TRANSIT TRANSPORT COORDINATION AUTHORITY
OF THE NORTHERN CORRIDOR

INVESTMENT OPPORTUNITIES IN THE NORTHERN CORRIDOR WITH EMPHASIS IN TRANSPORT INFRASTRUCTURE

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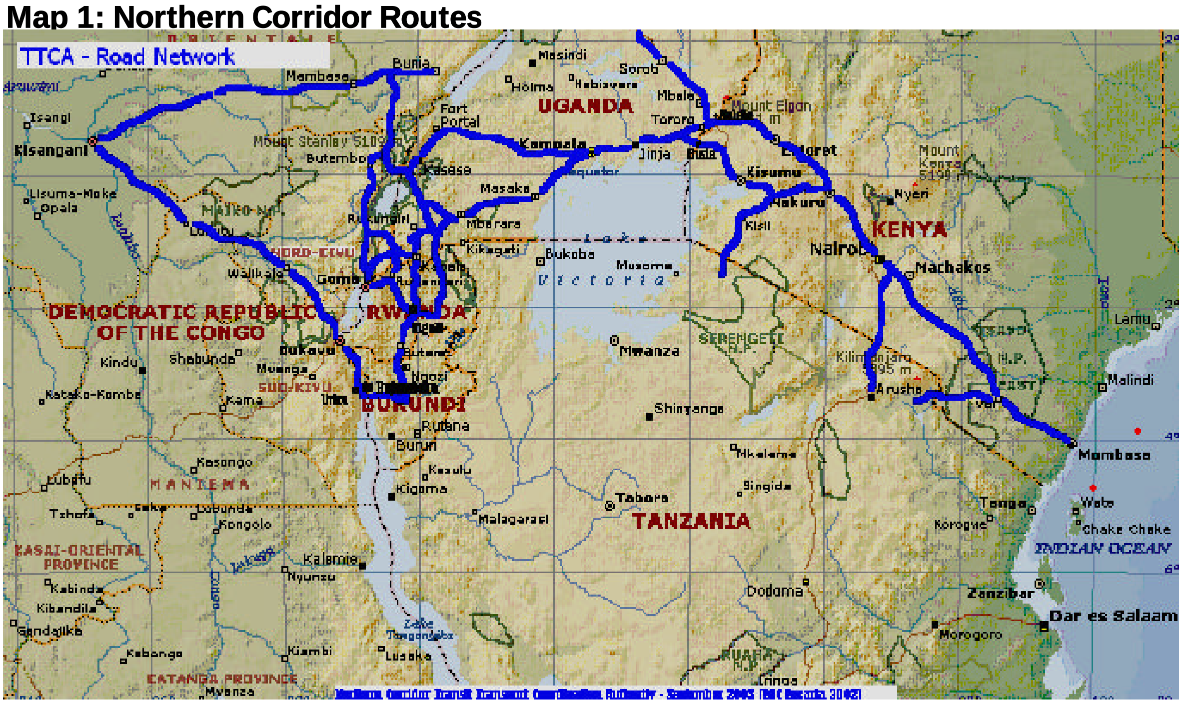
1.0. INTRODUCTION

This paper provides a brief review of the development opportunities in the Northern Corridor. The paper defines what constitutes the Northern Corridor, the mandate of the Corridor Authority (NCTTCA), the characteristics of the corridor, the economic development corridor concept, as well the potential and existing investment opportunities along the corridor.

1.1. Definition of the Northern Corridor

The Northern Corridor is the transport corridor linking the Great Lakes countries of Burundi, D. R. Congo, Rwanda and Uganda to the Kenyan sea port of Mombasa. The corridor also serves Northern Tanzania, Southern Sudan and Ethiopia.

Map 1: Northern Corridor Routes



1.2. Background

The Northern Corridor Transit Transport Coordination Authority was created in the mid-1980s, following the signing of the Northern Corridor Transit Agreement (the Treaty), by Burundi, Kenya, Rwanda and Uganda. The Democratic Republic of Congo became a contracting state of the NCTTCA in 1987 after ratifying the treaty.

1.3. Governance Structure of the NCTTCA

There are 3 principal organs of the NCTTCA, namely:

- The Authority, which is a Council of Ministers of the member states, responsible for transportation;

- The Executive Board, which is an Inter-governmental Committee of Permanent Secretaries and other senior government officials; and

- The Secretariat, headquartered in Mombasa, Kenya and headed by an Executive Secretary, is the executing organ.

1.4. Mandate of the NCTTCA

The NCTTCA mandate is stipulated in the in the Transit Agreement and they include:

- Safeguarding the freedom of transit and right of access to and from the sea for the landlocked countries;
- Ensuring implementation of and compliance with the provisions of the Transit Agreement;
- Joint promotion and coordination of the development of regional transport infrastructure;
- Reduction of transport costs through the removal of all barriers to traffic using the corridor;
- Harmonization of transit transport policies and technical standards in order to facilitate operations along the corridor;
- Promotion of regional consensus on all matters relating to the management of the corridor and which are of mutual benefit to the member States; and
- Cooperation with other international organizations.

2.0. CORRIDOR CHARATERISTICS

2.1. Mombasa Port

Mombasa's Port, which has 16 deep-water berths, a container terminal, two bulk terminals (cereals and cement), and two oil terminals, is connected with the hinterland by road, rail and pipeline and is capable of accommodating a wide range of ships.

The Mombasa port is the biggest port in East and Central, with an intrinsic throughput capacity of over 20 million tons. The volume of cargo handled by the port and passing through the corridor has been growing at an average rate of 7% per annum, over the past five years, rising from 8.56 million tons in 1988 to 11.93 million tons in 2003. Transit traffic has meanwhile doubled during the past five years, rising from 1.126 million tons in 1998 to 2.452 million tons in 2003, representing at an average annual rate of 17.6%, during the same period. These figures signify growth of the economies of the sub-region.

Table 1: Mombasa traffic throughput 1998 – 2003 (Mn Tons)

Year	1998	1999	2000	2001	2002	2003	Avg.Growth p.a. (%)
Domestic	7.32	6.74	7.47	8.18	8.01	8.87	4.2
Transit	1.13	1.31	1.45	2.12	2.22	2.45	17.6
T/ment	0.11	0.14	0.20	0.30	0.34	0.61	42.6
Total	8.56	8.16	9.13	10.60	10.56	11.93	7.2

Source: KPA Annual Review and Bulletin Statistics

Table 2: Mombasa Port Transit Traffic by Country in (000 Tons)

Country	1998	1999	2000	2001	2002	2003	Avg
Uganda	841.9	1,012.6	1,114.6	1,669.8	1,710.1	1,893.7	
Tanzania	57.7	63.3	93.2	145.9	157.0	181.8	
Burundi	1.2	4.2	2.3	6.8	28.8	4.2	
Rwanda	94.4	109.3	71.7	109.1	80.8	176.8	
Sudan	52.2	46.3	45.1	67.4	93.0	75.3	
D.R Congo	59.5	52.4	76.3	68.5	100.2	71.6	
Others	20.1	21.8	51.2	49.4	45.1	49.2	
TOTAL	1,126.8	1,310.0	1,454.3	2,116.8	2,214.9	2,452.6	
% change p.a.	-	16.2	11.0	45.5	4.6	10.7	17.6

Source: Kenya Ports Authority

Table 3: Northern Corridor Road/Rail Modal Split (1998 – 2003)

Year	Total Traffic	Road	Rail	(%) Rail
1998	841,901.00	429,682.03	412,218.97	48.96
1999	1,012,581.00	624,803.00	387,778.00	38.30
2000	1,114,586.00	686,933.50	427,652.50	38.37
2001	1,669,816.00	1,203,607.70	466,208.30	27.92
2002	1,710,098.00	1,229,183.50	480,914.50	28.12
2003	1,893,690.00	1,388,220.60	505,469.40	26.69

Sources: Kenya Ports Authority, Uganda Railways, Kenya Railways

Containerized cargo is growing rapidly and yet the container terminal has a design of only about 250,000 TEUs per annum. This terminal is now operating well beyond capacity. It handled over 380,000 TEUs in 2003.

2.2. Road Network

The road network radiates around the main axis Mombasa-Nairobi-Kampala-Kigali-Bujumbura. Eastern DRC links extend from Kigali through either Goma or Bukavu to Kisangani. From Uganda, Eastern DRC is linked via Bunagana, Mpondwe, Ishasha, Goli and Aru border posts, with the main axis going through Kasindi, Beni, Komanda, and Niania to Kisangani.

The Northern Corridor main roads network totals nearly 7000 km, of which only 60% is paved, as shown in the table below.

Table 4: Northern corridor road network distribution (main axis)

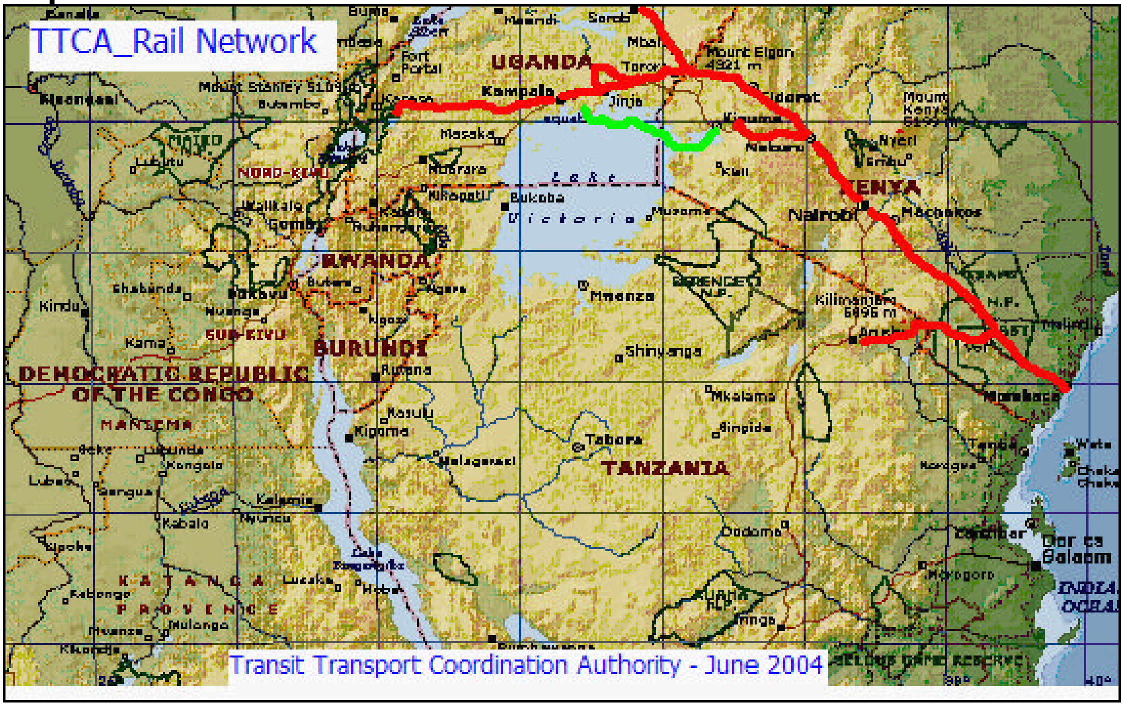
Country	Paved	Unpaved	Total
Burundi	320	36	356
Congo D R	721	1920	2641
Kenya	1196	0	1196
Rwanda	814	0	814
Uganda	1042	657	1669
Total	**4093**	**2613**	**6706**
Per Cent	**61%**	**39%**	**100%**

Overall, however, the Northern Corridor road network is generally in poor condition, due to inadequate maintenance.

2.3. Rail Network

The Northern Corridor railway network comprises of the Kenya/Uganda sections, which runs from Mombasa through Nairobi, Nakuru, Eldoret, Malaba, Jinja, and Kampala to Kasese in western Uganda (a distance of approximately 1660 km). A branch line runs from Nakuru to Kisumu on Lake Victoria (217 km), from where there is a wagon ferry link with Jinja and Port Bell in Kampala.

Map 2: Northern Corridor Rail Network



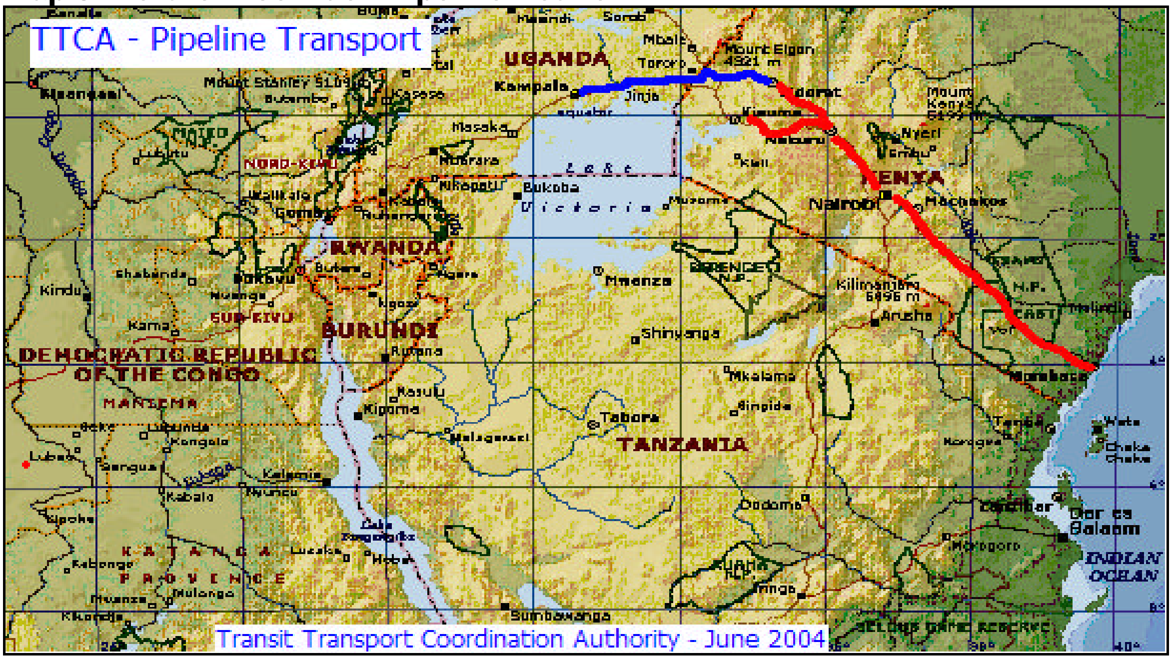
Out of the total trunk network of approximately 1890 km, almost 800 km, representing 42% of the network is in rather poor condition. The most affected sections are Nakuru-Kisumu (217 km), Malaba-Kampala (251 km) and Kampala-Kasese (333 km). The Kampala-Kasese line has been closed since 1998, due its state of disrepair.

In a nutshell, the Northern Corridor rail network coverage is very limited in scope. As a result, Rwanda, Burundi, Eastern D R Congo and Southern Sudan, which depend on the Mombasa port for their overseas trade, have no links with the East Africa Railway System.

2.4. Pipeline transport

Transport by pipeline was initially limited between Nairobi and Mombasa. The pipeline was extended to Kisumu and Eldoret from where the landlocked countries of Uganda, Rwanda, Burundi and Eastern DR Congo access their fuel supplies. The pipeline will however require expansion and extension to at least Kampala, in order to effectively meet the fuel demand of these countries.

Map 3: Northern Corridor Pipeline Network



2.5. Inland Waterways

Lake Victoria, Lake Albert, Lake Kivu, the River Nile and the River Congo provide the major inland waterways, which are currently not fully exploited, as part and parcel of the transportation network of the Northern Corridor.

2.6. Challenges Facing the NCTTCA

Given the above scenario, there are a number of challenges facing the Northern Corridor Transit Transport Coordination Authority. They include:

- Poor/Inadequate transport infrastructure and facilities
- Limited coverage of the rail network and decline of the existing railway systems.
- Deterioration of the road network, as a result of the diversion of heavy loads from rail to road.
- Complex cargo clearance procedures at the port, frontier posts and inland terminals result in delays.
- The delays caused by the complex procedures contribute to high transportation costs as a result of long transit times and long turn-around times of transport equipment.
- Inadequate and an inefficient mechanism for exchanging information and for monitoring performance.

3.0. DEVELOPMENT OPPORTUNITIES IN THE NORTHERN CORRIDOR

In order to order to turn the challenges and constraints facing the NCTTCA in opportunities for economic growth and development, the 13th meeting of the Authority held in Bujumbura in November 2003 resolved that the corridor be transformed into a development corridor. The objective of the transformation is to stimulate growth, by creating synergies between transport infrastructure development and the development of other sectors of the economy, such as agriculture, mining, energy, tourism.

3.1. Objectives of the development corridor approach

This approach utilises the Spatial Development Initiative (SDI) concept, which recognizes the inter-dependence of the various sectors of the economy and places transport infrastructure development in the general context of facilitating regional integration, trade, investment economic development. For example, tourism or agriculture or mining cannot flourish without an adequate infrastructure system and in turn, an infrastructure system is not a means to an end, but is there to serve the needs of other economic sectors. SDIs or *"Economic Development Corridors"* as they are invariably known, provide a broad-based model for integrating transport with overall economic and social development across a number of countries with common interests.

Economic development corridors also provide opportunities for private sector investment in the provision of transport infrastructure associated with the exploitation of some resource in another sector. Similarly, the approach encourages investment in other sectors of the economy, knowing that transport facilities and services are easily available for bringing in raw materials or accessing markets for products.

In other words, the successful exploitation of the opportunities that arise from development corridors or SDIs depends on availability of efficient transport. In this regard, therefore, the upgrading and modernization of port, road/rail and telecommunications infrastructure is fundamental to the effective and efficient functioning of development corridors.

3.2. Justification

The five countries of the Northern Corridor have a total land area of over 3 million square kilometres and a population of approximately 120 million people, which offers further opportunities for economic development. These countries possess enormous economic potential, which is yet to be fully exploited. The potential is in several sectors including agriculture, fisheries, tourism and mining, whose full exploitation is linked to the development of transportation infrastructure and facilities. Efficient management of these resources will not only result into sustained economic growth and employment opportunities, but also contribute towards increasing revenue and improving the living conditions of the populations of the sub-region.

As indicated earlier, the Northern Corridor is unique in that the five member States decided to conclude a multilateral treaty to provide the framework for their cooperation in the in the field of transport and trade facilitation. In addition, all Northern Corridor countries are also members of the Common Market for Eastern and Southern Africa (COMESA).

The countries of the Northern Corridor have shown political commitment in amending the current treaty in order to widen its scope to facilitate the transformation of the Northern Corridor into an economic development corridor. This exercise is well underway and will be completed by the end of this year, with financial support from SSATP/World Bank.

In addition, USAID/REDSO, through the East and Central Africa Competitiveness Hub, has agreed to support activities leading to the profiling of investment opportunities and projects along the Corridor. Subsequently, an investors' conference will be organized.

3.3. Expected Benefits of the Economic Corridor Approach

The benefits of an economic corridor approach are many. They include, facilitating closer economic integration; improving transit transport efficiency; harnessing latent economic potential; enhancing economic competitiveness; promoting regional trade and investment; promoting and strengthening partnerships; and improving quality of life.

3.3.1 Facilitating Closer Economic Integration

Development of the Northern Corridor as an economic corridor would facilitate closer integration of the economies of the five countries involved. It would also facilitate harmonization of policies particularly as they relate to the smooth and efficient operation of the corridor, investment mobilization and trade promotion. This would ensure that the agenda for the Northern Corridor would be enhanced from the current emphasis on transport logistics facilitation, to a broader socio-economic development agenda of COMESA.

3.3.2. Improving Transit Transport Efficiency

As indicated earlier, this approach would require that transport logistics and facilitation constraints on the corridor are not viewed merely in the context of transport, but in the broader context of trade, investment and economic development. The expected cross-border investments should provide additional impetus for the improvement of corridor efficiency by removing the remaining bottlenecks to the free flow of trade and traffic.

3.3.3. Harnessing the Region's Potential

The Northern Corridor SDI will enable TTCA member States to harness their regional potential through:

- A joint approach to mobilizing investment;
- Proper identification and packaging of investment opportunities;
- Coordinated marketing of the sub-region;
- Establishment of a macro-economic and investment environment that is fully supportive of private participation; and
- Improved transport infrastructure, facilities and services.

3.3.4. Enhancing Economic Competitiveness

Transit costs in the Northern Corridor are still 2 to 3 times more than those of the developed regions of the world. For the landlocked countries, 35-40% of the value of imported goods are attributed to transport costs. Similarly, the sub-region's exports are subjected high transport prior to reaching the ports of exit. This state of affairs implies that the sub-region's trade competitiveness in the global market.

The economic corridor approach, however, has the potential to substantively reduce the region's transport costs through improvements in transport logistics efficiency, as a result of targeted infrastructure investments and general facilitation along the Corridor. Reduction of transport costs would enhance export competitiveness, reduce the cost of imports and result in the overall competitiveness of the economies of the region.

3.3.5. Promotion of Public/Private Partnerships

The Northern Corridor SDI would provide an enabling environment for the promotion of Public-Private Partnership (PPP), particularly in major infrastructure projects as partnership between the public and private sector can enhance the viability of such projects. While the countries of the sub-region still rely heavily on official development aid, it is their ability to create the necessary environment to promote private sector investments that would ultimately make the difference. Economic corridor approach provides the opportunity for the private sector to contribute in a more proactive manner.

3.3.6. Poverty Reduction and Sustainable Development

The potential investment in infrastructure and other sectors would result in the reduction of poverty through employment generation and income creation, which would result in the improvement of the quality of lives of the people of the sub-region. This also means that the population may be able to afford and be willing to pay for infrastructure services such as water, electricity, telephones and public transport as well as other consumer goods, thus boosting the whole economy.

Employment opportunities would encourage skills improvement, which would in turn encourage additional investments, thus leading to sustainable development.

4.0. POTENTIAL AND EXISTING INVESTMENT OPPORTUNITIES ALONG THE NORTHERN CORRIDOR

4.1. Potential Investment Opportunities

Table 5 below shows the spectrum of possibilities in terms of economic activities that can be undertaken on the Northern Corridor.

Table 5: Spectrum of Potential Investments on the Northern Corridor

Sector	Potential Projects/Activities
Transport	-Road infrastructure development -Construction of dual carriageway and other toll roads -Upgrading and modernization of port of Mombasa and inland lake ports -Upgrading and modernization of railways including a possible cross-border railway concession involving KRC and URC -Upgrading and modernization of airports -Establishment of air cargo hubs and freight distribution centers -Construction of modern inland container depots -Upgrading of border posts and facilities including establishment of "One-Stop-Border Posts"
Telecommunications	-Upgrading and modernization of telecommunications infrastructure and services -Development of information communications technology (ICT) industries and services
Energy	-Harnessing hydro power potential -Harnessing new and renewable sources of energy (NRSE) -Construction of cross-border electricity grids -Establishment of a "Northern Corridor Power Pool" to facilitate electricity exchange and trade - Petroleum exploration
Water	-Upgrading and modernization of water systems and services

Agriculture	-Rain fed agriculture -Irrigated agriculture -Horticulture and floriculture -Agro-processing
Forestry	-Wood and pulp production -Paper production
Fisheries	-Freshwater fishing -Sea fishing -Fish farming -Fish processing
Mining	-Heavy mining -Precious and semi-precious stones
Industry and Manufacturing	-Heavy industry (steel, machinery production, vehicles, chemicals) -Light industry (electronics, textiles and clothing, footwear, appliances) -Food processing and beverages -Construction
Tourism	-Eco-tourism -Hotels, lodges and restaurants -Tour, travel operations -Handicrafts and curios
Services	-Banking and financial services -Commerce and retail -Information and communications technology services -Education and specialized training services -Health and specialized medical services -Sports and recreation -Real estate (industrial parks, commercial parks, shopping malls, offices, residential)

4.2. Existing Investment Opportunities along the Northern Corridor in Transport Infrastructure

4.2.1. Road infrastructure

As indicated earlier, road infrastructure is generally in a poor condition, with some sections of the trunk route network not paved. In the next five years, it has been estimated that nearly US $ 1.7 billion will be required for the rehabilitation of the Northern Corridor road network in the five countries, as shown in the table 6.

Table 6: Road Rehabilitation Costs in the Northern Corridor

Country	Distance (km)	Cost US $ million
Burundi	253	42.73
D R Congo	3234	620.70
Kenya	1061	517.30
Rwanda	874	225.00
Uganda	893	289.50
TOTAL	6315	1695.23

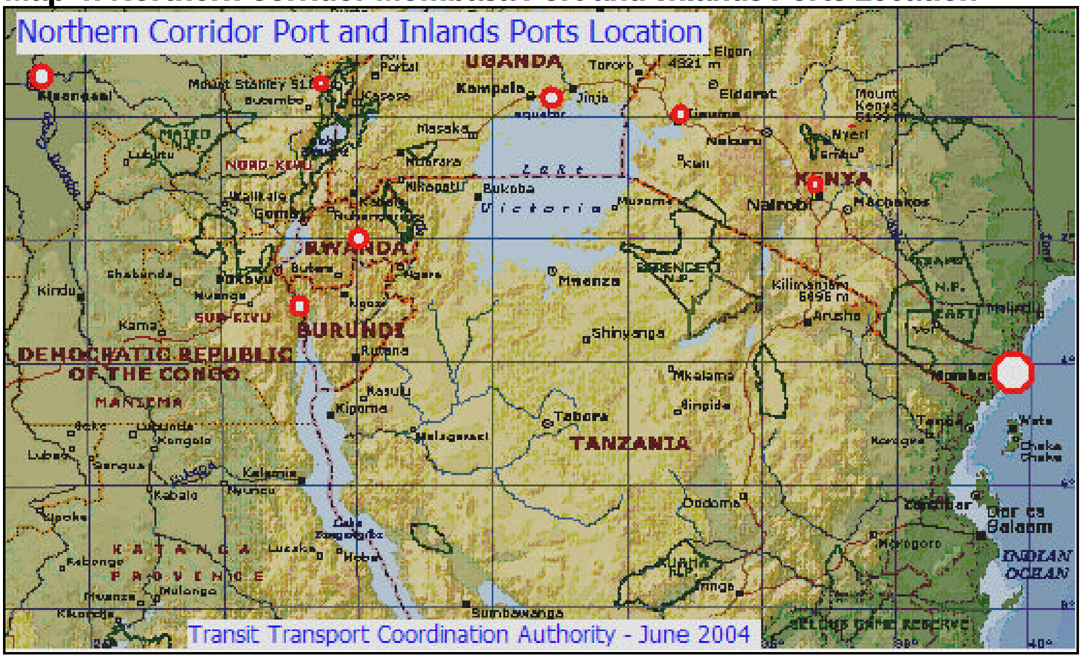
The member States of the Northern Corridor have undertaken policy reforms and do recognise the significant role of public and private sector partnerships in the provision and maintenance of transport infrastructure in general and road infrastructure in particular. In this regard, Kenya has begun to offer concessions on sections of the Mombasa-Malaba Highway. This approach is bound to gain momentum ill all the countries of the Northern Corridor.

4.2.2. Ports Infrastructure and Inland Terminals

a) Mombasa Port

The Government of Kenya has adopted the policy of turning the Port of Mombasa into a landlord port. This means that the majority of the services that have hitherto been provided by the Kenya Ports Authority will now be provided by the private sector. The Port Authority is currently investing in handling equipment in order to improve its efficiency and to cope with the growing cargo volumes. The Container terminal will require expansion, within the next two years, as the current facility is not adequate for the ever increasing volumes of containerized traffic. Investment in the container terminal alone will require between US$ 185m and US$ 225 million.

Map 4: Northern Corridor Mombasa Port and Inlands Ports Location



Kenya Ports Authority has the vision to make Mombasa Port become one of the 20 most efficient ports in the world by 2010. Efficiency in operations at the

Mombasa Port is vital in NCTTCA's aim of reducing transport costs along the corridor.

In addition, plans are underway to establish a duty free area in the port of Mombasa, which provides further investment opportunities.

b) Inland Ports

In order to further ease cargo throughput of the Mombasa Port and shipment of goods, inland ports are required. In this regard, there are already common user facilities in Bujumbura, Burundi and Kigali, Rwanda. While there are a number of privately owed container depots in and around Kampala, there is an urgent need to develop an Inland Port in Kampala. Public, private partnership is required for the development of such a facility.

The inland port in Bujumbura and Kigali also require expansion and equipment. The Bujumbura one is already being operated under a concession.

The Kisangani River Port is strategically located and plays a major role in linking Eastern D R Congo with Kinshasa, other parts of the country and Eastern Africa.

4.2.3. Inland Waterways Transport

As indicated earlier, Lakes Victoria, Albert, Edward, Kivu and Rivers Nile and the Congo provide the inland waterways along the Northern Corridor. There is an enormous potential for the private sector to participate in the provision of shipping services across all these waterways.

In the case of Lake Victoria, the largest waterway, only wagon ferry services operated by the rail companies of Kenya and Uganda exist. Investment in container carrying ships is a great prospect.

In addition and by way of the Akagera River, there is the possibility of developing a transport route for Rwanda through Lake Victoria.

4.2.4. Development of Rail Transport

Rail transport is still regarded as the most convenient and cost effective mode for the haulage of cargo, over long distances and as such, the improvement of rail transport infrastructure and services has been given prominence in TTCA's immediate and long term objectives. In this regard, TTCA is promoting the upgrading of the existing rail infrastructure and the construction of missing links.

(i) Rehabilitation and Upgrading the Existing Network

Mombasa-Nairobi (530km)

This section, which is laid with 95lb rail, requires spot improvements and replacement of rails and sleepers. For this purpose, US$ 5million is required.

Nairobi-Malaba (550km)

This section requires upgrading to 110lb rails, replacement of sleepers and reconstruction of culverts, for which US$ 62million is required.

Nakuru-Kisumu (217km)

Upgrading of the section, Nakuru to Mau Summit, a distance of about 60 km from 60lb to 80lb rail has been undertaken in the past two years. The remaining sections (approximately 160km) are still to be upgraded from 60lb to 80lb rails. This has been estimated to cost US$47million.

Malaba-Kampala (250km)

Emergency repairs of bad spots, culverts and bridges are currently being undertaken with the financing of the European Union. The remaining sections of the permanent way rehabilitation will require US$ 35million. In addition, US$3million is needed for the improvement of the signaling and telecommunications system.

Kampala-Kasese (330km)

This line requires major rehabilitation, which entails strengthening of the basement, realignment, reconstruction of culverts and bridges and replacing rails and sleepers. Depending on the scale of works, estimates range from US$42million to US$100million.

Tororo-Mbale-Soroti-Gulu-Pakwach Line

Insecurity in Northern Uganda had closed the closure of this line, which has now been re-opened, for freight services, up to Mbale. Uganda Railways plans to continue with the current efforts to re-open the line, at least up to Soroti.

Subsequently, the plan is to open the entire line up to Pakwach on the Nile with a view to restoring rail transport links with southern Sudan.

(ii) Rail Concessions

The governments of Kenya and Uganda are currently engaged in negotiations that will lead them to contracting one concessionaire to run the two railways for the next twenty five years. The target is to complete the process by July 2005. This will be a vertically integrated concession, whereby, besides operating trains, the concessionaire will also be responsible for track maintenance. The following are some of the main features of what the two governments are considering:

- One concessionaire, but different concession agreements;
- Concessionaire to register two separate operating companies, one in Kenya and one in Uganda for tax purposes;
- Nationals of Kenya and Uganda to hold 40% shares in the operating companies;
- Kenya and Uganda to have two separate assets holding companies;
- Separate regulatory authorities for each country are to be formed;
- Government of Uganda and the Government of Kenya to enter into a bilateral agreement, spelling out commitments and to facilitate the operations of the two rail companies to be registered by the single concessionaire;
- Separate agreements for freight and passenger services;
- Kenya is offering all lines and both freight and passenger services;
- Uganda is offering Kampala-Malaba, Tororo-Soroti and marine services on Lake Victoria

In terms of the timeframe, pre-marketing to commence in June this year, while full blast marketing shall commence in August and September this year. The bidding process will be launched in December 2004 and the entire process ought to be completed by the end of July 2005.

(iii) Development of Missing Links

A number of initiatives aimed at linking Burundi, Rwanda and D R Congo to the East African rail network, have been pursued in the recent past. These include the would-be Kagera Basin Organization railway system and the Great Lakes Railways Initiative of COMESA.

The KBO went to the extent of carrying out economic feasibility studies, in the 1980s, but the projects were never implemented for one reason or another.

The Great Lakes Railway project of COMESA, which aims at linking Burundi, Rwanda, D R Congo and Uganda to the Zambia Railway System, through Lake

Tanganyika, Lake Kivu and Lake Edward, was initiated about 4 years ago and a pre-feasibility study was carried out.

In line with its objective to transform the Northern Corridor into an economic development corridor, and the prominence being accorded to rail transport, the TTCA is currently promoting an initiative to link Kisangani to Mombasa by rail. A number of options are under review. Studies will be required to facilitate the selection of the most suitable option.

In summary, rail projects of the Northern Corridor, which are aimed at improving corridor efficiency and the global competitiveness of the sub-region include:

i. Rehabilitation of the existing network;
ii. Concession of the existing railway companies;
iii. Upgrading and widening of the existing lines;
iv. Construction of missing links.

Investment opportunities exist in all the above cases, both in the immediate and the medium to long term.

4.2.5. Pipeline

The extension of the oil pipeline from Eldoret or Kisumu to Kampala has been found to be viable, with an internal rate of return estimated at more than 32%. Preparation of the project has been completed and tender for "Expression of Interest" for strategic investment partners has been issued. The project is being promoted on the basis of **build, own, operate and transfer** (BOOT) strategic partnership. Project is estimated to cost about USD 100 Million.

Equity partnership has been agreed as follows:

Private investor:	51%
Kenya Government:	24.5%
Uganda Government:	24.5%

5.0. CONCLUSION

The Northern Corridor Sub-region is endowed with resources which are not yet fully harnessed. All Countries of the Northern Corridor have adopted liberalization policies, thereby providing an enabling environment for investment.

The Corridor is the busiest trade Corridor in the COMESA region and as such, its transformation into an economic corridor would offer real prospects for economic growth and sustainable development, resulting in improved standards of living for a significant proportion of the population of the sub-region.

Even at the current levels of economic development, transportation infrastructure and facilities are inadequate, thereby providing investment opportunities in this sector.

Corridor approach in now recognized by donors and development partners as an effective mechanism for facilitating trade. Therefore COMESA should embrace this approach and align its programs with a view to supporting Corridor activities.