

CENTRAL CORRIDOR TRANSPORT OBSERVATORY



ANNUAL REPORT | 2020



*“Promoting Efficiency in transport,
Logistics Value Chain and Trade in the Region”*

MAY 2021



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ACRONYMS AND ABBREVIATIONS

AVG/AVRG - Average
CCTO - Central Corridor Transport Observatory
CF&A - Clearing and Forwarding Agent
DRC - Democratic Republic of Congo
ECTS - Electronic Cargo Tracking System
GPS - Global Positioning System
Km - Kilometers
mT - Metric Tons
OBR - Burundi Revenue Office
OSBP - One Stop Border Post
RRA - Rwanda Revenue Authority
RW - Rwanda
SCT - Single Custom Territory
TANROADS - Tanzania National Roads Agency
TICTS - Tanzania International Container Services
TMEA - TradeMark East Africa
TPA - Tanzania Port Authority
TRA - Tanzania Revenue Authority
TRC - Tanzania Railway Corporation
TTFA - Transit Transport Facilitation Agency
TZ - Tanzania
UG - Uganda
URA - Uganda Revenue Authority

FOREWORD

The Transport Observatory is a performance monitoring tool that was developed to monitor the performance of the Central Corridor. The CCTO also compliments the activities of CCTTFA to enable achieve its vision of making the Central Corridor the most competitive corridor in East and Central Africa by monitoring a number of indicators and measuring performance of the corridor. Transport Observatory helps in providing key and reliable information to policy makers and users to facilitate the formulation of policies and decisions.

The Central Corridor Transport Observatory (CCTO) Report is an annual report that gives the performance of the corridor. This report is prepared by the CCTTFA Secretariat in collaboration with stakeholders and support from Trademark East Africa (TMEA). The analysis in this report is based on detailed analysis of data and presents the collective performance on all the indicators that are monitored by the Central Corridor Transport Observatory for the period January to December 2020. The report provides a roadmap on identifying key issues affecting trade and transport along the corridor and make recommendations of improving the corridor performance. The report also provides comparison of performance of the corridor from previous years to effectively know and trace the improvements along the Corridor.

This report is aimed at providing information on various issues along the corridor routes, identification of areas requiring improvement and the evaluation of the effectiveness of programs designed by policy makers to improve competitiveness of the corridor. The 2020 CCTO Performance Report is the 8th Annual report which assesses 38 indicators along the Central Corridor with the ultimate goal of ensuring that it can identify the challenges that may be impeding transport along the Corridor. From the data collected on the performance of the Corridor and from the Member States, we are able to make recommendations on how each member state can contribute to efficient transport along the Corridor.

To this end I would like to acknowledge the valuable support accorded by the CCTTFA policy organs namely: Council of Ministers, Executive Board of Directors and the Stakeholders Consultative Committee (STACON) and thank all stakeholders who provided data and information that allows the Central Corridor Transport Observatory to generate meaningful indicators that monitor the corridor's performance. We urge all stakeholders to also focus on implementing the main recommendations from this report so that member states can continue experiencing smooth transportation that facilitates sustainable development.

I take this opportunity to extend my gratitude to Trademark East Africa for the financial and technical support for the upgrade of the existing Transport Observatory Toolkit to add more features into it and adapt modern technologies for improvement and sustained development of the Central Corridor Transport Observatory.



Capt. Dieudonné Dukundane
Executive Secretary

EXECUTIVE SUMMARY

The Transport Observatory report has continued its quest of ensuring the provision of evidence-based information to support the development of Central Corridor transport infrastructure. The 8th annual edition of the Transport Observatory Report assesses more than 38 performance indicators along the corridor with a special focus on projects and policy recommendation that can help reduce the cost of transportation, delays and other transport logistic challenges.

The Transport Observatory project cycle consists of data collection provided by various stakeholders among the member states including Revenue Authorities, Roads Authorities, Ports, Railway Authorities, Transport Associations, Transporters and Private Sector Institutions closely affiliated to Trade and Transport; data processing and analysis; online and offline reporting; and dissemination in order to support trade and transport planning and operations in the member states. The Annual Performance Monitoring Report 2020 compiles and publishes statistics covering four trade and transport performance areas, namely: volume of transactions, cost and rates, productivity and efficiency and transit time and delays. This report also includes data on railway transport and inland waterways.

Online usage of the Transport Observatory portal has been gradually increasing with more feedback and increased demand of the CCTO reports and updates, from the year 2019 to 2020 we recorded an online traffic increase of about 21%. Currently the Transport Observatory is undergoing an upgrade to enhance operations of its information platforms, addition of other components such as the intra-regional trade between countries as well as improving the communications and advocacy strategy for the transport observatory to widely disseminate its reports and findings.

The key performance indicators on volume of transactions demonstrate the performance of the Port of Dar es Salaam in terms of availed data on cargo flow both for imports and exports for the period of January to December 2020. The overall trend shows a slight decrease in cargo for imports of about 1.1% and exports increased by 4.7% for the year 2020 in comparison to the same period in 2019. In terms of traffic sharing, Tanzania (domestic) cargo represents 66% of all imports passing through the port of Dar es Salaam while transit cargo to the Central Corridor member states represents 34%.

On maritime operations along the Central Corridor three major lakes of Kivu, Victoria and Tanganyika form the transport and logistics chain for the member countries. Specific to this report we have extensive data on Lake Victoria operations between Mwanza Port in Tanzania and Port Bell in Uganda. At the moment two wagon ferries namely MV. Umoja, operated by Marine Services Company Limited (MSCL), has a capacity of carrying 19 Wagons equivalent to 760 tons, and MV. Kaawa operated by Uganda Railways Corporation (URC) with capacity of carrying 22 Wagons equivalent to 880 tons are providing services on this route. During the period January to December 2020, MSCL vessel Mv. Umoja was operational only during the first quarter Jan - Mar 2020 and was drydocked in April 2020 to undergo routine maintenance. It will undergo major rehabilitation expected to start in May 2021 and will last for one (1) year. Mv. Kaawa managed by URC was drydocked in January 2020 for routine maintenance and resumed its operations in May 2020.

The efficiency and productivity indicators give a basic guideline on how well the corridor performs operationally. The objective of productivity measurement is to give the current performance in the transport logistics chain against desirable productivity measures as provided by the best practice, also ensuring that its outcomes live up to the expected values. On port efficiency, the Container Dwell Time for transit has decreased to approximately 10.6 days in 2020 in comparison to the same period in 2019 but is still way below the target of 5 days.

The truck turnaround at TICTS terminal has improved from 2.14 hours in 2019 to 1.84 hours in 2020 indicating a decrease of 14% and is mainly attributed to having enough handling facilities and effective management.

The number of foreign registered transit trucks carrying transit cargo has increased significantly from less than 6% in the last 5 years to 12.4% in 2020 with Tanzania registered transit trucks still dominating the transit transport market. The increment of transit trucks can be attributed to the harmonization of road user charges and significant improvement on the Central Corridor in terms of cargo handling at the port of Dar es Salaam and as well as road infrastructure that are encouraging other transporters to operate on the Central Corridor. Indicators for transit time and delays are obtained from Transporters and the GPS road survey results. Corridor monitoring starts from when goods and cargo arrive at the port of Dar es Salaam up to when it reaches its final destination. This time has been broken down to form different indicators depending on different activities and sections along the Corridor. We observed an increase in Transit Time to all destinations of the Central Corridor Member States mainly attributed by the impact of the COVID-19 global pandemic where governments responded with travel restrictions and bans to minimize the spread of the disease within the local community and from country to country. Some of the measures put in place included curfew, lockdown of major cities, closure of borders, closure of businesses, and introducing massive testing and screening activities as well as effecting wearing of masks, regular washing of hands and encouraging social distancing. These measures slowed down the movement of cargo across the Central Corridor member countries and in one way or another affected imports and exports operations.

Lastly, in addition to monitoring the performance of the corridor, the Central Corridor Transport Observatory is mandated to carry out specialized surveys of different modes of transport along the corridor. Due to the effect brought by the COVID-19 global pandemic Central Corridor carried out various interventions with special focus on the impact of the pandemic on the Transport and Logistics sector. CCTTFA intervened through various engagements that included: conducting a special survey to the impact of COVID-19 on Transport and Logistics sector, provision of Personal Protection Equipment (PPEs) to truck drivers at Rusumo border through the partnership with Rwanda Private Sector Federation, participating in campaigns to raise awareness on the Regional Electronic Cargo Drivers Tracking System (RECDTS) to Central Corridor member states.

SECTION ONE: INTRODUCTION

The Central Corridor Transport Observatory annual report highlights the key performance indicators from the period January to December for the year 2020.

SUMMARY OF THE PERFORMANCE

The impact on transport and trade patterns in the Central Corridor member countries is not immediately felt in the first six months of 2020 as most of the performance indicators reflected slight differences compared to the same period last in 2019. But a deep analysis of the entire period under review January to December 2020 depicts that there are effects on various key performance indicators that were directly affected by the impact of the COVID-19 pandemic.

The below table shows the summary of the performance indicators where comparison is made between January to December 2020 and same period in 2019.

PERFORMANCE INDICATOR	COMPARISON 2019 vs 2020		
	2019 (JAN - DEC)	2020 (JAN - DEC)	
1. Total Cargo throughput	16,022,952	15,857,870	
2. Total Coastal Cargo	575,327	507,039	
3. Total Transshipment Cargo	86,388	19,837	
4. Country Imports	Local	8,147,222	8,457,724
	D.R. Congo	1,249,458	1,209,565
	Burundi	430,543	464,458
	Rwanda	1,200,640	1,204,321
	Uganda	140,877	153,964
	Others	1,819,513	1,357,571
5. Country Exports	Tanzania	1,342,128	1,532,985
	D.R. Congo	664,680	631,092
	Burundi	22,737	12,350
	Rwanda	37,900	34,917
	Uganda	83	30
	Others	305,456	272,018

PERFORMANCE INDICATOR

COMPARISON 2019 vs 2020

		2019 (JAN - DEC)	2020 (JAN - DEC)
6. Transport rates (imports to)	Kigali	\$2,900	\$2,800
	Bujumbura	\$3,100	\$3,000
	Kampala	\$3,250	\$3,300
	Bukavu	\$4,900	\$4,900
	Goma	\$4,200	\$4,300
7. Ship turnaround time (Days)		3.6	5.8
8. Dwell time	Average Local Container Dwell Time TPA	9.9	9.4
	Average dwell time transit container TPA	11.41	10.2
	Average monthly local container dwell time TICTS	4.2	4.6
	Average Dwell Time Transit Containers TICTS	10.8	10.4
9. Truck turnaround time	Truck Turnaround Time at Tanzania International Container Terminal Services in Hours	2.14	1.84
10. Transit time to destinations	Dar-Kigali	3.75	8.71
	Dar-Bujumbura	4.19	6.93
	Dar-Kampala	4.33	7.50
	Dar-Bukavu	4.81	11.35
	Dar-Goma	4.65	10.87

1.1 Key Macroeconomic Indicators

This section normally provides the quantitative information in relation to Economic and Trade Policy issues. Mainly providing some key macroeconomic indicators that provide the statistics or data readings that reflect the economic circumstances of a particular country focusing mainly on the Central Corridor member countries of Burundi, Democratic Republic of Congo (DRC), Rwanda, Tanzania and Uganda.

1.1.1 Population And Gross Domestic Product

Central Corridor Member States average population has been increasing annually having a combined total population of approximately 220 million. This large population presents a huge market for trade and is projected to keep growing in the future. In addition, the region surface area of 3.585 million Km² calls for complex trade and logistic interventions to facilitate smooth trade. The table below shows the Real Gross Domestic Product growth in percentages is as depicted in the table from 2019, as estimated in 2020 and projected percentages for 2021 and 2022 for the Central Corridor member states.

Table 2: Population and Real GDP Growth in 2020

ECONOMY	Real GDP Growth (%)				Population in Thousands ('000')	Total Land Area in KM ²
	December 2020 estimates					
	2019	2020 estimated	2021 projected	2022 projected		
Burundi	4.1	-3.3	3.5	2.1	11,892	27,830
DRC	4.4	-1.7	3.3	4.5	89,561	2,345,410
Rwanda	9.4	-0.4	3.9	6.9	12,952	26,000
Uganda	7.5	-0.5	4.8	5.4	45,741	241,000
Tanzania	6.8	2.1	4.1	5.8	59,734	945,000

Source: African Development Bank Statistics 2021

1.1.2 Ease Of Doing Business And Trading Across Borders Indexes

The ease of doing business index is meant to measure regulations directly affecting businesses. Doing business gathers detailed and objective data on 11 areas/parameters of business regulation, helping governments diagnose issues in administrative procedures and correct them. Table 2 shows the performance of the Central Corridor Member States on ease of doing business score and trading across borders score. The scores range from 0 (worst) to 100 (best) and helps us to analyse economic outcomes and identify what reforms of business regulation have worked, where and why. Rwanda economy witnessed the most notable

improvement in ease of doing business performance score which was attributed to implementing business regulatory reforms across some of the parameters. Uganda and Tanzania were ranked at positions 116 and 141 respectively. Tanzania made starting a business easier by launching online company registrations. DRC and Burundi need to enhance their regulatory reforms to improve on their scores.

On the other hand, trading across borders which is a critical parameter to multilateral trade logistics, records the time and cost associated with the logistical process of exporting and importing goods. Uganda reduced the time needed to export and import by further implementing the Single Customs Territory, as well as by developing the Uganda Electronic Single Window and the Centralized Document Processing Centre. Rwanda streamlined the process of starting a business by replacing its electronic billing machine system with new software that allows taxpayers to issue value added tax invoices. Rwanda and Uganda were ranked position 88 and 121 respectively, out of 190 on this parameter, while Burundi, DRC and Tanzania need to implement measures that will facilitate efficient trade across borders.

Table 3: Ease of doing business global ranking out of 190 countries

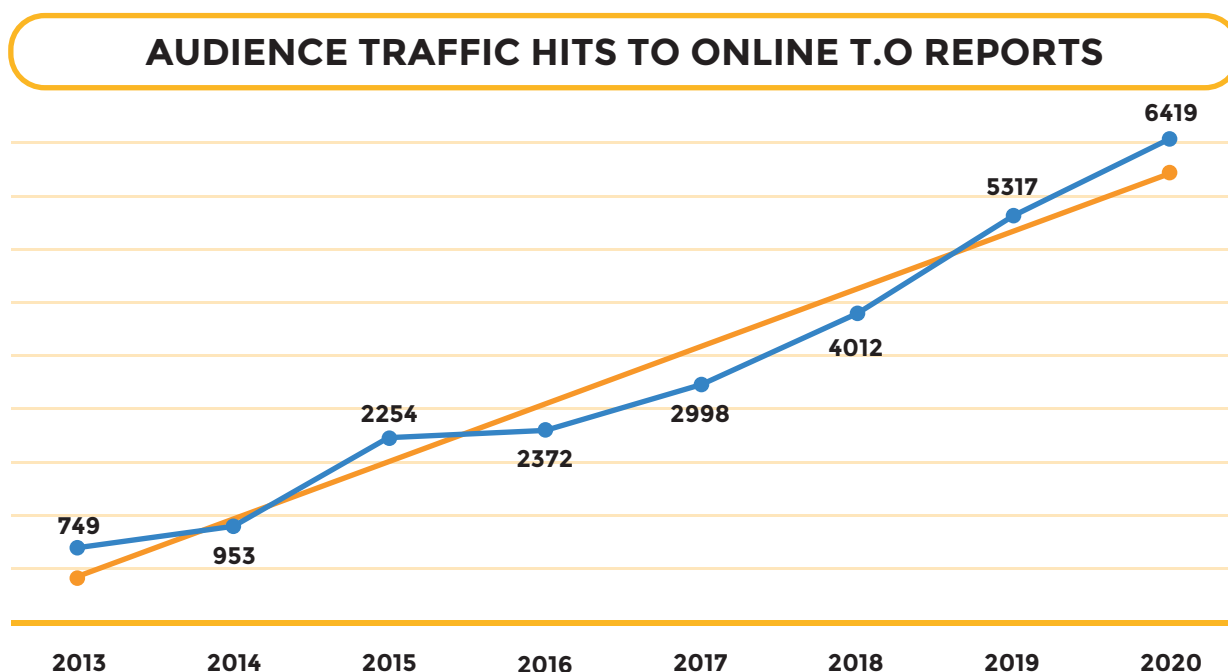
ECONOMY	Rank as of doing business out of 190	Overall ease of doing business score (0-100)	Trading across borders score	Ease of Trading RANK
Burundi	38	76.5	75.0	88
DRC	116	60.0	66.7	121
Rwanda	141	54.5	20.2	182
Uganda	166	46.8	47.3	169
Tanzania	183	36.2	3.5	187

Source: World Bank – Doing Business Database, 2019 / 2020

1.2 CENTRAL CORRIDOR PERFORMANCE MONITORING

The CCTTFA uses the Transport Observatory Portal to monitor the performance of the corridor. The observatory portal includes the Main Observatory which features more than 38 performance indicators on regular basis, the Dashboard which display selected KPIs among the main indicators and the GIS component which visualizes various nodes on the route in relation to various KPIs being monitored. The Information reported by the CCTO are used as evidence-based source of information by various stakeholders along the region and policy makers to decide for the betterment of the corridor.

Figure 1: Audience Traffic Hits to Online Report



Online usage of the Transport Observatory portal has been increasing yearly with more feedback and increased demand on the CCTO reports. From the year 2013 to 2020 a trending analysis observed that the traffic hits to online reports increasing steadily, comparing the year 2019 and 2020 an increase of 21% was observed. This equivalently activated the Central Corridor Secretariat to improve on its observatory activities to align with day-to-day stakeholder’s demand. As a result, the Transport Observatory Portal is currently being upgraded to align with the demand and expectations of our stakeholders. This upgrade of the toolkit will improve the look and feel of the portal and embed more features and components to track more indicators for wider monitoring of the corridor performance. With support from Trademark East Africa (TMEA) the Transport Observatory is expanding its monitoring scope to include Green House Gas (GHG) emissions indicators, railways and inland waterways modes of transport.

1.3 METHODOLOGY

The Transport Observatory methodology for monitoring the performance of the corridor involves data collection, data processing and analysis, reporting & dissemination and finally coming up with evidence-based findings, results and recommendations that influence governments of Central Corridor member states to formulate of policies to improve transportation and logistics on the Central Corridor.

Figure 2: CCTO Methodology



Data collection process involves a combination of various methods and sources. The main sources of data include Central Corridor stakeholder’s electronic systems such as Ports Authorities (TPA and TICTS), Revenues Authorities (TRA, URA, RRA, DGDA and OBR), Railway Authorities (TRC & URC), Transporters, Clearing and Forwarding Agents. Other sources include GPS and mobile Surveys, specialized field visits combined with road transport surveys. Other information is secondary sourced from various policy documents and reports.

The CCTO engages the data providers by signing the Memorandum of Understandings (MoUs) that specify the nature of data to be shared, schedules of the data sharing, formats and also acts as a platform that binds the data sharing processes with CCTO Stakeholders. Through these MoUs, CCTO has advanced its data sharing mechanism to an automated technology (system integration through modern technologies) which simplifies data collection process by reducing human interventions thereby improve the quality data being sourced and it is of collected on time.

1.4 PROCESSING, ANALYZING AND REPORTING

Once the data is collected from various stakeholders, they are processed through various agreed formulae and scripts then analyzed focusing on various indicator categories of the Central Corridor Transport Observatory (CCTO). The results are presented in various sections and chapters as detailed in this report.

Analysis is both quantitative and qualitative in nature and different statistical tools are used to produce tables, graphs and other visualization mechanisms. Prepared reports are then validated by all data providers and stakeholders, designed and printed and widely disseminated both in hardcopies and online where the two Central Corridor official languages (English and French) are used to well accommodate all the users and stakeholders. Finally, all findings and recommendations are presented to respective institutions and agencies for actions and way forward.

The Central Corridor Secretariat is tasked with advising the member states on best practices in implementing the findings and recommendations and in coming up with relevant policies to improve the logistics and transport along the Central Corridor.

PERFORMANCE MONITORING REPORT

January - December 2020



Section 2

VOLUME AND CAPACITY INDICATORS

2.1 INTRODUCTION

The Port of Dar es Salaam is Tanzania's principal port with a rated capacity of 4.1 million (dwt) dry cargo and 6.0 million (dwt) bulk liquid cargo. The port has a total quay length of about 2,600 meters with eleven (11) deep-water berths. Dar es Salaam Port handles about 95% of the Tanzania international trade. The port serves the landlocked countries of Burundi, Democratic Republic of Congo, Malawi, Rwanda, Uganda and Zambia. The port is strategically placed to serve as a convenient freight linkage not only to and from East and Central Africa countries but also to Middle and Far East, Europe, Australia and America.



Tanzania Ports Authority (TPA) is implementing a number of major projects as outlined in the National Ports Master Plan (PMP) study undertaken by Royal Haskoning in February 2009. The study laid out long term strategy for Tanzanian Ports to create capacity for the expected demand. One of such projects is the Dar es Salaam Maritime Gateway Project (DMGP).

DMGP will improve the effectiveness and efficiency by converting the port to a world class port with optimized efficiency to accommodate the calling and reception of larger vessels. The DMGP is expected to increase the capacity of the port to 28 million metric tons by 2025.

The Port of Dar es Salaam modernization projects include but not limited to strengthening and deepening of berths 1-7 and RORO terminal, dredging of entrance channel, turning circle and harbor basin, strengthening and deepening of berths 8-11, and construction of a new terminal jet.

This section shows the performance of the Port of Dar es Salaam in terms of cargo stream both imports and exports from January to December for the year 2020 in comparison with previous years. The overall trend shows a slight decrease in cargo for imports of about 1.1% and an increase in exports by 4.7% for the year 2020 in comparison to the year 2019.

The statistics show that due to the impact of the COVID-19 global pandemic there was a very slight total cargo throughput decrease at the Port of Dar es Salaam of about 1.03%. Also, the analysis reveals that the Tanzania (domestic) cargo represents about 66% of all Imports through the port while transit cargo to Central Corridor member countries is about 23% and other countries using the port of Dar es Salaam 11%.

2.2 DEEP SEA CARGO TRAFFIC

This refers to traffic/goods on intercontinental routes, crossing oceans. This section highlights an overview of the deep-sea cargo traffic at the Port of Dar es Salaam January to December from 2016 to 2020.



Source: TPA Official Website 2020

2.2.1 Total Cargo Throughput At The Port Of Dar Es Salaam In Metric Tons

This Indicator shows the total cargo throughput via the Port of Dar es Salaam which is mainly distributed in total Imports, Exports, Transshipment that form an overall total Traffic but also comprise of Coastal Traffic that in total form Total Cargo Throughput passing the Port of Dar es Salaam.

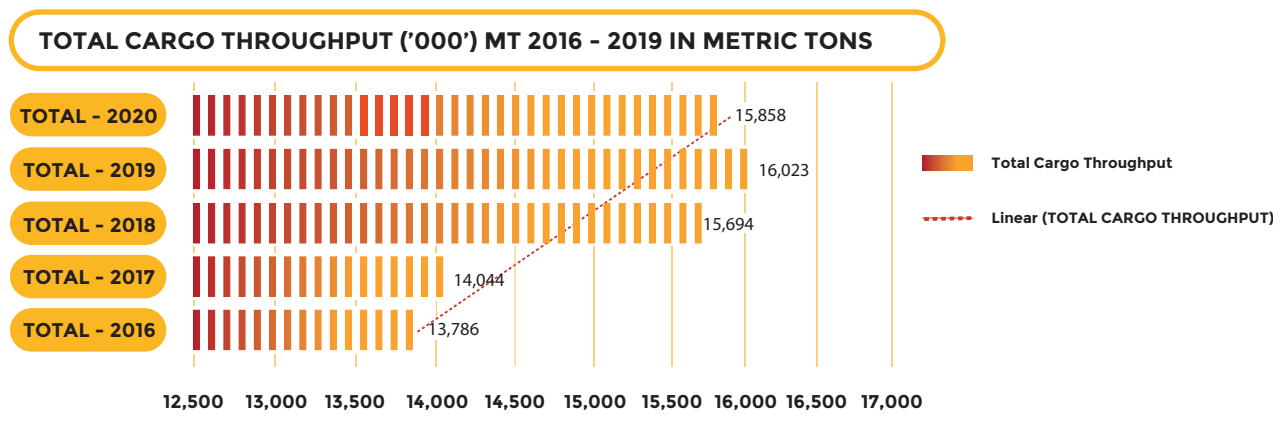
Table 4: Total Cargo Throughput at the port of Dar es Salaam in metric tons

	2016	2017	2018	2019	2020
Imports	11,260,549	11,460,983	12,682,586	12,988,253	12,847,602
Exports	2,039,244	2,044,935	2,451,775	2,372,984	2,483,392
Transshipment	289,173	255,618	266,915	86,388	19,837
Total Traffic	13,588,966	13,761,536	15,401,276	15,447,625	15,350,831
Coastal Traffic	196,785	390,238	509,307	575,327	507,039
TOTAL CARGO THROUGHPUT	13,785,751	14,044,036	15,693,793	16,022,952	15,857,870
Annual % change	-	1.87	11.75	2.10	-1.03

Source: TPA Data 2016 - 2020

The data table above shows that, the total cargo through-put at the Port of Dar es Salaam is increasing from 2016 to 2019. A slight decrease of cargo throughput in the year 2020 which can be attributed to the impact caused by the COVID-19 global pandemic was observed. Deep analysis of the year 2019 in comparison to 2020 observed a very slight decrease of about 165,082 metric tons which is equivalent to 1.03% decrease. There is a tremendous increase of total cargo throughput from the year 2016 to 2019 that was mainly attributed to port improvements in terms of effectiveness and efficiency on cargo handling and operational management. The graph below indicates the trend analysis in total cargo throughput from the year 2016 to 2020 in metric tons.

Figure 3: Cargo throughput at the port of Dar es Salaam 2016-2020 in Metric Tons ('000')



2.2.2 Volume Per Destination Country

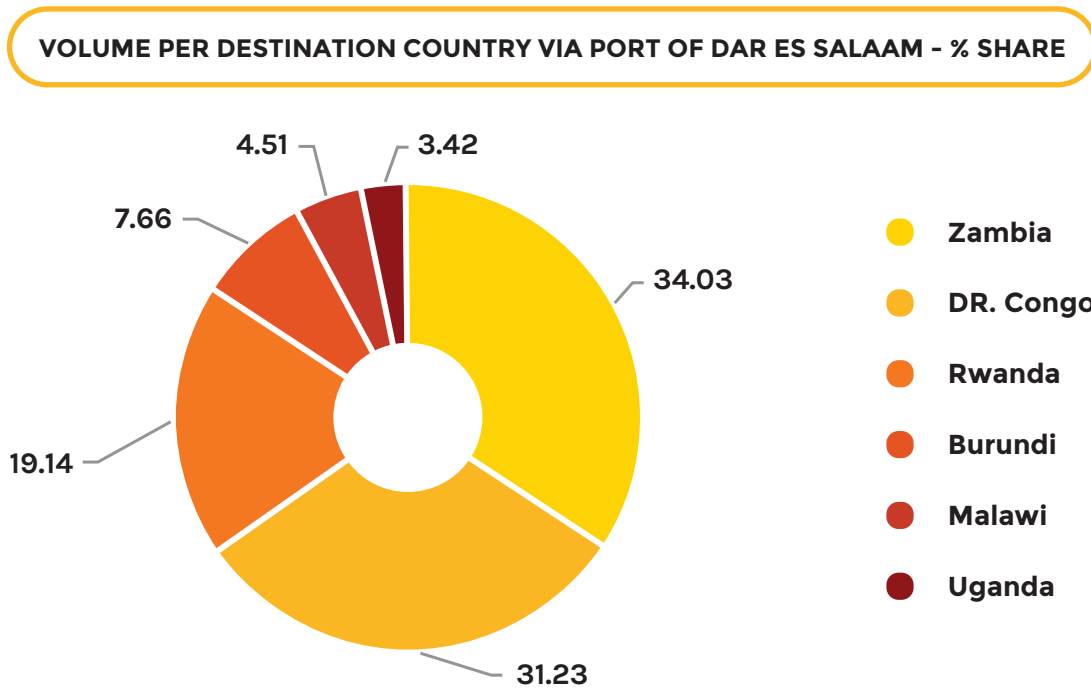
Transit volume is the quantity of cargo that is discharged or loaded at the port and destined to countries outside the port of loading or discharge. This indicator is obtained by the summation of all cargo's weight handled at the Port of the Dar es Salaam per Country of destination. The main destinations of cargo coming through the Port Dar es Salaam are Burundi, DRC, Malawi, Rwanda, Uganda and Zambia excluding the local destined cargo volume.

The below table indicate cargo traffic handled per destination for the period 2014/15 to 2019/20.

Table 5: Cargo Traffic Handled ('000') Metric Tons 2014/15 – 2019/20

COUNTRY	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	Total	% Share
Zambia	1,738	1,799	1,704	2,053	1,663	1,394	10,351	34.03
DR. Congo	1,677	1,464	1,142	1,370	1,955	1,891	9,499	31.23
Rwanda	725	850	1,013	922	1,061	1,252	5,823	19.14
Burundi	333	353	363	425	379	478	2,331	7.66
Malawi	94	107	218	258	320	376	1,373	4.51
Uganda	128	148	240	216	167	140	1,039	3.42
TOTAL LOADED	4,695	4,721	4,680	5,244	5,545	5,531	30,416	100.00

Figure 4: Volume per destination country – transit percentage share



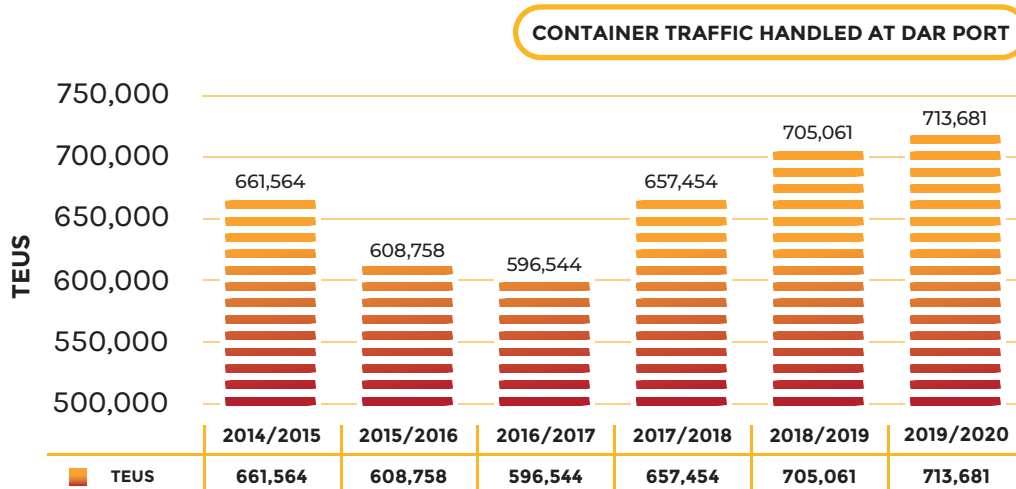
The graph above indicates the volume per destination country in percentage share. It was observed that Zambia and DRC have the majority share of the transit cargo passing through the Port of Dar es Salaam followed by Rwanda and Burundi while Uganda recorded the least percentage share.

2.2.3 Container Traffic Handled At The Port Of Dar Es Salaam

This indicates the amount of container traffic handled at the Port of Dar es salaam. Container Terminals (Berths 8 – 11) leased to Tanzania International Container Terminal Services Ltd (TICTS) with capacity of 400,000 TEUs are used to handle large share of the containers at the Port of Dar e salaam.

Data for the container traffic handled at the Port of Dar es Salaam has been obtained from the Tanzania Ports Authority (TPA) for a six years period from 2014/15-2019/20 where container performance per country has also been provided as depicted in graph below;

Figure 5: Container Traffic handled at DSM port



Cargo Traffic Handled during the six years (2014/15 – 2019/20) was increasing at an average of 1.52% from 614,909 TEUs in 2014/15 to 713,681 TEUs in 2019/20. It is expected that in the coming years, more containers will be handled at the Port of Dar es Salaam due to various improvements that will attract big vessels.

Table 6: Container Performance (TEUs) per destinations

COUNTRY	2014/15	2015/16	2015/16	2016/17	2017/18	2018/19	Total	%Share
D.R.Congo	65,821	52,473	43,934	66,969	94,394	90,222	413,813	37.7
Zambia	49,834	40,365	44,089	62,432	55,815	41,416	293,951	30.0
Rwanda	30,939	35,984	36,738	39,690	47,925	54,506	245,782	21.8
Burundi	11,843	10,042	11,007	13,460	14,563	16,279	77,194	7.1
Malawi	2,310	2,420	4,055	4,347	4,355	3,449	20,936	2.2
Uganda	1,703	1,727	2,693	2,840	2,185	985	12,133	1.3
TOTAL	162,450	143,011	142,516	189,738	219,237	206,857	1,063,809	100

Container traffic handled from and to the neighboring countries was increasing by an average of 5% annually with DR. Congo and Zambia contributing more than 67% of the containers handled, from the year 2015/2016 to 2018/2019. However, the year 2019/2020, shows a different scenario, where container numbers for DRC and Zambia showed a decreased trend.

2.2.4 Imports in Metric Tons

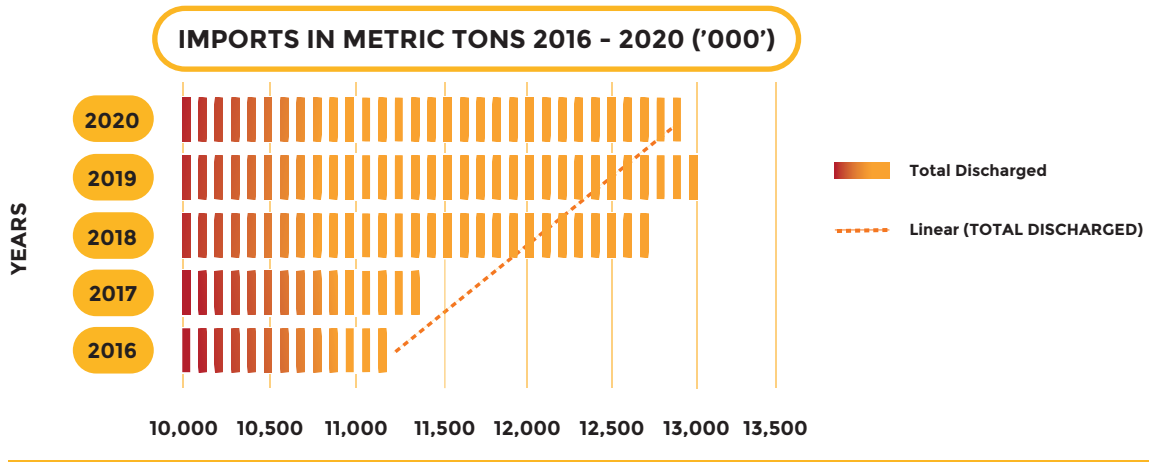
This indicator shows the Total Cargo Discharged at the Port of Dar es Salaam (Imports) categorized per countries where Local represent cargo discharged in Tanzania (Local destined cargo).

Table 7: Imports in Metric Tons

COUNTRY	2016	2017	2018	2019	2020
DISCHARGED/IMPORTS					
Local	7,190,337	6,703,864	8,307,087	8,147,222	8,457,724
D.R.Congo	789,046	785,307	1,239,780	1,249,458	1,209,565
Burundi	301,000	403,801	366,515	430,543	464,458
Rwanda	840,291	1,040,322	881,949	1,200,640	1,204,321
Uganda	165,123	270,379	188,433	140,877	153,964
Other	1,974,752	2,257,310	1,698,822	1,819,513	1,357,571
TOTAL DISCHARGED	11,260,549	11,460,983	12,682,586	12,988,253	12,847,602

Source: TPA Data 2016 - 2020

Figure 6: Imports in Metric Tons ('000') 2016 - 2020



As depicted on the graph, it shows the total traffic through the Port of Dar es Salaam in terms of total cargo discharged (Imports) in metric tons. The trend analysis indicates that the imports increased steadily from the year 2016 to 2019 while a slight decrease in imports was observed in the year 2020 which is highly attributed to the impact of COVID-19 global pandemic. Deep analysis in comparing the year 2019 and the year 2020, observed a very slight decrease of about 140,651 metric tons which is equivalent to 1.1% decrease..

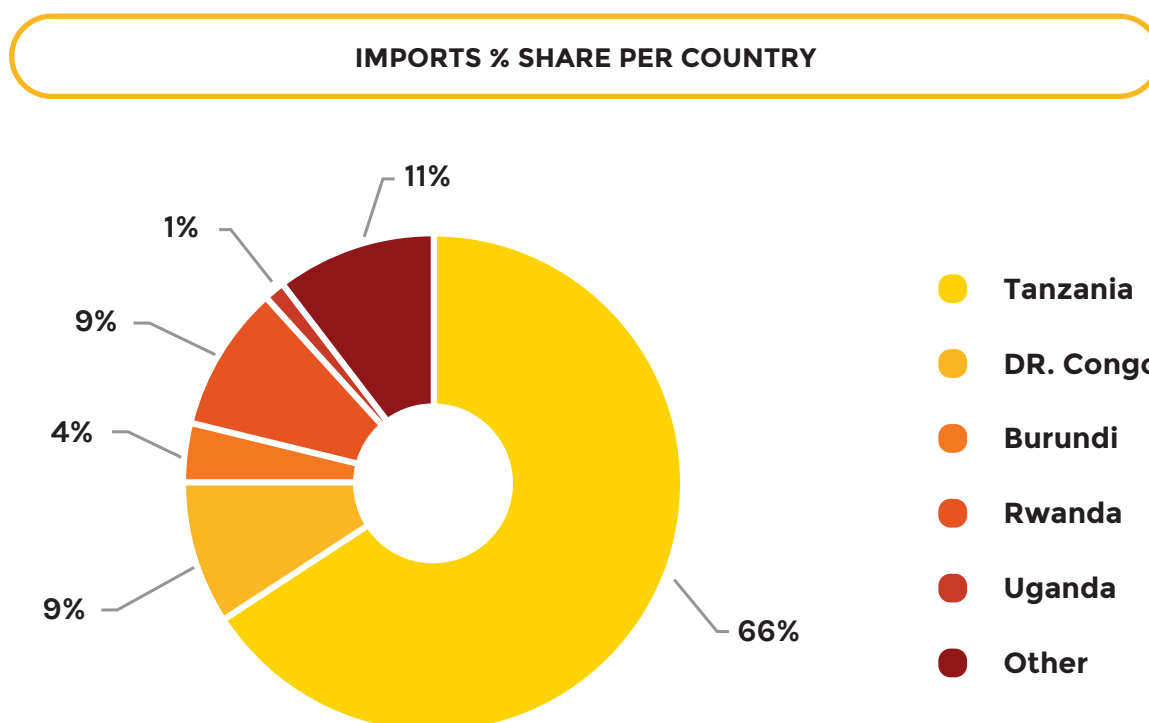
2.2.5 Imports Percentage Share Per Country

This indicator, shows the percentage shared by Central Corridor countries on imports cargo passing through the Port of Dar es Salaam in metric tons for the year 2020.

Table 8: Imports Percentage Share per country

COUNTRY	IMPORTS 2020	% SHARE
DISCHARGED/IMPORTS		
Local	8,457,724	66
D.R.Congo	1,209,565	9
Burundi	464,458	4
Rwanda	1,204,321	9
Uganda	153,964	1
Other	1,357,571	11
TOTAL DISCHARGED	12,847,602	100

Figure 7: Imports Percentage Share per country



As depicted on the graph, it shows that Tanzania (Local cargo) takes the majority share of about 66% followed by D.R. Congo and Rwanda both with 9% share while Uganda takes the least imports cargo share of about 1%.

2.2.6 Exports In Metric Tons

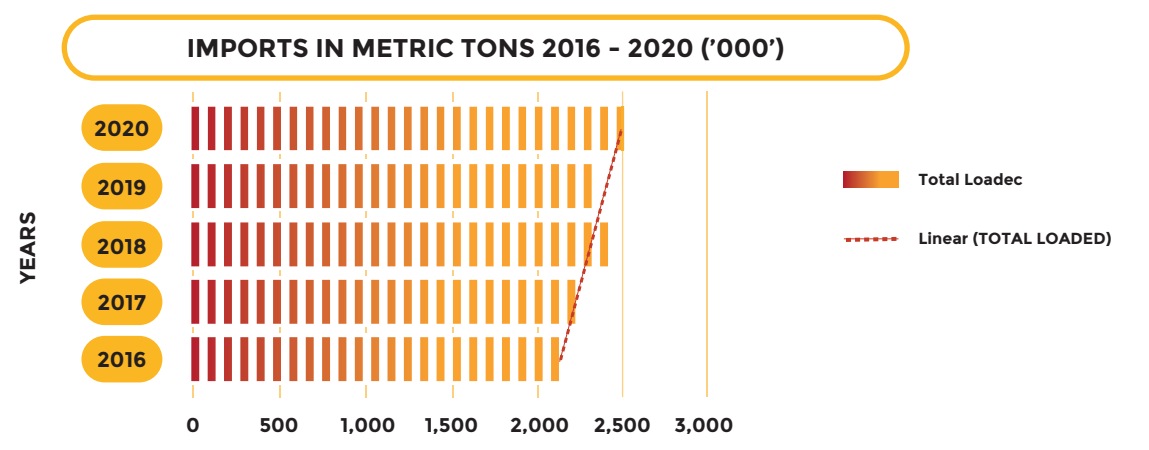
This indicator shows the Total cargo Loaded at the Port of Dar es Salaam (Exports) categorized per countries in metric tons.

Table 9: Exports in Metric Tons

COUNTRY	2016	2017	2018	2019	2020
Tanzania	1,271,160	1,103,445	1,144,490	1,342,128	1,532,985
DR. Congo	363,701	391,457	539,837	664,680	631,092
Burundi	19,374	12,192	13,189	22,737	12,350
Rwanda	22,348	20,871	29,921	37,900	34,917
Uganda	796	1,578	158	83	30
Others	361,865	515,392	724,180	305,456	272,018
TOTAL LOADED	2,039,244	2,044,935	2,451,775	2,372,984	2,483,392

Source: TPA Data 2016 - 2020

Figure 8: Exports in Metric Tons ('000') 2016-2020



As depicted on the graph, it shows that the total exports in metric tons passing through the Port of Dar es Salaam are slightly fluctuating between the years 2016 to 2020. The analysis comparing 2019 and 2020 recorded an increase of about 110,408 metric tons which is equivalent to 4.7%. From the analysis, exports through the Port of Dar es Salaam were not really affected by the COVID-19 global pandemic of Covid-19.

2.2.7 Exports Percentage Share Per Country

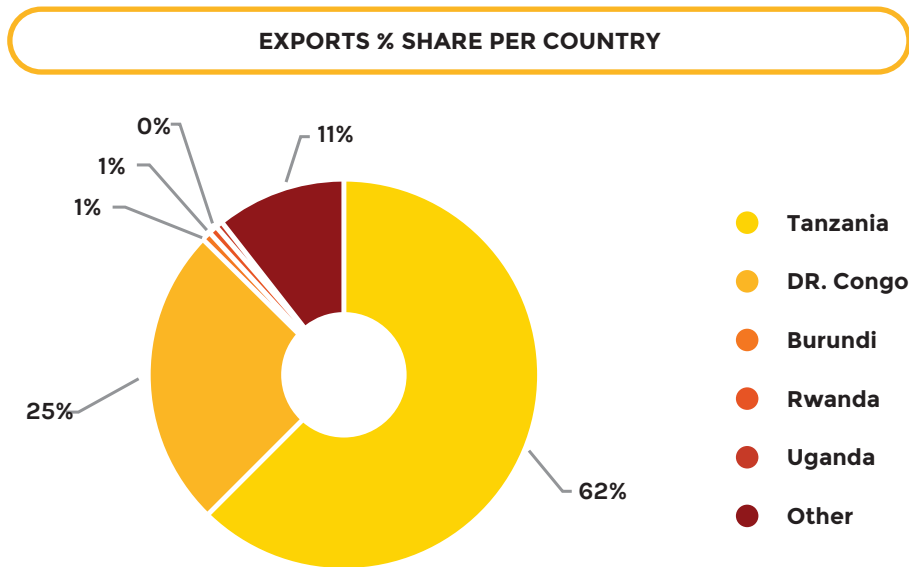
This indicator, shows the percentage shared by Central Corridor countries on exports cargo passing through the Port of Dar es Salaam in metric tons for the year 2020.

Table 10: Exports Percentage Share per Country

COUNTRY	EXPORTS 2020	% SHARE
Tanzania	1,532,985	61.7
D.R.Congo	631,092	25.4
Burundi	12,350	0.5
Rwanda	34,917	1.4
Uganda	30	0.0
Others	272,018	11.0
TOTAL LOADED	2,483,392	100

As depicted on the graph below, the percentage share for the exports passing through the Port of Dar es Salaam, the higher percentage is the cargo originating from Tanzania about 62% followed by D.R Congo at about 25.4%.

Figure 9: Exports in Metric Tons



2.3 DSM PORT COASTAL TRAFFIC: FROM 2017-2020 JAN-DEC IN METRIC TONS

2.3.1 Coastal Traffic In Metric Tons

This Indicator shows the total coastal cargo originating from other minor coastal ports both Imports and Exports via Port of Dar es Salaam.

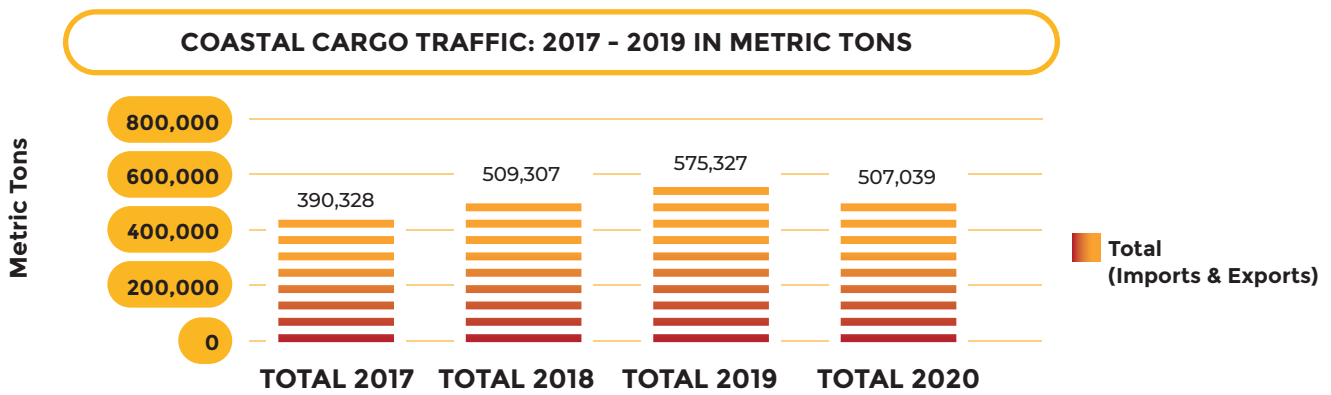
Table 11: Coastal Traffic in Metric Ton

	TOTAL - 2017	TOTAL - 2018	TOTAL - 2019	TOTAL - 2020
Imports	102,692	123,044	150,516	135,938
Exports	287,546	386,263	424,811	371,101
TOTAL COASTAL TRAFFIC	390,238	509,307	575,327	507,039

Source: TPA Data 2017 - 2020

The data on the table above shows that the total coastal cargo is also increasing between the year 2017 and 2019. In the analysis comparing the years 2019 and 2020 it was observed that the total coastal cargo traffic (imports + exports) decreased from 575,327 metric tons in 2019 to 507,039 metric tons in 2020 which is equivalent to a decrease of about 12%.

Figure 10: Coastal cargo Traffic: 2017 - 2020 in Metric Tons



2.4 TRANSPORT CAPACITY BY RAIL

Tanzania Railways Corporation (TRC) was established under the Railway Act No. 10 of 2017 by merging the functions of Tanzania Railways Limited (TRL) and Reli Assets Holding Company Limited (RAHCO). The mandate of TRC is to provide rail transport services and to develop, promote and manage rail infrastructure.

Tanzania Railway Corporation (TRC) Performance review of rail sub-sector is measured into two categories. First category is performance based on key indicators and the second category is based on implementation of key projects.

2.4.1 TRC Performance Review Based on Key Performance Indicators (KPIs)

The performance of TRC in FY 2018/2019 is measured using the following Key Performance Indicators, namely; -

- (i) Speed restriction (No.);
- (ii) Number of kilometres relayed (km);
- (iii) Number of metric tons of freight transported (Tones);
- (iv) Wagon turnaround;
- (v) Number of passengers transported (number)

PERFORMANCE OF TRC FOR THE LAST THREE YEARS (FY 2016/2017 – FY 2018/2019)

KEY PERFORMANCE INDICATORS	2016/17		2017/18		2018/19		2019/20	
	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL	TARGET	ACTUAL
Track speed restriction (No.)	0	37	0	48	0	46.5	0	47
No. of kilometres relayed	100	0	100	0	100	264	0	514.6
No. of metric tonnes of freight transported (tonnes) ('000')	538	293	352	365	690	425	746	295
Wagon turn around (days)	14	33	14	28	14	22	-	-
No. of passenger transported (Mainline) ('000')	600	613	600	531	620	579	665	432
No of passenger (Commuter) ('000')	1,455	5,138	5,016	6,046	6,847	4,231	5,016	3,197

Source: TRC 2016 - 2020

Poor infrastructure led to speed restrictions, which were imposed as a safety measure to prevent accidents as reflected on the table above. TRC aims to work towards achieving no speed restrictions (compared to the original design speed of the track) by rehabilitating existing meter gauge railway line through Tanzania Intermodal Railway Project (TIRP) which is under implementation through World Bank credit.

However, number of speed restrictions have been further reduced due to relaying of 264 km of railway lines done in FY2018/19 under TIRP. Despite that there was a decrease in commercial cargo (tonnes) transported from 399,000 metric tonnes in 2018/19 to 294,795 metric tonnes in 2019/2020 which is a decrease of 26%.

2.4.2 TRC Performance Review Based On Implementation Of Key Projects

2.4.2.1 Implementation Status Of Tanzania Intermodal And Rail Development Project (Tirp)

Objective of the Project: Project objective is to deliver a reliable open access infrastructure on the Dar es Salaam-Isaka rail segment. The Project focuses on the rehabilitation of the Dar es Salaam – Isaka section (970kms) of the central railway line to achieve a minimum permissible axle load capacity of 18.5 tons per axle. The Project is intended to achieve the following:

- i. Re-lay within the project areas between DSM - Munisagara (308 km) and Igalula - Tabora (39 km) with 80 Lbs track material;
- ii. Rehabilitation of weak bridges to increase the capacity to a minimum of 18.5 tons per axle load;
- iii. Train control system for controlling train movement safety;
- iv. Purchase of 3 new locomotives, 44 flatbed wagons, and remanufacturing of two locomotives
- v. Strengthening Capacity measures for project implementation to TRC, LATRA, and MoWTC.

Benefits of the Project

During the Project

- Job opportunities.
- Enhance the economy of the people surrounding the project.
- Building knowledge and skills.

After the Project

- Improvements on freight services.
- Increase of Speed from 30kph to 70kph and reduce transportation costs.
- Cut down time of uploading and offloading from Dar es Salaam port to Isaka
- Progressive plan in rail infrastructure rehabilitation to ensure reliable rail transport.
- Building workers capacity to increase efficacy in services.
- To reduce government burden in roads construction

Status on TIRP - Component A:

The rehabilitation of railway line from DSM-Isaka (970 Km) have been divided into two packages namely **A** and **B** and the status is as follows;

Package A: Dar es Salaam - Kilosa (283km and 126 bridges)

- i. Rehabilitation Contract of track and bridges for package A was signed on 9th April, 2018 between TRC and contractor China Civil Engineering Construction Corporation (CCECC). The project work is 100% completed.

Package B: Kilosa- Isaka (687 km and 249 bridges)

- i. Rehabilitation Contract of track and bridges for package B was signed on 10th May, 2018 between TRC and contractor China Civil Engineering Construction Corporation (CCECC). The project work is 100% completed.
- ii. Consultant for supervision work is M/s DOHWA Company is on site monitoring defects and supervising rectification of any defects observed during defect notification period.

Status on TIRP- Component B:

Procurement of forty four (44) Freight flat wagons, the rolling stock and three (3) high horse power locomotives are expected to be delivered in August, 2021. This also will increase the haulage capacity of freight from Dar es Salaam Port to different destinations.

Status on TIRP- Component C:

Regarding the development of Isaka Terminal, Ilala Good shed and Dar es Salaam Port Platform; basic design was completed in September, 2019, Detailed design and preparation of tender documents for works contract is completed and documents are in place.

Status on TIRP- Component D:

On Institutional strengthening, Capacity building, and Implementation support; it is on implementation stage and expected to commence within this FY 2020/21.

2.4.2.2 Construction Of Standard Gauge Railway Along The Central Corridor

The United Republic of Tanzania and Tanzania Railway Corporation (TRC) extinguished to construct the Standard Gauge Railway network that links Dar es Salaam, Mwanza, Kigoma, Katavi and neighbouring countries of, Burundi, DRC and Rwanda. The project will involve use of highly advanced train control (European Rail Traffic Management System - L2) technology with capacity of 35 tons per axle;

Tanzania Standard Gauge Railway; a first railway in East Africa and central designed to use electricity to power locomotives and it has capacity to accommodate passenger trains traveling at 160 kilometres per hour and 120 kph for freight trains.

The main objectives of the SGR are to add efficient in transportation especially in Tanzania Railway sector and the following will be simplified;

- Increase of freight service, whereby railway will be able to carry up to 10,000 tonnes merely equal to the 500 Cargo tracks.
- Cut off time for Passenger and freight trains will help to boost economic
- Increase of employment opportunities
- Improving Social Community Welfare through Corporate Social Responsibilities i.e., Building Schools, Hospitals in project surrounding areas.
- Boosting agriculture, mining, business and industry sector by ensuring safe and reliable rail transport of raw and processed Agriculture products in Tanzania and Neighbouring Countries.
- Economic benefits result from Cut off transport cost in road maintenance

Status by December, 2020

- i. Design and Build contract for construction under LOT 1 (Dar es Salaam- Morogoro (300 km) is ongoing under contractor YAPI MERKEZİ (TURKEY). The Overall percentage completion of the project is 89 percent and the work is expected to be completed in November, 2021.
- ii. Design and Build contract under LOT 2 (Morogoro-Makutopora (422km) is on progress under contractor YAPI MERKEZİ (TURKEY). The Overall percentage completion of the project is 53.52 percent and construction work is expected to be completed in February, 2022.
- iii. Supervision work, review of design and Management of the project is under Consultant M/s KORAIL (Korea) in Joint Venture with other eight (8) companies.
- iv. Government is underway to solicit financing for the remaining lots of Makutopora -Tabora (249km); Tabora - Isaka (133km) and Isaka -Mwanza (341km).

2.5 MARITIME OPERATIONS ON THE CENTRAL CORRIDOR

This section analyses maritime operations along the Central Corridor, where three major lakes of Victoria and Tanganyika and Kivu plays bigger part in the whole transport and logistic chain in the Central Corridor member countries.

Various maritime indicators will be presented at this section.

2.5.1 Lake Victoria Maritime indicators: Vessels Operation Indicators for The Mwanza - Port Bell Route

The Central Corridor Rail – waterways intermodal route of Dar es salaam – Mwanza -PortBell Kampala was re-opened in Mid-June 2018 after being idle for about 10 years, this follows directives of the President of Tanzania, H.E. John Joseph Pombe Magufuli and his counterpart, President Yoweri Kaguta Museveni of Uganda when met on 25th February, 2017, during the bilateral talks in Dar es Salaam, to the responsible institutions in Tanzania and Uganda to make necessary consultations with immediate effect, aiming at re-opening of the Mwanza – Port Bell – Kampala Route, for handling Uganda’s export and import traffic to/from the

international markets by rail and water transport, through the Port Dar es Salaam up to Kampala.

Upon arrival at the port's facility of Mwanza and Port Bell by rail, cargo is being handled by wagon ferries which are operating across the route to ensure smooth interchange from rail mode of transport to inland waterways mode of transport in Lake Victoria without transshipment process and are operated by two Maritime states Authority of Marine Shipping Company Limited (MSCL) of Tanzania and Uganda Railways Cooperation (URC) of Uganda.



At the moment two wagon ferries namely MV. Umoja operated by MSCL with capacity of carrying 19 Wagons equivalent to 760 tons, also MV. Kaawa operated by URC with capacity of carrying 22 Wagons equivalent to 880 tons are providing services on this route.

During the period January to December 2020, MSCL vessel Mv. Umoja was operational only during the first quarter Jan – Mar 2020 and plying the route Mwanza-PortBell-Mwanza and was drydocked in April 2020 to undergo routine maintenance. It will undergo major rehabilitation expected to start in May 2021 and last for one (1) year. Contract has been awarded and resource mobilization processes are ongoing. Mv. Kaawa managed by URC was drydocked in January 2020 for routine maintenance and resumed operations in May 2020.

Below are operational indicators for Mv. Umoja during the period January – March 2020 and Mv. Kaawa between May – December 2020.

i. Number of vessel's returns Trip made per month

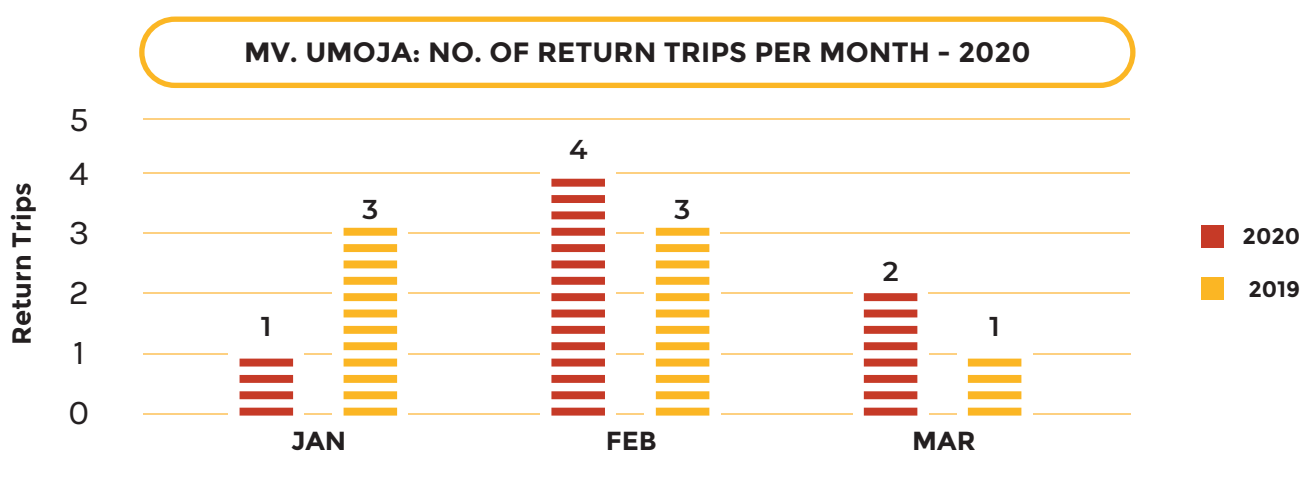
Number of returns trip per month indicate the number of completed return trip made by the vessel to the ports which are PortBell – Mwanza-PortBell for Mv. Kaawa operated by URC and Mwanza – PortBell – Mwanza for Mv. Umoja operated by MSCL.

Table 12: Number of vessel's returns trip made per month

YEAR	JAN	FEB	MAR	TOTAL
2019	3	3	1	7
2020	1	4	2	7

Source: MSCL 2019 / 2020

Figure 11: MV Umoja number of return trips per month



ii. The vessel turnaround time

The vessel turnaround time is the total time spent by a vessel to complete a total round trip between Mwanza and Port Bell in Lake Victoria. Its components include vessel sailing time (Mwanza - PortBell or PortBell - Mwanza) and the port stay (Mwanza port/PortBell). The vessel turnaround time is highly affected by port Stay as depicted in the figures below;

Figure 12: MV Umoja vessel turnaround time (a)

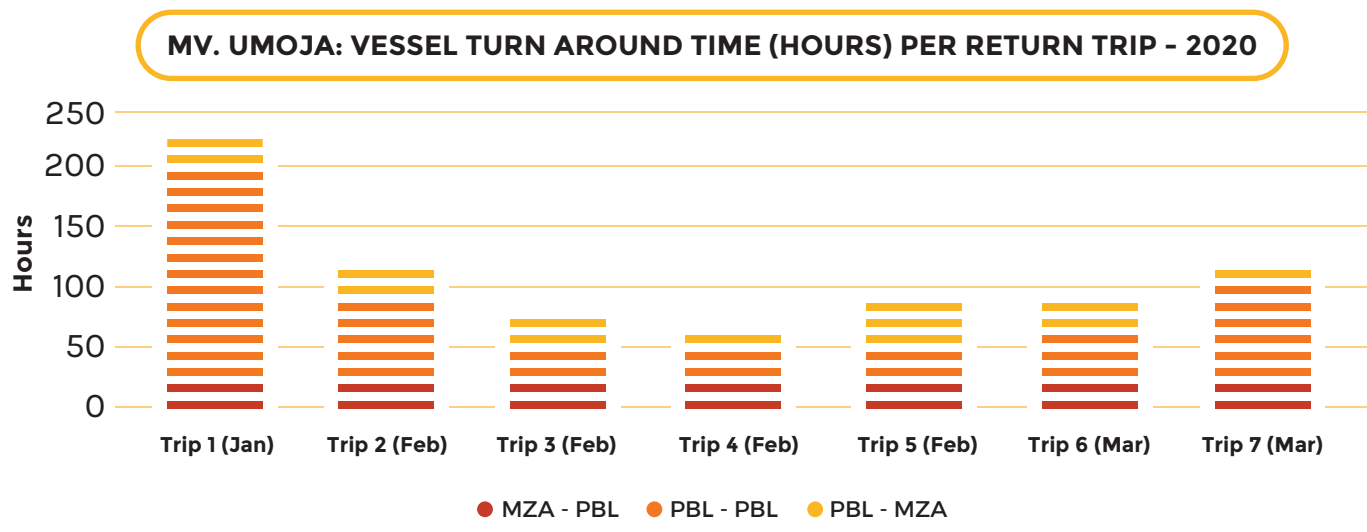
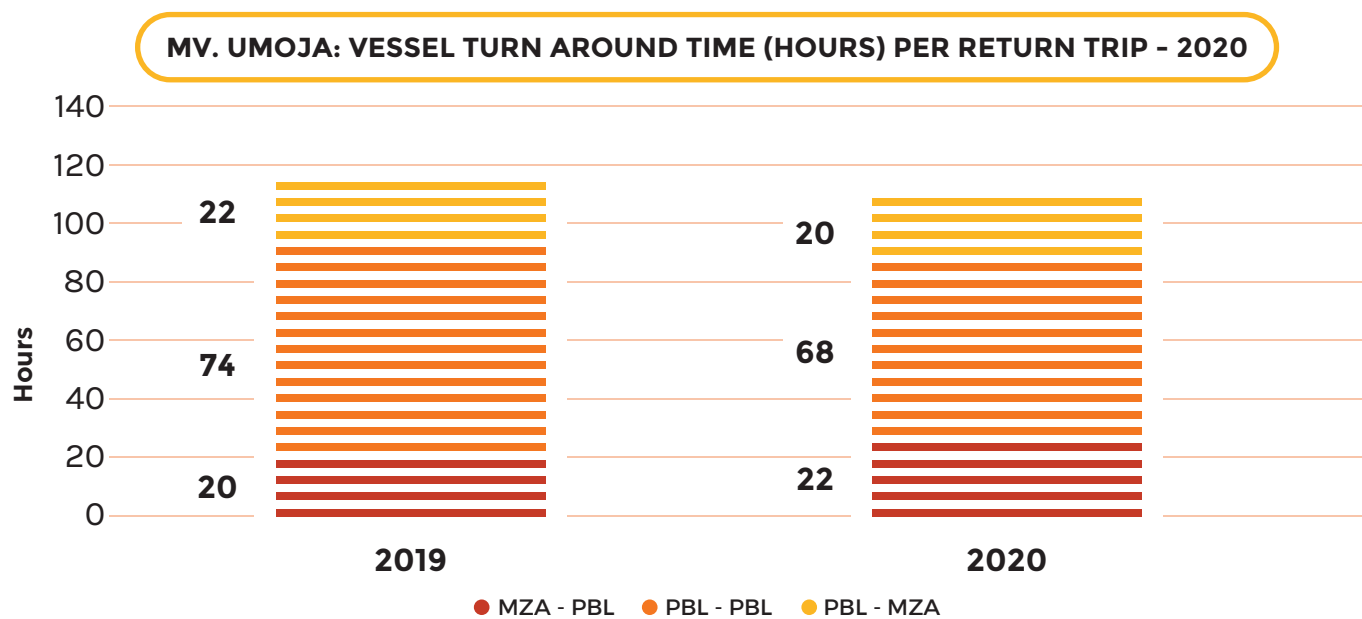


Figure 13: MV Umoja vessel turnaround time (b)



iii. Volume handled per month

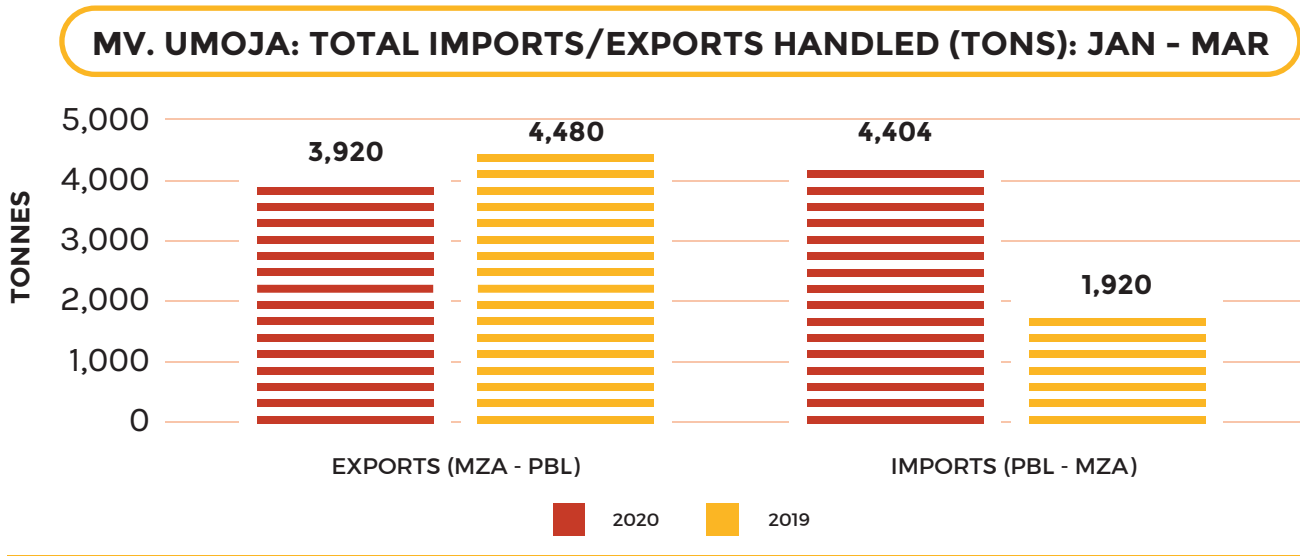
Mv. Umoja handled export (Mwanza PortBell) volume of 3,920 tonnes for the period Jan – March 2020 which has decrease compared to the 4,480 tonnes of export handled for the same period in 2019. Whereas about 4,404 tons of imports (PortBell – Mwanza) volume was handled for the period Jan – March 2020 marking an increase compared to 1,920 tonnes of volume handled for the same period 2019.

Table 13: Volume handled per month

MONTH	EXPORTS - 2020	EXPORTS - 2019	IMPORTS - 2020	IMPORTS - 2019
JANUARY	NIL	1,840	820	760
FEBRUARY	2,400	2,280	2,131	360
MARCH	1,520	360	1,453	800
TOTAL	3,920	4,480	4,404	1,920

Source: MSCL 2019 / 2020

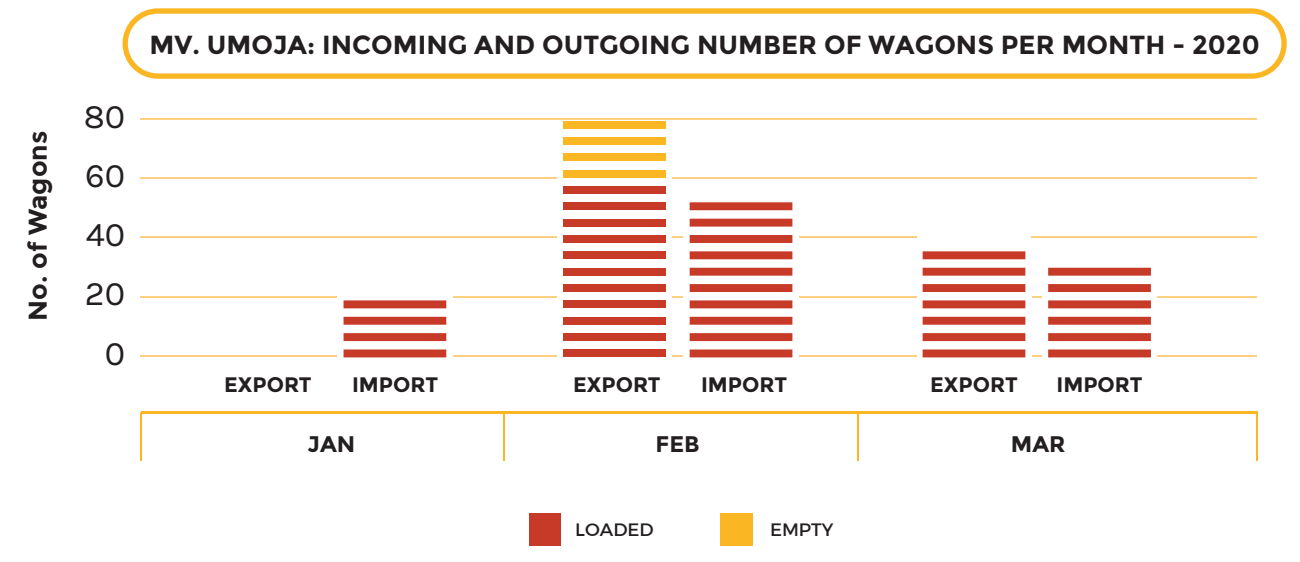
Figure 14: MV Umoja Total Imports and Exports



iv. Incoming and outgoing number of Wagons per month

For the period Jan - March 2020, a total of 217 wagons were operated by Mv. Umoja, out of it 16 wagons were empty representing about 7.3% of the 768 wagons operated. 114 wagons were for Export and 103 were for imports.

Figure 15: MV Umoja Incoming and Outgoing Number of Wagons Per Month



Source: MSCL 2020

PERFORMANCE MONITORING REPORT

January - December 2020



Section 3

TRANSPORT RATES AND COSTS

3.1 INTRODUCTION

This section provides highlights of the rates and costs of transportation services paid by the cargo owners/ shippers to the transporter and other service providers within the logistic chain. The cost is determined by various conditions related to location, infrastructure, administrative barriers, energy and how the freight is carried from one point to another.

Generally, the Central Corridor Total Transport Cost (road trip cost profile) is contributed by number of costs/charges at various nodes including Vessel Voyage Charges, Port Charges, Road Transport Charges, as well as indirect costs as indicated below.

3.2 Road Transport Rates and Charges per Destinations (USD per Container)

This section provides highlights of the rates of transportation services paid by the cargo owners/shippers to the road transporters. The rates are determined by various conditions related to location, infrastructure, administrative barriers etc. These rates differ depending on whether the cargo is imports or exports.

The road Transport charges can be categorized into three main groups namely; the costs paid to the Transporter (Truckers) which are normally referred as Transport rates, the costs paid to the Freight Forwarders and the Costs paid to the Customs Freight Agents (CFA) at the inland borders.

3.2.1 Road Transport Rates

Table below indicates the road transport rates (Imports) to various destinations per container for the year 2020. A comparison on the average road transport rates with the previous years is also provided in the below graph.

Table 14: Road transport rates (Imports) per container

DIRECTION	DESTINATION	TRANSPORT RATES (USD/TEU&FEU) 2019	TRANSPORT RATES (USD/TEU&FEU) 2020	DISTANCE (KM)	COST (USD/KM) 2019	COST (USD/KM) 2020
Imports	Kigali	2,900	2,800	1,495	\$1.94	\$1.87
	Bujumbura	3,100	3,000	1,640	\$1.89	\$1.83
	Kampala	3,250	3,300	1,780	\$1.83	\$1.85
	Bukavu	4,900	4,900	1,769	\$2.77	\$2.77
	Goma	4,200		1,635	\$2.57	\$2.63

Source: C&F Agents / Transporters 2020

Figure 16: Road transport rates (Imports) per container

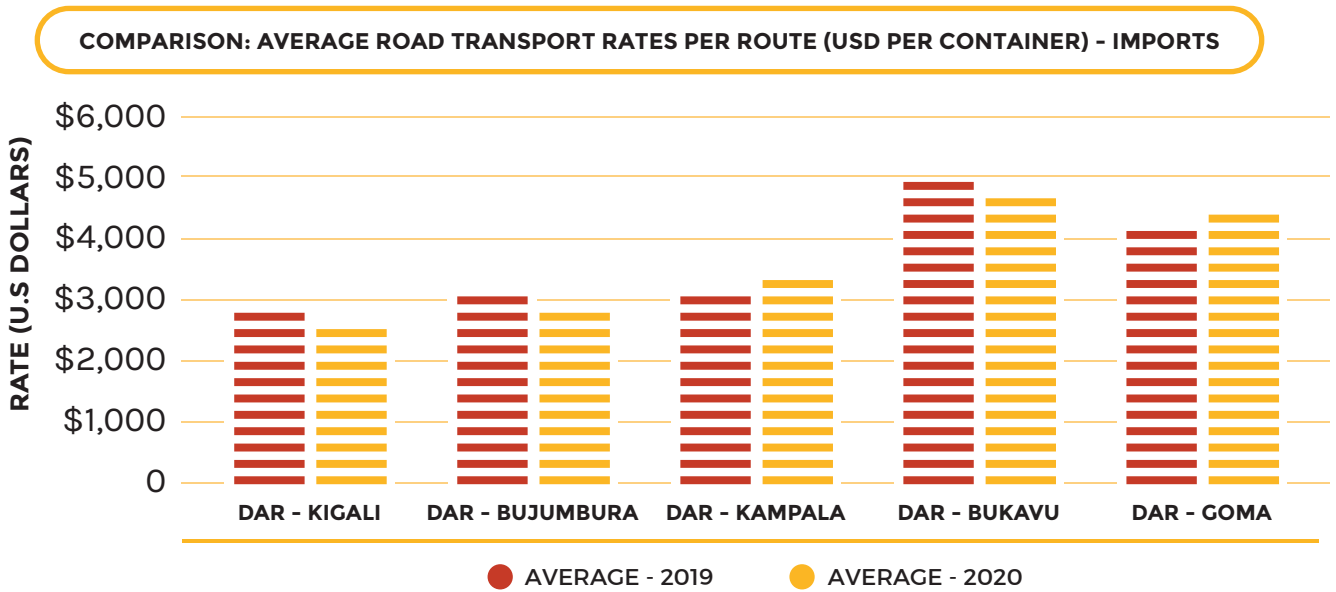
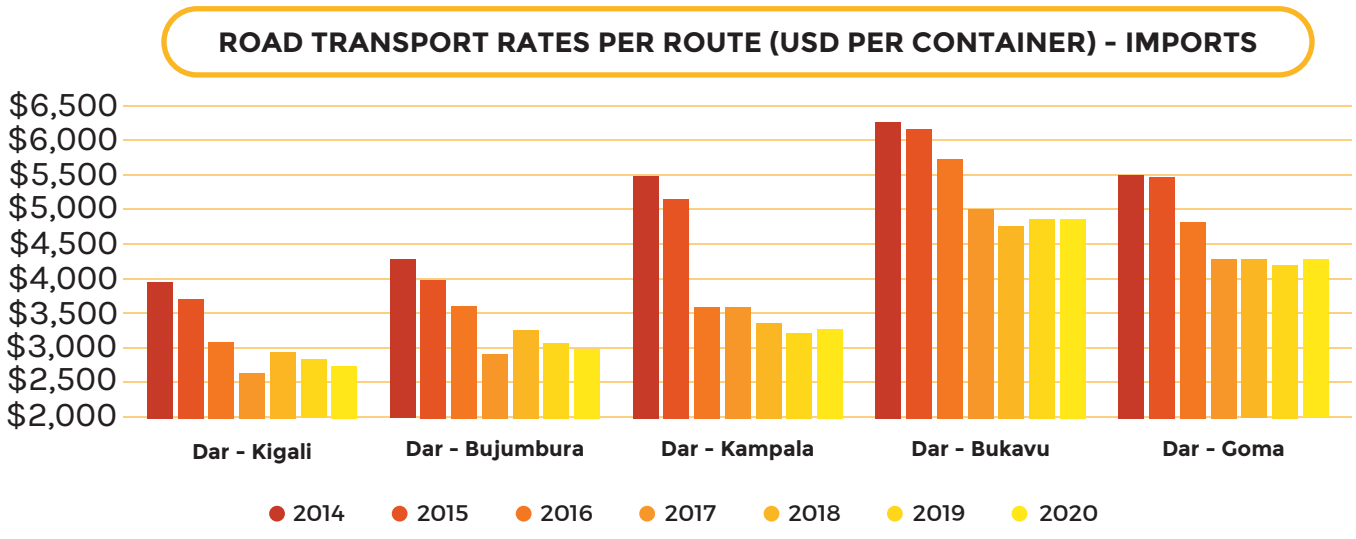


Figure 17: Transport Rates per Central Corridor Destinations



Source: C&F Agents / Transporters 2020

As depicted on the graph the transport rates trends are slightly going down for the mentioned period (2014 - 2020) for some destinations and is lower for Dar es salaam - Kigali route at an average of \$2800 per container while it is higher for Dar es salaam - Bukavu route at an average of \$4,900 per container. Transport rates have gone down during the year 2020 compared to the year 2019 and years before mainly during the second half of the year (July - Dec 2020) and various reasons provided by stakeholders included volume reduction to the transporters in Tanzania, as some of transporters in destination countries brought trucks into the system, also assurance of return cargo to some transporters was a contributing factor.

3.2.2 Freight Forwarder Charges

Freight forwarding costs on the Central Corridor have less variation between origin/destination than transport costs since freight forwarders tend to charge a flat rate per consignment type and flow.

Table below indicates the Freight Forwarders Charges (USD/Container) along the Central Corridor

Table 15: Freight Forwarders Charges (USD/Container)

DIRECTION	ORIGIN/ DESTINATION	CONTAINER TYPE	CHARGES (USD)
Imports	Bujumbura	20ft	200
		40ft	300
	Kigali	20ft	200
		40ft	300
	Kampala	20ft	200
		40ft	300
	Goma	20ft	200
		40ft	350
	Bukavu	20ft	200
		40ft	350
Exports	Bujumbura	20ft	70
		40ft	70
	Kigali	20ft	70
		40ft	70
	Kampala	20ft	70
		40ft	70
	Goma	20ft	100
		40ft	100
	Bukavu	20ft	100
		40ft	100

Source: CFAs and Transporters Transport Surveys - 2020

3.2.3 Clearing & Freight Agent Charges

Clearing and Freight Agent (CFA) charges at the border vary by consignment, flow, and origin/destination. CFA costs represent only a small share of total road trip charges.

Table 16: Clearing & Freight Agent Charges

DIRECTION	ORIGIN/ DESTINATION	CONTAINER TYPE	CHARGES (USD)
Imports	Bujumbura	20ft 40ft	100 100
	Kigali	20ft 40ft	170 160
	Kampala	20ft 40ft	58 60
	Goma	20ft 40ft	200 200
	Bukavu	20ft 40ft	200 200
	Exports	Bujumbura	20ft 40ft
Kigali		20ft 40ft	40 45
Kampala		20ft 40ft	40 40
Goma		20ft 40ft	100 100
Bukavu		20ft 40ft	100 100

3.3 Rail Transport Rates and Charges.

Ahead of the construction of the Central Corridor Standard Gauge railway in Tanzania, the Central line meter gauge is operational and is being used to transport Cargo from Dar es salaam to various Central Corridor member countries of Uganda through Mwanza, Burundi and DRC through the Port of Kigoma.

The Dar es Salaam – Mwanza – PortBell – Kampala Goods shed was re-opened in June 2018. The below Summarises the promotional tariffs charged on the re-opened Dar es salaam – Mwanza - Kampala route.

Table 17: summary - total route costs by rail for imports (DSM to Kampala) - USD

SERVICES RENDERED		20FT (USD)	40FT (USD)	RATE/TON (USD)
1	PORT CHARGES - DAR PORT (TPA/TICTS)	\$180	\$270	\$9.50
2	CORRIDOR LEVY - DAR PORT (TPA/TICTS)	\$6	\$12	\$0.30
3	AGENCY FEES	\$150	\$200	\$5.00
4	RAILWAY CHARGES - TRC	\$800	\$1,600	\$40.00
5	RAILWAY CHARGES - URC	\$50	\$100	\$2.50
6	MARINE CHARGES - URC or MSCL	\$374	\$748	\$18.70
7	LINK SPAN CHARGES - TPA and URC	\$20	\$40	\$1.00
8	IMPORTS - TOTAL ROUTE COSTS - USD	\$1,580	\$2,970	\$77.00

Table 18: Total route costs by rail for exports (Kampala to DSM) - USD

SERVICES RENDERED		20FT (USD)	40FT (USD)	RATE/TON (USD)
1	PORT CHARGES - DAR PORT (TPA/TICTS)	\$90	\$120	\$6.00
2	AGENCY FEES	\$100	\$150	\$3.75
3	RAILWAY CHARGES - TRC	\$800	\$1,600	\$40.00
4	RAILWAY CHARGES - URC	\$20	\$40	\$1.00
5	MARINE CHARGES - URC or MSCL	\$180	\$360	\$9.00
6	LINK SPAN CHARGES - TPA and URC	\$20	\$40	\$1.00
7	EXPORTS - TOTAL ROUTE COSTS - USD	\$570	\$1030	\$28.75

Note: Container free detention grace period is given at (thirty) 30 days.

PERFORMANCE MONITORING REPORT

January - December 2020



Section 4

PRODUCTIVITY AND EFFICIENCY

4. INTRODUCTION

Efficiency and productivity indicators give a basic guideline on how well the corridor performs operationally. The objective of productivity measurement is to give the current performance in the transport logistics chain against desirable productivity measures as provided by the best practice, also ensuring that its outcomes live up to the expected values. Being efficient entails reducing the number of wasted inputs, thus it is imperative to make investments to develop trading capacities such as ports and roads improvements, improved efficiency in customs administration and adoption of e-services. Efficiency gains in the transportation sector will also be discussed given that it is a key driver of the competitiveness and growth of any economy. In addition, the efficiency and productivity indicators help the Central Corridor Secretariat to gauge the performance of the corridor at large.

This section highlights the performance of key efficiency and productivity indicators, identify the factors responsible for the efficiency improvements and provide insights into policy approaches that could trigger enhanced performance going forward.

4.1 Ship Turnaround Time

Ship turnaround time is the total time spent by a ship at the port; measured from an average time difference per month from when a ship is ON-Berth to when the ship is OFF-Berth measured in Hours per ship from Tanzania Ports Authority (TPA).

Components of ship turnaround time include the following aspects: Ship waiting time, Berthing/un-berthing time, Berth time (Service time), while the waiting time is normally a small proportion of turnaround time. The waiting time for the year 2020 increased to approximately 2.6 days on average from half a day (0.5 days) waiting time same period last year 2019. This might be attributed by the outbreak of COVID-19 pandemic as most of the staff within the port were required to take precautions and observe internationally accepted protective measures to curb the spread of the virus. These included wearing of masks, regular washing of hands and encouraging social distancing and working on shifts.

Table 19: Ship Turnaround Time distribution in days

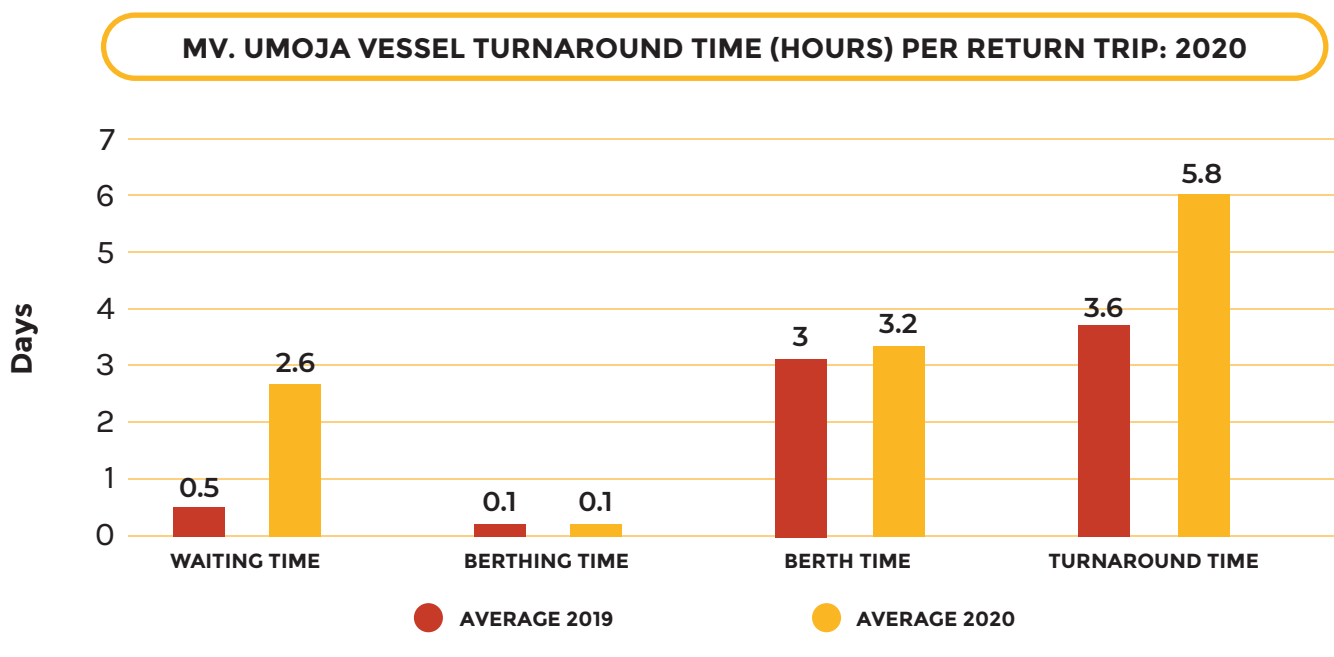
INDICATORS	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019	NOV 2019	DEC 2019	AVG. 2019
Waiting time	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.2	0.0	0.0	0.5
Berthing time	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.3	0.1	0.1	0.1
Berth time	2.8	2.7	2.9	2.9	3.2	2.9	2.6	3.1	3.2	2.9	3.2	3.5	3.0
Turnaround time	2.9	2.8	3.0	3.0	3.3	3.0	2.7	3.2	8.6	3.4	3.3	3.6	3.6

INDICATORS	JAN 2020	FEB 2020	MAR 2020	APR 2020	MAY 2020	JUN 2020	JUL 2020	AUG 2020	SEP 2020	OCT 2020	NOV 2020	DEC 2020	AVG. 2020
Waiting time	8.2	8.8	7.2	2.8	2.0	1.8	0.0	0.1	0.0	0.1	0.0	0.0	2.6
Berthing time	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Berth time	3.2	3.4	3.3	3.3	2.8	3.3	3.0	3.3	2.8	3.4	3.3	3.2	3.2
Turnround time	11.4	12.3	10.5	6.2	4.9	5.2	3.4	3.2	2.8	3.5	3.4	3.3	5.8

Source: TPA 2019 & 2020

As shown on the table above, the containerized vessel ship turnaround time is on average of 3.6 days January to December 2019 compared to 5.8 days same period in 2020 which shows a tremendous increase in ship turnaround time of about 2.2 days equivalent to 61% increase. This is mainly attributed to the ship waiting time at Outer Anchorage (OA) and Berth time which affected the overall ship turnaround time.

Figure 18: Ship Turnaround Time distribution in days



As depicted on the graph above it indicates that the containerized vessel turnaround time is highly attributed by the berth time (service time) of the ship. However, when berth time is reduced, it can substantially reduce ship turnaround time and reduce shipping costs. The berth time depends on the quantity of cargo a vessel has to load or discharge, the type and characteristics of a vessel, the type of port equipment and other resources used at berth/port.

4.2 Dwell Time Indicators

Dwell time refers to the total time spent by containerized cargo at the port from when the cargo was discharged from the vessel until port exit (average number of days the container stays in a yard).

The below statistics give out highlights on the dwell time measured in days for both Tanzania Ports Authority (TPA) and Tanzania International Container Terminal Services (TICTS). The analysis is also based on the overall impact caused by the COVID-19 pandemic which has attributed to some delays on the clearance of cargo at the Port of Dar es Salaam as most of the institutions from March 2020 started operating under shifts' basis with limited number of staff so as to observe social distancing requirements and adhere with other internationally standard guidelines.

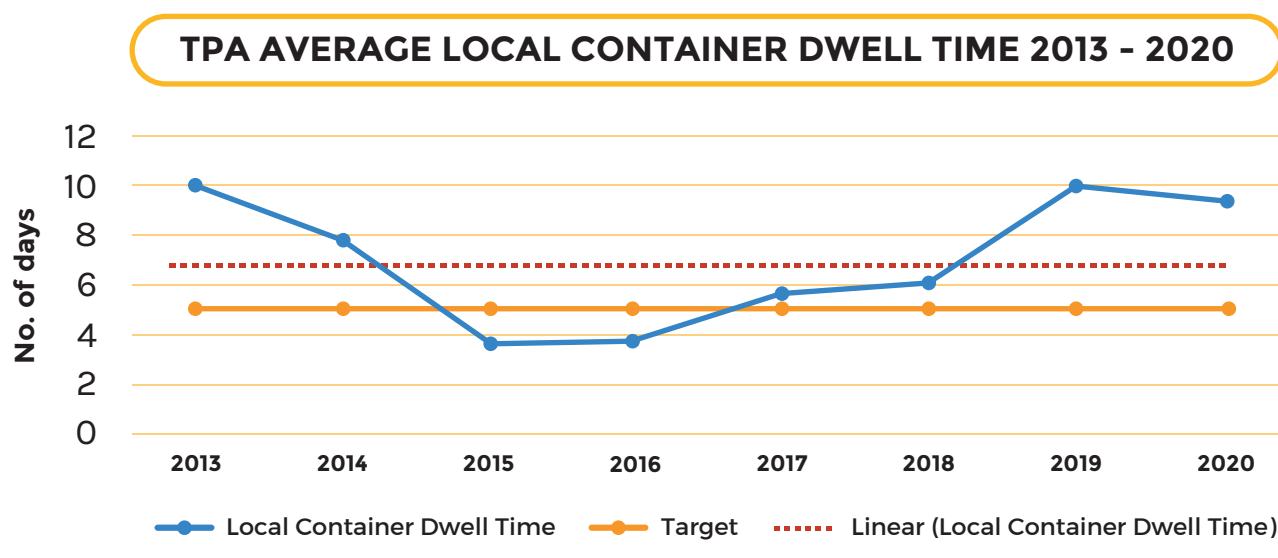
4.2.1 TPA Dwell Time

TPA Container Dwell time Indicators are generated from data collected from Tanzania Port Authority -TPA electronic system.

Table 20: Average Local Container Dwell Time TPA (Days)

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2013	18.5	15.3	7.8	6.3	7.3	7.6	7	9.7	14.1	8.4	8.8	8.5	9.94
2014	10.5	9	6.5	7.8	8.8	8.1	3.1	9.9	8.7	7.8	4.2	8.5	7.74
2015	4.9	2.8	4	5.5	6.2	3.8	2.8	3.3	2.8	2.3	2.2	2.32	3.58
2016	2.3	2	6.3	4.2	1.3	1.6	1.9	2.7	2.4	4.6	8.5	7	3.73
2017	7.1	5.6	4.5	3.8	4.3	5.3	5.5	6.6	5.7	5.39	6.3	6.9	5.58
2018	6.7	7.3	5.23	5.74	6	6.1	4.3	6.9	5.4	8.1	6.9	4.8	6.1
2019	6	5.1	5.4	3.6	19	8.4	12.8	18.5	12.5	11.3	9.5	6.8	9.9
2020	9.4	10.5	11.7	9.5	9.8	8.5	8.8	12.0	7.8	8.5	8.2	7.9	9.4

Figure 19: TPA average local container dwell time 2013 - 2020



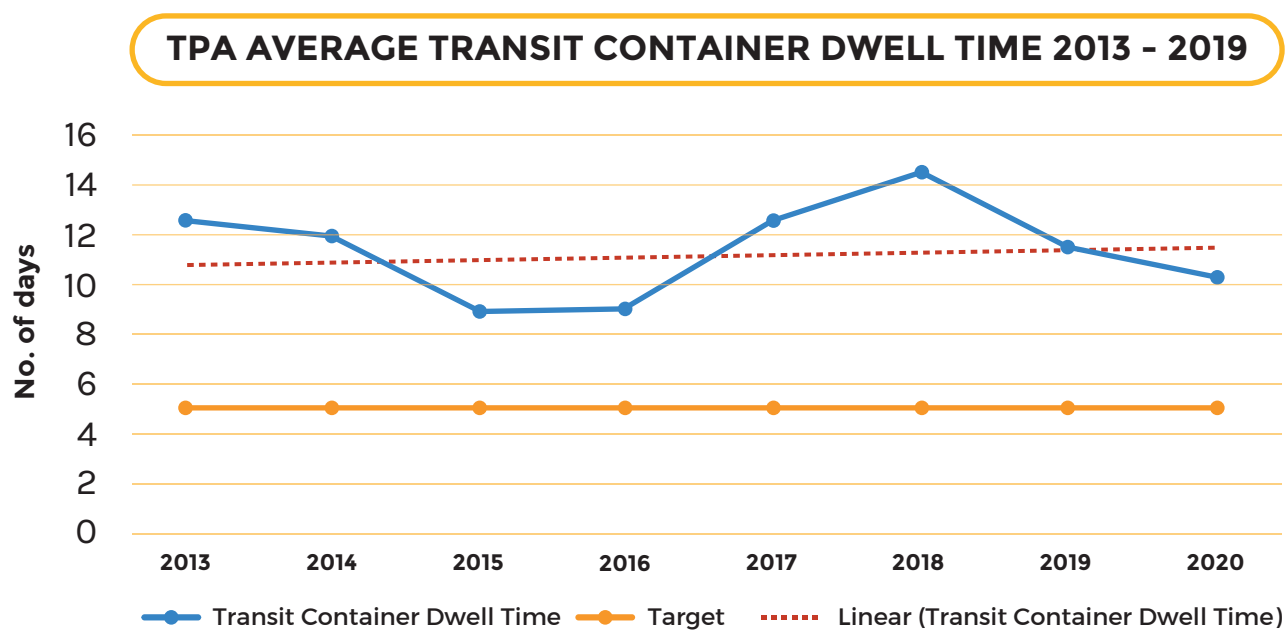
Source: TPA data 2013 - 2020

As depicted on the graph, the trends show fluctuations on the average dwell time for local containers. On comparing the years 2019 and 2020, shows a decrease on containerized dwell of about 0.5 days which is equivalent to 5.1% decrease. It is expected for the year 2021, the overall dwell time will be more stabilized due to various ongoing improvements at the Port of Dar es Salaam to meet the expected set targets.

Table 21: TPA average local container dwell time 2013 - 2020

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2013	14.4	17.6	19.1	11.2	9.5	10.2	9.7	9.1	13.0	12.4	9.9	8.8	12.07
2014	14.8	14.2	17.3	11.0	15.0	9.5	7.8	12.6	10.1	11.3	9.5	7.6	11.72
2015	9.4	11.4	7.2	6.0	7.0	9.7	8.7	10.2	7.2	10.7	10.1	8.5	8.84
2016	12.8	10.6	4.1	3.8	8.9	7.6	9.2	10.3	10.6	8.4	11.0	8.5	8.82
2017	9.6	10.7	11.5	9.7	9.4	11.5	9.1	11.3	15.1	15.5	17.4	14.1	12.08
2018	15.8	16.9	13.6	13.6	13.8	10.4	14.4	15.3	13.3	14.6	15.0	12.9	14.13
2019	13	10.4	13.2	9.7	17.8	12.2	12.1	13	9.5	9.8	9.1	7.1	11.41
2020	9.9	10.8	13.7	11.1	11.6	9.4	9.5	8.7	9.8	8.6	9.2	10.1	10.2

Figure 20: TPA average transit container dwell time 2013 - 2020



Source: TPA 2013 - 2020

The average transit container dwell time kept decreasing from 2013 to 2016 while observed an increase between 2017 and 2018 but the regular exchange of information and training between the respective Revenue Authorities has contributed to solving the issue of system compatibility. This is supported by the data from TPA that shows an average Transit Container dwell time has been decreasing from 2018 to 2020 despite the fact that it is still very high compared to the set target of 5 days but plans are in place to make sure the targets are attained including various improvements that are ongoing within the Port of Dar es Salaam. In comparing 2019 and 2020 it has been observed a decrease of approximately 10.6% resulted from the ongoing improvements at the port and joint efforts from stakeholders to make the port efficient and productive.

4.2.2 TICTS dwell time

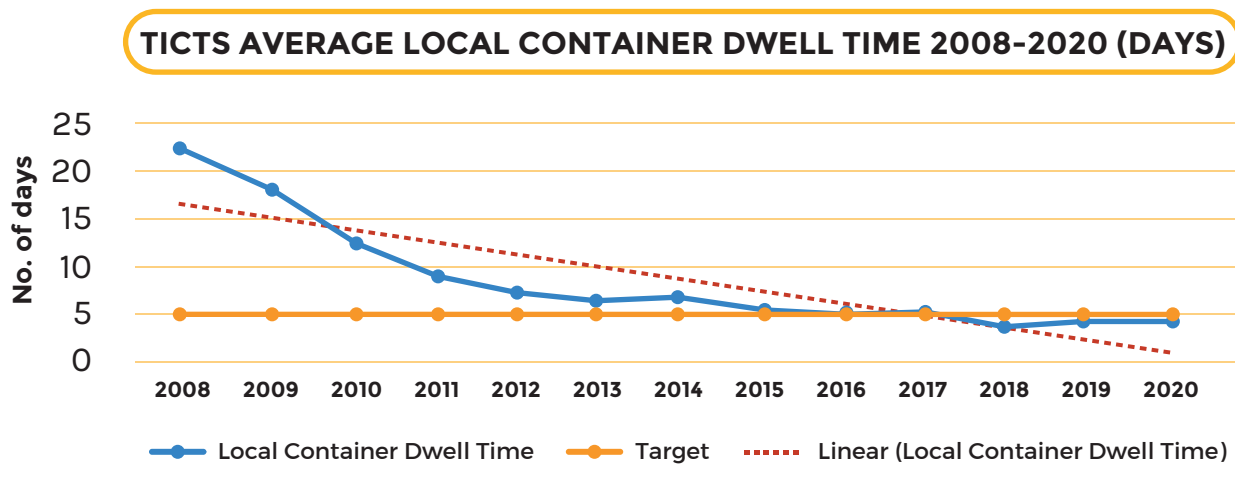
i. Average monthly local container dwell time (days): DSM container terminal (TICTS) year: 2008 - 2020

Table 22: Average monthly local container dwell time (days) 2008-2020

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2008	19	23	20	21	21	22	28	22	22	24	21	21	22
2009	17	16	18	21	25	22	19	19	16	15	15	11	17.83
2010	12	12	13	12	13	11	13	12	10	12	12	15	12.25
2011	13	11	10	10	9	7	8	7	7	7	8	9	8.83
2012	7	7	6	6	7	9	9	8	7	7	8	7	7.33
2013	8	7	6	6	7	7	6	6	6	6	7	5	6.41
2014	7	6	6	6	6	6	5	7	6	6	9	11	6.75
2015	8	6	6	6	7	6	4.7	4.5	4.6	5.5	4.2	5.3	5.65
2016	5.8	5.3	5.2	4.6	4.7	4.3	5.1	4.8	3.7	5.6	6.4	5.6	5.09
2017	5.1	5	5	13	6	5	5	5	4	4	4	3.8	5.41
2018	4	3	3	3.3	4.3	5.3	3.7	3.8	3.6	3.9	3.9	3.8	3.8
2019	3.6	3.6	3.3	3.4	4.1	6.4	4.8	4.2	4.5	4.1	3.9	4.2	4.2
2020	4.7	4.0	4.2	4.8	4.6	3.9	4.6	5.5	4.0	4.8	6.1	3.9	4.6

Source: TICTS 2008-2020

Figure 21: TICTS Average local container dwell time 2008 - 2020



Source: TICTS Data 2008 – 2020

As depicted on the graph above, the average local Container dwell time for TICTS has been decreasing in the last 12 years. The trend analysis confirmed that the local container dwell time attained the set target of 5 days since 2018 to 2020. Referring to the years 2019 and 2020, an average local container dwell time of 4.2 days and 4.6 days respectively surpasses the set target of 5 days. However, in 2020 it was observed a slight increase of local container dwell time of about 0.4 days (9.6 hours) which is equivalent to an increase of 9.5%.

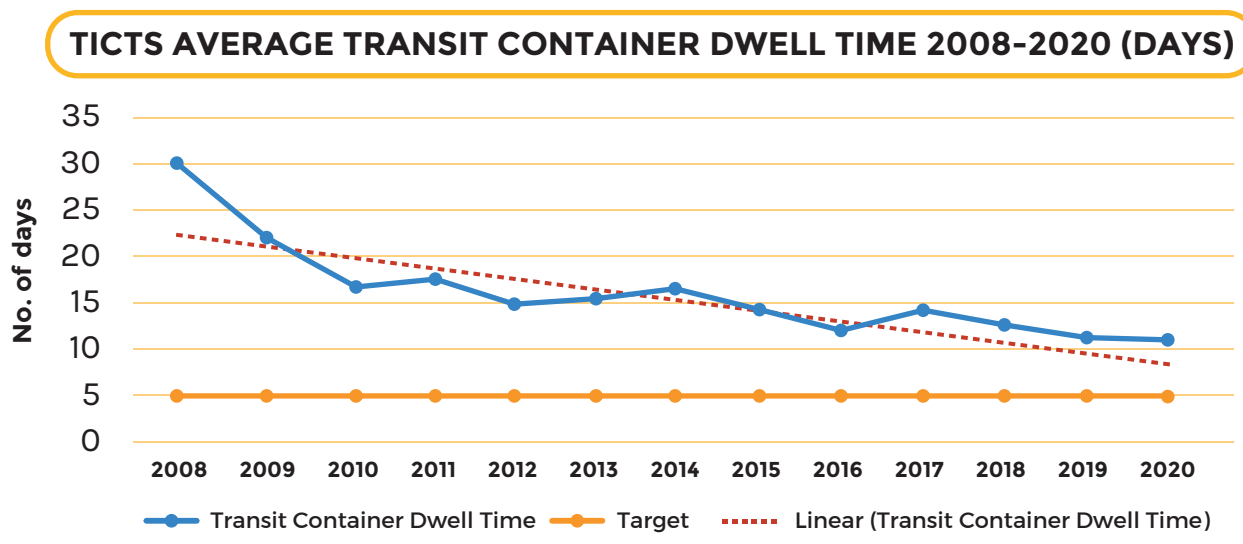
ii. Average Dwell Time Transit Containers TICTS

Table 23: Average Dwell Time Transit Containers TICTS 2008 - 2020

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2008	26.2	19.2	24.8	27.8	30.3	33.2	38.5	28.3	31.5	32.7	28	31.3	29.32
2009	26.2	19.2	24.8	27.8	30.7	23	21.2	26.3	15.3	13.5	17.5	13.8	21.61
2010	23.3	13.8	15.2	13.8	14.5	15.2	15.2	14	15.8	17.8	16.3	20.7	16.3
2011	20.2	16.7	15.5	14.7	16.3	16.5	17.7	19	19.8	19	14.2	16	17.13
2012	13.5	14.2	14.2	15.8	16.7	13.5	14.5	15.2	12.3	14.3	13.3	15.3	14.4
2013	18.3	20.2	17.5	18	16.3	13.2	13.7	12.3	11.7	10.5	13	14.7	14.95
2014	17.3	21.8	18	19	16.5	13.8	15.8	15.1	13	12.5	14.7	15.5	16.08
2015	17.2	17.7	15.5	17.7	19.5	15.3	11	11.3	10.9	8.7	11.4	11.1	13.94
2016	12.4	12.2	11.8	11.1	12.3	9.9	11.9	11.2	12.2	11.1	11.2	12	11.61
2017	12.5	13.2	15.3	14.2	13.7	12.5	12.8	12.5	16.7	16	13.1	13.8	13.86
2018	14.7	14.3	13.3	12.8	13.1	9.4	9.5	12	12.3	11.9	13.3	12.1	12.4
2019	12.6	12.6	12.9	11.2	10.5	11.3	10.4	9.3	9.2	10.3	9.1	9.9	10.8
2020	10.8	9.7	9.7	11.0	11.2	9.6	8.6	11.6	10.0	10.3	12.5	9.5	10.4

Source: TICTS 2008 - 2020

Figure 22: TICTS Average transit container dwell time 2008 - 2020



Source: TICTS Data 2008 - 2020

As depicted on the graph, the average TICTS Transit Container dwell time is slightly decreasing from the past years as shown on the data table. In comparing the year 2019 and 2020, the trend analysis shows a decrease on an average transit container dwell time from 10.8 days in 2019 to 10.4 days in 2020 which is equivalent to a decrease of 3.7% attributed by improvements on operational efficiency on handling of transit cargo at Tanzania International Container Terminal Services (TICTS).

4.3 Customs Release Time/Document Processing Time (DPC) Time

It provides the average time taken in Hours that elapse from when declaration is made by Clearing & Forwarding Agent till when the Release order is issued by the Customs for Transit Cargo declarations. It has been calculated from the average time difference between Release time and Declaration time, measured in Hours from Tanzania Revenue Authority.

4.3.1 Tanzania Customs Release Time (Hours)/Document Processing Centre (DPC)

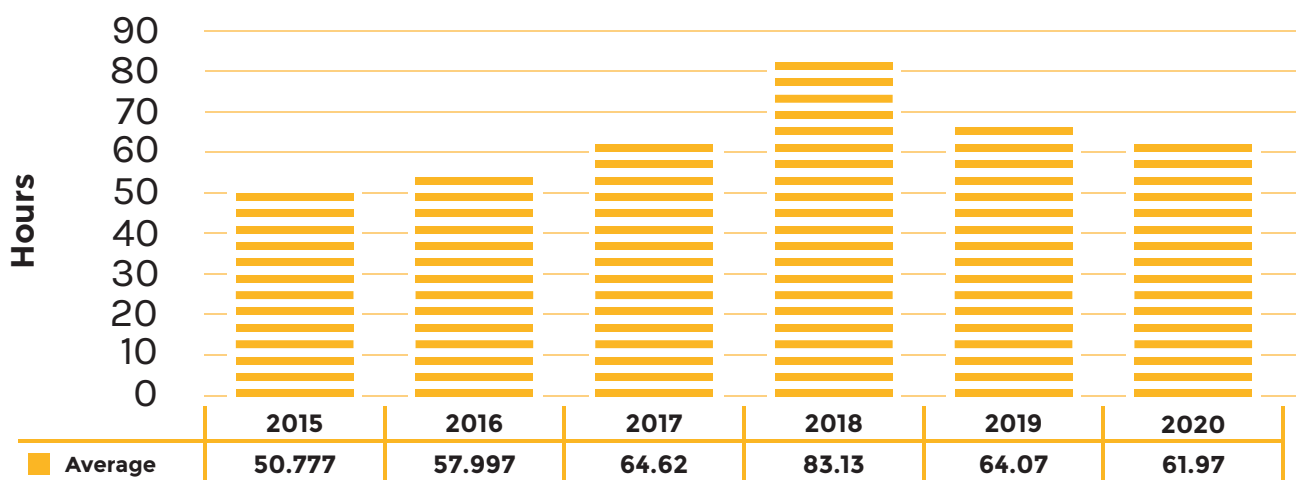
Table 24: Tanzania Customs Release Time (Hours)

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2015	51.2	52.9	50.5	50.2	51.6	51.2	51.1	50.8	50.3	50.1	49.7	49.6	50.777
2016	55.14	52.4	48.46	50.98	53.48	55.92	57.64	59.6	62.53	65.25	66.71	67.85	57.997
2017	65.58	67.18	68.83	64.86	65.13	64	63.33	62.55	62.6	63.65	63.3	64.4	64.62
2018	87.01	86.69	84.33	83.05	80.98	81.92	81.35	82.67	83.18	81.97	81.32	80.1	83.13
2019	64.73	64.79	63.03	62.27	62.80	63.26	63.36	63.91	64.65	65.24	65.26	65.5	64.07

Source: TRA Jan to Dec 2015 - 2020

Figure 23 Customs release time (hours)

TANZANIA CUSTOMS AVERAGE RELEASE TIME (HOURS)/DOCUMENT PROCESSING CENTRE (DPC) 2015-2019



Source: TRA 2015 - 2020

As depicted on the graph above, it shows that the average time in hours for the year 2019 is 64.07 hours compared to 61.97 hours in 2020. This shows that the release time is decreasing between 2019 and 2020 by approximately 3.3% which is mainly attributed by operational improvements at Document Processing Centre (DPC). But Transporters are still concerned with high DPC time and have been emphasizing on timely release of cargo.

4.4 Truck Turnaround Time

4.4.1 TICTS

Table 25: Truck Turnaround Time at Tanzania International Container Terminal Services

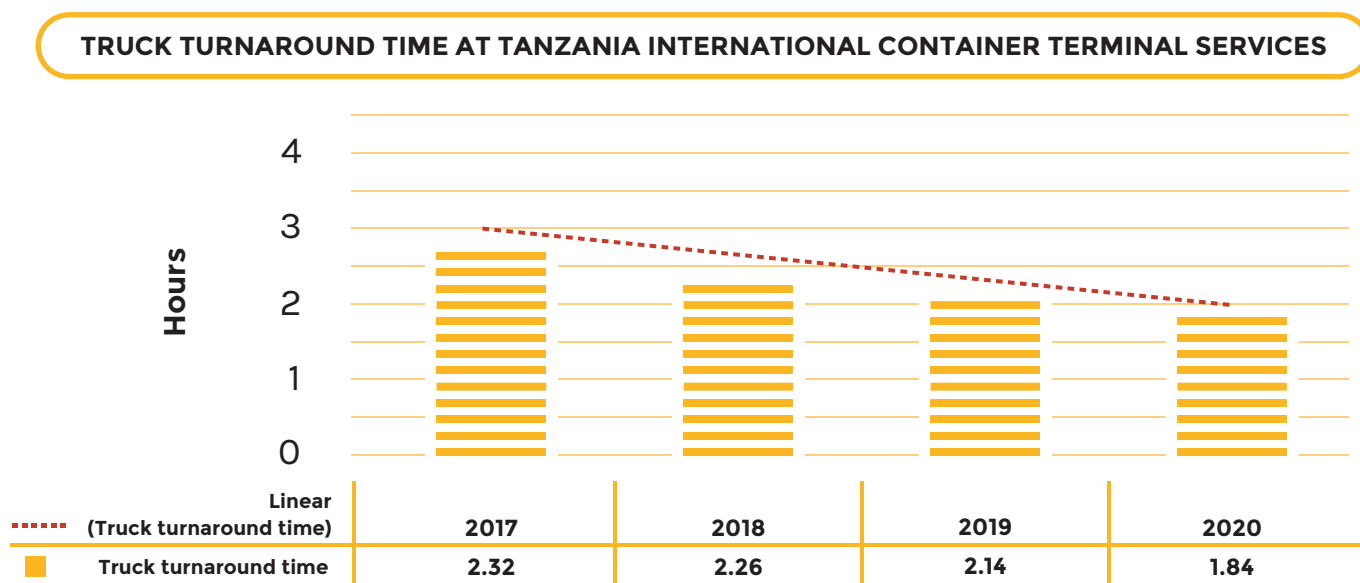
YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	AVG.
2017	2.4	2.4	2.18	2.28	2.29	2.3	2.31	2.31	2.32	2.33	2.35	2.35	2.32
2018	2.12	2.03	2.01	2.47	2.04	2.31	2.5	2.03	2.41	2.45	2.32	2.41	2.26
2019	2.3	2	2.1	2.2	2	2.2	2.1	2.3	2	2.2	2.1	2.2	2.1
2020	1.8	2.0	1.7	1.7	2.0	1.8	1.7	1.8	1.9	1.8	2.1	1.8	1.84

Source: TICTS 2017 – 2020

Refers to the average time taken in Hours for Truck Turnaround time at Tanzania International Container Terminal Services (TICTS) measured from the average time difference between Truck Gate Out date and Truck Gate In date.

Truck turnaround time for the calendar year 2019 at TICTS is on average of 2.14 hours while same period in the year 2020 recorded the average of 1.84 hours. This shows that TICTS are operating efficiently to make sure Truck turnaround time is effectively reduced. Further analysis shows that the decrease is equivalent to 14% which are mainly attributed by enough handling facilities and effective and efficient operational management.

Figure 24: Truck turnaround time in Hours

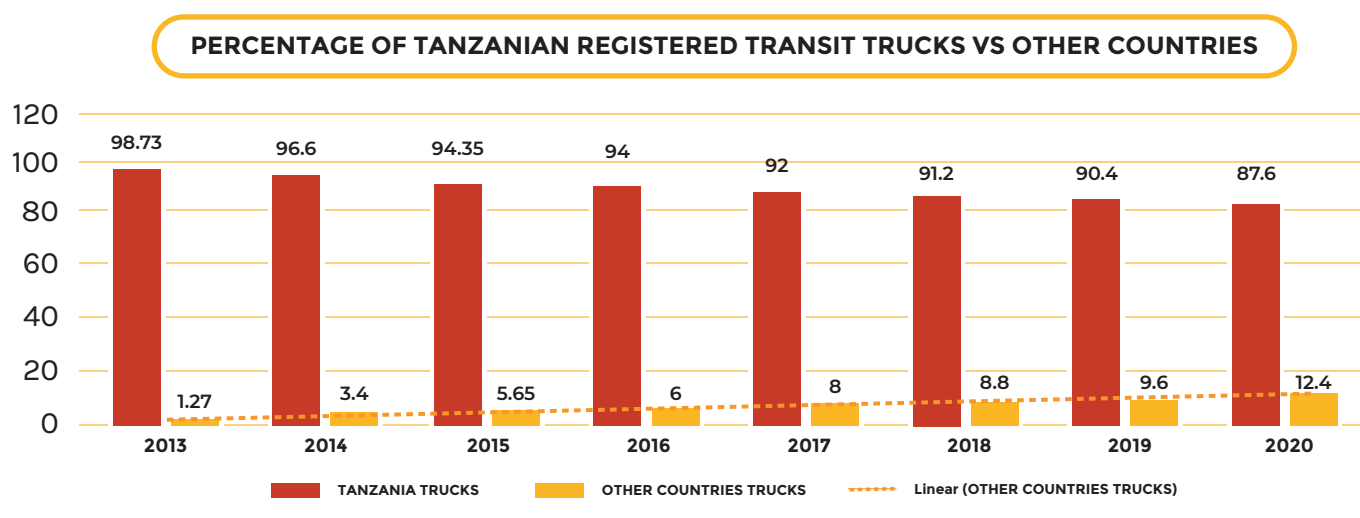


Source: TICTS, 2017-2020

4.5 Percentage of the Origin for Transit Trucks vs Other Countries

This Indicator gives out the percentage of Tanzanian registered transit trucks against other countries registered trucks that are carrying cargo from the port of Dar es Salaam. It provides an indication that, the Tanzanian registered transit trucks are dominating the transport business as the analysis show that more than 90% of the cargo is transported by Tanzania registered trucks since 2013.

Figure 25: Percentage of the Origin for Transit Trucks Vs Other Countries



Source: TPA, 2013 - 2020

As depicted on the graph above, further analysis shows that for the year 2019 the percentage for other countries registered trucks was 9.6% while for the year 2020 recorded 12.4% which is equivalent to 29 percentage increase which still signifies a lot of improvements within Central Corridor in terms of cargo handling at the port and infrastructures which encourages other Transporters from other member countries to operate. Also attributed by harmonization of road user charges to some of the member states within the corridor that favours other countries registered trucks to operate.

4.6 Axle load Control (Weighbridges) Indicators

This indicator measures the average number of trucks weighed in a month at the various weighbridges in Tanzania along the Central Corridor.

Central Corridor Transit nodes in Tanzania have a total of 10 weighbridges, five of them Vigwaza, Mikese, Dakawa, Nala and Njuki are Weighing in Motion (WIM) for the purpose of reducing time spent during weighing process whereas Kurasini, Mwendakulima, Nyakahura, Kyamyora and Mutukula are static bridges.

Transit vehicles through the central corridor are weighed and being inspected at only three stops of Vigwaza, Njuki and Nyakahura.

The below statistics indicates the summary of weighed vehicles at the respective weighing per Quarters in Tanzania since 2017 to June 2020. It should be noted that. Dakawa weighbridge started operations in April 2019 replacing Kihonda weighbridge, data before this period reflects data measured at Kihonda weighbridge.

4.6.1 Weighbridge Traffic in Tanzania

This indicator measures the average number of trucks weighed in a month at the various weighbridges in Tanzania along the Central Corridor.

Central Corridor Transit nodes in Tanzania have a total of 10 weighbridges, five of them Vigwaza, Mikese, Dakawa, Nala and Njuki are Weighing in Motion (WIM) for the purpose of reducing time spent during weighing process whereas Kurasini, Mwendakulima, Nyakahura, Kyamyora and Mutukula are static bridges.

Transit vehicles through the Central Corridor are weighed and being inspected at only three weighbridges of Vigwaza, Njuki and Nyakahura.

The below statistics indicates traffic of all vehicles weighed at the Static bridges per Quarters in Tanzania.

Table 26: Weighbridge Traffic in Tanzania

WEIGHBRIDGE TRAFFIC		JAN- MARCH	APR- JUN	JUL- SEPT	OCT- DEC
VIGWAZA	2017	114,824	123,970	115,786	133,413
	2018	118,355	93,423	286,493	271,333
	2019	271,785	194,526	96,235	238,716
	2020	277,216	250,955	217,733	214,621
MIKESE	2017	42,401	38,226	51,702	172,584
	2018	47,540	59,109	129,371	52,791
	2019	73,628	67,723	147,530	152,891
	2020	191,907	187,420	249,658	214,051
KIHONDA/DAKAWA	2017	21,518	17,910	19,140	25,905
	2018	15,754	29,053	38,513	32,777
	2019	33,897	37,262	92,058	109,518
	2020	165,154	151,551	183,713	188,852
NALA	2017	46,521	43,913	45,023	51,337
	2018	52,277	58,958	60,647	47,581
	2019	42,090	75,915	55,097	92,903
	2020	45,686	45,441	57,088	54,264
NJUKI	2017	29,523	31,752	12,538	18,741
	2018	31,852	58,840	31,374	41,209
	2019	41,228	43,720	131,366	201,301
	2020	253,860	249,764	260,778	232,105
MWENDAKULIMA	2017		27,654	30,743	28,473
	2018	32,153	30,563	34,098	32,291
	2019	29,194	26,086	9,142	25,967
	2020	26,853	27,553	36,453	27,421
NYAKAHURA	2017	20,276	1,239	24,299	2,4745
	2018	20,113	16,833	25,478	9,561
	2019	19,925	24,333	24,516	0
	2020	16,685	25,314	31,374	

Table 26: Weighbridge Traffic in Tanzania

WEIGHBRIDGE TRAFFIC		JAN-MARCH	APR-JUN	JUL-SEPT	OCT-DEC
KYAMYORWA	2017	10,006	7,715	11,078	10,415
	2018	9,879	8,925	9,044	10,657
	2019	14,568	17,531	18,315	16,502
	2020	18,365	8,623	7,632	2,346
MUTUKULA	2017	3,561	2,114	2,093	930
	2018	2,281	2,428	2,186	2,780
	2019	2,486	4,326	4,480	7,847
	2020	5,308	10,129	14,085	15,622

Source: TANROADS, 2017- 2020

The period January – June 2020, has recorded increased number of weighed traffic at all weighbridges compared to same period last year. This has been attributed by conversion of most of the weighbridges into Weigh in Motion and improvement of recording systems at the respective weighbridge stations hence improving data capturing for all vehicles passing the stations.

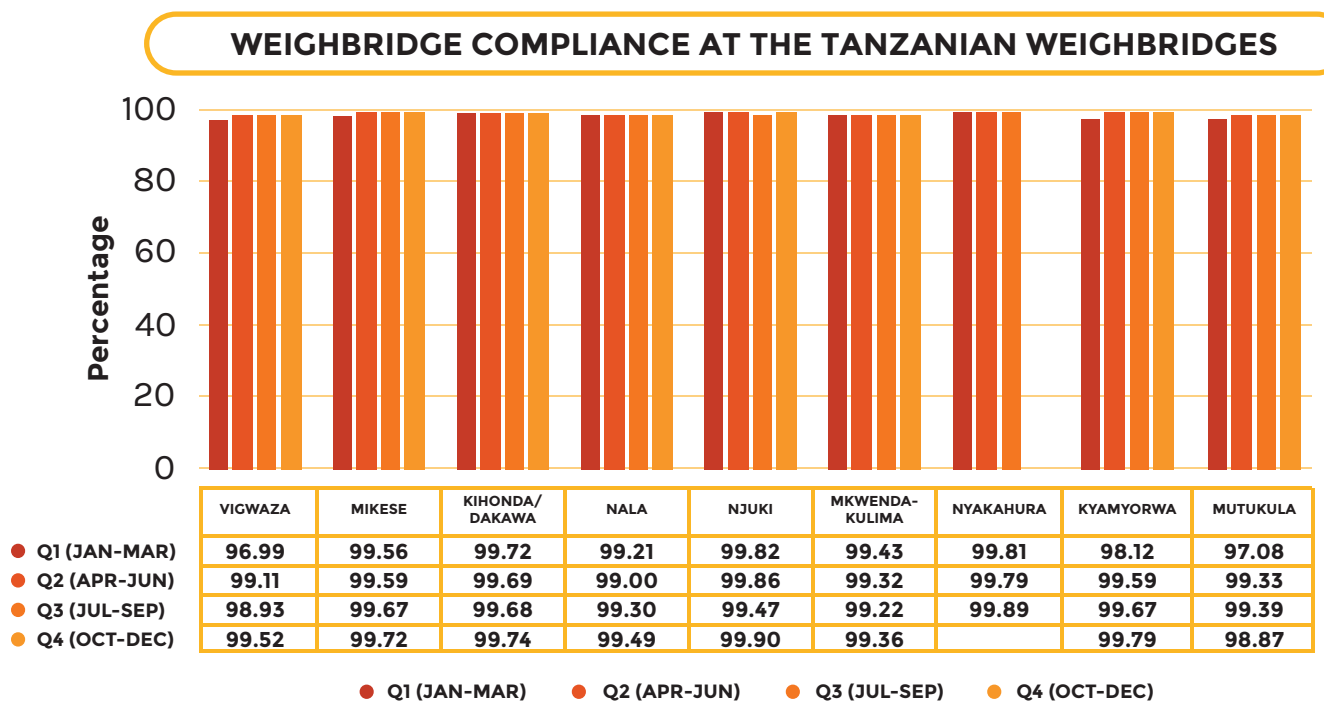
4.6.2 Weighbridge Compliance in Tanzania

This measures the percentage of trucks that comply with the gross vehicle weight and the axle load limits before or after re-distribution of cargo.

The East African Community Vehicle Load Control Act 2016, is an Act of the Community to make provision for the control of vehicle loads, harmonized enforcement, institutional arrangements for the Regional Trunk Road Network within the Community and to provide for other related matters including management of the weighbridges. In Tanzania, weighbridges are managed by TANROADS

Below statistics indicates compliance level of trucks at various weighbridges in Tanzania, where the compliance is taken for all measured vehicles at the static and portable scales which are complying vehicles within the allowable 5% tolerance weight limit.

Figure 26: Weighbridge compliance at the Tanzanian weighbridges in 2020



Source: TANROADS, 2020

The figure above shows that there is high compliance level by trucks in all weighbridges along the central corridor in Tanzania. The compliance is consistent throughout the reporting period (Jan - Dec 2020). The average compliance is less at the first weighbridge of Vigwaza compared to all other weighbridges, however it has improved to 99.52% compliance for Oct - Dec 2020 where a traffic of 214,621 trucks were weighed during that period compared to from 96.99% compliance for the period Jan - March 2020 where 277,216 trucks were weighed.

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Section 5

TRANSIT TIME AND DELAYS

5.1 Introduction

Indicators of Transit time and delays within the Central Corridor are obtained from Electronic Cargo Tracking System (ECTS) from TRA and the GPS road survey results. Corridor monitoring starts from when goods/cargos arrive at the Port of Dar es Salaam until when they reach their final destinations. This time has been broken down to form different indicators depending on different activities and sections along the Corridor.

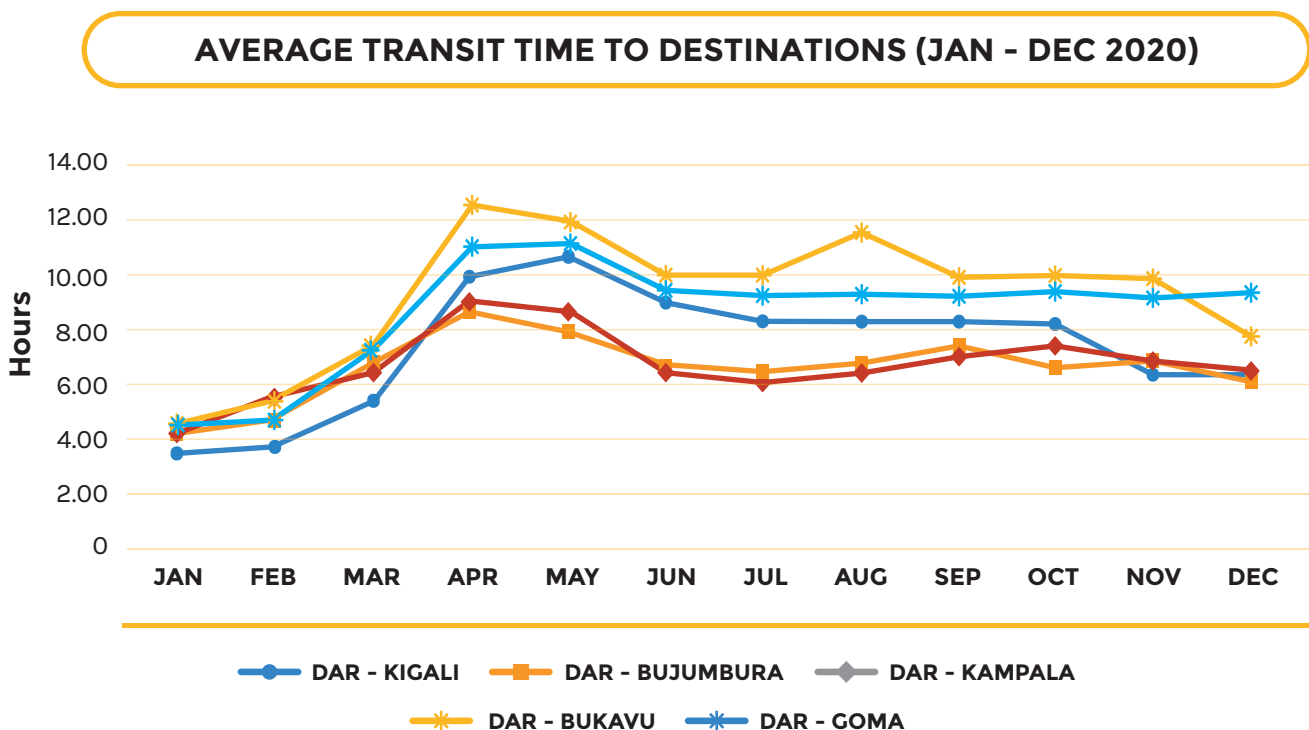
5.2 Transit time to destinations

The section highlights the transit time, which is it takes for a cargo to move from the Port of Dar es salaam to various destinations in the Central Corridor Member States. This transit time is greatly affected by stoppages along the Corridor. Some of the main stoppage reasons include; drivers' personal reasons, police checks, weighbridges, company checks, road conditions, customs check among others.

Some of the measures that have been put in place to minimize stoppages and improve transit time include the implementation of the High-Speed Weigh in Motion (HSWIM) weighbridges in Tanzania, implementation of one-stop border posts (OSBPs) almost at all border points in the Central Corridor member countries, Construction of One Stop Inspection station (OSIS) in Tanzania which will allow transit trucks to stop and be inspected at only three weighbridges, and Implementation of the Single Customs Territory (SCT) which is another measure that enhanced clearance of the goods across borders.

Figures below provides highlight on an average transit time for imports i.e. from Dar es salaam port to various destinations in the Central Corridor member states for year 2020 on monthly average. Annual comparison between 2019 and 2020 has also been provided as well as periodical comparison from 2014 to 2020.

Figure 27: Transit times to destinations



COMPARISON: 2019 vs 2020 AVERAGE TRANSIT TIME TO DESTINATIONS (DAYS)

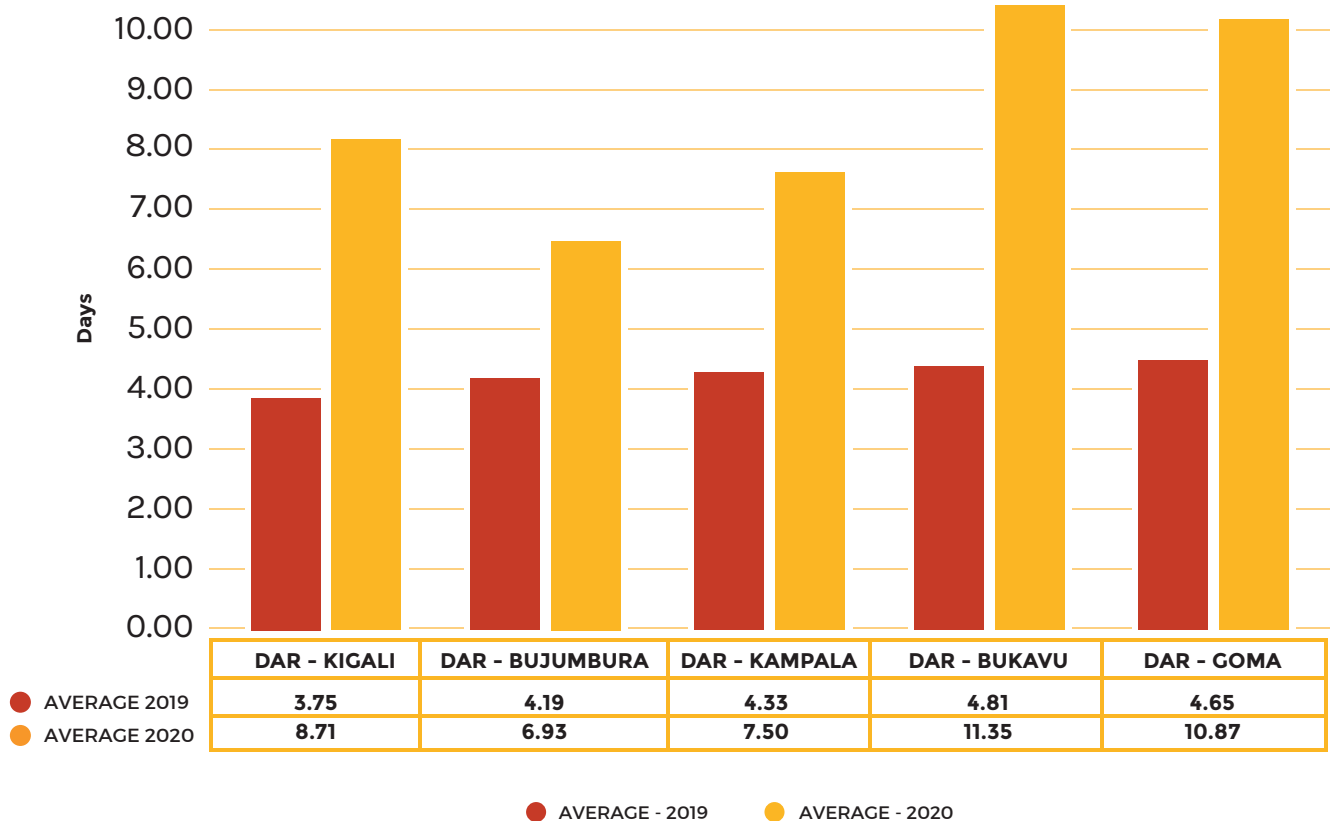
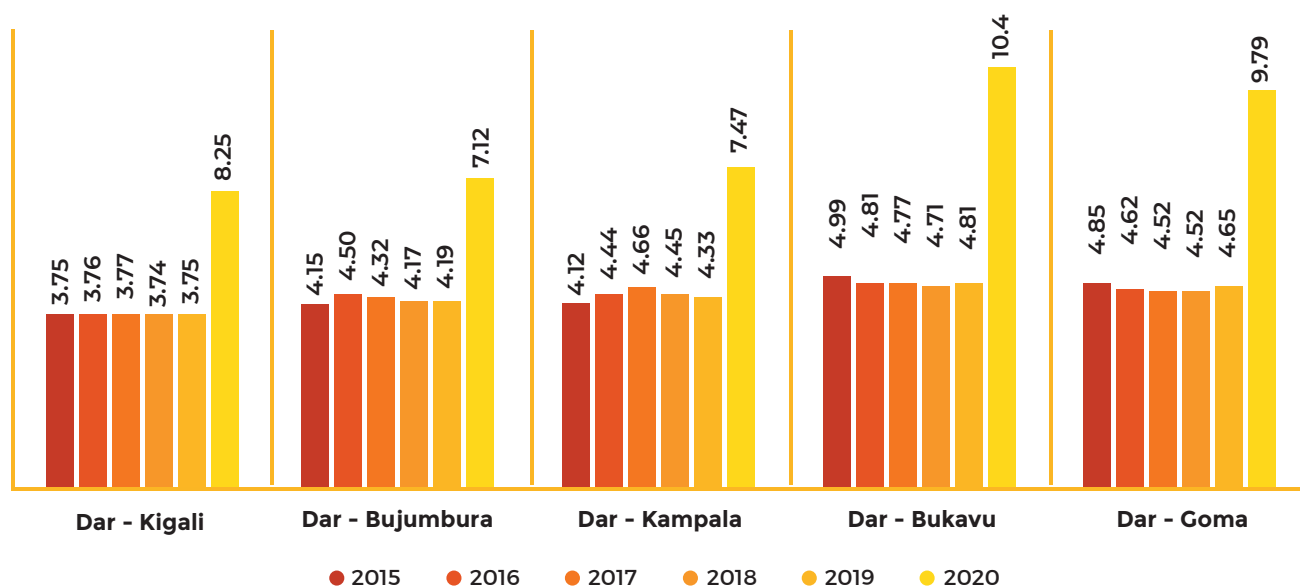


Figure 28: Comparison average transit time to destinations (days) 2014 –2020

COMPARISON: AVERAGE TRANSIT TIME TO DESTINATIONS (DAYS) 2015-2020



Source: GPS Road surveys data (2015-2017) & TATO/TAT data 2018-2020

The Transit time to destination is measured from the time cargo starts its journey from Dar es salaam to the time it arrives at the various destinations in the Central Corridor member countries. The data used in the analysis of this indicator is from the Transporters tracking systems through Transporters associations of TATO and TAT in Tanzania and the GPS/road transport surveys results. All the destinations from Dar es salaam have observed a tremendous increase in an average transit time to destinations in 2020 compared to 2019. The analysis shows that an increase of 132%, 65.4%, 73.2%, 136% and 134% was observed for the destinations of Kigali, Bujumbura, Kampala, Bukavu and Goma respectively from the Port of Dar es Salaam when comparing the year 2020 and 2019. This tremendous increase of transit time was mainly attributed to the COVID-19 global pandemic that had forced Central Corridor governments to respond with travel restrictions and bans to minimize the spread of the disease within the local community and from Country to Country. Some of the measures put in place included the curfew, lockdowns of major cities, closure of borders, closure of businesses, and introducing massive testing and screening activities as well as effecting wearing of masks, regular washing of hands and encouraging social distancing. These and others measures slowed down the movement of cargo across the Central Corridor member countries and in one way or another affected imports and exports operations and thus affecting a number of corridor performance monitoring indicators including transit time to destinations along the Central Corridor.

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Section 6

ESTIMATION OF GREENHOUSE GAS
(GHG) INVENTORY FOR CENTRAL CORRIDOR

6.1 Introduction

This section covers the development and future application of a tool for the estimation of greenhouse gas (GHG) emissions from the freight subsector of the Central Transit and Transport. The development of the tool was commissioned by TradeMark East Africa (TMEA) on behalf of the corridor and regional governments who are members of the corridor.

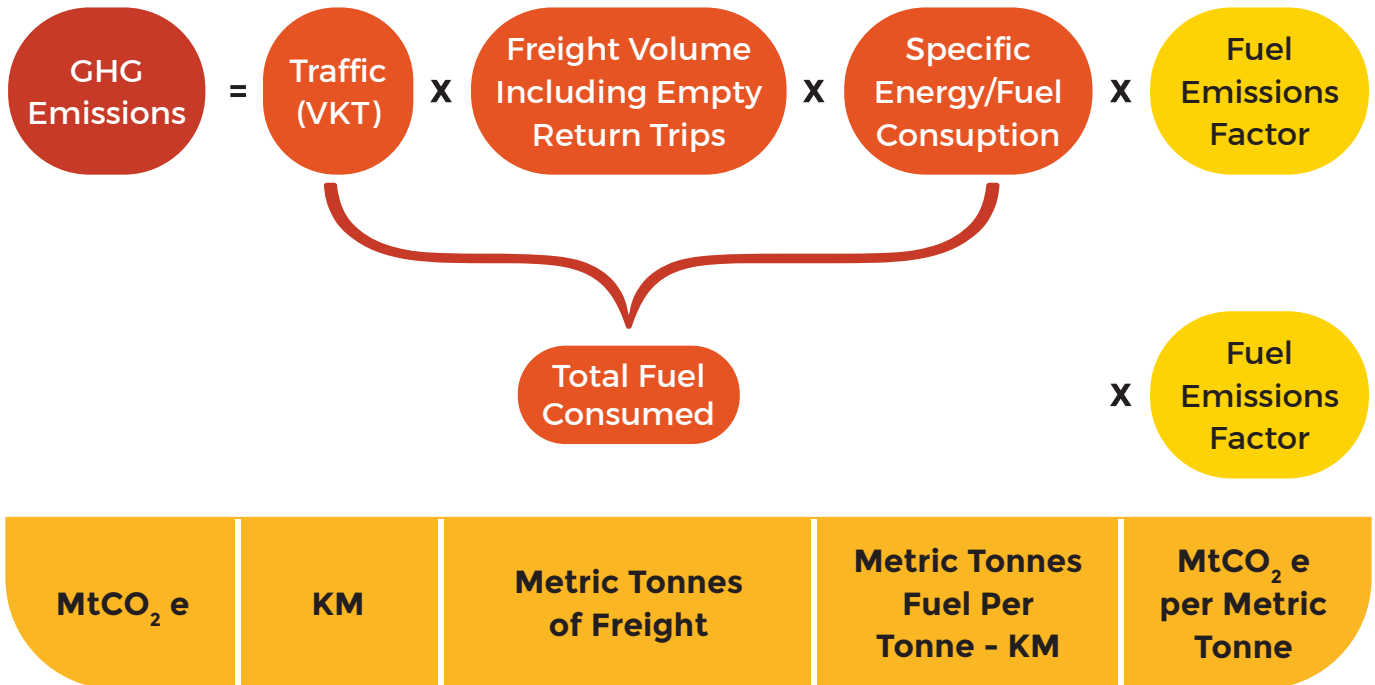
TMEA seeks to increase trade in these target countries and region by unlocking economic potential through reduced barriers to trade and improved business competitiveness. One of the focus areas of TMEA is the freight transport sector in the region, and TMEA works with the regional freight transit corridors and has been supporting the corridor management to set up corridor transport observatory systems (Corridor Performance Monitoring Tool). The observatory systems track the indicators using raw data collected from the stakeholders in all the member states. The indicators provide clear information, enabling the identification of the bottlenecks that need to be resolved to improve on the efficiency and, eventually, the trade and operations along the corridor.

Support Programme to understand the climate change impacts of the corridors, among other related issues was set to:

- i. Develop a tool for estimating the greenhouse gas (GHG) emissions associated with the corridor.
- ii. Support the corridor transport observatory systems to establish a system of collecting and apply the relevant data using the tool to regularly report on the performance of the corridors with respect to GHG emissions.
- iii. Identify GHG emission reduction potential in possible climate change mitigation projects of the corridors.

Ultimately, this work will help identify projects along the regional transit corridors which reduce the carbon intensity of freight transport operations leading to lower grams of CO₂ emitted per tonne-kilometre. This is particularly important considering that in the freight transport sub- sector, the total tonne-kilometres delivered is expected to increase three-fold between 2010 and 2050 in emerging economies and developing countries like those in the East African region (ITF 2019)

6.2 GHG Emission Model



The GHG Emission Model is based on the following internationally proclaimed framework of IPCC Guidelines for the National Greenhouse Gas inventories, 2006 for GHG emission estimations. The model is very robust and comprehensive and also, considers categorization of the vehicle (like LCV, MCV, HGV), freight volume and empty return trips of a goods vehicle, the model does not use local fuel efficiency data and uses the global fuel efficiency data sourced from HBEFA 3.3 which has been customized to local conditions by considering factors like pavement condition of the road, the average speed of the vehicles, and the number of lanes. The data like pavement condition of roads, the average speed of vehicles, and the number of lanes would not be used for GHG emission calculations. However, these data would be used for identifying climate mitigation projects like improving pavement conditions, increasing number of lanes, training or capacity building programs for drivers on optimal vehicle speed which can help in reducing GHG emissions of the corridors.

The routes which are currently considered for calculating GHG emissions of the central corridor are given below and the routes considered were based on availability of data, more routes/sections can be considered for GHG emission calculations in future.

The GHG emissions are calculated based upon the vehicle kilometre travelled, freight volume and fuel efficiency. The framework broadly used to calculate GHG emissions across various vehicle categories in the corridor is as depicted in the figure above:

Table 27: Routes of Central Corridor considered for GHG emission calculations

S/N	ROUTES/SECTIONS		ORIGIN COUNTRY	DESTINATION COUNTRY
1	Dar-es- Salaam	Morogoro	Tanzania	Tanzania
2	Morogoro	Isaka	Tanzania	Tanzania
3	Isaka	Rusumo/ Rusumo	Tanzania	Rwanda
4	Isaka	Kabanga/ Kobero	Tanzania	Burundi
5	Isaka	Mwanza	Tanzania	Tanzania
6	Lusahunga	Mutukula	Tanzania	Uganda
7	Mutukula	Kampala	Uganda	Tanzania
8	Kabanga	Bujumbura	Tanzania	Burundi
9	Rusumo	Kigali	Rwanda	Rwanda
10	Kigali	Goma	Rwanda	DR Congo
11	Kigali	Bukavu	Rwanda	DR Congo

6.3 GREENHOUSE GAS EMISSIONS RESULTS

Based on the GHG emission calculation modal provided above, the summary of results from GHG emission calculation has been provided in this section.

The estimated total GHG emission of the Central Corridor is 1.23MMtCO₂e. The GHG emission intensity of the Central Corridor is 91 gCO₂/tonne-km as detailed below;

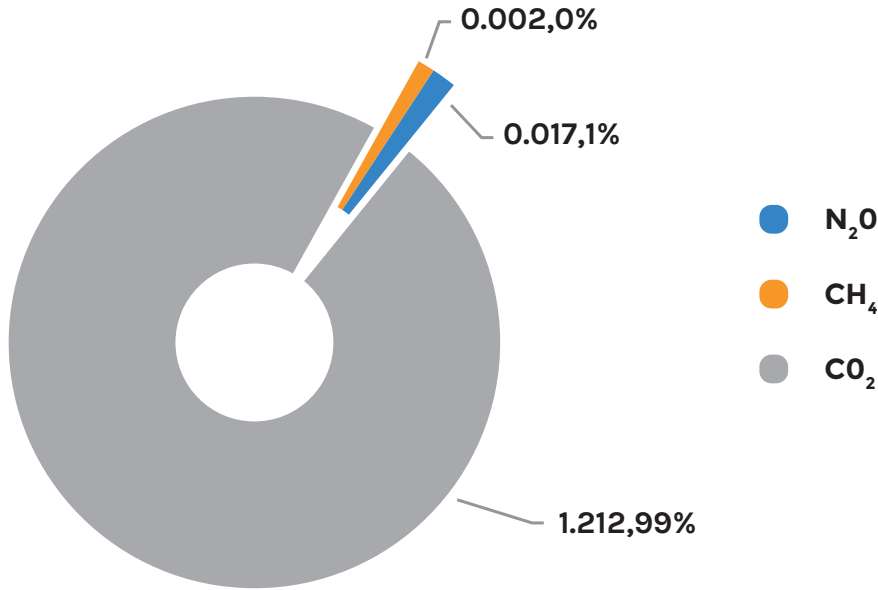
6.3.1 Estimated Total GHG Emissions of the Central Corridors - Breakup GHG wise (CO₂, CH₄, and N₂O)

The estimated total GHG emission comprises of three major GHGs, namely Carbon Dioxide (CO₂), Methane (CH₄) and Nitrous Oxide (N₂O). Among the GHGs, CO₂ contributes the major emissions followed by N₂O and CH₄.

In Central Corridor, CO₂ emissions account for about 99.00% (1.212 MMtCO₂e) followed by N₂O which is less than 1% (0.017 MMtCO₂e), and CH₄ emissions are comparatively minimal. The GHG wise break up of total estimated GHG emission of the Central Corridor is provided in below figure.

CO₂ emissions accounted for significant emissions compared to other GHGs; hence the climate change mitigation measures which need to be planned for the corridor need to focus mainly on reducing CO₂ emissions.

Figure 29: Estimated total GHG emissions of Central Corridor - Breakup GHG wise (In million tones)

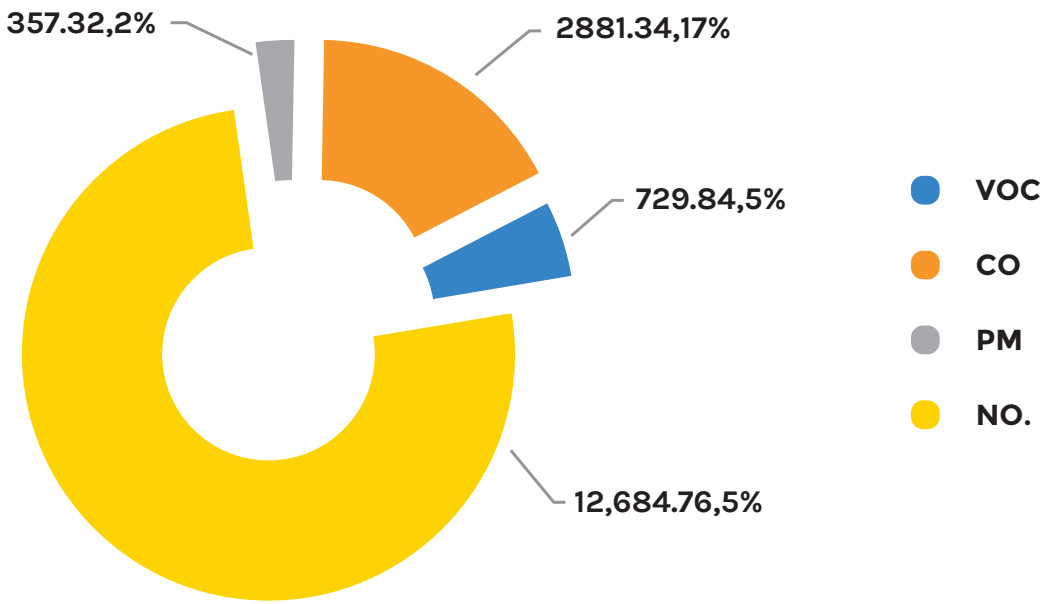


6.3.2 Total Pollutant Emissions of the Central Corridor- Breakup Pollutant wise (CO, NOX, and VOC).

The major pollutants of the corridors are Nitrogen Oxides (NOX), Particulate Matter (PM), Carbon Monoxide (CO) and Volatile Organic Compounds (VOC).

The estimated total quantity of pollutants in the Central Corridor is 16,653.26 tonnes, out of which quantity of Nitrogen Oxides constitutes around 76% (12,684.76 tonnes) of total quantity followed by CO-17% (2,881.34 tonnes), VOC- 5 % (729.84 tonnes) and PM- 2% (357.32 tonnes) as given in the figure below.

Figure 30: Estimated total pollutant emissions of Central Corridor - Pollutant wise



6.3.3 Estimated Total GHG Emissions of the Corridor - Breakup Section-wise

Apart from calculating the GHG emissions for the entire corridor, route wise/ section wise GHG emissions were calculated to determine GHG intensive routes/ sections of the corridors. After identifying, the top 5 or top 10 GHG intensive routes/ sections, corridors can prioritise the identification and implementation of climate change mitigation actions in these GHG intensive routes/sections.

In Central Corridor, the top 5 routes having maximum GHG emissions are: Morogoro – Isaka, Dar es Salaam – Morogoro, Isaka - Rusumo, Isaka - Mwanza, Isaka - Kabanga. Out of 11 routes in Central Corridor, these 5 routes constituted 94 % of estimated total GHG emissions of the corridor. Hence these routes are priority routes where climate change mitigation actions can be identified and implemented for reducing GHG emissions in Central Corridor.

The routes and sections have been divided country-wise for better comprehension and analysis, and details are figuratively represented below.

Figure 31: Total GHG emissions of Central Corridor routes/ sections in Tanzania - Section-wise

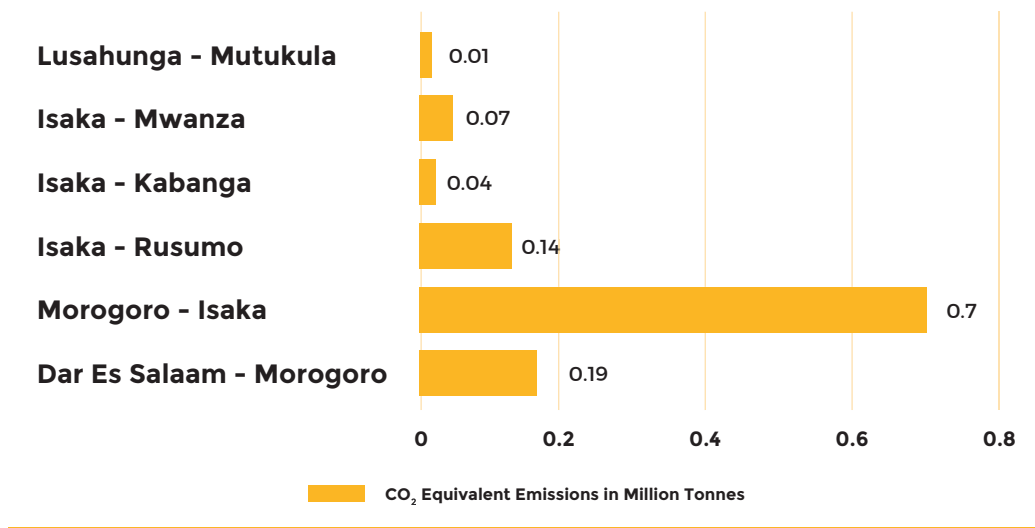
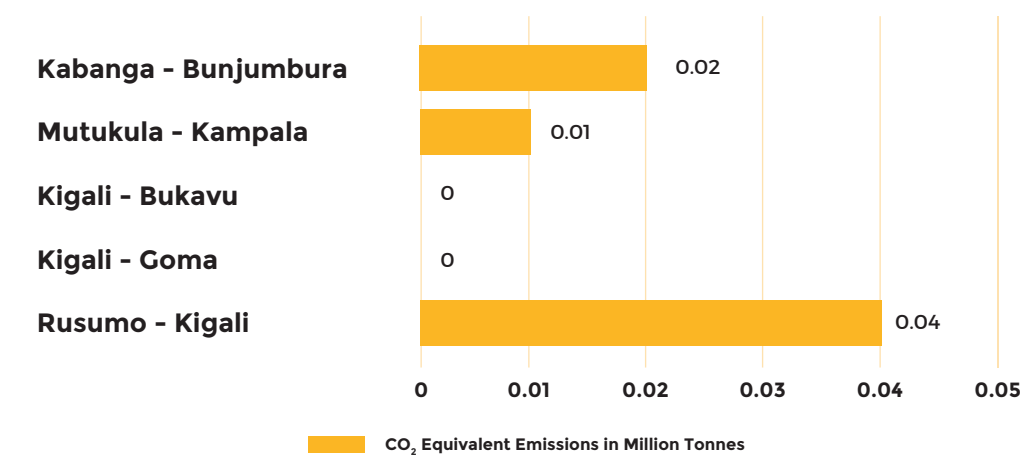


Figure 32: Total GHG emissions of Central Corridor routes/ sections in Rwanda, Burundi and Uganda - Section-wise



6.3.4 Estimated Total GHG emissions - Breakup- Onward & Return (Loaded & Empty) Journey

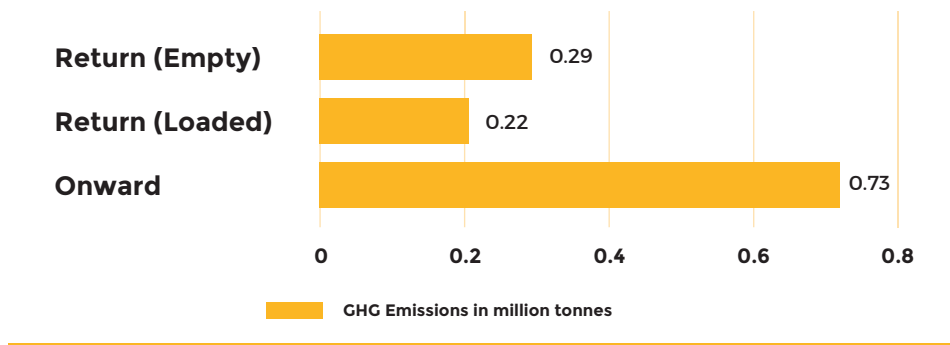
The GHG emissions for onward journey (port city to capital or major city) and return trip (capital or major city to port city) was analysed. It has to be noted that in the Central Corridor, the export is only 14% of the total trade; hence a higher proportion of empty return trips is anticipated.

It was observed that the onward journey constituted 59% (0.73 MMtCO₂e) of estimated total GHG emissions and return journey constituted 41% (0.51 MMtCO₂e) of the total GHG emissions. In the return journey, the empty trips contributed 57% (0.29 MMtCO₂e)

of the estimated total GHG emissions of the return journey, and loaded trips contributed 43% (0.22 MMtCO₂e) of the total GHG emission of the return journey.

It was further observed that empty trips constituted a significant portion of the estimated total GHG emissions of the return journey. It has to be noted that in empty trips as well as in the loaded trips, GHG is emitted however in the empty trips, fuel is consumed, and subsequently, GHG is emitted without carrying out any useful work (no goods are transported). Hence empty trips not only cause climate issues but also affect or increase the logistics cost substantially. Therefore, corridors, along with truck operators, need to take initiatives like route optimisation, reverse logistics, truck aggregator model (similar to cab aggregator model of Uber) etc., to reduce empty return trips.

Figure 33: Estimated total GHG emissions – Breakup - Onward & return (loaded & empty) journey - Central Corridor



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PART II: SPECIALIZED SURVEYS

CENTRAL CORRIDOR-TTFA INTERVENTIONS ON
THE IMPACT OF COVID-19 PANDEMIC IN
TRANSPORT AND LOGISTICS

1. INTRODUCTION

The first case of COVID-19 was recorded in China in December 2019 and was declared as a pandemic by the World Health Organization (WHO) on 11th March 2020 where it has continued to spread across the world and in the Central Corridor regions.

In the Central Corridor, the first cases were confirmed in March for instance, Rwanda's first case of COVID-19 was confirmed on 14th March 2020 where various Government lockdown measures were put in place from Saturday, 21st March 2020, for an initial period of two (2) weeks and all borders were to be closed, cargo and Rwandan nationals being exempt, with a mandatory 14-day quarantine.

Burundi's Health Minister Dr. Thadée Ndikumana confirmed the country's first two cases of COVID-19 on 31st March, while earlier on 12th March, the government instituted 14-day quarantining for people entering Burundi from affected countries.

Uganda confirmed its first COVID-19 case on 22nd March where on 30th March, the President declared a nationwide curfew from 7 pm to 6:30 am, which would run for 14 days to prevent the spread of the disease. Likewise, on 16th March, the first case in Tanzania was confirmed where on 23rd March, the Government announced that all incoming travellers from most COVID-19 affected countries would be placed in quarantine for 14 days. DRC as well confirmed and reported the first case in the country on 10th March.

The pandemic had forced Central Corridor Governments to respond with travel restrictions and bans to minimize the spread of the disease within the local community and from Country to Country. Some of the measures put in place included the curfew, lockdowns of major cities, boarder closure, closure of businesses, massive screening, effective social distancing even at work etc. These and others are slowed down the movement of cargo across the central corridor member countries and in one way or another affected imports and exports operations and thus affecting a number of corridor performance monitoring indicators.

Towards the end of the year 2020, travel and cross-border restrictions along the central corridor member countries were eased and thus reducing cross-border hurdles that transport and logistic sector were experiencing, however some of the internationally accepted measures are still in place to keep everyone safe. This section of the report highlights some of the interventions undertaken directly by CCTFA to address Covid-19 pandemic in a view of improving corridor performance indicators;

2. Interventions undertaken by CCTFA

2.1 Special assessment of the Impact of Covid-19 impact on Transport and logistics

Through Transport observatory, which is a corridor performance diagnostics and performance monitoring tool, The CCTFA published a special Transport Observatory Bi-Annual report Jan-

June 2020 highlighting the performance indicators for the first six months of the year 2020 in comparison with the same period 2019 with focus on the impact on transport and logistics operations following the outbreak and global spread of the Corona virus pandemic (COVID-19). Various governments measures, directives and guidelines issued at various dates are also detailed in the table below per various countries. Governments Directives/Guidelines that had significant impact on cargo movement along the central Corridor in April 2020.

Table 28 Various governments measures on Covid-19.

Table 28 Various governments measures on Covid-19

DATE	COUNTRY	DIRECTIVE / GUIDELINE
10th April 2020	Burundi	- Borders with Rwanda and DRC remain closed except for the cargo already cleared up to 27 th March 2020. The border with Tanzania remained open.
	Uganda	- All crew members in cargo trucks entering Uganda are being tested for Covid-19 before they are granted entry.
13th April 2020	Burundi	- All borders are now open where truck drivers must ensure minimal interaction with the community. - Drivers and conductors must follow the guidelines and ensure proper hygiene through washing their hands among other measures and those disregarding the guidelines to be punished according to the law
14th April 2020	Uganda	- Truck drivers and crews entering Uganda allowed to continue their journeys as they wait the test results. Those testing positive to be managed by the government.
16th April 2020	Rwanda	- Customs agents at Rusumo border will continue with clearance of essential cargo only. The agents will however camp at the border to stop physical contact with the community.
18th April 2020	Uganda	- Covid-19 to be enhanced at the key borders targeting truck drivers with deployment of additional mobile testing equipment.
		- Standard operating procedures and the Joint border clearance forms with truck drivers' details have been developed.
		- Truck routes to be strictly followed have been mapped with tracking mechanisms also in place.
	Rwanda	- To start monitoring the truck driver's health and behaviour enroute to their destinations to prevent interactions with the community.
19th April 2020	Rwanda	- Trucks are being escorted in Convoys of 30 from Rusumo border to special area designated for covid-19 testing before dropping cargo to ICDs and warehouses.

- Continuation on next page.

DATE

COUNTRY

DIRECTIVE / GUIDELINE

DATE	COUNTRY	DIRECTIVE / GUIDELINE
26 th April 2020	Rwanda	<ul style="list-style-type: none">- All Customs clearing processes will be carried out at the entry border points to manage the entry of trucks into the country, where Kiyanzi were designated for trucks through the Central Corridor.- Warehouses services were being extended at the border posts of Rusumo effectively Monday 27th April.- All transit trucks will be escorted to borders in Convoys.
27 th April 2020	Rwanda	<ul style="list-style-type: none">- All cargo and conveyors to be offloaded and transhipped at the customs point of entry.- Transporters with two truck drivers (one from the point of departure and second driver based on Rwandan territory) to be allowed to proceed to destinations after fulfilling health guidelines.- All services offered by customs offices in Kigali and other customs-controlled areas to be availed at Rusumo.- ICDs to be availed for effective loading and transhipment exercise at the customs entry points.- Clearing of Goods to be done using the pre-clearance mechanisms currently in place i.e SCT clearance framework and payments of duties and taxes before the arrival of goods for quick release at the entry. All declaration documents accompanying cargo to be submitted to customs electronically.- Perishable and special consignments to proceed to destination after change of crew members (truck drivers) in respect with the current health guidelines in place.

The report focused on the impact on transport and trade patterns in the Central Corridor member countries of which the analysis indicated that the effects were not immediately felt as most of the performance indicators reflected slight differences for six month of the year 2020 compared to the same period 2019.

2.2 Provision of PPEs through Rwanda Private Sector Federation at Rusumo

Central Corridor Transit Transport Facilitation Agency (CCTTFA) and Rwanda Private Sector Federation (PSF) have signed Memorandum of Understanding (MoU) of USD 40,000 for purchase and distribution of face masks to truck drivers as part of efforts to combat COVID-19 and provide protection. The signing ceremony took place in Kigali, at the Private Sector Federation Office.

In the spirit of strengthening cross border trade by protecting truck drivers during this unprecedented COVID-19 pandemic, CCTTFA provided assistance by facilitating truck drivers with face masks to protect their lives. This is a key measure against the spread of COVID-19 along the Central Corridor. PSF was responsible for the procurement and distribution of the face masks to the eligible truck drivers at the border posts.

2.3 AWARENESS RAISING CAMPAIGN ON REGIONAL ELECTRONIC CARGO AND DRIVER TRACKING SYSTEM (RECDTS) ALONG THE CENTRAL CORRIDOR.

With the outbreak of COVID-19, technology has played a big role in managing the pandemic crisis. Measures put in place to contain COVID-19 have encouraged Governments and businesses to provide their services and operations online in order to limit physical interactions that could amplify the spread of the virus.

Among measures initiated in the East African Community is the development of the EAC Regional Electronic Cargo and Driver Tracking System (RECDTS) which is designed as a mobile phone application that enables the issuance of the East Africa Community (EAC) COVID-19 digital certificates that are mutually recognized by Partner States, thus eliminating need for multiple testing as well as contributing to alleviating ongoing congestion at East Africa border crossing point. The System is directly linked to the national Laboratory repository for all COVID-19 results for each Partner State. Only the negative results are automatically linked to the RECDTS application that has been developed and information is shared across all transport corridors through a secure mechanism.

The above system has been developed by the EAC Secretariat with the assistance of Trademark East Africa (TMEA) as mandated by the Joint Ministerial meeting of Ministers responsible for Health, Trade and EAC Affairs during their virtual conference organised on 25th March 2020.

On September 8th 2020, TMEA in collaboration with The East Africa Community Secretariat and its Partner States held a virtual event to officially roll out the Regional Electronic Cargo and Driver Tracking System (RECDT)S application that will issue jointly recognised EAC COVID-19 digital certificates.

The application provides a surveillance system to monitor long distance trucker's crew health and enable contact tracing. It allows partner states to electronically share truck drivers' COVID-19 test results; therefore, minimising need for multiple COVID-19 tests in a single trip. The reliance on manual certificates and delayed test results at the borders has been reported as one of the main reasons for costly long delays at border points. It is expected that RECDTS will contribute to protecting lives, support health related protocols and facilitate safe trade. RECDTS will be used in all partner states and will eventually be extended to EAC neighbouring countries, particularly Democratic Republic of Congo (DRC).

To address the on-going trade facilitation challenges at various Central Corridor cross borders particularly in Tanzania, it was very imperative to sensitize and raise awareness of the new facility (RECDTS) among transport and logistics value chains stakeholders involved in cross border trade, as well as the Health Officials. In this regard, the Central Corridor Transit Transport Facilitation Agency (CCTTFA) in collaboration with Tanzania Private Sector Foundation (TPSF) and TradeMark East Africa undertook various consultations aimed at jointly organize sensitization campaigns to increase awareness and usage of the application amongst drivers and other stakeholders involved in the transport and logistics value chains.

The aim is to reach out to transporters who are the primary beneficiaries of the RECDTS facility and other stakeholders involved in facilitating regional trade and transport. Consultations are at final stages thereby kickstarting the awareness campaigns in Tanzania where the team will work closely with the Government of Tanzania through four key line ministries, i.e. Ministry of Industry and Trade, Ministry of Health, Community Development, Gender & Children (MoHCDGC), Ministry of Foreign Affairs and EAC Cooperation, Ministry of Works, transport and communications. Participants are expected further to be sensitized on COVID-19 health measures being implemented in various neighbouring countries and the best ways to comply to the set guidelines without disrupting the Transport and Logistic Chain across the EAC region.

2.4 ROADSIDE STATIONS FINANCING AGREEMENT WITH GOVERNMENT OF RWANDA

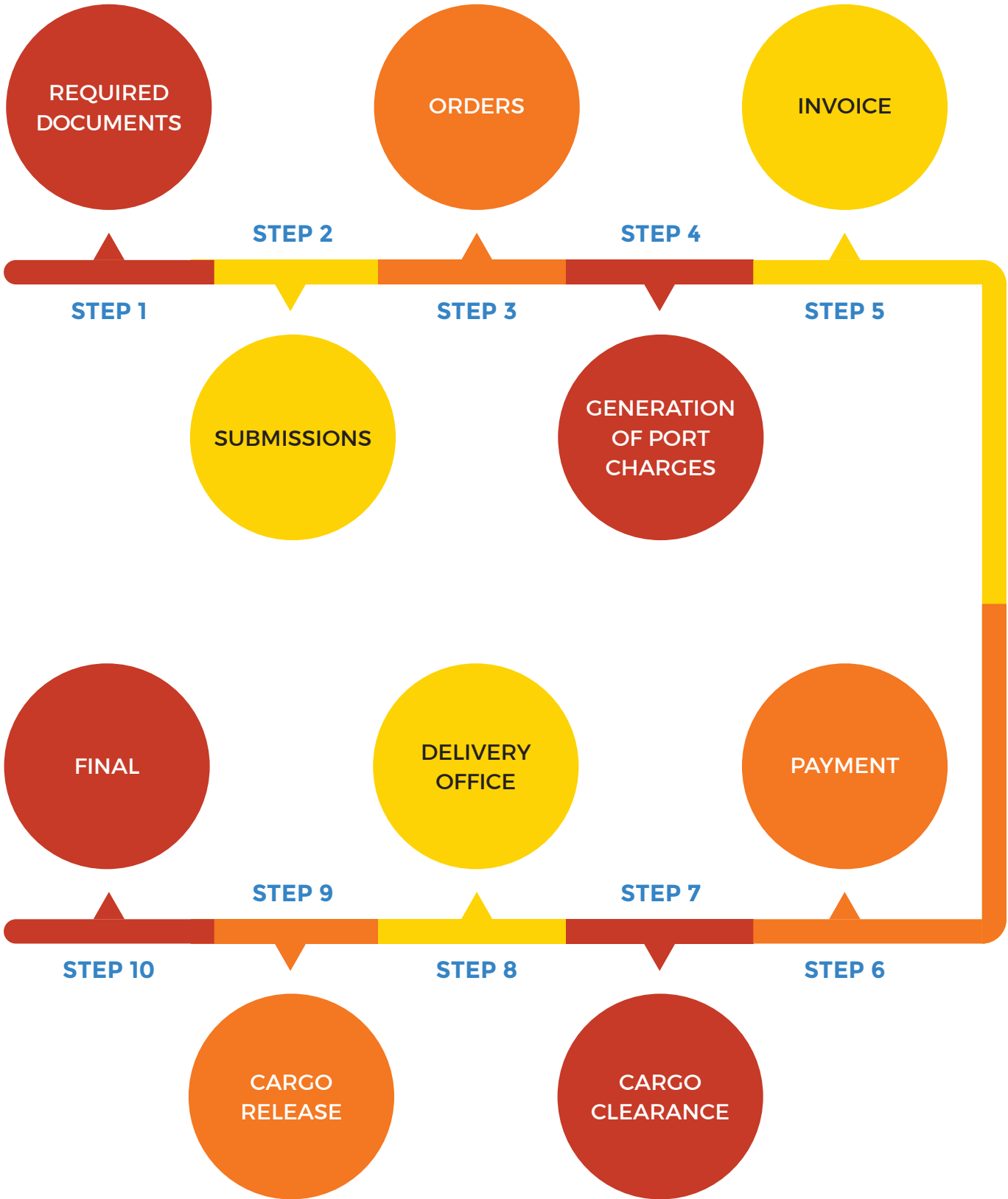
The government of Rwanda and Central Corridor Transit Transport Facilitation Agency signed a financing agreement of USD 100,000 to conduct a comprehensive Feasibility Study for the development of roadside stations in Rwanda. The signing ceremony took place in Kigali, on the 11th of December 2020, at the Ministry of Infrastructure.

Eng. Patricie Uwase, Permanent Secretary Ministry of Infrastructure signed on behalf of the government of Rwanda and Capt. Dieudonne Dukundane, Executive Secretary, signed on behalf of CCTTFA.

The feasibility study will assess how roadside stations can provide rest stops for cargo trucks, reduce driver fatigue, secure parking yards and be used by other motorists as refreshing stops. In addition, these facilities will not only improve safety of drivers but also enhance development of local communities.

ANNEXES: IMPORT AND EXPORT PROCESSES AT DAR ES SALAAM PORT

Annex 1: Import Processes at Dar Es Salaam Port



Source: TPA official Website

- Continuation on next page.

Step 1: BILL OF LADING (BL), FIND CLEARING & FORWARD AGENT (CFA).

Step 2: HAND OVER THE BL TO THE CFA, BE SURE TO KEEP A COPY

Step 3: CFA GETS CUSTOMER RELEASE ORDER FROM TRA, CFA GETS DELIVERY ORDER FROM SHIPING AGENT.

Step 4: GENERATION OF PORT CHARGES, SCAN AND UPLOAD THE 3 DOCUMENTS INTO TPA SYSTEMS TO GENERATE INVOICE FOR PORT CHARGES.

Step 5: TPA'S BILL SYS WILL GENERATE AN INVOICE WITH A PRN FOR PAYMENT, YOU CAN CHECK HOW MUCH YOU NEED TO PAY HERE.

Step 6: PAYMENT OF PORT CHARGES AS PER INVOICE THROUGH BANKS/MOBILE MONEY WITH REFERENCE.

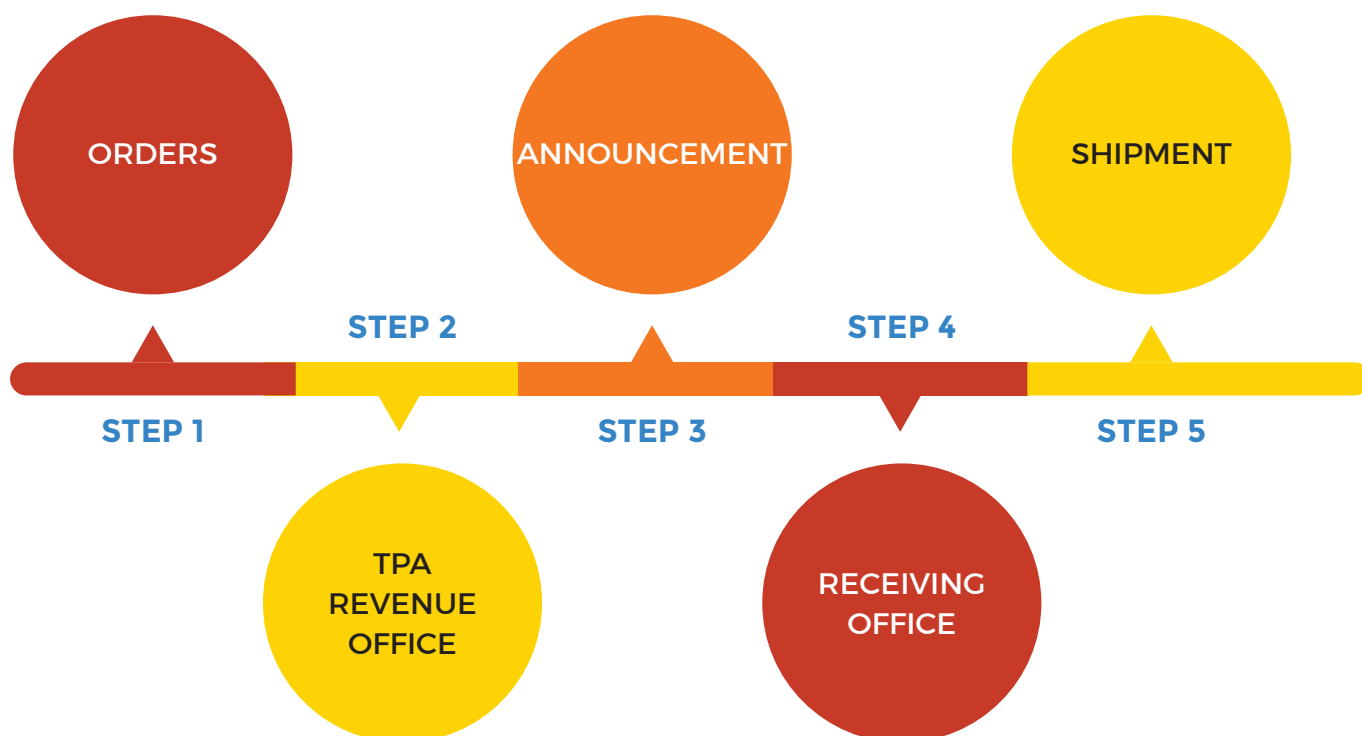
Step 7: CFA WILL BEGIN CARGO CLEARANCE PROCESS USING TPA SYSTEMS.

Step 8: THE CARGO IS CLEARED FROM THE YARD AND LOADED ON THE TRUCK THAT WAS ANNOUNCED BY CRF.

Step 9: CARGO IS CLEARED AND RELEASED TO THE CFA.

Step 10: COLLECT YOUR CARGO FROM THE CFA.

Annex 2: Export Processes at Dar es Salaam port



Source: TPA official Website

Step 1: APPOINT A LINCENSED CFA-HAND OVER DOCUMENTS TO CFA, CFA UPLOADS DOCUMENTS TO TANCIS.

Step 2: CFA SUBMITS SHIPPING ORDER WITH TRA APPROVED LOADING LIST, INVOICE ISSUED FOR PAYMENT, TPA VERIFIES PAYMENT AND ISSUES RECIEPT.

Step 3: CFA UPLOADS TRUCK ANNOUNCEMENT DOCUMENT TO THE CARGO SYSTEM. DRIVER GETS GATE-IN TICKET FROMTHE SYSTEM.

Step 4: CARGO ARRIVES AT THE PORT, TPA ACCEPTS CARGO FOR SHIPMENT.

Step 5: CARGO IS LOADED IN THE SHIP AND SHIPPED TO ITS DESTINATION.





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