CORRIDOR DIAGNOSTIC STUDY OF THE NORTHERN AND CENTRAL CORRIDORS OF EAST AFRICA

INCEPTION REPORT - FINAL VERSION

SUBMITTED TO
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<tr>
<td>4PL</td>
<td>Fourth Party Logistics Provider/Advisor</td>
</tr>
<tr>
<td>ADAR</td>
<td>Association of Clearing Agents of Rwanda</td>
</tr>
<tr>
<td>ADB</td>
<td>African Development Bank</td>
</tr>
<tr>
<td>ARNOLAC</td>
<td>Armement Nord Lac (Burundi)</td>
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<tr>
<td>ASAR</td>
<td>Association of Insurers of Rwanda</td>
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<tr>
<td>ATAR</td>
<td>Association of Transporters of Rwanda</td>
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<tr>
<td>CC-TTFA</td>
<td>Central Corridor Secretariat</td>
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<td>CDS</td>
<td>Corridor Diagnostic Study</td>
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<tr>
<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
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<tr>
<td>COMPETE</td>
<td>Competitiveness and Trade Expansion Program</td>
</tr>
<tr>
<td>COP</td>
<td>Chief of Party</td>
</tr>
<tr>
<td>CTI</td>
<td>Confederation of Tanzania Industries</td>
</tr>
<tr>
<td>CUSTOMS</td>
<td>Tanzania Revenue Authority</td>
</tr>
<tr>
<td>DHID</td>
<td>Department for International Development (UK)</td>
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<tr>
<td>DPG</td>
<td>Development Partner’s Group</td>
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<td>EAC</td>
<td>East African Community</td>
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<tr>
<td>EDI</td>
<td>Electronic data interchange</td>
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<tr>
<td>ESRI</td>
<td>Environmental Systems Research Institute</td>
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<td>FEAFFA</td>
<td>Federation of Eastern African Freight Forwarders Associations</td>
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<tr>
<td>FIAS</td>
<td>Foreign Investment Advisory Service</td>
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<tr>
<td>FRSP</td>
<td>Rwanda Federation of Private Sector</td>
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<tr>
<td>GIS</td>
<td>Geographic Information System</td>
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<td>IG</td>
<td>Implementation Group</td>
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<tr>
<td>JICA</td>
<td>Japan International Cooperation Agency</td>
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<tr>
<td>KIFWA</td>
<td>Clearing and Forwarding services</td>
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<tr>
<td>LAMUSSEC</td>
<td>Lamu-Southern Sudan-Ethiopia Corridor</td>
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<tr>
<td>LBG</td>
<td>Louis Berger Group</td>
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<tr>
<td>MAGERWA</td>
<td>Magasins Généraux du Rwanda– ICD/Bonded warehouse</td>
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<tr>
<td>MINICOM</td>
<td>Ministry responsible for Commerce &amp; Tourism (Rwanda)</td>
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<tr>
<td>MSC</td>
<td>Marine Services Company Limited (Tanzania)</td>
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<tr>
<td>MTEF</td>
<td>Medium-Term Expenditure Framework</td>
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<td>NC-TTCA</td>
<td>Northern Corridor Secretariat</td>
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<td>NCIMPS</td>
<td>Northern Corridor Infrastructure Master Plan Study</td>
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<td>NDC</td>
<td>National Development Corporation (Tanzania)</td>
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<td>OSBP</td>
<td>One stop border post</td>
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<td>PMAESA</td>
<td>Port Management Association of Eastern and Southern Africa</td>
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<tr>
<td>RJCCC</td>
<td>Regional Joint Coordinating Committee on Customs</td>
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<td>SACU</td>
<td>Southern Africa Customs Union</td>
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<td>SADC</td>
<td>Southern African Development Community</td>
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<td>SDI</td>
<td>Spatial Development Initiatives</td>
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<td>SUMATRA</td>
<td>Surface and Marine Transport Regulatory Authority (Tanzania)</td>
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<tr>
<td>Acronym</td>
<td>Description</td>
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<tr>
<td>TAFFA</td>
<td>Tanzania Freight Forwarders Association</td>
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<td>TANROADS</td>
<td>Tanzania Roads Agency</td>
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<tr>
<td>TATOA</td>
<td>Tanzania Truck Owners Association</td>
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<td>TASAA</td>
<td>Tanzania Shipping Agencies Association</td>
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<tr>
<td>TCG</td>
<td>Task Co-ordination Group</td>
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<td>TICTS</td>
<td>Tanzania International Container Terminal Services Company Limited</td>
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<tr>
<td>TTFA-CC</td>
<td>Central Corridor Secretariat</td>
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<tr>
<td>TPA</td>
<td>Tanzania Ports Authority</td>
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<tr>
<td>TRL</td>
<td>Tanzania Railways Limited</td>
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<tr>
<td>TCCIA</td>
<td>Tanzania Chamber of Commerce Industries and Agriculture</td>
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<tr>
<td>TTCA-NC</td>
<td>Transit Transport Coordination Authority of the Northern Corridor</td>
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<tr>
<td>TSU</td>
<td>Task Support Unit</td>
</tr>
<tr>
<td>UFFA</td>
<td>Uganda Freight Forwarders Association</td>
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<tr>
<td>UGIETA</td>
<td>Uganda Importers &amp; Exporters Association</td>
</tr>
<tr>
<td>UMA</td>
<td>Uganda Manufacturers Association</td>
</tr>
<tr>
<td>UNCCI</td>
<td>Uganda National Chamber of Commerce and Industry</td>
</tr>
<tr>
<td>URA</td>
<td>Uganda National Road Agency</td>
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<td>USAID</td>
<td>United States Agency for International Development</td>
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1 Objectives and Mission

This Inception Report provides (i) the objectives and mission of the Corridor Diagnostic Study (CDS) of the Northern and Central Corridors, (ii) a summary of the key technical and administrative activities undertaken during the first month of the study, (iii) a discussion of key methodological issues, (iv) an updated work program, and (v) the Communications Strategy for the CDS.

The Heads of State in the COMESA, EAC and SADC, the Tripartite, have determined that the transport inefficiencies are among the biggest impediments to realizing their vision to lead their countries out of poverty. Transport costs are prohibitively high and are a barrier to trade and investment, which are the cornerstone for the aspired economic growth to regional prosperity.

Having had the experience of successful development of an action plan to effectively tackle transport bottlenecks on the North-South Corridor, the Tripartite have ordered the preparation of a similar action plan for the key trade routes of Eastern Africa. As a technical foundation for the action plan, regional stakeholders in March 2009 agreed to carry out a Corridor Diagnostic Study (CDS) with funding from the U.S. Agency for International Development (USAID) and the U.K. Department for International Development (DFID).

The work is guided by a task Coordination Group (TCG) chaired by EAC, and comprising the Tripartite (represented by COMESA, EAC and SADC Secretariats), the Northern and Central Corridor Secretariats, representatives of national governments and Development Partners (led by USAID, DFID, JICA, AfDB, EU and World Bank).

The main outputs of the study, due in the third quarter of 2010, are:

- Comprehensive diagnostic audit of the logistics system of the Northern and Central corridor detailing status, impact and causes of inefficiency as well as possible solutions;

- Prioritized action plan to address the identified deficiencies based on economic assessments of the benefit and costs of specific investments and policy reforms;

- Project coordination database containing key studies, reports and activities related to the Northern and Central corridors; and
EastAfricanCorridors.org website which will house all materials produced under the CDS, including the study itself when complete, the project coordination database, GIS maps, project updates, interviews, news and short films.

A draft Action Plan will be presented at a major stakeholders’ workshop for review and verification. Subsequently, the final report and Action Plan will be prepared and presented to a regional Ministerial meeting for approval and, thereafter, submission to the Tripartite.

The Action Plan will be presented as a clear statement projected via GIS maps showing:

- Ports with main characteristics, proposed projects and photos; and
- Main roads and state of the roads, proposed projects with photos, and a database of distances/times taken between points;
- Railways of the region with photos, databases of characteristics and proposed projects for improvements;
- Lake ports and services with photos, characteristics and proposed projects to improve corridor links through the main Lakes Victoria and Tanganyika;
- Border posts with times taken to cross and photos; and
- Other key logistics infrastructure projects, with photos.

Just as was the case for the North – South Corridor, the Tripartite will use the Action Plan to galvanize implementation in the member countries and to host an international investment conference to showcase the approach and mobilize necessary investment finance. Major finance institutions, the private sector, investment funds and consortiums, and bilateral and multilateral donors will be invited to participate. It is expected that the CDS will make a difference in securing implementation of projects and removing the long standing transport bottlenecks in East Africa.
2 Background and Scope

2.1 Background

The Northern Corridor anchored by the port of Mombasa in Kenya, and the Central Corridor, anchored by the port of Dar es Salaam in Tanzania, are principal and crucial transport routes for national, regional and international trade of the five East African Community (EAC) countries, namely; Burundi, Kenya, Rwanda, Tanzania and Uganda. Due to inadequate physical infrastructure and inefficiency, these corridors are characterized by long transit times and high cost. Freight costs per km are more than 50 percent higher than the USA and Europe and for the landlocked countries; transport costs can be as high as 75 percent of the value of exports. Modernization of transport infrastructure and removal of non-tariff barriers along these corridors is critical for trade expansion and economic growth, which are key to the success of regional integration as well as creation of wealth and poverty alleviation in the individual countries.

In response to the challenge to modernize Northern and Central corridor infrastructure and services, participants at a regional Stakeholder Coordination Conference held in Nairobi, Kenya on March 17-19 2009 on “Enhancing the Efficiency of Transit Corridors in Eastern Africa” agreed that a Corridor Diagnostic Study (CDS) be carried out. The diagnostic data and findings, which will be made available on a website (www.EastAfricanCorridors.org) and GIS database1, will enable policy makers, implementers, donors and other investors to get a clear understanding of transit delays and costs along the Northern and Central Corridor along with a view to implementing urgently the identified priority projects and interventions.

The CDS, engaged with funding from USAID and DfID, will be implemented under the guidance of a Task Co-ordination Group (TCG), chaired by EAC. The TCG comprises primarily the NC-TTCA (Northern Corridor Secretariat) and the CC-TTFA (Central Corridor Secretariat), the Tripartite (SADC, COMESA and EAC), and representatives of national Governments and development partners.

Nathan Associates was engaged to implement the CDS for the East Africa Northern and Central corridors as an activity under USAID’s Worldwide Trade Capacity Building Project (TCBoost) contract. Nathan

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1 The mentioned website and GIS database will be developed by USAID/COMPETE and the CDS Team will provide content.
Associates mobilized the CDS Team Leader and other core team members, based in Nairobi, on November 3, 2009.

The results of the study will be shared with the Implementation Group (IG) and a Development Partner’s Group (DPG) to be formed to coordinate work on the Northern and Central corridors, as well as a broader spectrum of regional and international potential investors at an Investment Conference.

2.2 Geographic Scope of Study

We have identified each corridor as a combination of port, railways, inland waterways, main road and several branches or feeder roads leading to other countries and large populated areas that contribute to traffic volumes. The thicker lines indicate the main corridor. If solid, these lines represent highways only. Striped lines indicate a combination of highways and parallel railroad tracks (see legend for more details). The diagrams are intended to be indicative of the corridor elements and as aids in project discussions. They are not exact nor to scale.

There were three guiding principles used to select which roads would be included in the diagrams:

- All national roads connected to the corridor’s main line;
- Main paved roads (or planned to be paved) that lead to border crossings or to major towns;
- Major new proposed regional linkages that will connect to the corridor (included in regional plans);

Major towns or important road intersections are marked with circles and border stations are indicated with black rings. Please note that some border stations may have two names, one for each country. We have only indicated one to keep the diagram as simple as possible. The branches typically end at the borders with countries not covered in the analysis. Possible connections with Central or Northern Corridors are indicated as traffic can use the connecting points to take the other corridor as an alternative route.

2.2.1 Northern Corridor

The corridor transport network and road connections into the Democratic Republic of Congo (DRC) are shown in the Figure 2-1 on the following page. Of the three connections to the DRC, the northernmost road was recently improved (still unpaved) while the southern connections to Kisangani remain impassable. The planned ring roads in Nairobi and Kampala are indicated with a red color in the diagram even though they are not constructed yet. Their associated time savings, reduction of pollution and accidents are expected to be significant.

There is a pipeline that runs parallel to the Mombasa-Nairobi-El Doret road (Figure 2-2). There are proposals to extend the pipeline all the way to Bujumbura. Given the simplicity of the pipeline and to avoid cluttering the diagrams it was kept in a separate diagram.
2.2.2 CENTRAL CORRIDOR

The port, road and rail network for the Central Corridor is shown in Figure 2-3. Additional branches include the ferry services offered in Lake Victoria that link Kenya (Kisumu) and Uganda (Port Bell and Port Jinja) with Tanzania (Mwanza) where there are connections with the road and railroad network in the Central Corridor. Another Lake service on Lake Tanganyika connects Kigoma (Tanzania) with Bujumbura (Burundi) and Kalemie and Uvira (D R Congo), after traveling by train from the port of Dar es Salaam. In general, ferry services are not very competitive and unreliable due to old and insufficient equipment and infrastructure.
Figure 2-2
Northern Corridor Roads and Rail

Legend
- Corridor Highway and Railway
- Corridor Highway and Proposed Railway Improvements
- Corridor Highway
- Feeder Roads - Existing
- Feeder Roads – Planned / Proposed Improvements
- Extensions into DRC
- Railway
- Border point
- Country Border
- Ferry Lines
- Major Cities/Nodes

Figure 2-2
Northern Corridor Roads and Rail

Legend
- Corridor Highway and Railway
- Corridor Highway and Proposed Railway Improvements
- Corridor Highway
- Feeder Roads - Existing
- Feeder Roads – Planned / Proposed Improvements
- Extensions into DRC
- Railway
- Border point
- Country Border
- Ferry Lines
- Major Cities/Nodes
Figure 2-3
Central Corridor Roads and Rail

Central Corridor

Legend
- Central Corridor Roads and Rail
- Corridor Highway and Railway
- Corridor Highway and Proposed Railway Improvements
- Corridor Highway
- Feeder Roads - Existing
- Feeder Roads - Planned/Proposed Improvements
- Extensions into DRC
- Railway
- Country Border
- Ferry Lines
- Major Cities/Nodes
- Border point

- DRC
- UGANDA
- TANZANIA
- KENYA
- ZAMBIA
- BURUNDI
- RWANDA
- CONGO (DRC)

Figure 2-3 shows the Central Corridor Roads and Rail network with key cities and nodes such as Dar Es Salaam, Lusaka, and Kisumu. The map highlights various highways, railway lines, and proposed improvements across the region.
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3 Summary of Key Activities

3.1 General Approach

The general approach of the study is to:

- Undertake a comprehensive analysis of relevant past studies and data collection, perform a verification of all aspects affecting infrastructure and the performance of the two corridors, and identify information gaps. This task will include carrying out an inventory of the status, condition of infrastructure and ongoing development programs and projects;

- Conduct extensive interviews with a variety of users of transport services and shippers of goods, services providers (port, rail, road, inland waterways, customs, clearing and forwarding, border crossing, security services) and select members of civil society. This process will be implemented using the FastPath® methodology. The key output would be a diagnostic audit of the logistics system of the two corridors, detailing status, impact and causes of inefficiency as well as possible solutions;

- Analyze data and formulate a prioritized action plan to address the identified deficiencies based on corridors’ freight performance and demand forecast;

- Present data and findings, as well as recommended projects and

- Develop and implement a communications strategy to inform about the process, findings and recommendations in a way that convinces and persuades the various stakeholders to take action and/or provide financing to implement the recommended action plan. Media to be used include a website, regular newsletters, posting photos, video clips and short films. The messages should address the respective interests of various stakeholders involved including policy makers, service providers (especially government agencies such as customs authorities, regulatory authorities, etc), shippers and

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2 FastPath® is a transport logistics diagnostics tool that allows the user to assess the performance of a transport logistics chain in terms of time, cost, and reliability, and compare the assessment results with global and regional benchmarks.
users, donors, private investors or financiers, freight forwarders, trucking companies and the general public.

3.2 Technical Activities and Issues

A good deal of progress has been achieved during the first month of the CDS project in the following areas:

- Caucus Meeting on Donor Coordination in Mombasa
- Technical Coordination Meeting in Nairobi
- Technical coordination memo
- Reports and data collection
- Donor coordination database
- Collaboration workspace
- Communications strategy
- Other meetings

A description of the work performed and issues encountered in each of these areas is provided in the sections below.

3.2.1 Caucus Meeting on Donor Coordination in Mombasa

On September 30-October 1, 2009, Lisa Yarmoshuk attended the Regional Conference on Northern Corridor Transport and Trade Facilitation in Mombasa Kenya. The conference theme was “Towards Reducing the Cost of Doing Business” and was attended by senior transport officials and representatives from the five EAC countries and the NC-TCCA. In conjunction with the conference, a caucus meeting on donor coordination was held on October 1, 2009.

The primary purpose of the Caucus Meeting was for AfDB to debrief donor partners on their discussions with RECs following COMESA’s approach for AfDB to support corridors within the Tripartite arrangement and in particular, with the preparation of bankable projects. The secondary purpose – at the request of USAID – was to have an initial discussion between development Partners on the various studies underway within the corridor under the leadership and direction of the COMESA/EAC/SADC to explore opportunities to foster effective coordination of efforts and avoid overlap in view of the various interventions/studies covering trade transport, transit and trade facilitation and infrastructure in general that are underway or planned in East Africa. The following conclusions and next steps were agreed:

1. Leadership and direction of initiatives on these corridor developments will be provided by the COMESA/EAC/SADC Tripartite. Capacity Building support to the tripartite will be provided through support from AfDB. Any supporting Donor coordinating mechanisms to be put in place
should be complementary to and support the Tripartite Framework and not be seen as a parallel process (Tripartite & all DPs).

2. The scope, focus and timeframe of the proposed Pledging Conference will be better defined following further consultations and direction from the Tripartite. (Tripartite & AfDB)

3. On-going studies should not be stopped. They should continue as they were meant to respond to specific needs of the sponsoring institutions and beneficiaries/recipient. Any adjustments to scope of work or timelines will need to be led by the clients in consultation with the Tripartite, once new objectives and timelines become clear. (Tripartite, government study leads and donors)

4. Those studies that are just commencing should, subject to the direction of the Tripartite and concurrence of the funding agencies, be amended to respond to areas that have been identified as priority gaps – and within sensible scope of existing work, and capabilities of existing consultants. If necessary complimentary studies may be commissioned to cover identified analytical, geographical and sector gaps. (Tripartite and Development Partners)

5. There is need for close collaboration and potential rationalization of studies to avoid overlap and ensure that the studies cover all areas of interest. In this regard, the TOR/Scope of work for the various studies should be shared by the concerned parties to the rest of the members before the proposed Donor Coordination meeting on October 16 in Nairobi. (Development partners)

6. The Donor Coordination meeting proposed for October 19 should now be brought forward to Friday, October 16, 2009 in Nairobi. This must be attended by senior level representatives from tripartite to deliver an effective outcome.

The record of the Caucus Meeting on Donor Coordination of October 1, 2009 is presented in Appendix A.

3.2.2 TECHNICAL COORDINATION MEETING IN NAIROBI

A CDS technical coordination meeting held on October 16, 2009 involved representatives of funding, coordinating and implementation agencies of various diagnostic and infrastructure studies on the Northern Corridor and Central Corridor. The meeting was attended by representatives from EAC (chair), NC-TTCA, USAID/EA, DFID, JICA, AfDB, USAID/COMPETE project, Nathan Associates Inc (contractor for CDS), and Louis Berger Group Inc (contractor for Northern Corridor Infrastructure master plan study). The World Bank/FIAS attended via a video conference. Representatives of CC-TTFA and COMESA were not able to attend the meeting.

Four major observations/decisions relevant to CDS were made:

- In order to avoid duplication, the three contractors for ongoing studies on the Northern Corridor and Central Corridor should identify and plan how to coordinate work in areas of duplication. The contractors concerned were Nathan Associates Inc (Corridor Diagnostic Study for Northern Corridor and Central Corridor), Louis Berger Group Inc (Northern Corridor Infrastructure Master Plan Study)
and CPCS Transcom, Ltd. (Analytical Comparative Transport Cost Study on Northern Corridor). Savings to be identified out of such coordination should be used to undertake additional work;

- Other donor activities were elaborated and have to be taken into account. These are USAID/COMPETE project, DfID funded one stop border posts’ in depth audits, JICA supported customs capacity building project for East Africa, World Bank FIAS/EAC program covering trade logistics, business licensing and regulatory reform, and special economic zones;

- A joint inception meeting was agreed to be convened in Arusha on December 2-3, 2009 as the first formal meeting of the TCG hosted by the EAC Secretariat.

- Ultimately the objective of all studies and initiatives is to generate an integrated corridors development programs and projects to be presented at an Investment Conference, as directed by the region’s Heads of State and Governments next July 2010.

The record of the meeting is attached as Appendix B.

### 3.2.3 TECHNICAL COORDINATION MEMO

Based on the decision of the October 16, 2009 technical coordination meeting in Nairobi, the three consultancy teams carrying out studies for the Northern Corridor and CC: Nathan Associates Inc, Louis Berger Group Inc (LBG) and CPCS consulted and reached agreement on how to cooperate. A memo presenting areas and modes of cooperation was prepared and submitted to the principals NC-TTCA, USAID, DfID and EAC. However, only Nathan and LBG signed the memo. CPCS, who had not attended the October 16, 2009 meeting, declined to sign, preferring to hold further consultations with their client, NC-TTCA, to secure further clarification.

NC-TTCA and USAID responded by concurring with the memo, with the following comments and instructions:

- There is need to synchronize and prepare a joint work plan, at least for those items/activities that are shared. This action plan should clearly show associated milestones that illustrate exactly when deliverables would be due and, hence, exact time when one consultant provides input to the other. Also where data is being exchanged, there should be clear language as to the exact format the data will be in when it is transferred from one team to another;

- Consultants should determine and clearly outline likely savings and suggest additional activities that can be done with the savings.

On the basis of that response, the two contractors, who had signed the memo, have worked out a coordinated work plan for the agreed areas. The memo and action plan are presented in Appendix C. The areas involved and agreed modes of cooperation are as follows:
• **Collection and sharing of background documents and data:** CDS team has established a collaboration website where all teams can upload and access documents. This is elaborated in section 3.2.6 below;

• **Infrastructure condition inventory:** The Northern Corridor Infrastructure Master Plan Study (NCIMPS) performed by LBG shall conduct an infrastructure condition survey for the Northern Corridor and provide results to the CDS Team by mid-January 2010. CDS will conduct condition survey on the Central Corridor using the methods, standards, and forms provided by the NCIMPS to match the work done on the Northern Corridor. CDS will share the results of their road condition surveys on the Central Corridor with the NCIMPS by January 31, 2010. CDS will supply the other two studies any analyses of other transit infrastructure on the Central Corridor, which is expected to be ready end of March 2010.

The CDS will cover Northern Corridor routes with a Media/Communication Specialist to prepare a photo journal and other media to be used in the communications materials. For the Central Corridor routes, the media specialist will accompany the CDS team conducting infrastructure condition surveys;

• **Baseline traffic data:** CDS team shall lead the preparation of baseline traffic flows for international trade on the Northern and Central Corridors between maritime ports and inland origins and destinations. Specification of origin-destination pairs for the domestic and intraregional trade flows will be coordinated with the CDS and NCIMPS teams. The CDS Team will provide the NCIMPS the collected and synthesized baseline traffic flows for international trade on the two corridors by January 31, 2010.

• **HDM model agglomeration:** NCIMPS Team shall lead in coordinating and contracting for an agglomeration of the HDM-4 data that is available for each country. It is anticipated that the University of Birmingham group that prepared an agglomeration of national HDM-4 data for the North-South Corridor will be retained to prepare a similar agglomeration for the Northern and Central Corridors. The agglomerated HDM-4 models for the Northern and Central Corridors shall be provided in electronic format by January 31, 2010. The specific costs will be borne equally by the CDS and NCIMPS teams. Should contracting the University of Birmingham fail, and no other contractor be found acceptable to NCIMPS and CDS, the CDS team will be responsible for generating the HDM-4 data for the Central Corridor while the NCIMPS team will be responsible for generating the HDM-4 data for the Northern Corridor. In this case, the CDS and NCIMPS teams will coordinate their use of HDM-4 so that HDM-4 data is consistent for both corridors. Also in this case, the CDS and the NCIMPS teams will share their data with each other by February 15, 2010.

• **Transport policy analysis and recommendations:** The CDS and the CPCS study teams will undertake their own assessment of transport policy, institutional and regulatory issues and identify recommended policy actions. The three teams (including LBG) will hold a joint working session prior to April 30, 2010 to review the initial assessments and to coordinate proposed policy recommendations.
\begin{itemize}
  \item \textit{Stakeholder workshops and review meetings}: Whenever feasible and practical, NCIMPS and CDS will endeavor to conduct joint stakeholder workshops and review meetings so that issues of common interest and subject areas can be discussed. Each team will be responsible for the travel and participation of their own team members to jointly held workshops. The NCIMPS and CDS will split evenly the logistics costs for the joint workshops including invitations, workshop materials, and arrangement for the venue and refreshments for up to four workshops. Costs for stakeholders travel and per diem are generally excluded from the joint workshops.
\end{itemize}

Subsequently, after further CPCS consultation with NC-TTCA, a meeting was held in Nairobi on November 26, 2009 between the CDS Team Leader and CPCS. Discussions focused on finding ways of cooperation at a practical on ground level outside the formal memorandum. It was agreed that CDS and CPCS will proceed with their assignments according to respective TORs and cooperate in discussing approaches and harmonizing their findings in the areas of (i) baseline traffic data, (ii) transport policy analysis and (iii) determination of freight rates for central corridor. CPCS will also participate in the sharing of documents via the collaboration website established by CDS.

The agreement with LBG to perform some of the CDS work has resulted in some cost savings for Nathan Associates Inc. With these savings Nathan has proposed to extend geographical coverage of the corridor diagnostic audit, using \textit{FastPath®} methodology, to analyze the link from Dar es Salaam to Mbeya in Tanzania. This route has been chosen because it provides a critical link between the food surplus areas in Southern Tanzania and neighboring Zambia and Malawi and the food deficit areas in Central and Northern Tanzania and Kenya. Furthermore, the limited amount of savings realized meant that the choice would be limited to such a well developed route, with adequate data availability. Application of \textit{FastPath®} methodology on this route will complement the detailed analysis on condition and development needs completed in mid-2009 under the North-South program.

\subsection*{3.2.4 Inter-Ministerial Meeting on Central Corridor Transport Project}

The CDS Team leader attended a trilateral (Burundi, Rwanda and Tanzania) senior officials and Ministerial meeting in Kigali from December 8–10, 2009, where the findings of the study to upgrade Dar es Salaam–Isaka railway line were presented by Burlington Northern Santa Fe (BNSF) railway, the company which conducted the study. The study included reviews of the Dar es Salaam Port Masterplan and the AfDB financed study of the new railway extension from Isaka–Keza (Tanzania)–Kigali (Rwanda) and Keza–Musongati (Burundi). The study was approved and a decision was made to take the project forward, with the assistance of a Project Management Consultant (PMC) to be procured. The decision is reflected in the Ministerial Joint Communiqué, which is presented in Appendix D.

While in Kigali, the Team Leader introduced the CDS to the Ministers at their side meetings, as well as the Permanent Secretaries, Director Generals, and other senior officials. He also met and held consultations with several persons, including the following key ones:
Prosper Musafiri, Director General of Rwanda Central Public Investment and External Finance Bureau (CEPEX), who provided data as inputs to the projects database CDS is preparing;

Vital Narakwiye, Director General of Ministry of Transport, Posts and Telecommunications, Burundi, who promised to send information and facilitate implementation of the CDS project in Burundi;

Dr William Nshama, new Director of Transport services in Tanzania, who acknowledged the importance of CDS process and committed to facilitate implementation;

Juste Rwamabuga, Division Manager, Transport in African Development Bank to brief him about CDS work which complements AfDB investments on the corridors;

M. Ann Tuwiler, Senior Advisor, International Programs USDA, Washington and Dr Julie Howard, Executive Director, Partnership to Cut hunger and Poverty in Africa, Washington. They are working on agricultural programs along corridors in East Africa. They indicated that the work on corridors to improve efficiency and lower cost would complement their work on agriculture development.

Joseph Foltz, USAID Economic Growth Officer in Rwanda regarding coordination of the Rwanda agriculture programs with work on Northern and Central corridors.

Alloys Mutabingwa, EAC Deputy Secretary General for Planning and Infrastructure. He expressed the commitment of EAC and his office to support efforts to develop and improve the region's infrastructure.

The BNSF consulting team to obtain reports and views on relevant subjects such as traffic forecast, costs and competitiveness of rail and road transport.

### 3.2.5 Reports and Data Collection

In addition to being a good host to the CDS Team, the USAID/COMPETE Project’s transit team has provided reports, especially on the Northern Corridor and background documents to regional meetings held on transit transport and facilitation.

In early November, the CDS Team Leader also visited and held consultations in Tanzania with the CC-TTFA Secretariat, and the Ministry of Infrastructure Development and the Tanzania Roads Agency (TANROADS) on November 9th. Among reports collected, the key ones are the background documents to the Joint (Government and donors) Transport Sector Review meetings held in October 2009. The reports provide a comprehensive review of each subsector, in terms of progress made, achievements and development plans. Other important reports were obtained from the CC-TTFA Secretariat, in particular on performance of the central corridor. The CDS Regional Integration Specialist, Lynn Harmon, also visited Burundi, Rwanda and Uganda in October 2009 where she collected some documents and information for the CDS project.
3.2.6 **Collaboration Workspace**

A shared project website ([www.collaboration.nathaninc.com](http://www.collaboration.nathaninc.com)) has been established and is managed by the CDS Team. The site is being used initially as the common access site for all prior studies, reports and data. Authorized members of each of the study teams have complete and continuous access to the background documents and information. The documents will subsequently be transferred to the [EastAfricanCorridor.org](http://EastAfricanCorridor.org) website developed and maintained in the short-term by USAID/COMPETE project and in the long-term by the EAC, NC-TTCA and CC-TTFA.

Collaboration is a secure, web-based collaborative platform that will allow communication primarily within the project team, with the client and with other stakeholders involved. An organized online library will facilitate easy access to background documents and data that will be useful for the project team, members and stakeholders. Access to Collaboration is limited to those who have been issued user names and passwords. We will soon add direct clients, study team members of related studies, followed by other stakeholders.

On the Collaboration platform, we are able to do the following:

- Organize the document library in the form of an ‘organizational tree’ with subfolders and ability to view this tree with a Table of Contents function.
- Create a calendar, shared by all users of Collaboration in order to keep everyone informed/ remind everyone of important meetings or deadlines.
- Set up meetings with selected users, with reminder options.
- Participate in discussion boards, helping bring people that are geographically apart to have discussions on particular topics. These discussion boards could serve as an alternative to conference calls.
- Send messages to other users of Collaboration with attachments of documents that are on our Collaboration database.
- Search document titles, if a word or more of a document title is known.
- Give different levels of access to different groups of users.

The CDS document library is already of substantial size. We have organized our documents into folders and subfolders based on their subject matter. Most of our documents are under the main folder “Background Documents” that currently consist of the following seven folders:

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3 The number and organization of subfolders is subject to change as more documents are added to our library.
• **Corridors:** Includes six sub-folders on Northern, Central, North-South Corridors, Other African Corridors and TransAfrica Highways as well as a folder on Corridor Best Practices.

• **Countries:** Includes documents related to corridors and are focused on a particular country rather than the entire corridor. We currently have documents on Congo, Kenya, Malawi, Mozambique, Tanzania, South Africa, Uganda and Zambia.

• **Donor Coordination:** Includes documents on donor coordination as well as a subfolder on October 16, 2009 Donor Coordination Meeting.

• **Maps:** Includes maps on the region on corridors, transportation infrastructure, trade, population, employment, mining and poverty.

• **Conferences:** Includes the Nairobi Conference Report. This regional conference discussed “Enhancing the Efficiency of Transit Corridors in Eastern Africa”.

• **Regional:** Includes documents that are focused on African regions as a whole rather than particular corridors or countries.

• **Trade Statistics:** Includes documents that cover trade statistics worldwide.

Collaboration workspace is in the process of continuous development as the East Africa CDS project progresses. New folders will be added for project generated documents, reports and materials presented at workshops and other stakeholder meetings. As of December 15, 2009, more than 170 documents have been uploaded onto the website. A complete table of contents of the documents in the Collaboration workspace is provided in Appendix E.

### 3.2.7 DONOR COORDINATION DATABASE

A meeting was held in Nairobi on November 13, 2009 with Sophie Walker, who led a team that prepared a quickly compiled donor coordination database for the Northern and Central Corridors for the Stakeholder Coordination Conference held in Nairobi, Kenya in March 2009. It was acknowledged that due to time constraint, the report was not comprehensive enough. Based on the experience and output of the Walker study, a methodology has been developed to carry out a more comprehensive “Projects Coordination Database” for Northern Corridor and Central Corridor. This methodology is presented in Section 4.1 below. The composition of the database is presented in Appendix F.

### 3.2.8 COMMUNICATIONS STRATEGY

Upon finalizing the SOW for the CDS, we explored options for staffing and implementing the communications component. As part of this process, we had several in depth conversations with key individuals who worked on the North-South Corridor initiative and who were involved in developing and producing the website, GIS maps and films (including the RTFP Team Leader, UK film and production out, DFID/Zambia point of contact and others). We reviewed and interviewed potential candidates for the position of communications consultant, identified through our own search as well as by way of recruitment.
initiatives conducted by others, including USAID/COMPETE and DFID/East Africa. We also interviewed film houses and other communication experts.

It was determined that in order to best address all elements of the desired communications approach in cost effective way, a full-time communications consultant versed in print, web and digital media would be preferred. It was also determined that an experienced regional film director/producer with extensive experience working with donor and private sector clients in East Africa, UK and the USA should oversee the development of the film products – for which the CDS communications consultant would be part of the team and would do much of the filming required to capture key events, interviews, etc over the course of the project.

In early November, the CDS project contracted Arjun Kohli to develop the communications strategy for print, web and film work. He worked closely with the CDS team leadership to develop the strategy, drawing on the experience of other communications work including DfID’s support of the North-South Corridor work and USAID’s communications and film work in Southern Africa. Mr. Kohli also participated in a series of meetings with USAID/COMPETE team members on the website and proposed GIS maps and met with potential firms who might assist with the design and printing of communications materials. Planning of content for web and print materials also started, as did planning for the proposed film products.

A discussion of the communications strategy is provided later in the Inception Report. The full strategy document is provided as Appendix G.

3.2.9 OTHER MEETINGS

Upon commencing work in Nairobi on November 3, 2009, the CDS Team sought to report and brief the focal representatives of the financing agencies, USAID/East Africa and DFID/East Africa on project start up and planned activities going forward. Accordingly, a meeting was held with USAID/East Africa (Stephanie Wilcock and Scott Allen). The intention was to hold such meeting together with DFID, the partner CDS project funding agency. However, this was not possible due to absence from office on medical reasons of the DFID/East Africa focal person, Frank Matsaert. Subsequently, on December 3rd, a teleconference was conducted with USAID/East Africa (Stephanie Wilcock) and Scott Allen), DFID/East Africa (Frank Matsaert) and Nathan Associates Inc (Lisa Yarmoshuk and Richard Blankfeld) and CDS Team Leader in Nairobi (SMAK Kaombwe).

Apart from project start up issues, discussions in these meetings were mainly on coordination with other consultants and what could be done with the resulting savings, institutional aspects and the scheduling of meetings and workshops as specified in the TOR, capability and assistance to the partner institutions, especially the EAC, to effectively support CDS work.

The agreements and guidance from the meetings have been incorporated in the proposed action plan presented in this Inception Report.
The CDS Team also held meetings with USAID/COMPETE (led by COP Stephen Walls). Apart from office and technical assistance to CDS, we discussed and agreed on how to proceed with development of a website and GIS. Since USAID/COMPETE is responsible for establishing the website and GIS, CDS would provide inputs and secure the best way to show and access project products and information. Discussions have also been initiated with Mark Pearson to determine how best to use the experience and platform from the North-South Corridor project.

3.3 Administrative Activities and Issues

Upon finalization of the terms of reference on September 28, 2009, we undertook a series of activities to arrange for the efficient mobilization of the study team and the establishment of a project office. Those activities and the challenges we envision are described in the sections below.

3.3.1 PROJECT START-UP AND TEAM MOBILIZATION

The Nathan TCBoost Project Chief of Party Project, Lisa Yarmoshuk, and Project Coordinator, Katherine Esser, traveled to Nairobi from September 15, 2009 to October 6, 2009 to consult with USAID and DfID and prepare for project start up. This included securing approval of the proposed Team Leader and other expats, recruiting a Field Office Manager and a local Media/Communications Specialist, interviewed film houses and events coordinators and meetings with USAID/COMPETE. Other activities included locating offices, identifying the most appropriate way to handle logistics and administrative issues and identifying possible residence for the CDS Team Leader.

Subsequently, the Team Leader (SMAK Kaombwe), Operations Manager (Jane Mwaniki) and Transport Analyst from Nathan-Arlington, Patricia Macchi, were mobilized and reported for duty, at the USAID/COMPETE offices, on November 3, 2009, to formally commence implementation of the CDS project. However, as part of agreements made, the project is scheduled to relocate to more spacious new offices to be provided by DfID under the TRADEMARK project in January 2010. The Media/Communications Specialist (Arjun Kohli) joined the team on November 9, 2009.

3.3.2 OFFICE SET-UP AND COORDINATION

Thanks to the USAID/COMPETE project, the CDS Team was able to have office accommodation immediately upon arrival. The office space is limited but it allowed the CDS Team to get on with work without delays. Further, the USAID/COMPETE project provided technical support to access internet and a telephone line.

With on ground arrangements by the Operations Manager and home office prompt response and support, the following have been achieved in a very short period:

- Purchase of office equipment and supplies including computers (2), printers (2 – one color and the other black and white), scanner (1) and mobile phones (2) with easy access to e-mails.
• The renting of an apartment for the Team Leader was also finalized and he moved in on November 13, 2009.

• An operational budget was established that allowed provision of transport services for official work.

In summary, the CDS field operations have started smoothly.

3.3.3 **Envisaged Challenges**

On the administrative side, the challenges appear to be minimal. The only major challenge is the limited space office space available at the USAID/COMPETE project, where all the three CDS staff (Team Leader, Field Office Manager and Media/Communications Specialist) sit in one room. Thus there is no room to have meetings with visitors. This problem will be even more severe when short-term consultants begin to come to the region. Therefore, moving to new offices, to be provided under DfID/TRADEMARK project, in January 2010 is critical.
4 Methodological Issues

In this section we describe our proposed methodology to address specific aspects of the terms of reference that warrant further elaboration. The areas covered include

- Project coordination database
- Interviews to be conducted
- Preparation of demand forecasts

Our proposed approach and methodology for each of these areas are discussed in detail below.

4.1 Project Coordination Database

In this task, we will collect and synthesize current transport related activities financed by each of the five Governments and principal donors along the Northern and Central corridor building on an initial study completed by Sophie Walker for the Stakeholder Coordination Conference held in Nairobi, Kenya in March 2009. A central element of this exercise is to contact the right people to obtain the required data.

We originally were tasked with updating and expanding the donor coordination database assembled by Walker between January and March 2009. However we think it is very important to also collect data from Governments and, where applicable, private sector financed projects to portray the big picture on transport development. Therefore we proposed to expand the task scope and change the name to Project Coordination Database.

4.1.1 Data Collection Methodology

Given the range of projects currently under way, our first approach is to review various relevant documents received and obtain additional data from the Government agencies in each of the five countries --as an alternative to Walker et al. (2009) methodology who contacted donors first. After we have collected

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the official documents and synthesized the information, we will request to the principal donors in the region\textsuperscript{5} to verify the data and to add any missing piece of information that is needed. Ultimately, the Governments are going to feed this database, therefore we will request final official data verification. In summary, the CDS team is following the general methodology which is illustrated in Figure 4-1.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure4-1}
\caption{Data Collection Methodology}
\end{figure}

We identified in Table 4-1 a set of official documents containing information about infrastructure related projects.

\begin{table}
\centering
\caption{Primary Data Sources}
\begin{tabular}{|l|c|c|c|c|c|}
\hline
\textbf{Official Documents} & Tanzania & Kenya & Uganda & Rwanda & Burundi \\
\hline
Infrastructure Development Plan & ✓\textsuperscript{6} & ✓\textsuperscript{7} & ✓ & ✓ & ✓ \\
Medium-Term Expenditure Framework (MTEF) & ✓ & ✓ & ✓ & ✓ & ✓ \\
Infrastructure Round Table & ✓ & & ✓ & & \\
Joint Sector Review & ✓ & & ✓ & & \\
Public Investment Program & & & & & ✓ \\
\hline
\end{tabular}
\end{table}

We will collect data on projects related to roads, railways, sea ports, lake ports and airports. The analysis will cover on-going projects whose start and finish dates range from 2002 and 2015. Any project completed before 2010 will not be included. The information on transport activity will include the current status of

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure4-1}
\caption{Data Collection Methodology}
\end{figure}

\begin{table}
\centering
\caption{Primary Data Sources}
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\textbf{Official Documents} & Tanzania & Kenya & Uganda & Rwanda & Burundi \\
\hline
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Medium-Term Expenditure Framework (MTEF) & ✓ & ✓ & ✓ & ✓ & ✓ \\
Infrastructure Round Table & ✓ & & ✓ & & \\
Joint Sector Review & ✓ & & ✓ & & \\
Public Investment Program & & & & & ✓ \\
\hline
\end{tabular}
\end{table}

\textsuperscript{5} Based on Walker et al. (2009), the main donors (i.e. funding partners above US$25 million) in the region are Africa Development Bank, Government of China, Government of Denmark, Department for International Development (DFID), European Commission, Japanese International Co-operation Agency (JICA), United States Agency for International Development (USAID), and World Bank.

\textsuperscript{6} Transport Sector Investment Program (TSIP).

\textsuperscript{7} Infrastructure Master Plan.
each project and (if applicable) a listing and links to available reports. Please see Appendix F for a complete description of the variables the database will cover.

4.1.2 ENVISAGED CHALLENGES

We envisage the challenge of distinguishing from on-going and already financed projects from prospect projects planned by the Government. Usually Governments have an ambitious agenda in planning and designing infrastructure development programs and projects. To solve this, we will cross check every piece of information with the donors. Our team members have a lot of experience in and knowledge of the region and will expect to obtain most of the information needed. To supplement that information, we will also contact other individuals previously surveyed in Walker et al. (2009).

4.1.3 FINAL DATABASE SUBMISSION AND DISTRIBUTION

The final database will be presented in an Excel file to the clients jointly with the collected material in electronic format. We envision the database to be finally accessible via the internet in updatable format on GIS maps to be posted on the [www.EastAfricanCorridors.org](http://www.EastAfricanCorridors.org) website.

4.2 Diagnostic Interviews

In this phase, we will assess and analyze all aspects related to the transport of goods along each corridor. A central element of the audit and diagnostic is the conduct of detailed interviews with stakeholders using sets of semi-structured questionnaires to guide the discussions. Information obtained in the interviews will be validated by reviewing original documents and/or collaborated by discussions with others. Further confirmation will be obtained by physically driving each corridor and its spurs up to the borders with neighboring countries.

Given the range of activities encompassed by logistics, the variety of problems that can affect the quality of services is immense. For the purposes of identifying and evaluating these problems, it is often necessary to group them into categories according to their source. The primary sources identified for this purpose are as follows:

- Physical operations and assets used in the transport, handling, and storage of goods.
- Transactions related to these operations that occur between shippers and logistics service providers as well as among third parties involved in a supply chain, including Customs.
- Government policy that regulates these operations and the underlying trade as well as safety and environment issues.
- Ancillary services such as financing and communications that contribute to the efficiency of these operations.
4.2.1 Physical Operations and Assets

The principal source of problems, and the area most frequently analyzed, is the physical assets used for the transport, handling, and storage of goods moving through a supply chain. These assets are subdivided into infrastructure, equipment, and labor. Problems with the condition and capacity of infrastructure and equipment limit the throughput of these activities thereby increasing cost and time and reducing reliability. These problems are usually addressed by renewing existing assets or procuring new assets. Problems with labor, which are frequently more serious, affect not only time and costs but also the productivity of existing as well as new infrastructure and equipment. These problems are addressed by enhancing skills and, where necessary and in cases of overstaffing, by reducing the labor force.

An equally important problem affecting the use of the assets is management performance. Logistics service providers normally evolve from individual operators to small enterprises providing a single service (e.g., cargo clearance, truck transport, warehousing). Their planning, monitoring and communications are rudimentary and they rarely provide complementary value-added services. As these enterprises grow, they may make small improvements in management capacity, but significant improvements do not occur until they interact with international logistics companies with modern management practices, including specialization and delegation. This enhancement can be accomplished through a correspondent or agency arrangement, a joint venture or direct competition where there is significant technology transfer.

4.2.2 Transactions

Because supply chains are usually constructed from a number of separate logistics activities, the movement of goods through a supply chain requires a number of commercial transactions between logistics service providers and/or between them and the cargo owners. A large percentage of logistics problems are caused by difficulties with these transactions as they add costs, delays, and uncertainty to the movement of goods through the supply chain.

Another set of transactions that frequently cause problems are those between shippers or logistics providers and the public officials whose approvals are required to move goods through the supply chain. While transactions involving public officials are usually minimal for domestic trade, they can be problematic within the country where provincial governments regulate the movement of goods transiting their province. For international trade they have traditionally been identified as a major source of cost and delay.

These transactions can be distinguished between those that must be completed prior to an activity taking place and those which occur as part of an activity. For example, a customs declaration must be submitted prior to clearance of import cargo and a contract of affreightment as well as, where applicable, bond guarantees, prior to transport of cargo but the bill of lading is issued after the cargo is loaded and transferred to the consignee while the vessel is en-route. The more complex the supply chain, the greater
the number of transactions and their associated costs and delays. The more complex these transactions, the greater the cost and delays incurred.

Two of the most effective mechanisms for reducing the cost and delays associated with these transactions have been to simplify the documentation and to eliminate redundant requests for information. For this purpose, forwarders have introduced combined bills of lading; customs officials have introduced Single Administrative Documents, and trucking organizations have acquired TIR carnets\(^8\). Efforts to simplify transactions allow for greater integration of logistics services but require a suitable environment. The government must reduce paperwork and the number of signatures required while reforming inefficient and corrupt practices. The private sector must adopt modern business practices, including increased transparency, more specialization of management functions, delegation of authority, and investment in information communication technology.

A third mechanism has been to automate data processing. While the procedures for storage and retrieval of data related to goods and their movement through a supply chain are well established, the use of this data to facilitate that movement is still evolving. Track and trace systems are a standard offering by the larger logistics service providers, especially those operating internationally, but are only now being offered by smaller providers. Similarly, while most forwarders offer warehousing only the international service providers and some large domestic providers offer inventory management systems. The ability to embed logistics information systems into the enterprise software of clients has become an important value-added service but relatively few fourth-party logistics providers/advisors (4PLs) have this capability.

4.2.3 GOVERNMENT REGULATIONS AND POLICIES
The effect of government policies on logistics has received more attention because of the substantial economic benefits of deregulation and privatization. Economic regulations have created significant problems for logistics activities when they prevented pricing from adjusting to market conditions and when they increased barriers to entry for new providers entering existing markets and existing logistics providers entering new markets. These not only increased costs but also reduced the variety of time and cost combinations offered by 3PLs. Safety and environmental regulations have also increased operating costs but often provided compensating public benefits.\(^9\) However, they can cause problems for logistics service providers when they are enforced in an arbitrary or selective manner. The resulting loss of transparency discourages competition, thereby severely reducing any benefits that the regulation might have provided. These problems can be addressed through programs of reform and deregulation.

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\(^8\) Formal in-transit documents for bonded cargo.

\(^9\) These regulations can increase short-term freight rates, but reduce long-term costs to the shippers. For example, the introduction of a requirement for annual certification of roadworthiness can force trucks operators to renew their fleet thereby providing safer and more reliable transport of goods.
Regulation of international trade can also add time and costs to logistics activities. The imposition of duties and taxes on traded goods, restrictions on the types of goods traded (based on trade agreements and protection of domestic industries), and enforcement of safety, sanitary and phytosanitary standards increases the time and cost of moving goods across land borders or through international gateways, can be justified on political and economic grounds. Problems arise where these is a lack of diligence, consistency and transparency in enforcement of these regulations or where the procedures are inefficient thus introducing unnecessary costs, delays and uncertainty.

Another area of government policy that affects performance in the logistics sector is investment in public transport infrastructure assets. The role of the private sector in these investments has been the subject of considerable experimentation over the last two decades. This has led to an increase in the number of privately operated toll roads and rail track as well as port and airport terminal concessions. There are various models for allocating responsibility between the public and private sector but the principle criteria of success is whether they provide sufficient capacity in a timely manner, at reasonable cost, and with acceptable quality. Otherwise, they significantly increase the time and cost for the logistics activities that use this infrastructure.

A final area of government policy that affects logistics is taxation and subsidization. Excessive taxation of transport equipment can discourage investment while increasing transport costs. This problem is often sited with regard to imports of equipment, especially parts. Subsidization can be a problem especially when it is used to maintain inefficient transport services thereby lowering the returns to efficient transport or when it provides a competitive advantage to less efficient logistics service providers.

### 4.2.4 Ancillary Activities

The remaining source of problems for the logistics sector are activities that facilitate logistics management, in particular, the acquisition of assets, the coordination of transactions and compliance with government regulations. Of particular concern is the lack of access to modern financial and communications services. The role of the government in financing public infrastructure has already been discussed. Of equal importance is the availability of commercial financing for both capital investment and working capital. This is a significant problem for the logistics sector. In many countries, banks are reluctant to lend to transport service providers for the procurement of equipment unless the loan is securitized with property or other fixed assets. This has led to extensive use of leasing arrangements in some countries, but in others, it has left transport service providers dependent on savings of families and friends to acquire new equipment.

Logistics service providers who act as forwarders but do not own transport equipment or other significant fixed assets still need working capital. The amount can be significant where transport companies and other logistics service providers require payment from forwarders on less favorable terms than the forwarders can obtain from the shippers. Producers and traders also require working capital. This is often
financed against firm orders or buyers’ Letters of Credit. Difficulties in obtaining this finance not only limit the amount of competition in the logistics sector but also prevent existing providers from expanding into new markets and increasing their market share.

The introduction of automatic debit systems has simplified transactions especially between logistics service providers and public agencies. These not only reduce the time required to complete transactions but improve transparency and eliminate the number of money exchanges between private parties and public officials.

Modern communications has been an essential part of logistics management. Email has replaced the telephone and fax as primary mode of communication, though internet-based transactions are usually limited either because electronic signatures are not legally recognized or because supporting financial services are not available.

Electronic data interchange (EDI) has also transformed transactions between the public and private logistics service providers. EDI allows supply chain participants to share information in a format that also supports data processing. While EDI has become essential in international transport and logistics, domestic providers have been slow to make the necessary investment. The public sector has often delayed the introduction of EDI because of difficulties in selecting a standard format (EDIFACT, XML/EDI, Rosetta.net, ebXML), method of access (VAN, VPN, or Internet), or, more commonly, right of access. Some government agencies have tried to discourage the use of EDI by restricting access, requiring hardcopy backup, and assigning strict liability for the data transmitted, but these actions are generally part of a broader effort to discourage transparency. At the same time, EDI has become essential for international trade and lack of it constitutes a competitive disadvantage.

4.2.5 COMBINING TYPES AND SOURCES OF PROBLEMS

The sources of problems discussed above can be linked to the general problems of inefficiency, competition, complexity, and compatibility as shown in Table 4-2. Problems with physical operations and assets generally result in inefficiency and incompatible interfaces. Problems due to excessive or complex transactions not only reduce efficiency but are symptomatic of complex supply chains. Difficulties associated with public regulation commonly lead to the complementary problems of inefficiency and lack of competition. Public policies related to international trade frequently lead to problems with compatibility at the borders and gateways. Limitations on ancillary activities constrain the growth of the logistics industry thereby maintaining the existing complexity of supply chains.
Table 4-2
Relationship between Type and Source of Problems

<table>
<thead>
<tr>
<th>Problems</th>
<th>Inefficiency</th>
<th>Competition</th>
<th>Complexity</th>
<th>Compatibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A S S E T S A N D O P E R A T I O N S</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infrastructure</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Labor</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Management</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>T R A N S A C T I O N S</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Between private logistics service providers</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>With public officials</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Data processing</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>P U B L I C P O L I C Y</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economic regulation</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regulation of trade</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Regulation of operations</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforcement of regulations</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxation and subsidization</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>A N C I L L A R Y A C T I V I T I E S</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public finance for capital investment</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Commercial finance for capital investment</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Working capital</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Data communications</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>EDI</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4.2.6 ORGANIZATIONS TO BE INCLUDED IN DIAGNOSTIC INTERVIEWS

Because of the diversity of logistics services and the large number of service providers, interviews may be conducted of groups representing specific sectors rather than individual companies or agencies, as follows:

- Traders, manufacturers, and retailers
- Transport service providers
- Freight forwarders
- Government ministries and agencies

In identifying candidates to be interviewed, care will be taken to include a sampling of both large and small entities and organizations. This will ensure that a balanced perspective of the issues, concerns and performance of the corridors is obtained. The sequencing of meetings is important. Discussions with those involved in trade will provide a user’s viewpoint that can guide subsequent discussions with transport
providers and forwarders. Similarly, discussions with the forwarders will provide a user’s perspective for subsequent discussions with the transport providers. Discussions with the private sector will provide an understanding of the problems that can then be discussed with public officials.

Interviews will be conducted as open-ended group discussions organized as follows:

- Introductions
- Background discussion
- Major issues and problems
- Detailed discussion on specific areas
- Prioritization of concerns
- Planned and potential initiatives

Depending on the interviewer’s level of interest and skill, discussions can take from one to three hours. In the private sector, it is often more convenient to hold meetings at the end of the day; public officials find morning meetings more productive.

**Table 4-3**

*Topics of Discussion by Group*

<table>
<thead>
<tr>
<th>Group</th>
<th>General Topic</th>
<th>Specific Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Businessmen – Trade</td>
<td>Competitiveness and trade facilitation</td>
<td>Markets and competitiveness, Quality of transport services, Structure of supply chains, Outsourcing logistics and SCM, Finance and communications</td>
</tr>
<tr>
<td>2. Transport Service Providers</td>
<td>Capacity, competition, profitability</td>
<td>Demand, capacity, utilization, Structure of industry, Competition and profitability, Equipment and finance, Intermodalism, Information systems, Regulatory constraints</td>
</tr>
<tr>
<td>3. Forwarders</td>
<td>Regulation, range of services</td>
<td>Role, domestic and international, Markets and competition, Services and integration, Level and changes in ITC, Professional standing</td>
</tr>
<tr>
<td>4. Public Officials – Regulation</td>
<td>Reforms, mandates, capacity</td>
<td>Changing mandates and challenges, Reform efforts, Institutional capacity, Role of E-government</td>
</tr>
</tbody>
</table>

The results from the four sets of interviews will be used to identify the interrelations between the parties (Figure 4-2) and the means to make these interrelationships more supportive. While the emphasis will be on improvements that could be undertaken through the public sector or donor activity, efforts by the private sector to improve their performance will also be evaluated.
### 4.2.7 Selection of Participants

As mentioned above, participants to be interviewed can be grouped into four categories:

- Government ministries and agencies
- Logistics service providers
- Users of transport services

In the sections that follow, we discuss the process for identifying participants for the interviews and the candidates that have already been identified.

**Government Ministries and Agencies**

For public officials, it is important to interview those responsible for regulation of logistics services and for the provision of public infrastructure. Responsibility for regulation of logistics services is generally distributed among a number of ministries. While the extent of regulation of the logistics services sector is usually limited, these same ministries are responsible for public policies that affect the structure of the industry. As such, it is important that they be interviewed as a group. Responsibility for organizing this group should be given to this senior ministry involved, which is often the Ministry of Finance. For international trade, it is necessary to interview the customs officials and the customs clearance agents. These could be done as separate interviews with the latter interviewed together with the freight forwarders.
On the basis of discussion with stakeholders, the team will identify specific persons to be interviewed whom are responsible for activities associated with planning and operations within each sector including but not limited to those listed below:

**Burundi**
1. Ministry of Transports, Posts and Telecommunications  
2. Ministry of Commerce and Industries  
3. Office of the Customs-Burundi  

**Kenya**
1. Ministry of Transport  
2. Ministry of Trade and Industry  
3. Ministry of Roads and Public Works, Kenya  
4. Kenya Maritime Authority  
5. Kenya Revenue Authority - Customs  
6. Ministry responsible for Internal Security  
7. Immigration Services  
8. Traffic Commandant, Kenya Police  

**Rwanda**
1. Ministry of Infrastructure  
2. Ministry responsible for Commerce & Tourism (MINICOM)  
3. Rwanda Revenue Authority  
4. Magasins Généraux du Rwanda (MAGERWA) – ICD/Bonded warehouse  

**Tanzania**
1. Ministry of Infrastructure Development  
2. Ministry responsible for Industries and Trade  
3. Ministry of Home Affairs – Immigration and Internal Security  
4. Surface and Marine Transport Regulatory Authority (SUMATRA)  
5. Tanzania Revenue Authority-CUSTOMS  
6. Tanzania Road Agency (TANROADS)  
7. National Development Corporation (NDC)  

**Uganda**
1. Ministry of Works and Transport  
2. Ministry responsible for Tourism, Trade and Industry  
3. Uganda Revenue Authority  
4. Uganda National Road Agency (URA)  

**Logistics and Transport Service Providers**

The transport sector is often represented by the associations for individual modes. This includes associations representing transport service providers and transport terminal operators. Transport operators also include shipping lines while the terminal operators would include seaports. Other key members of this group are the railroad and large truck operators as well as the operators of the larger truck terminals. Either the Chamber of Commerce or Ministry of Transport could take responsibility for organizing this group and arranging the interview. However, if there is a large transport sector and several modes are
being examined then it would be better to hold separate meetings with the associations representing each of the modes, e.g., truckers association, association of port authorities, etc.

For freight forwarders, there is normally an association that handles both domestic and foreign cargo and arranges transport, storage and consolidation services. This organization could identify the participants and organize the interview. There may also be separate organizations for airfreight agents and shipping line agents. Although they perform functions similar to that of freight forwarders, they could be interviewed as part of the trade associations representing transport service providers. We will also contact freight forwarders and logistics service providers to understand cargo movement practices on the corridor and measure their performance.

**Burundi**
1. Burundi Ports Corporation
2. Armement Nord Lac (ARNOLAC) – *Lake Shipping Services*
3. Association des Transitaires
4. Long distance drivers

**Kenya**
1. Kenya Ports Authority
2. KIFWA – *Clearing and Forwarding services*
3. Rift Valley Railways Company
4. Kenya Pipeline Co. Ltd
5. Kenya Long Distance Truck Drivers Union
6. Kenya Ships Agents Association
7. Kenya Transport Association
8. Cargo Logistics Service –Kenya

**Rwanda**
1. Rwanda Road Transport Operators Association
2. Association of Transporters of Rwanda-(ATAR)
3. Association of Clearing Agents of Rwanda-(ADAR)
4. Association of Insurers of Rwanda-(ASAR)
5. Long distance drivers

**Tanzania**
1. Tanzania Ports Authority (TPA)
2. Tanzania International Container Terminal Services Company Limited (TICTS)
3. Tanzania Railways Limited (TRL)
4. Tanzania Shipping Agencies Association (TASAA)
5. Tanzania Freight Forwarders Association (TAFFA)
6. Tanzania Truck Owners Association (TATOA)
7. Marine Services Company Limited (MSC) – *Lakes Services*
8. Long distance drivers

**Uganda**
1. Rift Valley Railways Company
2. Uganda Commercial Truck Owners Association
3. Uganda Freight Forwarders Association (UFFA)
4. Long distance drivers

**Others Regional**
1. Port Management Association of Eastern and Southern Africa (PMAESA)
2. Federation of Eastern African Freight Forwarders Associations (FEAFFA)

**Users of Transport Services**

The users of the logistics services who are involved in trade would be selected from the Chamber of Commerce and trade associations for exporters, manufacturers and retailers. Since there are various associations representing traders, manufacturers and retailers, a particular effort will be made to identify those associations that have the broadest representation and are most active in representing their members.

The team will identify associations actively involved in trade facilitation including main shippers and consignee organizations, shipper’s councils, chambers of commerce, association of exporters, association of transporters and product association of main commodities, among others.

With the help of the associations, we will identify a representative group of shippers and consignees to provide detailed data on the steps involved when exporting and importing their products along each corridor. We will put special attention in selecting a representative group of companies to ensure that the sample adequately characterize different size of companies and degrees of participation for specific products.

Our initial assessment suggests interviewing the following associations in each country. However, a more comprehensive list of shippers to be interviewed will be developed with further consultations to cover major exports and imports involved.

**Burundi**
1. DAF OTB, Office of Tea of Burundi
2. Chamber of Commerce, Industries and Agriculture
3. Association of Oil Marketing Companies
4. Association des Transitaires

**Kenya**
1. Kenya Association of Manufacturers
2. Coffee exporters

**Rwanda**
1. Rwanda Federation of Private Sector [FRSP]
2. Coffee exporters
3. Petroleum importers
4. Cement importers

**Tanzania**
1. Tanzania Chamber of Commerce Industries and Agriculture (TCCIA)
2. Tanzania Shippers Council
3. Marketing Boards (Cotton, Tobacco, Sugar, etc)
4. Confederation of Tanzania Industries (CTI)
5. Petroleum importers

**Uganda**
1. Uganda Manufacturers Association (UMA)
2. Uganda Importers & Exporters Association (UGIETA)
3. Uganda National Chamber of Commerce and Industry (UNCCI)

We shall identify a more exhaustive list together with these associations. During the interviews we will address issues associate with trade competitiveness or the lack of it, quality of logistics services and logistics industry structure, management of supply chains, facilitation of trade and transport, transport services quality and exiting fleet capabilities and capacities, transport services variety and efficiency, regulation and enforcement of transport services, ongoing planned and proposed initiatives, among others. Data collection and analysis will focus on transport logistics practices, behavior, and requirements, data on export and import transactions, identification of cost time and reliability, cargo volumes, operational reports, and others. We will map the processes to illustrate logistics transactions and services from point of origin to point of destination.

### 4.3 Preparation of Demand Forecasts

The objective of the demand forecasting activity in Phase 2 Task B are (a) to identify and analyze the evolving merchandise trade flows along the Northern and Central corridors (identifying key sectors and commodities/products), (b) identify and analyze trends in international shipping and freight, and (c) forecast changes in demand and supply for different transport modes along the Northern and Central Corridors over the period 2010-2030, taking into account various major scenarios including potential impacts of the establishment of a full customs union and common market. This forecast is intended to enable the team to evaluate the ability of the current infrastructure to accommodate demand and consider the impact of planned improvements on future demand. The forecast will also be used in the assessment of possible structural and non-structural interventions to mitigate current and future potential bottlenecks.

The forecast model must also be designed to show changes in demand that are likely with changing variables surrounding the different possible modes of transportation that a shipper/freight forwarder could chose from. It must also be able to analyze the way in which different factors might influence a shipper’s choice of which corridor to use in transporting their goods. In addition, it must also have the capability to analyze "what-if" scenarios that illustrate the way in which different investments might influence demand for different types of transport.
4.3.1 GENERAL METHODOLOGY

To best meet the above objectives, the Team is following the general methodology which is illustrated in Figure 4-3. The study starts with a review of existing studies and reports that lead to a synthesis of information on transit efficiency in the Northern and Central Corridors. We have expanded this to include analysis of other competing corridors (e.g., North-South corridor) whose data has been captured in a study by Nathan Associates of Southern and Eastern African Corridors, as well as in the North-South Corridor Study.

Next, the study team is carrying out a detailed analysis of network performance, based on FastPath® transport/logistics evaluation procedures, which provide cost, time and reliability indicators from the shippers’ point of view, based on a review of existing studies, interviews with corridor stakeholders and raw data collection. This analysis is complemented by two assessments, one on regulatory frameworks and policies and one on capital improvements and maintenance budgeting with a focus on how they impact transit efficiencies in the corridors.
The Base Case forecasts of trade flows and local traffic are being developed for the key years 2010, 2015, 2020, 2025 and 2030 (see further detail below). A corridor and mode assignment model is being used to assign future international trade flows, based on the current situation with the improvements associated with committed projects. Domestic traffic will be forecast separately by mode for each country (see further detail below). Capacity constraints will be employed to adapt forecast international flows to the physical
limitations of the corridors. In parallel, a trade model will estimate potential increases in trade in the region’s trade for improved customs union operations and for improved connectivity.\textsuperscript{10}

The analysis of the ability of the current and planned network to accommodate traffic flows will be based on an analysis of capacity constraints on future flows, diversion of flows between corridors (Northern, Central and North-South), the potential for increased flows and the new development projects planned for the region. This leads to the identification of potential structural and non-structural improvements to help accommodate future flows in an efficient manner.

Finally the team will develop detailed strategies based on the evaluation and prioritization of projects and policy reforms, leading to the creation of an Action Plan to improve transit efficiency in the Northern and Central Corridors. This Plan will include a combination of actions and investments.

4.3.2 METHODOLOGY FOR TRAFFIC FORECASTING

The methodology to be applied in this project for traffic forecasting has two components: (i) international trade flow forecasts and (ii) domestic traffic forecasts. Each is described below.

\textit{International Trade Flow Forecasting}

Trade flow forecasting starts with Base Case economic forecasts for each country in the Eastern and Central Africa Region that could use the Northern and Central Corridors for the key years (2010, 2015, 2020, 2025 and 2030). The countries included are Rwanda, Burundi, Uganda, Kenya, Tanzania, Zambia, Southern Sudan and Southern Democratic Republic of Congo. These country forecasts are linked to flow forecasts for key commodities. The identification of key commodities has been done to reflect high tonnage and value. These vary from country to country, but include the following:\textsuperscript{11}

<table>
<thead>
<tr>
<th>Key Imports</th>
<th>Key Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Cement</td>
<td>2. Copper</td>
</tr>
<tr>
<td>3. Fertilizer</td>
<td>3. Fish Products</td>
</tr>
<tr>
<td>4. Fish Products</td>
<td>4. Other Ag Products</td>
</tr>
<tr>
<td>5. Food Products</td>
<td>5. Other Minerals</td>
</tr>
<tr>
<td>6. Machinery</td>
<td>6. Tea</td>
</tr>
<tr>
<td>7. POL</td>
<td>7. Tobacco</td>
</tr>
</tbody>
</table>

\textsuperscript{10} The two models referenced here are being developed as part of the parallel study of Eastern and Southern Africa Corridors and applied to this study. More detail is given below.

\textsuperscript{11} Note: This list is not final.
These forecasts will be based on a most probable economic growth estimate and will assume that there is no change in the transport system, except for the implementation of committed projects (Figure 4-4). The country economic forecasts will then be linked to Base Case trade flows by commodity group both in the region and with other trade partners, although some commodity exports will be linked to resource factors and some imports to population growth. Large resource-based project flows will be forecast separately from traditional flows.

Figure 4-4
Overview of International Trade Flow Forecast Methodology

These flows will be assigned to corridors in the Base Case scenario under the assumption of no change, except for committed projects. These flows will be compared to capacity by link and the demand for links over capacity will be assigned to other links, where capacity is available. If network capacity is insufficient to meet the forecast Base Case demand, then demand will be reduced.

The next major step is to define alternative scenarios for analysis (See Figure 4-5). These scenarios will provide an internally consistent combination of trade and transport demand assumptions and supply assumptions reflecting network link capacities. Each scenario will be based initially on the most probable demand assumptions divided into regional international trade flows and overseas trade flows. Trade and
traffic induced by corridor improvements will be estimated for regional international and overseas trade using a trade model and a corridor choice model.

Each scenario will also represent a package of improvements to the transport network and to policies affecting trade flows, which will lead to reductions in price and transit time and increases in reliability for the network. These improvements may also increase the capacity of the improved network links. The assumptions in each scenario will lead to a forecast of trade flows which will be assigned to corridors and modes in the network using the model depicted in Figure 4-5. These flows will then be compared to link capacities and then reassigned as in the Base Case described above. In some cases, demand may be reduced due to network capacity constraints.

**Figure 4-5**
Flow Diagram of Scenario Trade Flow Forecast Methodology
Domestic Traffic Forecasts

Forecasts for domestic traffic (e.g., traffic that travels within a single country) will be made separately for three categories (i) Rail captive traffic (traffic that can only take rail), (ii) Multimodal traffic (traffic that could take either rail or road) and (iii) Road captive traffic (traffic that can only take road). All these types are illustrated in Figure 4-6.

- **Domestic Rail Captive Traffic** - is bulk traffic tied to production areas served primarily by rail. Any traffic in this category will be forecast by reference to production resource forecasts. If it is mineral traffic it will be forecast according to mine production.

- **Domestic Multimodal Traffic** - will be identified as commodities that have been carried by rail in past years. These commodities will be forecast by origin and destination and assigned a rail share and a road share for a given forecast. Each traffic flow will be converted to road vehicles per day or to trains per day according to the mode.

- **Domestic Road Captive Traffic** - will be forecast as vehicle growth rates by traffic link. This growth rate will be based on a linkage to general economic growth plus traffic related to specific large projects.

Figure 4-6
Flow Diagram of Domestic Traffic Forecast Methodology
4.3.3 CAPACITY CONSTRAINT ANALYSIS
As part of the traffic forecast, the domestic rail and road traffic by link will be compared to the capacity of the link. The available capacity will be calculated and this will be used as the capacity constraint for the international trade flows analysis. This is also shown in Figure 4-6.

4.3.4 TRAFFIC FORECASTING MODELS
As noted above, there are two models used in the forecast methodology: a corridor choice model and a trade model. These are described below

Corridor Choice Model
The import and export forecasts are assigned to a corridor/port combination and to road or multimodal subchains of the corridor according to a corridor choice model that has been developed from (i) annual historical data on percentage of trade flow for all corridors in Eastern and Southern Africa, (ii) measures of corridor performance for each corridor and subchain from FastPath® analysis, and (iii) policy indicators for shipping and trade facilitation/constraint issues.

Two versions of the corridor choice model are being created, one for regional international trade and one for overseas trade. The form of these models is a logit model. The models will be developed using ArcView Network Analyst, a GIS-based software extension developed by ESRI to be applied with the compatible ESRI product, ArcView GIS, a full-featured GIS software for visualizing, managing, creating, and analyzing geographic data. ArcView GIS is the current industry standard and is most widely used desktop GIS software in the world.

For the corridor choice model the following variables are being tested for significance:

- Regional or overseas flow
- Commodity group
- Price to the shipper
- Transit time
- Reliability/predictability of transit time
- Multimodal or road
- Frequency of rail service
- Safety and security of the corridor
- Historical ties (e.g. member of EAC, etc.)
• Shipping structure (feeder lines vs. direct calls, number of port calls by region for general cargo and container ships, largest general cargo vessels accommodated, etc.)

• Dummy variables for selected commodities and ports

• Special variables for commodities such as the location of tea auctions

For a given trade flow with a commodity group, origin, and destination, these models will estimate the percentage of flow which would take each corridor associated with the origin and destination. This is very useful for allocating traffic to the corridors in the regional network with and without improvements.

**Trade Model**

This model calculates total potential trade flows among countries in the Region. This model can also estimate the amount of induced traffic that will result from specific sets of improvements to the regional network or changes in the regional customs union.

The trade model has the form of a gravity model. The total trade between pairs of trading partners is assumed to be a function of the economic size of the trading partners and inversely related to the disutility of shipping freight between them. This disutility is assumed to be some combination of price, time and reliability of these shipments. Other factors may also be significant. The model is being calibrated on regional trade data for all trading partners on the characteristics of the trading partners and shipping disutility measures.

In the Total Trade Model the following variables are being tested for significance:

- GDP
- Regional or Overseas Trade
- Commodity Group
- Price, time and reliability
- Member of economic association (EAC, SACU, SADC, COMESA)
- Common language
- Total hassle factor for trade (time required for import and for export documentation from Doing Business Surveys)
- Trade compatibility between trading partners

Various formulations of these variables are being tested and the version with the most explanatory power will be selected.
4.4 Communications Strategy

In the previous sections, the CDS team has laid out its plans to execute an effective and efficiently-run corridor diagnostic study. However, even the best conceptualized and expertly implemented study is only as effective as the number of people who are aware of its findings and are inspired to act on them. Too many excellent studies end up gathering dust on shelves, never to be referenced again once the diagnostic team goes home. One of the reasons for the lack of implementation of good quality recommendations has been identified as the absence of effective communication of the studies and their results. The ultimate success of the CDS will be demonstrated by the follow-through of key stakeholders in implementing the recommendations.

Our communications strategy for the CDS will play a variety of roles, to ensure that CDS results are translated into action. Specifically, the CDS communications strategy is designed to lay the groundwork to:

1. Coordinate donor-funded, national and regional transport corridor reform initiatives to promote efficiency and reduce overlap;
2. Educate and raise awareness among corridor reform stakeholders (e.g., decision-makers in national and regional government bodies, private sector entities, NGOs, general public) of the importance of improving corridor efficiency and safety;
3. Provide reform champions with the tools to advocate for the allocation of technical, financial and administrative resources for corridor improvement projects identified by the CDS;
4. Inspire key decision makers to carry out the recommended reforms so as to remove inefficiencies, long delays and high costs along the East African Northern and Central corridors;
5. Motivate potential financiers and investors to allocate increased or additional resources for implementation of recommended projects and interventions;
6. Keep the Northern and Central Corridor Committees, RECS, other stakeholders and donors updated on the progress of the CDS, including key milestones and events;
7. Inform CDS funders USAID and DfID of progress against contract deliverables so that progress can be monitored and evaluated; and
8. Facilitate effective communication between CDS staff, USAID, DfID and the members of the TCG.

Because of the broad and complex technical nature of the issues the CDS will address, the variety of messages that the CDS must communicate will vary by audience and issue. However, there are common messages that all CDS staff should follow in communicating with key clients and audiences.

In the section below, we lay out the key CDS audiences/stakeholders and present key messages that will inform CDS communications with these groups.
4.4.1 TARGET AUDIENCES

The East Africa CDS has a broad range of stakeholders and audiences, all of which must be considered to achieve the objectives presented above. There are stakeholders internal to the process; e.g., USAID, DfID, the Corridor Committees and EAC; as well as external stakeholders who can be motivated to act upon CDS recommendations, provided the messaging is effective. These stakeholders include national Ministries responsible for Transport, Trade and Finance, as well as customs and other agencies (port authorities and regulatory, safety, inspection and security agencies), in the five EAC countries, the tripartite EAC, SADC and COMESA, the private sector (e.g., members of regional trade associations; clearing and forwarding agents; transport associations). External stakeholders also include other international donors and the general public. Participation in different forms from each of these internal and external stakeholders will be required in order to prepare a comprehensive diagnostic and encourage the implementation of recommendations long after the CDS team completes its tasks.

The CDS communications strategy will also reach out to target audiences via the media - through relevant journalists from the national and regional newspapers, radio and television stations and East Africa based correspondents with links to the international media, press and wire services, in order to (1) raise awareness of the CDS activity and promote milestones and events and (2) raise general awareness among regional stakeholders, national stakeholders, private sector and the general public of the importance of trade facilitation and efficient corridors. This will occur through press releases, press conferences, target stories and public service announcements for broadcast on public television.

4.4.2 COMMUNICATIONS PRODUCTS

Product design is driven by the identified objectives and key messages and the overall desire to create energy around the CDS work and the regions’ initiatives to make its transport corridors more efficient. All will share information and reinforce messages; seeking at the same time to do this in a way that brings the work “alive”. Essentially a “campaign” that brings the problems and recommended solutions to policy makers, implementers, key stakeholders and donors in a vibrant, easy to understand and engaging manner. To this end, a range of communications products is needed to create cohesion, foster understanding and stimulate change. These are identified in Table 4-4 and discussed in more detail below.
<table>
<thead>
<tr>
<th>Audience</th>
<th>Objectives</th>
<th>Messages</th>
<th>Comm. Product</th>
</tr>
</thead>
</table>
| Regional Stakeholders (RECs, Transit Corridor Committees) | (1) Raise awareness of and provide updates on the progress of the CDS  
(2) Educate and raise awareness of the importance of improving corridor efficiency and road safety | (1) CDS will not replicate past studies, progressing on a clear course of action that will not end with the study alone  
(2) Improving regional transport corridors can lower the costs of doing business for the region  
(3) CDS contributes to achieving broader goals for regional integration (Tripartite meetings—EAC-SADC-COMESA) | (1) Stakeholder meetings  
(2) Website  
(3) E-mail updates  
(4) Targeted leaflets  
(5) Press releases  
(6) Short film |
| National-Level Public Sector Stakeholders (Ministers of Transport, Works, Finance, Trade and Industry, Customs, Port Authorities, national regulatory agencies) | I. Raise awareness of and provide updates on the progress of the CDS  
I. Educate and raise awareness of the importance of improving corridor efficiency and road safety  
I. Motivate action to implement corridor improvement projects identified by the CDS | (1) National policies effect regional policies and vice versa; streamlining and coordinating policies benefits your nation and the region overall. | (1) Stakeholder meetings  
(2) Website  
(3) E-mail updates  
(4) Targeted leaflets  
(5) Press releases  
(6) Short film |
| Private Sector (service providers, users, shippers, transport operators associations, clearing and forwarding agents associations) | (1) Raise awareness of the CDS activity, provide updates on progress and events and encourage participation in the audit interview process  
(2) Educate and raise awareness of the importance of improving corridor efficiency and road safety to firm, national and regional competitiveness  
(3) Provide tools to advocate for change and increased investments | (1) Improvements to the corridor increase the efficiency and transparency of business, and therefore your bottom line  
(2) Strategic investment in corridor infrastructure projects can reap dividends, improve firm, country and regional competitiveness, promote technology transfer, and more | (1) Stakeholder meetings  
(2) Website  
(3) E-mail updates  
(4) Targeted leaflets  
(5) Press releases  
(6) Short film |
| CDS Clients (USAID, | (1) Keep clients/key stakeholders | (1) We are committed to undertaking a | (1) Monthly reports  
(2) Email updates |
<table>
<thead>
<tr>
<th>Audience</th>
<th>Objectives</th>
<th>Messages</th>
<th>Comm. Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>DfID, TCG)</td>
<td>informed of progress against contract deliverables so that progress can be monitored and evaluated</td>
<td>comprehensive diagnostic that will help you push forward a coordinated regional effort to improve the corridors</td>
<td>(3) Meetings/telcons</td>
</tr>
<tr>
<td></td>
<td>(2) Facilitate effective communication between CDS staff, CDS funders and the TSG.</td>
<td>(2) We are here to support you in achieving maximum corridor efficiency</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3) We seek to provide the information, data and analysis that will allow all stakeholders to work together to prioritize initiatives and leverage resources.</td>
<td></td>
</tr>
<tr>
<td>Other Donors and Implementers</td>
<td>(1) Raise awareness of the CDS activity and provide updates on progress and events</td>
<td>(1) We’re all in this together – let’s coordinate efforts for the best results.</td>
<td>(1) Stakeholder meetings</td>
</tr>
<tr>
<td></td>
<td>(2) Promote donor coordination, contribution to the donor coordination database and participation in stakeholder meetings</td>
<td>(2) Improved corridor performance will result in better value for money of your support to the development agenda of East Africa.</td>
<td>(2) Website</td>
</tr>
<tr>
<td></td>
<td>(3) Attract investment, grants, and funding for the implementation follow-on phase.</td>
<td>(3) Improved corridor performance will result in better value for money of your support to the development agenda of East Africa.</td>
<td>(3) Collaboration database</td>
</tr>
<tr>
<td>General Public</td>
<td>(1) Raise awareness of the CDS activity and educate on the importance of efficient trade corridors</td>
<td>(1) Better corridors mean increased livelihoods and a way out of poverty. Encourage and support your national and regional governments to improve corridors.</td>
<td>(1) Website</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(2) Better corridors mean increased livelihoods and a way out of poverty. Encourage and support your national and regional governments to improve corridors.</td>
<td>(2) Press releases</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3) Short film (PSA)</td>
<td>(3) Short film (PSA)</td>
</tr>
</tbody>
</table>
Print and Electronic Media

- A [www.EastAfricaCorridors.org](http://www.EastAfricaCorridors.org) website will be developed as the virtual face of the CDS and an avenue for providing project progress and updates, raising awareness of corridor and trade facilitation issues around east Africa and sharing information. It will also be the repository for all project-related information disseminated by email, at workshops or through the media, as well as ultimately for the library of studies and projects developed. It will serve as a common platform to download key materials, view photographs, read news and press releases, keeping the ever widening community of internet users informed of the CDS and the importance of efficient trade corridors.

- **CDS Flyer and Fact-sheets.** The CDS team will produce a one or two page flyer on the CDS, available as a printed handout as well as in electronic PDF form as an email or download, explaining the CDS and its relevance to donor coordination and corridor development in East Africa. It will also produce short fact-sheets on the Northern and Central Corridors, which will include a section about the CDS. Region-specific and country-specific fact sheets will be produced, to convey the tailored messages about the CDS laid out above. These flyers and fact-sheets will be written to ensure they remain current through the length of the project, thus providing a useful handout to accompany press releases and meetings.

- **E-mail Updates.** A monthly e-mail update, *East Africa CDS Update*, will provide all stakeholders with regular updates of progress, activities and upcoming events related to the CDS, including new additions to the website. It should be no longer than two-pages (and preferably one page). The monthly email update will be sent to all key stakeholders on the CDS mailing list (the base of which will be drawn from the March 2009 Donor Conference and Stakeholder meeting), other interested parties, as well as the press. The website will also include an option to sign-up for the mailing list. The update will be prepared using a CDS designed template. E-mail updates will also be used to announce the availability of new tools, such as the completed donor coordination database, the GIS maps, the HDM-4 data, the road safety report, and the results of the FastPath analysis. They will also be used to draw attention to the short films which will be streamed on the website.

- **Press Releases and Press Conferences.** To generate broader public interest in the regional trade corridors and the importance of trade facilitation, the CDS team will invite the media to report on milestones and high profile events. The press conferences will give the CDS team an opportunity to invite delegates onto a press panel. Local, regional and international press representatives will be invited and the latest press release distributed. In addition, information products such as the flyers and fact-sheets will be distributed to journalists attending these events. They will also serve as opportunities for the press to conduct television interviews with key stakeholders. There will be two press conferences called before the final CDS report (one each at the February and June stakeholders’ meetings). There will be a bigger one when the report is released (July). To maximize the newsworthiness of these events, press conferences will follow in the last hours of the stakeholder meetings.

- **Stakeholder Workshops.** Towards the end of April there will be five stakeholder diagnostic validation workshops (one in each of the five countries with an estimate of 25-35 participants) to
review the key information used in the diagnostic study. These meetings will not warrant press conferences but may prove to be an opportunity to disseminate country specific press releases.

**Audio-Visual**

Issues come alive in film and pictures in a way they do not as the written word. Educational and informational videos that raise awareness, tell a story and illustrate key issues can work to galvanize interest in the development of the regions corridors – reaching a broad audience of policy makers, key stakeholders and the general public. Both USAID and DFID developed impressive trade facilitation/corridor films in southern Africa to share best practices, foster dialogue and raise awareness of the importance of efficient trade corridors – galvanizing interest and energy improving trade facilitation.

Building on this past experience, video products will be developed to complement the other communications products and expand the reach and impact of the CDS work. As discussed below, several products will be produced from core film footage shot over the course of the CDS- to be used in a variety of contexts (e.g. workshops/conferences, streamed on websites and broadcast on local TV) and for different audiences (e.g. policy makers stakeholders, general public) both during the CDS and after its completion.

In addition, a photographic journal of the Northern and Central Corridors will be made. The photos will be used for a variety of purposes, including as part of the GIS platform developed. The photos will be taken by the Communications Consultant.

Filming and production of the videos will be undertaken by the Communications Consultant in collaboration and partnership with a producer/director of an experienced media company. Initial contacts and discussions with potential individuals and firms have occurred and final selection is expected by late January. Preliminary story planning, including filming schedules, will begin in December. A variety of filming will take place starting in January, including filming key stages of the CDS, key interviews, filming and photographic journal of the corridors (travelling with the transport consultant responsible for the road condition inventory). It is expected that the communication consultant will travel with members of the CDS and Berger team at various stages of the project and attend all workshops and stakeholder meetings.

All photographs and videos filmed will be integrated into the GIS maps that USAID COMPETE will develop, as practical. Therefore, if you click on a city, a border post, a port or a rail or road section, all interviews, photos and material related to that will be linked.

The primary video products will feature:

- **East Africa Corridors Film** – the major film product will be a 15 minute overview film of East Africa’s Northern and Central Corridors, designed to galvanize interest in corridor development. It is expected to discuss the importance of trade facilitation in the region, focusing on these two corridors to address key issues, challenges and needs. It will be a ‘curtain raiser’ shown at the final stakeholder conference when the final results of the CDS are presented. It will also be made available to stakeholders and donors on DVD to show at other events.
• **Investor Film** – a 5 minute film to motivate potential financiers and investors to allocate increased or additional resources for implementation of recommended projects and interventions

• **CDS Short Film** – a 5-10 minute film on the stages of the CDS as a stand alone product to be used by stakeholders and donors to discuss the approach and methodology behind the work undertaken. It will also be made available on DVD.

• **Northern and Central Corridor Short Films** – two 5 minute films, one on each of the Northern and Central Corridors, using the footage gathered for the East Africa film. This will leverage the work that goes into the flagship film and allow us to provide each of the corridor secretariats with a marketing and education film about their corridor for their own use.

• **Public Service Announcement with Key Figures** – to promote buy-in, create a buzz and a sense of urgency, we will develop 40 second public service announcements featuring key East African figures at sites such as ports, border posts, railway stations, weigh bridges. Each clip will highlight a pressing reason to “get moving” on corridor development. A “sexy” product like this may create more interest in corridor development than any of the other communications and activities put together. It will also get key decision makers involved – literally in the limelight. These clips will target all stakeholders and the general public. Given the time and buy-in required to secure such interviews, these products will be targeted for the end of the project so that they can be used in a ‘campaign-like’ way to create momentum for implementation of the CDS recommendations.

### 4.4.3 REGIONAL CAMPAIGN

As discussed earlier, the success of the CDS will be determined by the ultimate uptake and implementation of the studies recommendations. The communications products and activities are designed to inform, inspire and motivate stakeholders toward the ultimate goal of improving the efficiency of the regions corridors. The final step in the strategy is to work with the TCG to design a campaign to launch the implementation phase that will follow the CDS. Elements of this campaign will include the website, films and public service announcements developed during the CDS, as well as a slogan developed with the TCG.
5 Updated Work Program

The updated work program presented in this section reflects the activities undertaken and progress achieved during the first five weeks of the CDS as described in Section 1. The updated work program also incorporates the tasks that will be coordinated with other studies. One consideration that has pushed back tasks in Phase 1b and Phase 2 is the postponement of the First Stakeholders Meeting originally scheduled for the third week of January which is now programmed for the second week of February. Also at the request of the TCG, the first TCG Coordination Meeting previously scheduled for December 2-3, 2009 has been delayed to coincide with the First Stakeholder meeting during the second week of February. Finally, the impact of the Christmas/New Year holiday period and the Easter holiday is now accounted for in the updated work program.

The corridor diagnostic interviews will now commence the third week of February, immediately following the First Stakeholder and TCG Meeting. The three-week deferral in initiating these interviews results in a corresponding deferral of all subsequent CDS tasks. Accordingly, the CDS is now planned to be implemented over nine months from November 2009 through July 2010. The updated task schedule is presented in Figure 5-1. They key milestones of the CDS process and their due dates are:

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Due (week of)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inception Report submission</td>
<td>December 16, 2009</td>
</tr>
<tr>
<td>Literature review report and recommendations on data collection</td>
<td>January 25, 2010</td>
</tr>
<tr>
<td>First Stakeholder and TCG Meeting</td>
<td>February 8-9, 2010</td>
</tr>
<tr>
<td>Commencement of corridor diagnostic interviews</td>
<td>February 15, 2010</td>
</tr>
<tr>
<td>Baseline survey data and traffic demand forecast</td>
<td>February 22, 2010</td>
</tr>
<tr>
<td>Short film on development of Northern and Central corridors</td>
<td>March 15, 2010</td>
</tr>
<tr>
<td>Report on major logistics problems</td>
<td>March 29, 2010</td>
</tr>
<tr>
<td>15-minute East Africa Corridor film</td>
<td>June 7, 2010</td>
</tr>
<tr>
<td>Separate films on Northern Corridor and Central Corridor</td>
<td>June 28, 2010</td>
</tr>
<tr>
<td>Draft and Final Reports on corridors efficiency</td>
<td>June 7 and July 26, 2010, respectively</td>
</tr>
<tr>
<td>Draft and Final Action Plans</td>
<td>June 21 and July 26, 2010, respectively</td>
</tr>
<tr>
<td>5-minute Investor Film</td>
<td>July 26, 2010</td>
</tr>
</tbody>
</table>

Based on this schedule, the staff assignments by task and staffing schedule, respective responsibilities and levels of effort are also shown in the Figure 5.2 and Figure 5.3 below.
### Figure 5-1 Task Schedule

#### Phase 1: Data Collection, Verification, and Identification of Existing Data and Studies Relevant to Transit Efficiency along the Central and Northern Corridors

<table>
<thead>
<tr>
<th>Activity</th>
<th>1.1 Synthesis of Existing Studies and Cullion of Data Recently Collected on Transit Efficiency of Northern and Central Corridors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Caucus Meeting on Donor Coordination - Mombasa</td>
</tr>
<tr>
<td></td>
<td>Technical Coordination Meeting - Nairobi</td>
</tr>
<tr>
<td></td>
<td>Mobilization of Team Leader Plan for coordination with other studies</td>
</tr>
<tr>
<td></td>
<td>Central Corridor Ministerial Meeting - Kigali</td>
</tr>
</tbody>
</table>

**Task 1.1.1** Identify, Collect and Review Documents to Establish an Information Baseline

**Task 1.1.2** Synthesis of Available Quantitative and Qualitative Data

**Task 1.1.3** Assessment of Baseline of Information Needed for Subsequent Analysis

**Task 1.1.4** Plan to Complete Information Gaps

**Task 1.1.5** Detailed Study of Interventions Being Implemented by Donors along the Northern and Central Corridors

**Task 1.1.6** Dissemination of Current, Relevant and Good Quality Information

#### Activity 1.2 Assessment of Existing and Proposed Legal and Regulatory Frameworks, Policy Development and Planning Processes

**Task 1.2.1** Assessment of the Impacts of Existing Legal and Regulatory Frameworks, Policy Development and Planning Processes

**Task 1.2.2** Assessment of the Proposed Legal, Policy and Regulatory Frameworks and Planning Procedures Designed to Improve Transit Efficiency

**Task 1.2.3** Recommendation of a Menu of Restructuring Options, Legislative and Regulatory Interventions Presented

#### Activity 1.3 Assessment of Capital Improvement Planning (CIP) and Procurement Processes Relevant to the Efficiency of the Northern and Central Corridors

**Task 1.3.1** Assessment of Regional and National Level CIP Processes Relevant to the Efficiency of the Northern and Central Corridors

**Activity 1.4** Summary of Findings and Stakeholder Meeting

**Task 1.4.1** Preparation of a Stakeholders Meeting

**Task 1.4.2** Conduct Stakeholders Meeting

**Task 1.4.3** Preparation of a Report Summarizing Analysis of Existing Studies, Data and the Policies, Regulations and Planning Procedures

#### Phase 1b: Audit and Diagnostic of Transit Efficiency Along Central and Northern Corridors

**Activity 1.5 General Diagnostic Audit of the Logistics System and Description of the Northern and Central Corridors**

**Task 1.5.1** Tailor FastPath Questionnaires

**Task 1.5.2** Undertake General Diagnostic Questionnaires

**Task 1.5.3** Undertake Audit Checklists

**Task 1.5.4** Preparation of a Report Describing Major Logistics Problems and the Capacity of the Logistics Industry

**Task 1.5.5** Identify Additional Studies for Key Border Posts, Ports and Trade Facilitation Studies

**Task 1.5.6** Make a Detailed Record of Road Network Conditions for Central Corridor

**Task 1.5.7** Make a Detailed Record of Road Network Conditions for Northern Corridor

**Task 1.5.8** HDM Agglomeration of Country Files
### Phase 2: Data Analysis and Formation of a Prioritized Action Plan

#### Activity 2.1 Assessment of Impact of Freight Corridor Performance

- **Task 2.1.1 Stakeholders Diagnostic Validation Workshops**
- **Task 2.1.2 Examine Information Gaps**
- **Task 2.1.3 Conduct an Analysis that Provides a More Detailed Assessment of Logistics Chain Performance**
- **Task 2.1.4 Calculate the Economic Importance of the Trade Flows and Associated Costs of the Logistics Chain**
- **Task 2.1.5 Generate Data Report for GIS Application**

#### Activity 2.2 Preparation of Demand Forecasts

- **Task 2.2.1 Generate 20 Year Demand Forecasts for the Central and Northern Corridors**

#### Activity 2.3 Analysis of Possible Interventions and Development of an Action Plan

- **Task 2.3.1 Prioritization of Transport Projects for Investment along the Central and Northern Corridors**

#### Activity 2.4 Development of a GIS Based IT Platform for Presenting FastPath Data

- **Task 2.4.1 Provide FastPath Data to USAID COMPETE Programmes**

#### Activity 2.5 Action Plan to Improve Transit Efficiency along Northern and Central Corridors

- **Task 2.5.1 Development of Regulatory Reforms**
- **Task 2.5.2 Investments in High Priority Transport/Trade Facilitation Infrastructure**
- **Task 2.5.3 Identification of National and Regional Large Scale Infrastructure Development and Corridor Upgrades Investments**
- **Task 2.5.4 Identification of Bankable PPP Options**
- **Task 2.5.5 Draft Budget for the Overall Action Plan Elements with Elaboration of the Financing Instruments and Sequencing**

#### Activity 2.6 Stakeholder Conference

- **Task 2.6.1 Undertake a Stakeholders Regional Conference**

#### Activity 3: Communications

- **Activity 3.1 Prepare Communications Strategy**
- **Activity 3.2 Website Development/Provide CDCS input for website**
- **Activity 3.3 Elaboration of CDCS Flyer, Fact-Sheets, Email Updates, Press Releases and Press Conferences**
- **Activity 3.4 Plan and design videos and films**
- **Activity 3.5 Conduct filming**
- **Activity 3.6 Prepare and Edit CDCS Short Film**
- **Activity 3.7 Prepare and Edit 15-minute East Africa Corridors Film**
- **Activity 3.8 Prepare and Edit Separate Northern and Central Corridor Short Films**
- **Activity 3.9 Prepare and Edit 5-minute Investor Film**

#### Deliverables

- A) Inception Report Submission
- B) Report of First Stakeholder Workshop
- D) Literature Review Report and Recommendations on Data Collection
- E) Report on Major Logistics Problems
- F) Short Film of the Development of the Northern and Central Corridors
- G) Baseline Survey Data Report and Traffic Load and Transport Mode Forecasts For the Northern and Central Corridors
- H) Draft and Final Reports of Corridor Efficiency
- I) Draft and Final Action Plans to Increase Corridor Efficiency
- J) Monthly Progress Updates
- K) Bimonthly Progress Presentations
**Figure 5-2 Staff Assignments by Task**

<table>
<thead>
<tr>
<th>Phase, Activity and Task</th>
<th>R. Blankfeld</th>
<th>L. Yarmashuk</th>
<th>S. Kaombwe</th>
<th>TBD</th>
<th>S. Gleason</th>
<th>L. Harmon</th>
<th>M. Posada</th>
<th>P. Macchi</th>
<th>P. Cook</th>
<th>C. Espindola</th>
<th>TBD</th>
<th>A. Ashar</th>
<th>TBD</th>
<th>R. Botha</th>
<th>A. Kohli</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Principal/Financial Analyst</td>
<td>TCBoost Project Director</td>
<td>Transport Sector Development Specialist/Team Leader</td>
<td>Transport Economist</td>
<td>Transport Engineer/Planner/Intermodal Specialist</td>
<td>Regional Integration Specialist</td>
<td>FAST Path Modeler</td>
<td>Transport Analyst</td>
<td>Senior FAST Path Advisor</td>
<td>Transport Demand Specialist</td>
<td>FAST Path Modeler/Local</td>
<td>FAST Path Modeler/Local</td>
<td>FAST Path Modeler/Local</td>
<td>FAST Path Modeler/Local</td>
<td>FAST Path Modeler/Local</td>
<td></td>
</tr>
</tbody>
</table>

**Phase 1: Data Collection, Verification, and Identification of Existing Data and Studies Relevant to Transit Efficiency along the Central and Northern Corridors**

**Activity 1.1 Synthesis of Existing Studies and Collection of Data Recently Collected on Transit Efficiency of Northern and Central Corridors**

- Causal Meeting on Donor Coordination - Mombasa
- Bilateral Coordination Meeting - Nairobi
- Mobilization of Team Leader
- Plan for coordination with other studies
- Central Corridor Ministerial Meeting - Kigali

**Task 1.1.1 Identify, Collect and Review Documents to Establish an Information Baseline**

**Task 1.1.2 Synthesis of Available Quantitative and Qualitative Data**

**Task 1.1.3 Assessment of Baseline of Information Needed for Subsequent Analysis**

**Task 1.1.4 Plan to Complete Information Gaps**

**Task 1.1.5 Detailed Study of Interventions Being Implemented by Donors along the Northern and Central Corridors**

**Task 1.1.6 Dissemination of Current, Relevant and Good Quality Information**

**Activity 1.2 Assessment of Existing and Proposed Legal and Regulatory Frameworks, Policy Development and Planning Processes**

**Task 1.2.1 Assessment of the Impacts of Existing Legal and Regulatory Frameworks, Policy Development and Planning Processes**

**Task 1.2.2 Assessment of the Proposed Legal, Policy and Regulatory Frameworks and Planning Procedures Designed to Improve Transit Efficiency**

**Task 1.2.3 Recommendation of a Menu of Restructuring Options, Legislative and Regulatory Interventions Presented**

**Activity 1.3 Assessment of Capital Improvement Planning (CIP) and Procurement Processes Relevant to the Efficiency of the Northern and Central Corridors**

**Activity 1.4 Summary of Findings and Stakeholder Meeting**

**Task 1.4.1 Preparation of a Stakeholders Meeting**

**Task 1.4.2 Conduct Stakeholders Meeting**

**Task 1.4.3 Preparation of a Report Summarizing Analysis of Existing Studies, Data and the Policies, Regulations and Planning Procedures**

**Phase 1b: Audit and Diagnostic of Transit Efficiency Along Central and Northern Corridors**

**Activity 1.5 General Diagnostic Audit of the Logistics System and Description of the Northern and Central Corridors**

**Task 1.5.1 Tailor FAST Path Questionnaires**

**Task 1.5.2 Undertake General Diagnostic Questionnaires**

**Task 1.5.3 Undertake Audit Checklists**

**Task 1.5.4 Preparation of a Report Describing Major Logistical Problems and the Capacity of the Logistics Industry**

**Task 1.5.5 Identify Additional Studies for Key Border Posts, Ports and Trade Facilitation Studies**

**Task 1.5.6 Make a Detailed Record of Road Network Conditions for Central Corridor**

**Task 1.5.7 Make a Detailed Record of Road Network Conditions for Northern Corridor**

**Task 1.5.8 HDM Agglomeration of Country Files**
### Phase 2: Data Analysis and Formation of a Prioritised Action Plan

#### Activity 2.1 Assessment of Impact of Freight Corridor Performance

- **Task 2.1.1 Stakeholders Diagnostic Validation Workshops**
  - **S** Primary responsibility

- **Task 2.1.2 Economic Information Gaps**
  - **S** Primary responsibility

- **Task 2.1.3 Conduct an Analysis that Provides a More Detailed Assessment of Logistics Chain Performance**
  - **S** Primary responsibility

- **Task 2.1.4 Calculate the Economic Importance of the Trade Flows and Associated Costs of the Logistics Chain**
  - **S** Primary responsibility

- **Task 2.1.5 Generate Data Report for GIS Application**
  - **S** Primary responsibility

#### Activity 2.2 Preparation of Demand Forecasts

- **Task 2.2.1 Generate 20 Year Demand Forecasts for the Central and Northern corridors**
  - **S** Primary responsibility

#### Activity 2.3 Analysis of Possible Interventions and Development of an Action Plan

- **Task 2.3.1 Prioritisation of Transport Projects for Investment along the Central and Northern Corridors**
  - **S** Primary responsibility

#### Activity 2.4 Development of a GIS Based IT Platform for Presenting FastPath Data

- **Task 2.4.1 Provide FastPath Data to USAID COMPETE Programme**
  - **S** Primary responsibility

#### Activity 2.5 Action Plan to Improve Transit Efficiency along Northern and Central Corridors

- **Task 2.5.1 Development of Regulatory Reforms**
  - **S** Primary responsibility

- **Task 2.5.2 Investments in High Priority Transport/Trade Facilitation Infrastructure**
  - **S** Primary responsibility

- **Task 2.5.3 Identification of National and Regional Large Scale Infrastructure Development and Corridor Upgrade Investments**
  - **S** Primary responsibility

- **Task 2.5.4 Identification of Bankable PPP Options**
  - **S** Primary responsibility

- **Task 2.5.5 Draft Budget for the Overall Action Plan Elements with Elaboration of the Financing Instruments and Sequencing**
  - **S** Primary responsibility

#### Activity 2.6 Stakeholder Conference

- **Task 2.6.1 Undertake a Stakeholders Regional Conference**
  - **S** Primary responsibility

#### Activity 3: Communications

- **Activity 3.1 Prepare Communications Strategy**
  - **S** Primary responsibility

- **Activity 3.2 Website Development/ Provide CDS Input for website**
  - **S** Primary responsibility

- **Activity 3.3 Elaboration of CDS Flyer, Fact-Sheets, Email Updates, Press Releases and Press Conferences**
  - **S** Primary responsibility

- **Activity 3.4 Prepare Photo-Journal of Corridors**
  - **S** Primary responsibility

- **Activity 3.5 Plan and design videos and films**
  - **S** Primary responsibility

- **Activity 3.6 Conduct filming**
  - **S** Primary responsibility

- **Activity 3.7 Prepare and Edit CDS Short Film**
  - **S** Primary responsibility

- **Activity 3.8 Prepare and Edit 15 minute East Africa Corridor Film**
  - **S** Primary responsibility

- **Activity 3.9 Prepare and Edit Separate Northern and Central Corridor Short Films**
  - **S** Primary responsibility

- **Activity 3.10 Prepare and Edit 5-minute Investor Film**
  - **S** Primary responsibility

#### Deliverables

- **a) Inception Report Submission**
  - **S** Primary responsibility

- **b) Report of First Stakeholder Workshop**
  - **P** Supporting Role

- **c) Report of Draft Action Plan Stakeholder Conference**
  - **S** Primary responsibility

- **d) Literature Review Report and Recommendations on Data Collection**
  - **S** Primary responsibility

- **e) Report on Major Logistics Problems**
  - **S** Primary responsibility

- **f) Short Film of the Development of the Northern and Central Corridors**
  - **S** Primary responsibility

- **g) Baseline Survey Data Report and Traffic Load and Transport Mode Forecasts For the Northern and Central Corridors**
  - **S** Primary responsibility

- **h) Draft and Final Reports of Corridor Efficiency**
  - **S** Primary responsibility

- **i) Draft and Final Action Plan to Increase Corridor Efficiency**
  - **S** Primary responsibility

- **j) Monthly Progress Updates**
  - **S** Primary responsibility

- **k) Biannual Progress Presentations**
  - **P** Primary responsibility

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**Notes**
- **S** Primary responsibility
- **P** Supporting Role
### Figure 5-3  Staff Schedule

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Phase 1a</th>
<th>Phase 1b</th>
<th>Phase 2</th>
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<tr>
<td>R. Blankfeld</td>
<td>Corporate Principal/Financial Analyst</td>
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<td>S. Kaombwe</td>
<td>Team Leader</td>
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<tr>
<td>TBD</td>
<td>Transport Economist</td>
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<tr>
<td>B. Giersing</td>
<td>Transport Engineer/Planner/Intermodal Sp.</td>
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<td>L. Harmon</td>
<td>Regional Integration Specialist</td>
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<tr>
<td>M. Posada</td>
<td>FastPath Modeler</td>
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<tr>
<td>P. Macchi</td>
<td>Transport Analyst</td>
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<td>P. Cook</td>
<td>Senior FastPath Advisor</td>
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<td>C. Espindola</td>
<td>Transport Demand Specialist</td>
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<td>TBD/Local</td>
<td>HDM Transport Network Modeling Specialist</td>
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<td>A. Ashar</td>
<td>Port Operations Specialist</td>
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<td>TBD/Local</td>
<td>Road Specialist</td>
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<td>R. Botha</td>
<td>Transport Regulatory/Legal Specialist</td>
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<tr>
<td>A. Kohli</td>
<td>Media/Communications Specialist</td>
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- **Part time**
- **Full time**
- **Other than Nairobi**
- **Holiday**
Appendix A. Record of Caucus Meeting On Donor Coordination

RECORD OF CAUCUS MEETING ON DONOR COORDINATION
held at Sarova White Sands Hotel Mombasa, Kenya on Thursday, October 1, 2009 on the Fringes of
The Regional Conference of the Northern Corridor Transport and Trade Facilitation under the
Theme: “Towards Reducing the Cost of Doing Business”

In Attendance:

African Development Bank (AfDB)
Philibert AFRIKA - Chair - p.afrika@afdb.org
Domina BUZINGO d.buzingo@afdb.org
Mtchera CHIRWA m.chirwa@afdb.org
Peter FERNANDES CARDY p.fernandescardy@afdb.org
Tom OPIYO t opiyo@afdb.org

AfDB/Infrastructure Consortium for Africa (ICA)
Alex RUGAMBA a.rugamba@afdb.org

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USAID COMPETE
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David ADOLWA dadolwa@competeafrica.org

Department for International Development (DFID)
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DFID/RTFP
Mark PEARSON mpearson@rtfp.org

World Bank
Josphat SASIA Jsasia@worldbank.org

Japan International Cooperation Agency (JICA)
Tomomi TOKUORI tomomi.tokuori@gmail.com
Northern Corridor
Transit Transport Coordination Authority (NC-TTCA)
Godfrey ONYANGOGonyango@ttcanc.org
Venant NTAHONSIGAYEVntahonsigaye@ttcanc.org

Consulting Firms
Lisa YARMOSHUK – Nathan Associates Inc. lyarmoshuk@nathaninc.com
Gregory GAJEWSKI – Louis Berger Group Inc. ggajewski@louisberger.com

Objective
Caucus meeting ahead of the main Donor Coordination meeting. Primary purpose was for AfDB to debrief donor partners on their discussions with RECs following COMESA’s approach for AfDB to support corridors within the Tripartite arrangement and in particular, with the preparation of bankable projects. Secondary purpose – at the request of USAID – was to have an initial discussion between development Partners on the various studies underway within the corridor under the leadership and direction of the COMESA/EAC/SADC to explore opportunities to foster effective coordination of efforts and avoid overlap in view of the various interventions/studies covering trade transport, transit and trade facilitation and infrastructure in general that are underway or planned in East Africa.

Conclusions and Next Steps

7. Leadership and direction of initiatives on these corridor developments will be provided by the COMESA/EAC/SADC Tripartite. Capacity Building support to the tripartite will be provided through support from AfDB. Any supporting Donor coordinating mechanisms to be put in place should be complementary to and support the Tripartite Framework and not be seen as a parallel process (Tripartite & all DPs).

8. The scope, focus and timeframe of the proposed Pledging Conference will be better defined following further consultations and direction from the Tripartite. (Tripartite & AfDB)

9. On-going studies should not be stopped. They should continue as they were meant to respond to specific needs of the sponsoring institutions and beneficiaries/ recipients. Any adjustments to scope of work or timelines will need to be led by the clients in consultation with the Tripartite, once new objectives and timelines become clear. (Tripartite, government study leads and donors)

10. Those studies that are just commencing should, subject to the direction of the Tripartite and concurrence of the funding agencies, be amended to respond to areas that have been identified as priority gaps – and within sensible scope of existing work, and capabilities of existing consultants. If necessary complimentary studies may be commissioned to cover identified analytical, geographical and sector gaps. (Tripartite and Development Partners)

11. There is need for close collaboration and potential rationalization of studies to avoid overlap and ensure that the studies cover all areas of interest. In this regard, the TOR/Scope of work for the various studies should be shared by the concerned parties to the rest of the members before the proposed Donor Coordination meeting on October 16 in Nairobi. (Development partners)

12. The Donor Coordination meeting proposed for October 19 should now be brought forward to Friday, October 16, 2009 in Nairobi. This must be attended by senior level representatives from tripartite to deliver an effective outcome.
**AfDB Mission**

AfDB (Mr Afrika) informed the meeting that AfDB had been approached by COMESA to support the corridors within the tripartite structure and, in particular, to assist to bring projects to be implemented as part of the corridor initiatives to a bankable stage. AfDB has used this mission as an opportunity to consult further with RECs. This meeting provided an opportunity to share preliminary outcomes and get feedback from development partners.

The northern and central corridors have become a priority at the political level in East Africa as well as for EAC and COMESA and the Tripartite Arrangement. EAC / COMESA under the tripartite arrangement would like to hold a Northern/Central Corridor Pledging Conference in 2010. The conference would be modelled on similar lines to the North-South Corridor Pledging Conference held in Lusaka. The tripartite would like to learn from the NS Corridor experience and is keen to ensure the conference has some specific investments and packages to present for hard financing.

AfDB also received a verbal request during the mission to assist them in enhancing technical capacity for the tripartite Secretariat that could help facilitate Project Implementation and Coordination. AfDB is waiting for a formal letter from the tripartite, which it will respond to positively.

AfDB has been requested by the RECs to help play a lead convening role as part of this work. AfDB is happy to do this. But, AfDB is also clear that overall leadership must come from the RECs under the tripartite. In addition, further clarification is needed from the tripartite on overall objectives and approach to development of the corridors. For example:

- Transport corridor versus economic corridor
- Geographical coverage – possible inclusion of other corridors e.g., the Lamu (Southern Sudan/Ethiopia) Corridor and the Ethio-Djibouti Corridor
- Sector coverage – inclusion of Energy and ICT sectors

Development Partners agreed to work together to support the tripartite’s objectives – as they become clearer. And are ready to help work with them to identify what gaps, and/or additional analytical work is required to supplement on-going activities.

**Ongoing Studies**
The following studies are either ongoing or planned on the Northern and Central Corridors:

- Corridor Diagnostic Study co-funded by USAID/EA; DFID; and JICA and carried out by Nathan Associates Inc
- Northern Corridor Cost Study being carried under the NC-TTCA by CPCS of Canada
- Northern Corridor Infrastructure Master Plan funded by AfDB and being carried out under NC-TTCA by the Louis Berger Group Inc
- Study on Spatial Development Initiative (SDI) also being carried out under NC-TTCA whose initial findings were presented in Nairobi on October 28
- Proposed Scoping Study by AfDB in preparation to the proposed Northern/Central Corridors Pledging Conference
- Ethio-Djibouti Corridor Study, Lamu Corridor Study and Central Corridor Study to be carried out by consultants recruited by COMESA with funding from USAID/EA
- World Bank studies on trade facilitation
It was acknowledged that the studies were commissioned – in some cases up to 12 months ago - by the respective institutions/donors to fulfil specific objectives/mandates of the sponsoring institutions and to respond to the needs of the beneficiaries. As tripartite objectives become clearer there may be a need to adjust scope of work following discussion with clients. But, for now it was felt that there was need to foster better coordination so as to determine the scope, objectives and expected outputs of the studies and see how these relate to existing objectives.

In addition, a number of donors, notably, USAID, AfDB, World Bank, JICA and DFID were implementing trade/transport/transit facilitation programs in the same geographical area, East Africa and this necessitated the need for better and closer coordination amongst donors.

The meeting agreed that the studies that have been commissioned should proceed in accordance with their ToRs and present scope. However this may be revised by the Clients if need be and where possible, to respond to Tripartite objectives. It was also observed that it was important that the consultants engaged coordinate efforts so as to optimize their presence in the region particularly in interactions with stakeholders and other respondents.

**AOB**

**Clustering of Corridors**

It was also reported that the view of the Tripartite was that it may not be feasible to have coordinating agencies for each Corridor as was the case in East Africa for the Northern and Central Corridors, but that it may be desirable to group the Corridors into clusters based on the ports that the corridors end at. This needs further thought and discussion as to the appropriate institutional structures that would need to be put in place and operational modalities would need to be defined.

**Calendar of Events**

**Donor Coordination Meeting – Lusaka**

The meeting was informed that there was a Donor Coordination meeting planned for Lusaka on October 9, 2009 under the auspices of the EU Lusaka Office with the COMESA Assistant Secretary General expected to attend. Its agenda however is not specifically on the Northern/Central Corridors.

**Proposed Donor Meeting- Nairobi**

In view of the SSATP Annual meetings to be held in Malawi on October 19-20, 2009 and subsequently, the COMESA Technical/Ministerial meetings on Infrastructure to be held in Djibouti from October 23, the proposed dates of October 19-20 for the Donor Coordination meeting may not be feasible.

It was proposed that in view of the importance of the issues at hand which required urgent decisions, the meeting be brought forward to Friday, October 16, 2009 in Nairobi. It was also noted that to be successful they must involve senior decision makers from the tripartite to give donors guidance.

*Mombasa, October 2, 2009*
Appendix B. Record of Technical Coordination Meeting in Nairobi
October 16, 2009

REPORT OF THE CORRIDOR DIAGNOSTIC STUDY
WORK PLANNING MEETING HELD AT THE OFFICES OF USAID/COMPETE,
GIGIRI, NAIROBI ON FRIDAY, OCTOBER 16, 2009

Purpose

The meeting brought together funding and coordinating agencies and implementers of a range of diagnostic and infrastructure studies along the Northern and Central Corridors in East Africa. The objective was to come up with a common set of goals, approaches and shared work plan for implementation to reduce the possibility of duplication and ensure the best possible use of resources to optimize returns and impact. A secondary objective was to define the framework for follow-on meetings including the inception planning meeting to launch the Transit Coordination Group (TCG) agreed upon at the first Transit Donor Coordination meeting held at Intercontinental Hotel in Nairobi in March 2009.

Attendance

The meeting was attended by representatives from the EAC Secretariat; USAID/EA; DFID; JICA; AfDB; TTCA-NC; Nathan Associates Inc; Louis Berger Inc; USAID/COMPETE; and virtual attendance by the World Bank/FIAS via a Videoconference link. The full List of Participants is attached.

Apologies

Apologies were received from the COMESA Secretariat, TTFA-CC (Central Corridor Secretariat) and DFID/RTFP Program.

Welcome Remarks

The meeting was chaired by Mr. Hosea Nyangweso of the EAC Secretariat.

Mr. Godfrey Onyango Executive Secretary of the Transit Transport Coordination Authority of the Northern Corridor (TTCA-NC) in his opening remarks noted that the meeting should be viewed in the
broader context of the decision of the COMESA Heads of State and Government also endorsed by the EAC on the need to look at all the four Corridors in East Africa and also the decision to convene a Pledging Conference for East African Corridors similar to the North-South Pledging Conference held in Lusaka in April 2009.

He also emphasized the need to operationalize the Transit Coordination Group (TCG) including the setting up of the Task Support Unit (TSU) to be based at the EAC Secretariat funded by the DFID as agreed upon at the Nairobi March 2009 meeting. Mr. Onyango observed that donors should recognize and assist institutions that were on the ground to avoid running parallel programs so as to ensure meaningful collaboration and optimize impact of donor support.

He noted that in this regard, the Corridor Diagnostic Study (CDS) and the meeting should be viewed in the larger context of other studies such as those being carried out by the TTCA-NC; EAC; AfDB; JICA; COMESA; and others.

I. Structured Conversation – Ensuring Collaboration

Objective:
- Diagnose potential overlaps and foster coordination
- Agree upon a proper division of labor
- Harmonize methodologies,
- Coordinate stakeholder consultations
- Agree on timeline for deliverables

Ms. Stephanie Wilcock of USAID/EA observed that there was a clear overlap given the number and similarities of various studies/initiatives being supported by donors and that it was important to ensure that double payment was not being made for the same product. She estimated that there was nearly US$4.3 million committed to studies and it was important to ascertain outputs from these studies to ensure that collectively, the various sponsors, beneficiaries and the region as a whole got value for money.

Mr. Hosea Nyangweso informed the meeting that the EAC Secretariat was thin on the ground given the number of initiatives that were on-going and that in this regard, the need to recruit the Coordinator under the TCG arrangement had become urgent as this would help to augment the capacity of the Secretariat. He reiterated the need for a holistic approach across all RECs (Regional Economic Cooperation) groupings taking into account that the Central and Dar Corridors encompassed SADC; while the LAMU Corridor involved IGAD and the EAC Transport Strategy included eastern Democratic Republic of Congo (DRC).

Following discussions, consensus emerged as follows:

- Collaboration efforts need to be viewed in the broader context of the COMESA and EAC Summit decisions as well as the Tripartite Framework (COMESA, EAC and SADC) and that there was need to always bear in mind the “big picture”

- The TCG mechanism should be retained as agreed in March 2009 in Nairobi with the EAC as Chair. The 1st formal meeting of the TCG should be held as soon as possible preferably in early December 2009 hosted by the EAC Secretariat
- The TCG process and coordination of the various studies that are on-going/planned should proceed as this mechanism is coordinated by the EAC and this will ensure that outcomes are fed into the Tripartite process

- Priority should be given to establishing the TSU at the EAC Secretariat and appointing a Coordinator as the Focal Point for coordinating the work of the TCG as a matter of urgency

- Further consultations are required on the scope, structure and content of the proposed East African Corridors Investment Conference whose timing should be the last half of 2010 in order to accord adequate time for preparations and guidance in this regard is required from the Tripartite and AfDB

II. Presentations from CDS Implementation Teams

The various Consulting Teams made presentations of their respective studies and methodologies. The presentations covered the following:
- Area of Coverage
- Methodology
- Expected Results
- Expected Timeline
- Total Budget
- Experts Made Available for Completion of Study

Louis Berger – Northern Corridor Infrastructure Master Plan
Presentation: Greg Gajewski, Team Leader – NC-TTCA Master Plan Study

Highlights were as follows:
- The Study covered a large area from Mombasa (Indian Ocean) to Matadi in DRC on the Atlantic Ocean
- Timeframe for the Study was one year from October 2009
- The Study would involve about ten experts and would cover port, road, rail, pipeline, transit modes including airports and took a broader regional development approach
- The methodology to be adopted involved, diagnostic, inventory and stakeholder consultations
- A number of stakeholder workshops were planned with the Inception Workshop scheduled for November 2009
- A comparative analysis of the Nathan, CPCS, Louis Berger studies was done and potential areas of overlap were identified which included the following:
  - SWOT Analysis
  - Data collection on existing situation and infrastructure condition
  - Demand projections as traffic forecast were interdependent for the Central and Northern Corridors given the same hinterland
- The expected output was a Master Plan of Infrastructure Projects with sketch plans as feasible including issues related to safety, institutional arrangements, and an Action Plan for improving efficiency
- The Draft Report was expected to be presented in September 2010

CPCS – Time and Cost of Transport on the Northern Corridor
Presentation: Mr Godfrey Onyango, Executive Secretary, TTCA-NC

Highlights:
- Study to be carried out by CPCS of Canada and Consultants still mobilizing
- Study focuses on “soft side” and not “hard side” of infrastructure issues
- The timeframe of the study was 6/7 months from about November 2009
- Aim is to identify “drivers of costs” on the corridors – what generates the costs?
- Study will provide basis for evidence-based policy reforms
- Overall objective of the study was given as:
Discussions

Nathan and Associates – Corridor Diagnostic Study (CDS)
Presentation: Richard Blankfeld, Vice President and SMAK Kaombwe, CDS Team Leader

Highlights:

- The CDS is being procured on behalf of the TCG funded by a consortium of development partners (USAID, DFID and JICA)
- CDS will address logistics side and not engineering side of infrastructure
- Part of output will be web-based document access system
- Study will also involve Nathan’s tested “FastPath” methodology
- Study will also utilize “Integrated Transport Network Model”
- A GIS tool will also be utilized for:
  - Visualization of Corridors
  - Packaging and presenting information in GIS framework
- A visual in the form of a short film will be created as part of the communication and information dissemination strategy
- Areas of potential overlap with the Infrastructure Master Plan Study (Louis Berger) include:
  - Inventory of infrastructure facilities and condition
  - GIS
  - FRICON/EACON studies
  - East African Transport Strategy
- The CDS will be undertaken in 3 Phases
- Key areas to be addressed by the study include:
  - Synthesis of existing information
  - Assessment of national and regional policies and implementation
  - Identification and filling of data gaps to better understand barriers to transit efficiency
  - Identify causes of inefficiencies and address planning, investment and institutional governance issues
  - Set a baseline against which future corridor improvement activities will be measured
  - Analyze costs and benefits of interventions along the two Corridors (Northern and Central) and provide a platform for enhanced coordination of stakeholders
  - Synthesize findings and create an East African Corridor Action Plan and propose solutions to the TCG as well as convene a Conference of stakeholders
  - Highlight corridor development solutions that promote public-private partnerships (PPPs) and measures to strengthen private sector advocacy for reforms

Discussions

In the ensuing discussions, the following issues were raised:

- Determine the references of the total transport cost, including the invisible costs along the Northern Corridor
- Undertake a comparative assessment of transport costs by comparing different transport Corridors in Africa and elsewhere
- Develop different strategies and necessary measures to improve the performance of the Corridor

- Cost elements to be tracked by study include:
  - Shipping costs
  - Transhipment costs
  - Port terminal costs (handling, documentation, etc)
  - Inland route costs
  - Inland terminal costs
  - Vehicle operating costs along the Corridor
  - Inventory costs due to unreliable delivery systems or inefficiencies along the Corridor logistics chain
Value addition: There should be value addition from each of the studies and it is therefore critical that the studies do not duplicate each other but that collectively, they should be able to inform decision-making regarding all the critical aspects affecting corridor performance.

Convergence between CDS and TTCA Cost studies: There is need for convergence of the studies particularly on costs to avoid major various in cost figures.

Coordination framework: Contractors need to agree on a framework for collaboration as soon as possible so that this can then be turned into a directive by the TCG. A critical aspect should be to look at cost savings which can then used to address other areas or coverage of the studies (such as looking at links/spurs from the main corridors).

Joint workshops: As far as feasible, the Consultants should convene joint stakeholder workshops.

Traffic forecasts: Given that traffic forecasts for both the Northern and Central Corridors are interdependent as they will be based on the same hinterland countries, it is critical that the assumptions behind the traffic forecasts by the various studies are clear and that there is convergence.

Data sources: Due attention should also be given to data sources both primary and secondary (through for example surveys). The size of the samples will have a bearing not only on the credibility, but also quality of the results and this process therefore, needs to be managed carefully. It was therefore important that the Consultants share methodologies and approaches to ensure synergies and value addition to each other’s work and to ensure that the samples were representative both in scope and size.

Rail development: There are a number of rail developments such as the proposed Isaka-Rwanda rail-link, the Uganda-Kenya standard rail gauge as well as the EAC Railway Master Plan done by CPCS of Canada.

Dar port masterplan: This is another major study that needs to be taken into account.

Private sector: The CDS should include an assessment of the capacity as well as needs of private sector players along the transit corridors (Associations of C&F Agents, Transporters, Shipper’s) including measures to strengthen these Associations and the private sector generally.

III. Presentations on In-Depth Border Audits

DFID
Presentation: Graham Johnson, Customs Consultant
Highlights:
- Current work focusing on One Stop Border Posts audits targeting 10 borders looking specifically at:
  - Basic legal frameworks
  - Procedural and operational framework
  - Gap analysis
  - Infrastructure at borders
  - Assessment of border agencies operating at the border
- Standard methodology/framework has been developed as a basis for the border audits
- Model is broad and covers issues such as architectural design of the borders
- DFID supporting the setting up of a OSBP Management Desk at EAC Secretariat
- With respect to placing a Corridor Coordinator in line with TCG decision in March 2009, TOR have been done, the next step is to have a “body” in place
- Training of private sector players on the transit corridors such as Clearing and Forwarding agents was critical to ensuring that all key players had adequate capacity to respond to the various challenges

JICA
Presentation: Kurashina Yoshiro, Director, JICA
Highlights:

- JICA has a regional dimension through the Regional Strategy Unit for Africa based in Nairobi
- The regional strategy covers Sub-Saharan Africa with key areas of focus being, infrastructure, health and water
- Broader Japan-Africa cooperation is via TICAD through which the Yokohama Action Plan (YAP) has now been defined
- Under the Fukuda Initiative, bilateral assistance to Africa will double over the next five years reaching US$3 billion by 2012
- On-going programs in East Africa include:
  - Border audits
  - OSBP targeting 14 borders
  - Defining a legal framework for OSBP, a move away from the current bilateral to a multilateral framework
  - In addition to legal frameworks, operational agreements are also critical to the functioning of OSBP (a Regional Stakeholder Workshop is planned in December to review the findings of the study and define the way forward)
  - Capacity building project for customs targeting Kenya (KRA), Uganda (URA) and Rwanda (RRA) and will subsequently be extended to other EAC countries
  - Construction of the new second Container Terminal at Mombasa port in Kenya which will also include the “soft aspects” – human resources development, systems, documentation and processes
- The JICA Customs Training Team also provided an overview of the training work being undertaken in the region in two major phases:
  - Phase 1 – from September 2009
    - 17 Seminars for Customs officers and C&F agents
  - Phase 2 – Sept 2009 to Sept 2013
    - Apart from customs, the focus under Phase 2 will also be on C&F agents
  - JICA has helped set up the Regional Joint Coordinating Committee on Customs (RJCCC) bringing together all the Revenue Authorities in the EAC countries
  - HRD seminar will be held in Kigali first week of November back to back with meeting of the RJCCC

Discussions

COMPETE – Tracking Trade Flows, the GIS and [www.EastAfricanCorridors.org](http://www.EastAfricanCorridors.org) and Resource Library

Presentation: Shem Simuyemba, Transit Facilitation Advisor, COMPETE

Highlights:

Institutional Issues

- Who Hosts – Consultations-consultations held with RCMCD as potential host
- Capacity of host institution
- Authenticity
- Management

Content of Site

- Trade flow data by value chain especially agriculture
- Cost data
- Reports, studies and other resources
- Hard infrastructure
- Soft Infrastructure
- Real Time Operations
- Policy
- Rules and Regulations

Next Steps

- Consultations with key stakeholders
- Start with depository of existing studies, reports
- Site Development – engage firm familiar with GIS
✓ Develop capacity for day-to-day management – IT support, Content Manager
✓ Work within TCG Guidance on roll-out taking into account work being done by the various studies

FIAS
Presentation: Uma Subramanian, Product Manager, Trade Logistics (via Video Conferencing)
Highlights:
• FIAS/EAC work is in three areas:
  o Trade logistics
  o Business licensing and regulatory reform
  o Special economic zones
• Work program is for 6/7 months up to March 2010
• Regional Framework:
  o EAC-wide regional framework
• Country-level strategies:
  o Rwanda (2 and half year) program on trade logistics – deepen risk management work beyond Rwanda Revenue Authority (RRA) to standards and agriculture including Single Window
  o NTBs to trade – Kenya second country to be followed by Tanzania, Uganda and Burundi
• Identify regional-level activities
• New regional areas:
  o Development of baselines
  o Defining quantitative benchmarks
  o Documenting development impact
  o Measuring firm-level impact using methodologies like Fastpath
  o Legal and regulatory frameworks-implementation, not diagnosis
  o Trucking industry competition issues
  o Documentation and procedures
  o Cargo tracking systems (such as Bar Coding)
  o Border audits in the context of “Supply Chains” – process mapping/re-engineering
  o ICT systems – RADdex, KWATOS, ASYCUDA -connectivity and compatibility issues
  o Risk management – seamless transit operations
  o Valuation- Rules of Origin
  o Public/private networks to push reforms – EABC, Customs, Private Sector Associations; C&F Associations
  o Best practices and information sharing

IV. Other Important Contributors

World Bank – EATTP, Transport GIS, AIPC

EAC
Presentation: Hosea Nyangweso, Infrastructure Specialist
Highlights:
• A number of on-going studies which include:
  o Scoping study on identification of the missing links and bottlenecks affecting the performance of the East African Community Central Corridor
  o Preparation of a transport facilitation strategy for the East African Community
  o Proposed Technical Working Group (TWG) on axle load harmonization in the EAC region
• EAC has critical manpower constraints and it is critical that the position of Coordinator to be funded by DFID agreed upon at the March 2009 Donor Coordination meeting be filled as a matter of urgency

Discussions

OSBP common framework: Need to have common framework across the whole region (EAC, COMESA, SADC) and use Southern African experience as potential model. Framework needs to include dispute resolution mechanism.
GIS system: Institutional issues surrounding the proposed GIS system including host institution need to be addressed in consultation with potential beneficiaries. RCMCD may be most suited to provide regional technical mapping capacity but may not be the best host institution. Further consultations are required to determine the most suitable host institution.

Self-regulation: Private sector players should be assisted to develop capacity for self-regulation including development of codes of conduct and service delivery standards as well as a move towards regional rather than national accreditation.

Capacity building of private sector: Various players along the transit logistics chain in particular, the private sector need to be assisted to build capacity to offer value added services to their members but also to be abreast of various developments regionally and internationally (such as implications of the various FTAs, coming into place of the EAC Customs Union and subsequently, Common Market, International Conventions, INCOTERMS and other related instruments and developments).

Customs connectivity: The region should move towards customs automation and connectivity through systems such as RADDex. Customs IT systems should be seen in the broader context as a regional management tool and source of data on trade flows.

PPPs: A regional framework to support effective private sector participation in infrastructure needs to be put in place particularly in view of the many potential infrastructure projects coming on stream in East Africa with potential for public-private partnerships (PPPs). Projects include, standard rail between Uganda and Kenya, Tanzania-Rwanda rail, development of the LAMUSSEC (Lamu-Southern Sudan-Ethiopia Corridor) and other programs likely to come on stream as the Spatial Development Initiatives (SDIs) mature. Kenya has issued two infrastructure bonds which have been oversubscribed and these provide a model for extension to other countries in the region as a basis for mobilizing private sector financing for infrastructure development.

Investor Conference: With respect to the planned East African Infrastructure Investment Conference, there is need to have a Road Map to guide the roll-out of this important event. This should include packaging of investment projects, defining the scope of the Conference in terms of sectors and geographical coverage and mobilizing the private sector/investors so that there is strong private sector participation from across the world. This should include strategies such as identifying private sector champions who have already invested in the region as a basis to attract other potential investors.

Next Steps

Following deliberations, the meeting agreed on the following next steps:

1. **Synchronization of Work Plans:** The Consulting Teams should meet as soon as possible to synchronize their work plans with the overriding principle being to avoid overlap and duplication. This should be formalized by putting the agreed working modalities in writing so as to have clarity on harmonization of methodologies.

2. **Inception Meeting:** A joint inception meeting should be convened by the Consultants at the earliest opportunity to diagnose areas of potential overlap specifically:
   a. Avoid duplication of data collection efforts
   b. Identify cost savings and identify gaps that can be covered using these savings
   c. Identify time savings and synchronization activities such as stakeholder forums
3. **Additional Work:** The cost savings should, subject to the concurrence of the funding agencies, be used to undertake additional work as may be determined by the TCG. Such work could include, funding of joint stakeholder consultations; studies on additional spurs/corridors (such as Lamu) and preparatory work towards convening the East African Corridors Investment Conference.

4. **Joint Stakeholder Consultations:** As far as feasible, the Consulting Teams should convene joint stakeholder meetings in order to avoid “stakeholder overload” so as to enhance responsiveness and optimize outputs.

5. **Finalization of Inception Reports:** Consulting Teams (Louis Berger; Nathan; and CPCS) to finalize Inception Reports, Work Plans and clearly delineate division of labour through a formal collaboration framework/mechanism.

6. **Plan of Action on Deliverables:** Rationalization of studies and methodologies by the Consulting Teams should be undertaken urgently so as to inform definition of a Plan of Action on immediate deliverables.

7. **Institutional Framework:** The first formal meeting of the TCG should be held in Arusha at the EAC hosted by EAC Secretariat on 2/3 December 2009.

8. **Information Sharing:** Donors and partners should keep each other informed of developments and activities and participate as feasible, in each other’s activities so as to foster continued information sharing and coordination.

9. **Investment Conference:** The EAC Secretariat should seek further guidance from the Tripartite Arrangement and the AfDB on the proposed East African Corridors Investment Conference in terms of scope of sectors/issues to be covered and coverage (geographical reach) so as to inform preparatory work which needs to commence as soon as possible.

**V. Closure of the Meeting**

In closing, Ms Stephanie Wilcock observed that this consultative process was important because it was like a team steering a ship in one direction through an open collaborative approach. She indicated that she was glad the proposed Conference for the East African Corridors was likely to be an investment rather than pledging Conference. She reiterated the need for a Joint Stakeholder Workshop coordinated across the three core study teams to ensure optimization of synergies.

Mr. Shem Simuyemba of COMPETE informed the meeting that COMPETE was available to continue providing secretarial and logistical support for the Corridor Diagnostic Study and coordination process until the TSU was set up at the EAC Secretariat.

The Chairman, Mr. Nyangweso thanked the participants for the frank exchange of views and progress made and observed that the process had moved forward since the first Donor Coordination meeting held in Nairobi in March 2009. He observed that this should not be a blame game but a positive participatory partnership approach because the Tripartite Mechanism was looking up to the units on the ground to deliver results-driven collaboration and to inform its interventions.

In closing, he indicated that he looked forward to welcoming all present to the first formal meeting of the TCG scheduled to be held in Arusha in early December 2009.

There being no further business, the Chairman declared the meeting closed.
ANNEX II – LIST OF TERMS OF REFERENCE CIRCULATED AND PRESENTATIONS MADE

A) TERMS OF REFERENCE

1. The Northern Corridor Infrastructure Master Plan Study (TTCA-NC)
2. Analytical Comparative Transport Cost Study along Northern Corridor Region (TTCA-NC)
3. Corridor Diagnostic Study CDS) of the Northern and Central Corridors (USAID, DFID, JICA on behalf of TCG)
4. Legal Framework and Procedures Necessary for the Introduction of One Stop Border Posts (OSBP) in East Africa (JICA)
5. Consultancy Services for Detailed Border Audits in East Africa to Assess their Effects on the Performance of the East African Transport Corridors (JICA, DFID, USAID)
6. Detailed Design Study for One Stop Border Post (OSBP) at Namanga (EAC/JICA)
7. Preparation of a Transport Facilitation Strategy for the East African Community (EAC/AfDB)
8. Scoping Study on Identification of the Missing Links and Bottlenecks Affecting the Performance of the East African Community Central Corridor (EAC/JICA)
9. Technical Working Group (TWG) on Axle Load Harmonization in the Region (EAC)

B) POWER POINT PRESENTATIONS

1. Northern Corridor Infrastructure Master Plan Study and Some Comparisons with other Studies – Louis Berger
2. Eastern Africa Corridor Diagnostic Study (CDS) of the Northern and Central Corridors: Overview of the Terms of Reference – Nathan Associates
3. Japan’s Action Plan in Africa and On-going Projects in the Northern Corridor – JICA
4. Customs Capacity Building Project - JICA
5. East African Corridors Website and Transit Resource Library – USAID/COMPETE
## CORRIDOR DIAGNOSTIC STUDY - DONOR COORDINATION MEETING

### HELD ON 16TH OCTOBER 2009 AT THE OFFICES OF USAID/COMPETE

### LIST OF PARTICIPANTS

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Appendix C. Memorandum on Technical Coordination for Transport Studies on Northern and Central Corridors
MEMORANDUM

November 12, 2009

To: Philip Wambugu, Director for Infrastructure, EAC
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   Rukia D. Shamte, Interim Executive Secretary, Central Corridor TTFA
   Amadou Oumarou, Division Manager, African Development Bank
   Mtchera J. Chirwa, Principal Infrastructure Specialist, African Development Bank
   Stephanie Wilcock, Regional Trade Policy Specialist, USAID
   Frank Matasaert, Sr. Growth, Trade and Investment Advisor for East Africa, DFID

From: Richard Blankfeld, Nathan Associates Inc.
      Greg Gajewski, Louis Berger, Inc.
      Carolyn Mackenzie, CPCS Transcom, Ltd.

Subject: Proposed Areas for Technical Coordination for Transport Studies on Northern and Central Corridors

It was agreed at the October 16, 2009 technical coordination meeting in Nairobi that the contractors performing the three transport studies regarding the Northern and Central Corridors would explore specific areas where technical work could be coordinated to avoid duplication and to maximize the effective use of study resources. The three studies are:

- Northern Corridor Infrastructure Master Plan Study (NCIMPS) conducted by Louis Berger Group, Inc.
- Corridor Diagnostic Study of the Northern and Central Corridors (CDS), a TCBoost activity led by Nathan Associates Inc.
- Analytical Comparative Transport Cost Study (ACTCS) along the Northern Corridor Region conducted by CPCS Transcom, Ltd.

This memorandum outlines eight areas for coordination that have been identified and the procedures that will be employed to share information and work products.

1. Collection and Sharing of Background Documents
2. Infrastructure Condition Inventory
3. Baseline Traffic Data
4. HDM Model Agglomeration
5. Transport Policy Analysis and Recommendations
6. Freight Rates for the Central Corridor
7. Long-Term Costs of Provision and Maintenance of Infrastructure
8. **Stakeholder Workshops**

Some areas of coordination involve all three study teams; others involve coordination among only two study team members. The study teams involved in each area of coordination are clearly specified in this memorandum. The proposed coordination should result in some cost savings across the three studies as well as improved integration between study findings.

1. **Collection and Sharing of Background Documents**

Each of the three studies includes tasks related to the collection of existing studies and data related to the transportation and transit efficiency along the corridors.

**Proposed Coordination:** It is proposed that the Collaboration website already developed by the CDS Team be used initially as the common access site for these documents. Authorized members of each of the study teams will have complete and continuous access to the background documents and information. The documents can subsequently be transferred to sites developed and maintained by the EAC, NCTTCA and the Central Corridor TTFA. The costs for managing the initial common access site will be borne by the CDS Team.

2. **Infrastructure Condition Inventory**

The ToR for the **NCIMPS** states that the Consultant shall:

> Undertake comprehensive surveys for the inventory, condition, and operational performance characteristics of existing corridor infrastructure making use of GPS and GIS mapping, highway capacity analysis, and other performance assessment techniques and methodologies. (para 15. (iii))

The ToR for the **CDS** states that the Consultant shall:

> The Contractor will ground truth all data collected both through stakeholder meetings and by driving each Corridor and its spurs up to the borders with neighboring countries. A photo journal will be completed illustrating various challenges along the corridors. These photographs will be used in communications materials and as projects are packaged in Phase 3. (Item 3.1.2.1 Phase 1b (A))

> Deliverable 5: Driving of all roads and production of detailed records (photographic and paper based) of road conditions drawing on road maintenance data from national Ministries (HDM-4 models), including relevant FastPath analysis such as visual assessment. Identification of landsat data resources that could add a valuable visual component to the GIS is encouraged; (Item 3.1.2.1 Phase 1b (A))

**Proposed Coordination:** It is proposed that the NCIMPS take the lead in conducting the Infrastructure Condition Survey for the Northern Corridor. The NCIMPS Team will prepare detailed instructions for the
team to carry out the surveys for review and agreement with the CDS. As per the NCIMPS ToR, the Infrastructure Condition Inventory will cover road, rail, port, inland waterways, pipeline, multimodal transport, cross border infrastructure and facilities and other facilities on the corridor such as inland ports and terminals.

The NCIMPS will be responsible for completing the Infrastructure Condition Inventory for the Northern Corridor providing the results to the CDS Team in a suitable electronic format by mid-December, 2009. It is understood that the Berger Group may use subcontractors for completing all or part of the Infrastructure Condition Inventory. The CDS will have the right to include within the Infrastructure Condition Inventory Team, a Media Specialist to prepare a photo journal and other media to be used in the communications materials for remaining inventory work. Given that the NCIMPS has completed the condition survey for the core road links on the Northern Corridor, it is the responsibility of CDS to cover these routes with their media specialist. Other than the costs related to the CDS Media Specialist, all costs associated with the Infrastructure Condition Inventory for the Northern Corridor will be borne by the NCIMPS.

The road condition survey conducted on the Central Corridor will be done by CDS using the methods, standards, and forms provided by the NCIMPS to match the work done on the Northern Corridor. CDS will share the results of their road condition surveys on the Central Corridor with the NCIMPS by January 30, 2010. CDS will supply the other two studies any analyses of other transit infrastructure on the Central Corridor, which is expected to be ready at the end of March, 2010.

3. Baseline Traffic Data

The ToR for each of the three studies includes preparation of baseline traffic data for the Northern and Central Corridors.

Item 18 of the ACTCS TOR states that the following activities are to be undertaken:

i. Develop an origin-destination flow and tariff matrix. For the dominant export and import commodities, collect information on volume of movement, by mode, by time, through the logistics chain (including origin, points of transshipment, delivery to warehouses and the final consumption destination). For each link in the chain, collect information on freight tariff charged by different operators and forwarding agents. Examine cost of operation for domestic and international operators (including sea freight charge, port charges, rail and road transport charges, storage charge, financial cost of tied capital, handling cost, etc.). The information should be collected for:

   (i) International freight-volume and cost from point of origin to the port and from the port to the warehouse at destination;

   (ii) Domestic movement-volume and cost of delivery and storage from warehouse to the ultimate consumer.
The data on cost of operation should reflect "generalized cost" and include (besides tariff): costs imposed due to delays at ports, border posts, transhipment, storage and handling, reliability of service and other cost involved in moving goods from the supplier/producer to the point of final consumption.

ii. Analyse traffic flows and volumes along the Northern Corridor Transport Chain:
   - Shipping Lines (Maritime lines)
   - Ports (Mombasa and Dar Es Salaam)
   - Railways (KRC, TRC and URC)
   - Roads (TTCA transport Road network)
   - Inland ports and Inland Container Depots
   - Bonded Warehouse
   - Pipeline transport

Para 14 of the NCIMPS ToR states that the study will

(i) Take into account the actual and potential transport demand of the member States of the Northern Corridor and other countries of the region served by the corridor.

Section 3.1.1.1 Phase 1a) A of the CDS ToR states that:

The Contractor will collect and synthesize existing data on the Central and Northern Corridors, including relevant sea ports, railways and lake ports. The Contractor will include relevant studies from 2000 to present in their survey and data sets collected after 2006. The Contractor will include HDM-4 data sets in the material that is collected to incorporate up-to-date information about road quality and planned improvements into the synthesized database.

Proposed Coordination: It is proposed that the CDS Team take the lead in preparing baseline traffic flows for international trade on the Northern and Central Corridors between maritime ports and inland origins and destinations. Data on these traffic flows will be collected and synthesized by mode of transport, by major commodity or commodity group and by cargo type (containerized, non-containerized, bulk). Data will be collected from 2000-2008 and the baseline year will be 2008. A listing of the major commodities and commodity groups to be used will be coordinated with the other studies. The CDS Team will provide the NCIMPS and the ACTCS the collected and synthesized baseline traffic flows for international trade on the two corridors by January 15, 2010. The costs for preparing the international trade flows will be borne by the CDS Team.

It is proposed that the ACTCS Team take the lead in preparing baseline traffic flows for domestic and intraregional trade on the Northern corridor. A breakdown of commodity and commodity groups similar to that of the international trade flows should be used, where applicable. However, typically the commodity and commodity groups for domestic and intraregional flows are different from those found in the international flows. Thus the specification of origin-destination pairs for the domestic and intraregional trade flows will be coordinated with the CDS and NCIMPS teams. The CDS Team will provide the NCIMPS and the ACTCS
Teams with the collected and synthesized baseline traffic flows for domestic and intraregional flows on the Central Corridor by January 31, 2010. The ACTCS Team will provide the NCIMPS and CDS Teams with the collected and synthesized baseline traffic flows for domestic and intraregional flows on the Northern Corridor by January 31, 2010.

4. HDM Model Agglomeration

The ToR for the CDS includes the following activities related to the HDM-4 data:

Many Ministries of Transport in Africa (including Kenya) have adopted the World Bank supported HDM-4 software as a planning, programming, and budgeting tool for road planning and management. The Contractor will access data generated by HDM-4 on road conditions, maintenance practices, budgetary allocations for road construction and maintenance and overall road planning and management.

Deliverable 2: Integration of relevant data from HDM-4 model applications into the CDS analytical framework.

While not specifically mentioned in the TOR, the NCIMPS will need to use the HDM-4 data from each country to assess alternative road designs and maintenance costs for the Northern Corridor and benefit greatly from such data by country for the Central Corridor.

Proposed Coordination: It is proposed that the NCIMPS Team take the lead in coordinating and contracting for an agglomeration of the HDM-4 data that is available for each country. To accomplish this task, it is anticipated that the University of Birmingham group that prepared an agglomeration of national HDM-4 data for the North-South Corridor will be retained to prepare a similar agglomeration for the Northern and Central Corridors. The agglomerated models will then be made available for use by the CDS and NCIMPS teams. The agglomerated HDM-4 models for the Northern and Central Corridors should be completed and provided in electronic format by January 15, 2010. The specific costs for preparing the agglomerated HDM-4 models for the Northern and Central Corridor will be borne equally by the CDS and NCIMPS teams.

Should all reasonable attempts to contract with the University of Birmingham for the appropriate (specifically up-to-date) HDM-4 data for the Northern and Central Corridors be unsuccessful, and no other contractor be found acceptable to NCIMPS and CDS, the CDS team will be responsible for generating the HDM-4 data for the Central Corridor while the NCIMPS team will be responsible for generating the HDM-4 data for the Northern Corridor. In this case, the CDS and NCIMPS teams will coordinate their use of HDM-4 so that

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1 See Alta Innovations Limited, University of Birmingham, *Economic Benefits of An Efficient North-South Corridor: Strategic Level Analysis of Investments in the North-South Corridor Using HDM-4*, Final Report, April 2009 conducted under the Regional Trade Facilitation Programme.
the HDM-4 data is consistent for both corridors. Also in this case, the CDS and the NCIMPS teams will share their data with each other by January 31, 2010.

5. **Transport Policy Analysis and Recommendations**

Para 3.1.1.1 Phase 1a) B of the **CDS ToR** states that the study should:

There are a number of policies, regulations, procedures and processes that impact on the transport efficiency of both the Central and Northern Corridors both at national and regional levels. These policies stem from National governments and regional institutions such as the East African Community (EAC) and the Common Market for East and Southern Africa (COMESA). The Contractor will review and flag existing and proposed (soon to be implemented), missing (needed but not included) and non-functional (enacted but inoperable) legal and regulatory frameworks, policy and planning reforms. An analysis should be developed on the impact these have on the effectiveness of the transport sector costs, governance, regulation, service delivery, private sector participation, and coordinated policy development/execution and their likely impact on transit efficiency. The Contractor should make sure that their analysis not only covers regional and national-level policies but the relationship between the two, as many regionally adopted policies require action at the national level for full implementation.

Existing planning documents, and recent policy documents such as those addressing fuel levies, axle load controls, and maintenance tolls, and transit facilitation Instruments in general and related action plans, will also be reviewed. In addition to desk review, information should be collected through interviews with stakeholder groups (to be conducted during Phase 1b and Phase 2) as well as key informants to identify constraints and virtues of current policy, service provision, and institutional and regulatory arrangements. The Contractor should also consider the range of licensing regimes and permit requirements that govern participation in the regional transport industry, and what is self regulated and regulated by Government. The Contractor should consider transport policies and their implementation within all 5 of the EAC Countries targeted.

Para 18.(vi.) of the **ACTCS ToR** states that the following activities should be undertaken:

Review the policy framework impacting the transport sector and identify measures to capture full benefits of the movements using the Northern Corridor. Assess the direct and indirect impact of governments on transport industry-through regulatory and licensing bodies.

Para 15. (ix.) of the **NCIMPS ToR** states that Consultant shall carry out the following tasks

Recommend specific technical, institutional, policy and regulatory actions for implementation after reviewing current policies and standards for construction and maintenance of the Northern Corridor infrastructure, to include standards for design, construction and maintenance networks.
Proposed Coordination: It is proposed that the CDS and the ACTCS teams undertake their own assessment of transport policy, institutional and regulatory issues and identify recommended policy actions. The three teams will then hold a joint working session prior to April 15, 2010 to review the initial assessments and to coordinate proposed policy recommendations. The respective costs for conducting the policy assessment and initial recommendations will be borne separately by the CDS and ACTCS teams. The NCIMPS team will be responsible for the costs of their own team members to travel and participate in the joint working session.

6. Freight Rates for the Corridors

The ACTCS requires the comparison of freight rates of the Northern Corridor to the Central Corridor and other corridors in Southern Africa, Asia and Latin America. The detailed estimation of freight rates for the Central Corridor is a key component of the CDS.

Proposed Coordination: It is proposed that the CDS take the lead in developing freight rates for the Central Corridor and to provide preliminary estimates to the ACTCS and NCIMPS Teams by March 31, 2010 and final estimates by April 30, 2010. The costs for preparing the freight rates for the Central Corridor will be borne by the CDS Team. It is proposed that the ACTCS Team take the lead in developing freight rates for the Northern Corridor and to provide preliminary estimates to the CDS and NCIMPS Teams by March 31, 2010 and final estimates by April 30, 2010.

7. Long-Term Costs of Provision and Maintenance of Infrastructure

The long-term costs of provision and maintenance of infrastructure along the Northern Corridor will be developed by NCIMP and supplied to ACTCS as soon as developed. These cost estimates will be supplied to ACTCS in draft form no later than early March, 2010.

8. Stakeholder Workshops and Review Meetings

Proposed Coordination: Whenever feasible and practical, the three studies will endeavor to conduct joint stakeholder workshops and review meetings so that issues of common interest and subject areas can be discussed. One example is the joint session for the review of the Inception Reports of the CDS and NCIMPS that has been scheduled in Arusha for the first week of December 2009. It is also anticipated that the Stakeholder Workshop for the Presentation of the CDS Draft Action Plan could be held jointly with the presentation of the Interim Report of the NCIMPS. Each team will be responsible for the travel and participation of their own team members to jointly held workshops. It is proposed that the NCIMPS and CDS split evenly the logistics costs for the joint workshops including invitations, workshop materials, and arrangement for the venue and refreshments for up to four workshops. Costs for stakeholders travel and per diem are generally excluded from the joint workshops. The NCIMPS has a budget to support the costs for
Memorandum on Proposed Areas for Technical Coordination for Transport Studies on Northern and Central Corridors
Page 8 of 8
November 12, 2009

60 stakeholders' travel and per diem to participate in two workshops, and the ACTCS will support one workshop, all at the direction of the NCTTCA.

Beyond what is in the budget for the NCIMPS; the EAC, NCTTCA, TTFA, AfDB, USAID, DfID and other stakeholders are kindly requested to find funding to support the travel and per-diem costs for the other stakeholders to participate in the proposed workshops.

APPROVED:

____________________________

Mr. Richard Blankfeld for Nathan Associates, Inc.

____________________________

Mr. Gregory Gajewski for Louis Berger, Inc.

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Ms Carolyn Mackenzie for CPCS Transcom, Ltd.
Appendix D. Burundi, Rwanda and Tanzania Inter-Ministerial Meeting on Central Corridor Transport project

Joint Communiqué

INTERMINISTERIAL & STAKEHOLDERS’ MEETING


8th-10th December 2009, Serena Hotel - Kigali

1.0 General

At the invitation of the Minister of Infrastructure of Rwanda, Hon. Vincent KAREGA, the Minister of Infrastructure Development of the United Republic of Tanzania Hon. Dr. Shukuru J. KAWAMBWA (MP), and the Minister for Public Works and Equipment of the Republic of Burundi Hon. Anatole KANYENKIKO, made a four day visit to Kigali, Rwanda from 7th – 10 December, 2009. The purpose of the visit was to attend an inter-ministerial and stakeholders’ meeting on 9th December 2009, where the findings of the study to upgrade Dar es Salaam - Isaka railway line were presented by Burlington Northern Santa Fe (BNSF) railway, the company which conducted the study.

The meeting was also attended by the representatives of the Tanzanian Parliamentary Committee for Infrastructure, Permanent Secretaries of the three countries, high officials
from the EAC Secretariat, African Development Bank, World Bank, diplomatic corps, CEPGL and other stakeholders from the three partner countries.

The Ministers recognized the railway project as a backbone to economic transformation to facilitate countries to compete internationally. Furthermore, the project is considered important for improving the social and economic condition of the citizens of the countries.

On this basis, the three countries are committed to deliver this important project as an integrated and sustainable transport infrastructure system.

The Ministers reiterated their commitment to establish a road map for the project, including establishing a legal and regulatory framework for implementation of the railway project. The BNSF and DBI studies provide a strong and reliable basis to turn the project into reality and there is need to fast-track the next steps.

The Ministers expressed gratitude to BNSF for their keen interest and diligence in delivering a well prepared study which would assist in securing potential investors.

The Ministers also recognized the important role of AfDB in regional integration, in supporting and financing the DBI feasibility study for Isaka – Kigali/Keza – Gitega – Musongati Rail

2.0 Observations

(a) The Ministers reiterated that the project needs to be considered as an integrated regional railway development, and the construction works of all new (Isaka – Kigali/Keza - Gitega – Musongati) and upgrading of existing lines should start simultaneously;

(b) After the presentations and the business rationale highlighted, the Ministers find the use of AREMA standards to be more cost effective;

(c) Traffic forecast of 30 million tonnes by the year 2031 was found to be acceptable;

(d) The project of upgrading the Isaka – Dar es Salaam line as well as construction of the new line from Isaka – Kigali/Keza - Gitega – Musongati to AREMA standards was considered reasonable. The project was considered to be economically viable and financially bankable;

(e) The inter-operability of the new standard gauge with the existing metre gauge arterial and extension lines should be considered during detailed project development by the provision of interchange facilities;
3.0 **Recommendations and Way Forward**

The three partner states indicated their commitment to move forward and implement the project and agreed that the following issues be addressed as a matter of urgency:

1) Preparation of the structure of the PPP in order to mobilize private investors, public and multinational donors for financing;

2) The three governments with the assistance of AfDB, shall engage a Project Management Consultant (PMC) to prepare a bankable railway project document and gather investors/project developers. The PMC will also be responsible for completing critical risk analysis and mitigation plan; inviting Request for Proposals (RFPs) from prospective investors; bid evaluation and contract negotiations.

The delegations of Tanzania and Burundi expressed their appreciation for the invitation and hospitality extended to them by the Ministry of Infrastructure of the Republic of Rwanda.

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**Hon. Vincent KAREGA**
Minister of Infrastructure (RWANDA)

**Hon. Dr. Shukuru J. KAWAMBWA**
Minister of Infrastructure Development (TANZANIA)

**Hon. Anatole KANYENKIKO**
Minister of Public Works & Equipment (BURUNDI)

Done at Kigali, Rwanda on 10th December 2009
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# Appendix E. List of Documents Shared and Reviewed

## Background Documents

### Corridors

#### Central Corridor
- CDC PM Presentation to NEPAD Conference Aug 08 RSA.pdf
- Central_CDC RSDI - Volume II.pdf
- Central_CDC RSDIP _Volume 1_.pdf
- TOR for JICA Study on Central Corridor(5).doc

#### Corridor Best Practices
- Gajewski_FinOptions_ProPoorGrowth.pdf
- GajewskiWestAfricaFDAConference70909.pdf
- Transport Prices Costs Africa (publication).pdf

#### North-South Corridor
- 090401 NSC Surface Transport Report.pdf
- 090724 NSC_Projects_Database - adjusted.xlsx
- N-S Corridor.doc
- north_south_corridor_status_report_oct_08_mp.pdf
- RTFP N_S Corridor Efficiency Study_Final Report_April09.pdf

#### Northern Corridor
- Analysis of the State of NTBs along the Northern Central Corridors - Oct 08.doc
- Comparative Transportation Cost Analysis in East Africa.pdf
- CPCS ToR Northern CompCostStudy.doc
- EAC_nontariff.pdf
- LouisBerger_ToR_Northern_InfraMasterPlan.docx
- NCTTCA-Final-Report.pdf
- Northern_EconDevLB.pdf
- SandraCoetzee .doc
- SCoetzee_Part C Corridor Assessment.doc
- Transport Corridor Development in E. Africa.pdf

## Other African Corridors
II. Population Density map.jpg
III. Employment Areas.jpg
III. Mining Areas.jpg
North South Corridor Map LINK (RTFP).doc
 Proposed Trans Africa Highway Network.ppt
Nairobi Conference March 2009
Nairobi conference report.pdf
Patricia uploads
Peter uploads
Rean Botha's documents
Regional
090907 EAC EPA Development Strategy.pdf
AICD Flagship 2009.pdf
Buyt-Deichmann 2006 Trans-Africa Network (Color Version).pdf
DFID Scoping Study - List of Projects.pdf
EA Railway Master Plan Interim Report 2008 01 07 ALL.pdf
Institutional Arrangements for Transport Corridor Management in Sub-Saharan Africa.pdf
Regional Road Transport - How Competitive, Mar 2008.ppt
SADC Barometer - corridors.PDF
SATN - comparative transit transport cost analysis.pdf
SouthAfrica_RegionalTradeAgreements.pdf
TOR -One Stop Border Post Namanga.doc
TOR for Axle Load Harmonization in EA.doc
TOR for EAC TRANSPORT STRATEGY- May 2007(2).doc
TOR for OSBP Legal Framework.doc
USITC pub4071 Africa.pdf
WB Railway Concessions Study (2006).pdf
Richard uploads
SMAK's documents
Trade Statistics
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Appendix F. Project Coordination Database

Based on Walker et al. (2009) exercise and learning from the past experience, we will concentrate on collecting the following information.

### Table F-1

*Database Composition*

<table>
<thead>
<tr>
<th>Walker (2009) Database</th>
<th>Project Coordination Database under CDS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENERAL PROJECT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td>Financial sponsors (Government/donor/private sector)</td>
</tr>
<tr>
<td>Partners</td>
<td>-</td>
</tr>
<tr>
<td>Donor contact</td>
<td>-</td>
</tr>
<tr>
<td>Implementing partner</td>
<td>Implementing partner (official agency)</td>
</tr>
<tr>
<td>Project manager</td>
<td>Contact person (name, title, agency, email, telephone number)</td>
</tr>
<tr>
<td>Project</td>
<td>Project name</td>
</tr>
<tr>
<td>Goal</td>
<td>Overall project objective</td>
</tr>
<tr>
<td>Total grant/loan $ million</td>
<td>Total funding (US$ million)</td>
</tr>
<tr>
<td></td>
<td>Local component</td>
</tr>
<tr>
<td></td>
<td>Foreign component</td>
</tr>
<tr>
<td>Percentage of funding related to transport</td>
<td>12</td>
</tr>
<tr>
<td>Start</td>
<td>Start year</td>
</tr>
<tr>
<td>Finish</td>
<td>Expected finish year</td>
</tr>
<tr>
<td>Geographic area</td>
<td>Countries engaged (Kenya, Tanzania, Uganda, Burundi, Rwanda)</td>
</tr>
<tr>
<td>Location</td>
<td>-</td>
</tr>
<tr>
<td>Sectors</td>
<td>Sector (roads/railways/sea ports/lake ports/ airports/multimodal:border posts)</td>
</tr>
<tr>
<td></td>
<td>Sub-sector (e.g. type of road: rural, inter urban, urban)</td>
</tr>
<tr>
<td></td>
<td>Road or rail link name/port name/border post name</td>
</tr>
</tbody>
</table>

12 There exists projects which its main goal is not transport related but have a support transport component (i.e. an health project through a link road will be financed). On the other hand, some transport projects might have non-transport component and therefore we would like to exclude the funding for our analysis.
<table>
<thead>
<tr>
<th>Purpose</th>
<th>Construction/rehabilitation/maintenance/regulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Impact</td>
<td>Project target (total number of km/final infrastructure at the port and border post/type of regulation implemented)</td>
</tr>
<tr>
<td><strong>U P T O D A T E  P R O J E C T D A T A</strong></td>
<td></td>
</tr>
<tr>
<td>Spent to date million</td>
<td>Disbursement by calendar year (^{13}) (US$ million)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Outputs</td>
<td>Project outputs by calendar year</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities</td>
<td>-</td>
</tr>
<tr>
<td>Sustainability</td>
<td>-</td>
</tr>
<tr>
<td>Latest update</td>
<td>Link to project page (if available)</td>
</tr>
<tr>
<td>Comments</td>
<td>Comments</td>
</tr>
</tbody>
</table>

\(^{13}\) Calendar year goes from January to December.
Appendix G. CDS Communications Strategy

Objectives

In the previous sections, the CDS team has laid out its plans to execute an effective and efficiently-run corridor diagnostic study. However, even the best conceptualized and expertly implemented study is only as effective as the number of people who are aware of its findings and are inspired to act on them. Too many excellent studies end up gathering dust on shelves, never to be referenced again once the diagnostic team goes home. One of the reasons for the lack of implementation of good quality recommendations has been identified as the absence of effective communication of the studies and their results. The ultimate success of the CDS will be demonstrated by the follow-through of key stakeholders in implementing the recommendations.

Our communications strategy for the CDS will play a variety of roles, to ensure that CDS results are translated into action. Specifically, the CDS communications strategy is designed to lay the groundwork to:

1. Coordinate donor-funded, national and regional transport corridor reform initiatives to promote efficiency and reduce overlap;

2. Educate and raise awareness among corridor reform stakeholders (e.g., decision-makers in national and regional government bodies, private sector entities, NGOs, general public) of the importance of improving corridor efficiency and safety;

3. Provide reform champions with the tools to advocate for the allocation of technical, financial and administrative resources for corridor improvement projects identified by the CDS;

4. Inspire key decision makers to carry out the recommended reforms so as to remove inefficiencies, long delays and high costs along the East African Northern and Central corridors;

5. Motivate potential financiers and investors to allocate increased or additional resources for implementation of recommended projects and interventions;

6. Keep the Northern and Central Corridor Committees, RECS, other stakeholders and donors updated on the progress of the CDS, including key milestones and events;
7. Inform CDS funders USAID and DfID of progress against contract deliverables so that progress can be monitored and evaluated; and

8. Facilitate effective communication between CDS staff, USAID, DfID and the members of the TCG.

Because of the broad and complex technical nature of the issues the CDS will address, the variety of messages that the CDS must communicate will vary by audience and issue. However, there are common messages that all CDS staff should follow in communicating with key clients and audiences.

In the section below, we lay out the key CDS audiences/stakeholders and present key messages that will inform CDS communications with these groups.

**Target Audiences**

The East Africa CDS has a broad range of stakeholders and audiences, all of which must be considered to achieve the objectives presented above. There are stakeholders internal to the process; e.g., USAID, DfID, the Corridor Committees and EAC; as well as external stakeholders who can be motivated to act upon CDS recommendations, provided the messaging is effective. These stakeholders include national Ministries responsible for Transport, Trade and Finance, as well as customs and other agencies (port authorities and regulatory, safety, inspection and security agencies), in the five EAC countries, the tripartite EAC, SADC and COMESA, the private sector (e.g., members of regional trade associations; clearing and forwarding agents; transport associations). External stakeholders also include other international donors and the general public. Participation in different forms from each of these internal and external stakeholders will be required in order to prepare a comprehensive diagnostic and encourage the implementation of recommendations long after the CDS team completes its tasks.

The CDS communications strategy will also reach out to target audiences via the media - through relevant journalists from the national and regional newspapers, radio and television stations and East Africa based correspondents with links to the international media, press and wire services, in order to (1) raise awareness of the CDS activity and promote milestones and events and (2) raise general awareness among regional stakeholders, national stakeholders, private sector and the general public of the importance of trade facilitation and efficient corridors. This will occur through press releases, press conferences, target stories and public service announcements for broadcast on public television.

The key target audiences for this communication strategy are outlined below. Also provided is the reason for including them as audiences (communications objective) and the key message(s) and tools.

**REGIONAL STAKEHOLDERS**

**Who:** Regional Economic Communities, Transit Corridor Committees

**Communications Objective:** (1) Raise awareness of and provide updates on the progress of the CDS, including key milestones and events. (2) Provide tools to advocate for the allocation of technical, financial and administrative resources for corridor improvement projects identified by the CDS.
**Key Messages:** (1) The CDS provides an opportunity to take stock of the vast amount of previous and ongoing (including studies) corridor-related work in the region and build a strong foundation for an implementable and feasible course of action. (2) Improving regional transport corridors through well-targeted policy, regulatory and infrastructure improvements can lower the costs of doing business for the region, promote regional competitiveness, promote regional integration and improve the quality of life for regional residents.

**Key Tools:** EastAfricaCorridors.org website; monthly updates of progress made to date; targeted leaflets on CDS and its relevance to regional integration in East Africa; stakeholder meetings and workshops, press releases, emails, short films.

**NATIONAL-LEVEL PUBLIC SECTOR STAKEHOLDERS**

**Who:** National Ministers responsible for Transport, Works, Finance, Trade and Industry, Customs, Port Authorities and regulatory agencies in the region.

**Communications Objective:** (1) Raise awareness of and provide updates on the progress of the CDS, including key milestones and events; encourage participation in the project, report collection efforts as well as the audit interviews. (2) Educate and raise awareness of the importance of improving corridor efficiency and safety. (3) Motivate taking of concrete action to implement corridor improvement projects identified by the CDS.

**Key Messages:** (1) Improving efficiency of regional corridors will benefit the competitiveness and social welfare of national peoples. (Emphasize the benefits that can be reaped for national stakeholders by participating in regional programs). (2) Coordinated and informed action in making necessary policy, regulatory and infrastructure improvements to the regions transport corridors will improved country and firm competitiveness.

**Key Tools:** www.eastafricacorridors.org website; monthly updates of progress made to date; leaflets describing the CDS and its relevance to national development programs; press releases, stakeholder meetings and workshops, short films.

**PRIVATE SECTOR**

**Who:** Private sector representatives (e.g. service providers, users, shippers, transport operators associations, clearing and forwarding agents associations), potential investors and others.

**Communications Objective:** (1) Raise awareness of the CDS activity, provide updates on progress and events and encourage participation in the audit interview process. (2) Educate and raise awareness of the importance of improving corridor efficiency and safety to firm, national and regional competitiveness. (3) Provide tools to advocate for change. (4) Demonstrate that it is worth considering investing in infrastructure and transport operations development in East Africa.

**Key Messages:** (1) Improvements to the corridor increase the efficiency and transparency of business, and therefore your bottom line. (2) Strategic investment in corridor infrastructure projects can reap dividends, improve firm, country and regional competitiveness, promote technology transfer, and much more.
**Key Tools:** [www.eastafricacorridors.org](http://www.eastafricacorridors.org) website; monthly updates of progress made to date; short leaflets describing the CDS and its relevance to donor coordination and development in East Africa; press releases, stakeholder meetings.

**CDS CLIENTS**

**Who:** USAID, DFID, and the TCG (Northern and Central Corridor Committees, EAC, COMESA, SADC, etc).

**Communications Objective:** (1) Keep clients/key stakeholders informed of progress against contract deliverables so that progress can be monitored and evaluated. (2) Facilitate effective communication between CDS staff, CDS funders and the TSG.

**Key Messages:** (1) we are committed to undertaking a comprehensive diagnostic that will help you push forward a coordinated regional effort to improve the corridors; (2) we are here to support you in achieving maximum corridor efficiency; (3) we seek to provide the information, data and analysis that will allow all stakeholders to work together to prioritize initiatives and leverage resources.

**Key Tools:** [www.EastAfricaCorridors.org](http://www.EastAfricaCorridors.org) website; monthly updates of progress made to date; short leaflets describing the CDS and its relevance to donor coordination and development in East Africa; short films.

**OTHER DONORS AND IMPLEMENTERS**

**Who:** Including World Bank, ADB, EU, JICA, Louis Berger, CPCS, USAID/COMPETE project, DFID/TradeMark project.

**Communications Objective:** (1) Raise awareness of the CDS activity and provide updates on progress and events. (2) Promote donor coordination by informing other funders and projects of the CDS initiative; encourage visiting and contributing to the donor coordination database (activities and reports) and participation in stakeholder meetings. (3) Attract investment, grants, and funding for the implementation follow-on phase.

**Key Messages:** (1) “We’re all in this together—let’s coordinate efforts for the best results”. (2) We want to keep you informed of progress of the CDS; (3) We would appreciate your contribution to the data and information gathering phase and participation in key stakeholder workshops; (3) improved corridor performance will result in better value for money of your support to the development agenda of East Africa.

**Key Tools:** [www.eastafricacorridors.org](http://www.eastafricacorridors.org) website; monthly updates of progress made to date; short leaflets describing the CDS and its relevance to donor coordination and development in East Africa; press releases; collaboration database, stakeholder meetings, short film.

**GENERAL PUBLIC**

**Who:** The general public.
Communications Objective: (1) Raise awareness of the CDS activity and educate on the importance of efficient trade corridors.

Key Messages: (1) Better corridors means increased livelihoods, means a means out of poverty. Encourage your national and regional governments to improve corridors by doing X, Y and Z.

Key Tools: Press releases, press conferences, films broadcast on public television and public service announcement like campaign.

Implementation Timeline and Staffing

The communications strategy will be implemented as an integral part of the CDS, which kicked off with team mobilization in early November 2009 and is expected to be completed by the end of June 2010. As discussed below, there are a number of products that will be developed as part of implementing the communications strategy. Some of them will be primarily focused on keeping stakeholders updated on the CDS as it progresses, while others will be designed to raise awareness and build momentum for implementation of recommendations and push for change. As a result, some products will have a short life span, while others will continue past the life of the CDS, hosted and used by members of the TCG and others.

A communications consultant, Arjun Kohli, under the supervision of the CDS Team Leader SMAK Kaombwe and TCBoost COP Lisa Yarmoshuk, will be primarily responsible for implementing the communications strategy agreed upon and developing the elaborated products. Mr. Kohli has been retained based on his experience with print, web and film work. It is expected that he will work closely with CDS transport experts, other teams (e.g. COMPETE for the website) and vendors (e.g. printing and film houses) on specific deliverables. A discussion of proposed key communications products follows.

Communications Products

Product design is driven by the identified objectives and key messages and the overall desire to create energy around the CDS work and the regions’ initiatives to make its transport corridors more efficient. All will share information and reinforce messages; seeking at the same time to do this in a way that brings the work “alive”. Essentially a “campaign” that brings the problems and recommended solutions to policy makers, implementers, key stakeholders and donors in a vibrant, easy to understand and engaging manner. To this end, a range of communications products is needed to create cohesion, foster understanding and stimulate change. These are identified in Table G-1 and discussed in more detail below.
<table>
<thead>
<tr>
<th>Audience</th>
<th>Objectives</th>
<th>Messages</th>
<th>Comm. Product</th>
<th>Responsible</th>
</tr>
</thead>
</table>
| Regional Stakeholders (RECs, Transit Corridor Committees) | (1) Raise awareness of and provide updates on the progress of the CDS  
(2) Educate and raise awareness of the importance of improving corridor efficiency and road safety | (1) CDS will not replicate past studies, progressing on a clear course of action that will not end with the study alone  
(2) Improving regional transport corridors can lower the costs of doing business for the region  
(3) CDS contributes to achieving broader goals for regional integration (Tripartite meetings—EAC-SADC-COMESA) | (1) Stakeholder meetings  
(2) Website  
(3) E-mail updates  
(4) Targeted leaflets  
(5) Press releases  
(6) Short film | (1) SMAK  
Kaombwe (SK), Jane Mwaniki (JM), logistics firm, CDS stakeholders  
(2) CDS Technical Staff, Arjun Kohli (AK), USAID COMPETE project  
(3) AK, Zey Akalin (ZA)  
(4) AK, CDS technical staff  
(5) AK, SK  
(6) AK, local film production company, technical experts |
| National-Level Public Sector Stakeholders (Ministers of Transport, Works, Finance, Trade and Industry, Customs, Port Authorities, national regulatory agencies) | (1) Raise awareness of and provide updates on the progress of the CDS  
(2) Educate and raise awareness of the importance of improving corridor efficiency and road safety  
(3) Motivate action to implement corridor improvement projects identified by the CDS | (1) National policies effect regional policies and vice versa; streamlining and coordinating policies benefits your nation and the region overall. | (1) Stakeholder meetings  
(2) Website  
(3) E-mail updates  
(4) Targeted leaflets  
(5) Press releases  
(6) Short film | (1) SK, JM, logistics firm, CDS stakeholders  
(2) CDS technical staff, AK, USAID COMPETE project  
(3) AK, ZA  
(4) AK, CDS Technical Staff  
(5) AK, SK  
(6) AK, local film production company, technical experts |
<p>| Private Sector (service) | (1) Raise awareness of          | (1) Improvements to the corridor                      | (1) Stakeholder meetings | (1) SK, JM, logistics firm, |
|                                 |                              |                                                          |               |                                |</p>
<table>
<thead>
<tr>
<th>Audience</th>
<th>Objectives</th>
<th>Messages</th>
<th>Comm. Product</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>providers, users, shippers, transport operators associations, clearing and forwarding agents associations)</td>
<td>the CDS activity, provide updates on progress and events and encourage participation in the audit interview process</td>
<td>increase the efficiency and transparency of business, and therefore your bottom line Strategic investment in corridor infrastructure projects can reap dividends, improve firm, country and regional competitiveness, promote technology transfer, and more</td>
<td>(2) Website (3) E-mail updates (4) Targeted leaflets (5) Press releases (6) Short film</td>
<td>CDS stakeholders (2) CDS technical staff, AK, USAID COMPETE project (3) AK, ZA (4) AK, CDS Technical Staff (5) AK, SK (6) AK, local film production company, technical experts</td>
</tr>
<tr>
<td>CDS Clients (USAID, DfID, TCG)</td>
<td>(1) Keep clients/key stakeholders informed of progress against contract deliverables so that progress can be monitored and evaluated (2) Facilitate effective communication between CDS staff, CDS funders and the TSG.</td>
<td>(1) We are committed to undertaking a comprehensive diagnostic that will help you push forward a coordinated regional effort to improve the corridors (2) We are here to support you in achieving maximum corridor efficiency (3) We seek to provide the information, data and analysis that will allow all stakeholders to work together to prioritize initiatives and leverage resources.</td>
<td>(1) Monthly reports (2) Email updates (3) Meetings/telcons</td>
<td>SK, Richard Blankfeld (RB), ZA (2) AK, ZA (3) SK, RB, ZA</td>
</tr>
<tr>
<td>Other Donors</td>
<td>(1) Raise</td>
<td>(1) We’re all in this</td>
<td>(1) Stakeholder</td>
<td>(1) SK, JM,</td>
</tr>
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</table>
### Audience and Implementers

<table>
<thead>
<tr>
<th>Audience</th>
<th>Objectives</th>
<th>Messages</th>
<th>Comm. Product</th>
<th>Responsible</th>
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</thead>
<tbody>
<tr>
<td>and Implementers</td>
<td>awareness of the CDS activity and provide updates on progress and events</td>
<td>together—let’s coordinate efforts for the best results. Improved corridor performance will result in better value for money of your support to the development agenda of East Africa</td>
<td>meetings</td>
<td>logistics firm, CDS stakeholders</td>
</tr>
<tr>
<td></td>
<td>(2) Promote donor coordination, contribution to the donor coordination database and participation in stakeholder meetings</td>
<td>(2) Website</td>
<td>(2)</td>
<td>(2) CDS technical staff, AK, USAID COMPETE project</td>
</tr>
<tr>
<td></td>
<td>(3) Attract investment, grants, and funding for the implementation follow-on phase.</td>
<td>(3) Collaboration database</td>
<td>(3)</td>
<td>(3) CDS stakeholders, international donors, Patricia Macchi (PM), ZA, USAID COMPETE</td>
</tr>
<tr>
<td>General Public</td>
<td>(1) Raise awareness of the CDS activity and educate on the importance of efficient trade corridors</td>
<td>(1) Better corridors mean increased livelihoods and a way out of poverty. Encourage and support your national and regional governments to improve corridors.</td>
<td>(1) Website (2) Press releases (3) Short film (PSA)</td>
<td>(1) CDS technical staff, AK, USAID COMPETE project</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1) Website</td>
<td>(2)</td>
<td>(2) AK, SK</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(3) Short film (PSA)</td>
<td>(3)</td>
<td>(3) AK, local film production company, technical experts</td>
</tr>
</tbody>
</table>

**WEBSITE - [WWW.EASTAFRICACORRIDORS.ORG](http://WWW.EASTAFRICACORRIDORS.ORG)**

A [www.EastAfricaCorridors.org](http://www.EastAfricaCorridors.org) website will be developed as the virtual face of the CDS and an avenue for providing project progress and updates, raising awareness of corridor and trade facilitation issues around east Africa and sharing information. It will also be the repository for all project-related information disseminated by email, at workshops or through the media, as well as ultimately for the library of studies and projects developed. It will serve as a common platform to download key materials, view photographs, read news and press releases, keeping the ever widening community of internet users informed of the CDS and the importance of efficient trade corridors.

While the website will be developed in the context of the CDS, it is expected that it will outlive it and be continued as an information platform for ongoing trade corridor and trade facilitation work throughout the
region. Specifically, it is proposed that at the end of the CDS the website be handed over to the EAC Secretariat to manage in close coordination with and involvement of the Northern and Central Corridor Secretariats, with the ongoing technical and resource support of DfID’s TradeMark and USAID’s COMPETE projects. We recommend early involvement from the EAC – Northern and Central Corridor team that will eventually take over the running of the website to ensure its sustainability.

USAID’s COMPETE project is providing the resources for the actual physical development of the website and GIS map and is also making the decision on vendor selection and hosting. The CDS team has met with the COMPETE team several times to discuss preliminary planning issues related to the website development. A beta site is in development and will be ready for viewing early in the new year. The CDS Communications Consultant and CDS Team Leader will work closely with the COMPETE team and website vendor on the design of the website and be responsible for developing, producing and posting all website content. Elements and features of the website are expected to include overview information, highlights and updates, document library, GIS maps of the corridor, photos, links and contacts.

**CDS Flyer and Fact-sheets**

The CDS team will produce a one or two page flyer on the CDS, available as a printed handout as well as in electronic PDF form as an email or download, explaining the CDS and its relevance to donor coordination and corridor development in East Africa. It will also produce short fact-sheets on the Northern and Central Corridors, which will include a section about the CDS. Region-specific and country-specific fact sheets will be produced, to convey the tailored messages about the CDS laid out above. These flyers and fact-sheets will be written to ensure they remain current through the length of the project, thus providing a useful handout to accompany press releases and meetings.

**E-mail Updates**

A monthly e-mail update, *East Africa CDS Update*, will provide all stakeholders with regular updates of progress, activities and upcoming events related to the CDS, including new additions to the website. It should be no longer than two-pages (and preferably one page). The monthly email update will be sent to all key stakeholders on the CDS mailing list (the base of which will be drawn from the March 2009 Donor Conference and Stakeholder meeting), other interested parties, as well as the press. The website will also include an option to sign-up for the mailing list. The update will be prepared using a CDS designed template. E-mail updates will also be used to announce the availability of new tools, such as the completed donor coordination database, the GIS maps, the HDM-4 data, the road safety report, and the results of the FastPath analysis. They will also be used to draw attention to the short films which will be streamed on the website.

**Press Releases and Press Conferences**

To generate broader public interest in the regional trade corridors and the importance of trade facilitation, the CDS team will invite the media to report on milestones and high profile events. The press conferences will give the CDS team an opportunity to invite delegates onto a press panel. Local, regional and international press representatives will be invited and the latest press release distributed. In addition, information products such as the flyers and fact-sheets will be distributed to journalists attending these
events. They will also serve as opportunities for the press to conduct television interviews with key stakeholders.

There will be two press conferences called before the final CDS report (one each at the February and June stakeholders’ meetings). There will be a bigger one when the report is released (July). To maximize the newsworthiness of these events, press conferences will follow in the last hours of the stakeholder meetings.

Over the course of the project we will also work with regional media contacts and organizations to explore additional ways of disseminating information at key junctures and after press conferences.

**STAKEHOLDER WORKSHOPS**

Towards the end of April there will be five stakeholder diagnostic validation workshops (one in each of the five countries with an estimate of 25-35 participants) to review the key information used in the diagnostic study. These meetings will not warrant press conferences but may prove to be an opportunity to disseminate country specific press releases.

**AUDIO-VISUAL**

Issues come alive in film and pictures in a way they do not as the written word. Educational and informational videos that raise awareness, tell a story and illustrate key issues can work to galvanize interest in the development of the regions corridors – reaching a broad audience of policy makers, key stakeholders and the general public. Both USAID and DFID developed impressive trade facilitation/corridor films in southern Africa to share best practices, foster dialogue and raise awareness of the importance of efficient trade corridors – galvanizing interest and energy improving trade facilitation.

Building on this past experience, video products will be developed to complement the other communications products and expand the reach and impact of the CDS work. As discussed below, several products will be produced from core film footage shot over the course of the CDS to be used in a variety of contexts (e.g. workshops/conferences, streamed on websites and broadcast on local TV) and for different audiences (e.g. policy makers stakeholders, general public) both during the CDS and after its completion.

In addition, a photographic journal of the Northern and Central Corridors will be made. The photos will be used for a variety of purposes, including as part of the GIS platform developed. The photos will be taken by the Communications Consultant.

Filming and production of the videos will be undertaken by the Communications Consultant in collaboration and partnership with a producer/director of an experienced media company. Initial contacts and discussions with potential individuals and firms have occurred and final selection is expected by late January. Preliminary story planning, including filming schedules, will begin in December. A variety of filming will take place starting in January, including filming key stages of the CDS, key interviews, filming and photographic journal of the corridors (travelling with the transport consultant responsible for the road condition inventory). It is expected that the communication consultant will travel with members of the CDS and Berger team at various stages of the project and attend all workshops and stakeholder meetings.
All photographs and videos filmed will be integrated into the GIS maps that USAID COMPETE will develop, as practical. Therefore, if you click on a city, a border post, a port or a rail or road section, all interviews, photos and material related to that will be linked.

The primary video products will feature:

- **East Africa Corridors Film** – the major film product will be a 15 minute overview film of East Africa’s Northern and Central Corridors, designed to galvanize interest in corridor development. It is expected to discuss the importance of trade facilitation in the region, focusing on these two corridors to address key issues, challenges and needs. It will be a ‘curtain raiser’ shown at the final stakeholder conference when the final results of the CDS are presented. It will also be made available to stakeholders and donors on DVD to show at other events.

- **Investor Film** – a 5 minute film to motivate potential financiers and investors to allocate increased or additional resources for implementation of recommended projects and interventions

- **CDS Short Film** – a 5-10 minute film on the stages of the CDS as a stand alone product to be used by stakeholders and donors to discuss the approach and methodology behind the work undertaken. It will also be made available on DVD.

- **Northern and Central Corridor Short Films** – two 5 minute films, one on each of the Northern and Central Corridors, using the footage gathered for the East Africa film. This will leverage the work that goes into the flagship film and allow us to provide each of the corridor secretariats with a marketing and education film about their corridor for their own use.

- **Public Service Announcement with Key Figures** – to promote buy-in, create a buzz and a sense of urgency, we will develop 40 second public service announcements featuring key East African figures at sites such as ports, border posts, railway stations, weigh bridges. Each clip will highlight a pressing reason to “get moving” on corridor development. A “sexy” product like this may create more interest in corridor development than any of the other communications and activities put together. It will also get key decision makers involved – literally in the limelight. These clips will target all stakeholders and the general public. Given the time and buy-in required to secure such interviews, these products will be targeted for the end of the project so that they can be used in a ‘campaign-like’ way to create momentum for implementation of the CDS recommendations.

**Regional Campaign**

As discussed earlier, the success of the CDS will be determined by the ultimate uptake and implementation of the studies recommendations. The communications products and activities are designed to inform, inspire and motivate stakeholders toward the ultimate goal of improving the efficiency of the regions corridors. The final step in the strategy is to work with the TCG to design a campaign to launch the implementation phase that will follow the CDS. Elements of this campaign will include the website, films and public service announcements developed during the CDS, as well as a slogan developed with the TCG.