GIZ 1million, ECOWAS/UEMOA 1million); implemented by GIZ and IFC.
Objectives: To contribute to the establishment of an effective common market and the gradual integration of the West Africa region into the global economy, leading to increased economic growth and poverty reduction;
- Transport Facilitation Project I; 9 years; EUR 68.8 million.
Objectives: Harmonisation and simplification of regulations, procedures, and documents; Reduction of road controls across the main regional corridors and the border posts; Improving information systems on freight traffic; Construction of 3 joint border posts in Malanville (between Niger and Benin), Noepe (between Ghana and Togo) and Seme-Krake (between Nigeria and Benin).
Progress: 10% of work on the JBP at Seme-Krake (Nigeria-Benin border) is completed.
- Transport Facilitation Project II; 5 years; EUR 27 million (EU 27m, ECOWAS EU 11.7m, UEMOA EU 13).
Objectives: Three joint border posts are equipped, operational and put into service; Road information systems are designed for the West African region and deployed; Institutional, technical and financial conditions are met for the installation of a Regional Transport Observatory (RTO); and regional organizations' capacity is strengthened to track and manage regional transport better.

12.6 Department for International Development (DfID)

The UK's DfID has two regional projects of interest to ATWA:

- Support to West African Regional Integration Programme (SWARIP); Budget: GBP 7,737,039 - spent to date GBP 4,358,671 (56 percent); Expected result: The foundation is in place to help bring West Africa into the Continental Free Trade Area. As of August 2015 all components have either been suspended or are in the process of being closed for a variety of reasons.
- West African Regional Food Markets (WAFM); Budget GBP 10,065,092 - spent to date GBP 138,577 (1.4 percent); Expected results: More staple food traded and more farmers and farming households benefit from cross-border value chains. WAFM has two components: a challenge fund providing funds directly to private sector operators in selected staple food value chains, and a policy facility working to improve the policy environment.

12.7 GIZ (German Corporation for International Cooperation)

GIZ supports the Programme for Infrastructure Development in Africa (PIDA) at the AU level. In West Africa GIZ has a support programme for the ECOWAS Commission focusing on trade and customs. This component targets the capacities of the ECOWAS Commission to design and implement its trade policy and to promote trade, both within West Africa and between the region and the rest of the world.

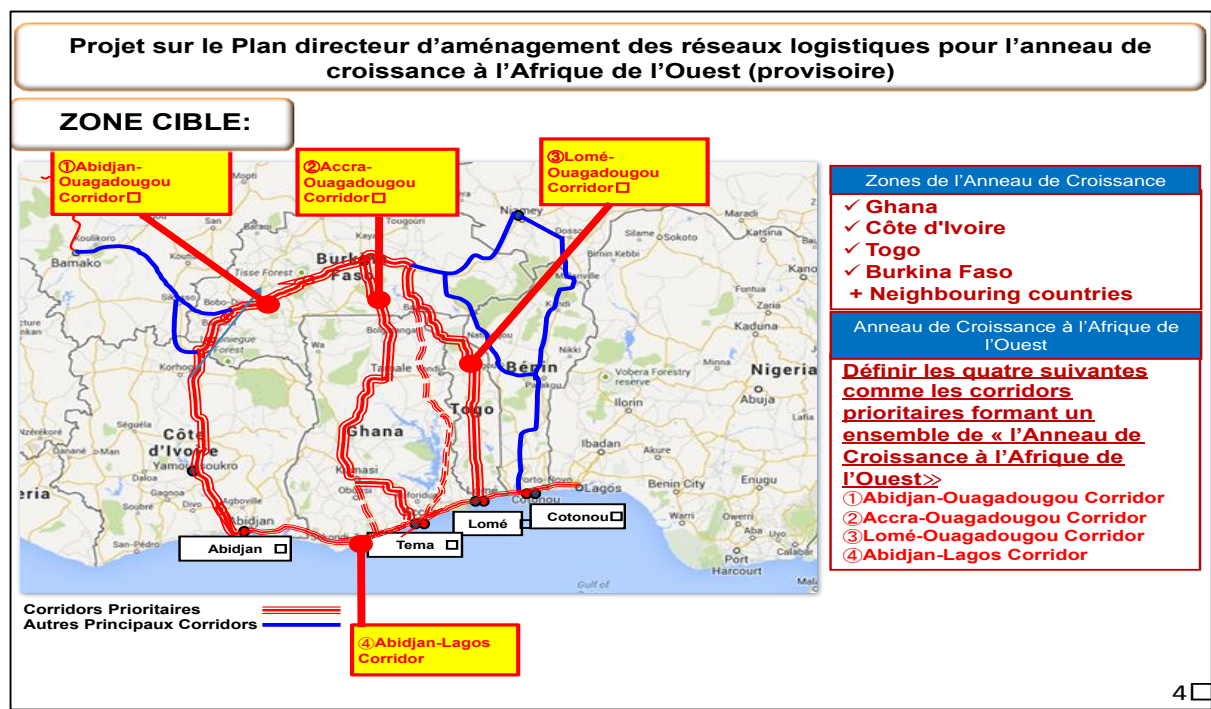
Complementing that, or part of it, is the Promoting West African Trade Integration (WATIP) project, which supports ECOWAS in achieving a customs union in West Africa. Specifically it will assist in improving the ECOWAS Trade Liberalization Scheme, in developing a common trade policy, in facilitating the harmonization of trade-related policies and statistical data, as

well as disseminating trade-related information. GIZ also has a project “Trade Route Incident Mapping System – TRIMS”, piloted in Ogun State in Nigeria, which attempts to combat “multiple levies, delays, harassment, and other illegal non-tariff trade barriers” at checkpoints along trade routes, by putting in place a mobile phone based system of reporting incidents of harassment.

12.8 Japanese International Cooperation Agency (JICA)

JICA has long been supporting the regional organizations, UEMOA in particular, in customs and infrastructure issues. JICA is in the process of finalizing a Master plan, which is expected to focus on “the ring of growth”, which will include the Abidjan-Ouaga; Tema-Ouaga; Lomé-Ouaga, and Abidjan-Lagos corridors emphasizing customs issues. JICA is also planning to repeat the Traffic Survey, which it undertook in 2012.

Figure 18 - JICA’ “Ring of Growth”

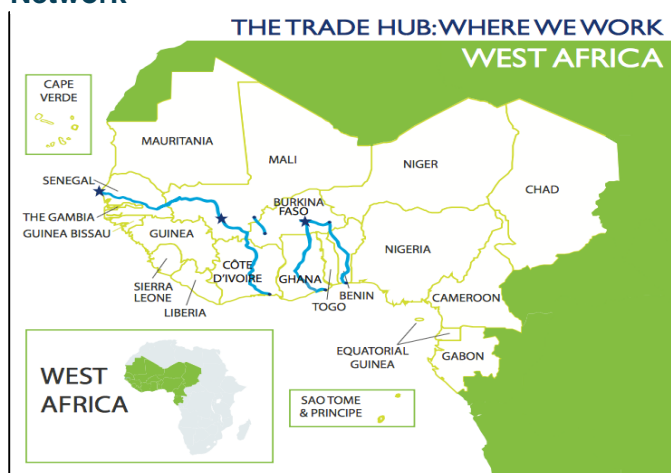


12.9 United States Agency for International Development (USAID) and the US Millennium Challenge Corporation (MCC)

Both USAID and the MCC support regional integration, trade, transport and infrastructure in West Africa.

At the regional level, USAID supports the West Africa Trade Hub and African Partners Network, which focuses on food security, working through regional private sector associations to assist farmers and firms in meeting product quality standards and market requirements. USAID also supports the West Africa Power Pool and Public Private Partnerships to develop large-scale electricity generation for regional markets. MCC has invested the upgrading of Cotonou Port and financed the George Bush highway in Accra, Ghana, among other projects.

Figure 19 - West Africa Trade Hub and Partners Network



13. EXISTING TRANSPORT OBSERVATORIES

There are several observatories in West Africa, mostly focusing on documenting harassment at checkpoints along transit corridors.

OPA - l'Observatoire des pratiques anormales: The OPA collects data on eight corridors in UEMOA member countries and Ghana and reports on the controls to which trucks are subjected at checkpoints on journeys between ports and landlocked countries, by which services, the time this takes and the amounts paid in bribes at each control. Local OPA field agents employed by shippers' councils or Chambers of Commerce collect data continuously from truck drivers.⁸⁹

The regional commissions have long been concerned by the excessive number of abusive checkpoints along corridors and UEMOA unsuccessfully attempted to put an observatory of bad practices in place as early as the 1990's. In 2003, ECOWAS adopted a Decision calling for such observatories to be established.⁹⁰

In 2005, UEMOA asked USAID to help it to establish OPA and from 2007 to 2013 until it closed, the West Africa Trade Hub established and expanded this observatory, publishing quarterly reports together with UEMOA. UEMOA is still financing local OPA field agents, except for Ghana, but no report has been published since the 2nd quarter 2013. UEMOA wants OPA to continue and is investigating options. OPA results are discussed extensively in the section on Road Governance and in Box 1.

Comité Inter-Etats pour la Lutte contre la Sécheresse au Sahel (CILSS) Trade Flows and Road Harassment monitoring: From 2008 to 2013, the USAID Agribusiness Trade Promotion (ATP) project collected data on road harassment experienced on selected agricultural value chains. The results of ATP surveys were published with the OPA reports. When ATP closed in 2013 this work was transferred to CILSS with support from USAID and is still ongoing.

⁸⁹ If there is more than one agency at a checkpoint each check the driver is subjected to is counted as a "control".

⁹⁰ ECOWAS decision A/DEC/13/01/03

Box 1: What has the *Observatoire des Pratiques Anormales* achieved?

The OPA was active from 2007 to 2013 and during that time it did not “solve” the problem of checkpoints. The number of controls went down in some countries like Senegal and Togo and the level of bribes went down, again in Senegal and Togo, but also in Côte d’Ivoire. These figures did not change much in Burkina Faso or Ghana however.

What OPA did accomplish was a general acceptance among government agencies that the problem existed and that it needed to be addressed. The OPA reports also allowed the industry to know if things were getting better or worse. Now since OPA no longer publishes its reports the state of affairs is anybody’s guess, except that the situation has apparently gotten worse in Ghana. UEMOA is looking for support to continue the work.

ALCO – the Abidjan-Lagos Corridor Organization: ALCO is contracted by the World Bank to monitor the Abidjan-Lagos corridor for the Abidjan-Lagos Trade and Transport Facilitation Project. The indicators include

- Monitoring of single window operations in ports;
- Goods dwell time in ports;
- Number of observed checkpoints per 100 km;
- Border crossing times;
- Percentage of roads in good and fair condition;
- Kms of road upgraded with World Bank-IDA funding;
- Percentage of truck drivers familiar with at least two means of protection against HIV/AIDS;
- Percentage of truck drivers reporting using condoms during intercourse with a casual partner.

The project’s closing date is on September 30, 2016 and continued funding is not assured. The result of ALCO’s corridor monitoring is summarized below. What is striking is the long dwell time in ports and the long time it takes to cross borders along the Abidjan-Lagos corridor. The only border crossing that seems to be “reasonable” is Sanvee Kondji in Togo on the border with Benin which takes about 7 hours to cross. It should be noted that Borderless Alliance conducted a survey of border crossing times that give a somewhat more positive picture of the situation but it is hard to know who is right ALCO or the Borderless Alliance

Table 25 - Corridor performance – As reported ALCO

Corridor	Corridor Length	Check points	Transit	Average border crossing time (hrs)	Port dwell time (days)	Road condition
Abidjan-Lagos / Port /border			%			
Nigeria Lagos / Seme	NG – 71 km	16	5%	I: 19,4 – T: 15.9	25	Very bad
Benin Cotonou / Krake	BJ – 90 km	15	71%	I: 40.5 – T: 403.3	13	Fair
Hillacondji			n/a	30		
Togo Lomé / Sanvee Kondji	TG - 103 km	2	65%	I: 7.2 – T: 6.8	12	Fair
Kodjoviakope			74%	I: 22.6 – T: 19.3		
Ghana Tema / Aflao	GH – 512 km	20	44%	I: 38.7 – T: 41.0	20	1/3 Very bad - 2/3 Fair
Elubo			n/a	34		
Côte d'Ivoire Abidjan / Noe	CI – 166 km	9	n/a	32	13	Fair
Total	942 km	62				

Source: ALCO, ALTTP, Rapport An 4: Juillet 2013 – Juin 2014; Compiled by author

Note: I=Import; T=Transit

A project funded by the World Bank Trade Facilitation Facility has attempted to put in place a transport observatory as a demonstration project. This observatory collected and published performance data from cooperating operators' IT systems. The project is not live but the website is informative, and any future observatory in West Africa would do well to build on this experience.⁹¹

13.1 A Regional Transport and Facilitation Observatory

Up-to-date, independent, relevant and reliable information is essential for good policymaking, for effective evidence-based advocacy, for designing appropriate development projects, and to guide private operators in their business and investment decisions.

“In the absence of good statistics, implementing sound and predictable policies is a serious challenge. Imperfect information leads to absent or inadequate at the least, and in worse instances even wrong-headed policy responses, adding another potential source of costs borne by actors on food markets”⁹²

ECOWAS and UEMOA have agreed to jointly establish a regional transport and facilitation observatory but it is not likely to happen until an organization is found that is willing to host and build it.

The reports that have been produced for West African trade corridors have been undertaken by different organizations for different purposes and using different methods. It is therefore very difficult to compare the information in the reports and compare the performance of the

⁹¹ <http://www.westafricacorridors.org/observatory/> - See also ToR Consulting services for SSATP (Africa Transport Policy Program) Internet based Transport Observatory Database - Financing by the World Bank Trade Facilitation Facility

⁹² World Bank - Connecting Food Staples and Input Markets in West Africa - a Regional Trade Agenda for ECOWAS Countries (2014)

corridors. The same can be said for the OPA and CILLS observatories and the ALCO monitoring of the Abidjan-Lagos corridor.

There is therefore a great need for a regional transport and facilitation observatory which can produce relevant and timely information that will allow comparisons among corridors as well as identifying trends.

The kind of information which a regional observatory could publish and disseminate in regard to trade and transport facilitation and corridor performance include:

- Performance indicators on the various transport modes as well as on ports and inland terminals;
- Transport and logistics costs;
- Regional and national indicators on delays, uncertainties, costs/prices, and illicit payments for the different modes and nodes in the transport sector;
- Road, rail and air networks, developments and conditions;
- Traffic flows;
- Transport statistics on fleets and transport services;
- Surveys and control data on the implementation of priority policies such as member-state compliance and corridor monitoring of ECOWAS/UEMOA axle-load regulations, and the effective implementation of ECOWAS and UEMOA transport and trade policies;
- Corridor and value chain studies as well as studies of specific transport and facilitation issues as they arise, in order to correct or improve performance;
- Guides and directories to support capacity building in regional and national transport institutions and agencies and professionalization of the trade, transport and logistics industries;
- Assisting partners with making information available as required by the WTO Trade Facilitation Agreement, Article 1.

Much information to be published and disseminated by the observatory will come from partners such as ports, Customs authorities, Ministries of transport, road agencies, terminal operators, shoppers' councils, Chambers of Commerce and private sector operators.

An important role of a regional observatory will therefore be to develop partnerships and to encourage and assist partners to be transparent and make all relevant information available on the Web in a timely and useful manner.

14. REFERENCES

ECOWAS & UEMOA plans and priorities

The primary sources for this section are the ECOWAS vision statement and its Community Development Program (CDP). The CDP Annex lists ECOWAS priority projects

- ECOWAS Vision 2020 - Towards A Democratic And Prosperous Community, June 2010
- Draft ECOWAS Community Development Programme (CDP), Dec. 2012
- Annex – CDP Priority Projects

ECOWAS' most ambitious road infrastructure project, the 6-lane Abidjan-Lagos Corridor, was announced in this press release

- ECOWAS Press release #066/2014 - ECOWAS Leaders Sign Abidjan-Lagos Corridor Road Project Treaty, April 1, 2014

Donors & Financing Institutions

Most information in this section comes from donor and financing institutions' websites.

The information on China is from an article by

- Andrew Duffield, Chinese Infrastructure Investment: Paving a New Road in West Africa? November 27, 2012

Additional information on China in Africa can be found here: <http://www.scoop.it/t/china-africa>

Traffic Flows and Informal Trade

The source for port and transit traffic comes from Port Authorities

Data on import and export to and from landlocked countries comes from the Transport Observatories operated by the Ministry of Transport in Mali and the Burkinabè Shippers' Council in Burkina Faso. *Le Conseil des utilisateurs de transports public* (CNUT) in Niger presumably has similar statistics but we have not been able to get hold of it.

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- Programme for Infrastructure Development in Africa (PIDA) - Africa Transport Sector Phase III Report

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- Jean-Christophe Maur and Ben Shepherd, Connecting Food Staples and Input Markets in West Africa - a Regional Trade Agenda for ECOWAS Countries, June 2015

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Legal Environment

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- USAID West Africa Trade Hub - ECOWAS Market Integration: A Gap Analysis (2009)

The African Alliance For Electronic Commerce has published peer reviews of the implementation of Single Windows with information on electronic commerce legislation.

- Alliance Africaine For Electronic Commerce: Single Window Peer Review

The *Fédération française des sociétés d'assurances* has published a list of countries with restrictive maritime insurance measures, something that is common in West Africa

- FFSA/DMAT, Freedom Of Insurance; List Of Countries With Restrictives Measures In The Field Of Marine Insurance (2008)

Transport Observatories

This section briefly discusses existing observatories in West Africa, but is primarily a plea for the establishment of a regional transport and facilitation observatory. USAID has reviewed the current situation in a report published in September 2014:

- USAID Trade Hub And African Partners Network - Road Governance Study: Current Status, Analysis, and Recommendations, Sep 2014

Reports from existing observatories in West Africa, OPA, CILLS and ALCO can be found on the following websites:

www.Borderless.wa ; <http://www.cilss.bf> ; and <http://www.corridor-sida.org> respectively

A World Bank Trade Facilitation Facility project issued Terms of Reference for an Internet based observatory that would be very useful for a future observatory

- Consulting services for SSATP (Africa Transport Policy Program) for an Internet based Transport Observatory Database

Other useful references include an observatory guide prepared by the World Bank

- WB Olivier Hartmann, Corridor Transport Observatory Guidelines, Nov 2013

Customs & Other Government Agencies

In this section we discuss border crossing issues and, in particular, dwell times at borders and in ports with information from these sources:

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- Règlement 14/2005/CM/UEMOA
- Supplementary ACT/SP. 17/02/12 Relating to the Harmonization of Standards and Procedures for the Control of Dimensions, Weight and Axle Load of Goods Vehicle within member states of ECOWAS

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