



The Gambia

Transport Sector Diagnostic Study



AFRICAN DEVELOPMENT BANK GROUP

Transport, Urban Development
and ICT Department

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FOREWORD

This report was prepared by the Transport, Urban Development and ICT Department (OITC), under the supervision and guidance of Mr. Jean Kizito Kabanguka, Manager, Transport Division 1. The assignment was managed by Mr. Aaron Mwila, Senior Transport Engineer (OITC). The report was drafted by Mr. Micah Olaseni Ajjo (Consultant Transport Economist) with contributions of several experts in the Transport and ICT Department who reviewed the draft and provided valuable comments, data and information. Special thanks also go to Government of the Republic of The Gambia for providing the Bank Team maximum support in finalizing this report.

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ABBREVIATIONS AND ACRONYMS

ADT	Average Daily Traffic	GoTG	Government of The Gambia
AFC	Africa Finance Corporation	GPA	Gambia Ports Authority
AfDB	African Development Bank	GPTC	Gambia Public Transport Corporation
ADF	African Development Fund	GRA	Gambia Revenue Authority
AFTN	Aeronautical Fixed Telecommunication Network	GRT	Gross Registered Tonnage
AS	Aircraft Safety	HDM IV	Highway Design and Management Tool Model - IV
ASI	Air Safety Infrastructure	IASA	International Aviation Safety Assessment Program
ASO	Air Safety Operations	ICAO	International Civil Aviation Organization
AVSEC	Aviation Security	ICD	Inland Container Depot
BADEA	Arab Bank for Economic Development in Africa	IDB	Islamic Development Bank
BASA	Bilateral Air Service Agreement	ILO	International Labour Organisation
BEAC	Belgian Airports Consultants	ILS	Instrument Landing System
BIA	Banjul International Airport	IMO	International Maritime Organisation
CBD	Central Business District	ISRT	Inter State Road Transit
COSCAP	Cooperative Safety and Craft Airworthiness Programme	MAP	Maintenance Action Plan
DME	Distance Measuring Equipment	MOWCI	Ministry of Works, Construction and Infrastructure
DVOR	Doppler Very High Frequency Omni-directional Radio Range	NACO	Netherlands Airport Consultants
EBID	ECOWAS Bank for Investment and Development	NPV	Net Present Value
ECOWAS	Economic Community of West African State	NRT	Net Registered Tonnage
EIRR	Economic Internal Rate of Return	NTA	National Transport Agency
ESW	Economic and Sector Work	NTCA	National Transport Controllers Association
EU	European Union	NRA	National Road Authority
FAA	Federal Aviation Administration	PAGE	Program for Accelerated Growth and Employment
GAMWORKS	Gambia Agency For Management of Public Works	PRSP	Poverty Reduction Strategy Paper
GBoS	Gambia Bureau of Statistics	RTA	Road Transport Accident
GDP	Gross Domestic Product	R.MAP	Road Maintenance Action Plan
GCAA	Gambia Civil Aviation Authority	SARPS	Standards and Recommended Practices
GIA	Gambia International Airlines	TEU	Twenty Feet Equivalent Unit
GMA	Gambia Maritime Administration	TRO	Transport Regulatory Office
GMD	Gambia Dalasis	TPO	Transport Policy Office
		UNSO	United Nations Sahel Organization
		VOC	Vehicle Operating Cost

EXECUTIVE SUMMARY

A. Background

The Gambia has a land area of about 11,300 km², and is one of the smallest countries in continental Africa. Its land area stretches 450 km along the Gambia River and except for a 60 km Atlantic Ocean front, The Gambia is surrounded by Senegal. The Gambia itself is divided into two distinct parts - the North and South Banks by the Gambia River. This geography does not only make it necessary to connect the two Banks of the Gambia River but it also urges to use the national transport system of the Gambia for the national integration of Senegal; a country divided into two by the Gambia River. This is a requirement if one seeks to facilitate transit traffic from South to North.

The Gambia's national development strategy recognized the role of transport as critical for the efficient functioning of the national economy. It can provide vital and essential links between areas of production and markets and also facilitate access to social and economic facilities.

The African Development Bank in this context, and for its future programmatic engagement through its lending and non-lending activities with The Gambia, has to deepen its knowledge on emerging transport sector issues. More specifically, it needs to know how best to support the Government's development efforts as elaborated in the Gambia Incorporated Vision 2020. This is the vision that is being implemented within the framework of successive National Development Plans; the latest of which is the Programme for Accelerated Growth and Employment (PAGE) 2012-2015.

B. Sector Development Context

The development of The Gambia Transport Sector had its roots in the colonial period. The natural port of Banjul, supported by the River Gambia. Provided the international gateway and main transport artery for The Gambia and its neighbouring countries of Senegal, Mali, Guinea Bissau and Guinea Conakry external trade. The Gambia Transport system is currently made of three modes of transport:

- the road transport system consisting of a primary network

of 818.53 km of inter-urban trunk roads, of which 649kms are paved, 303 kms of secondary roads mainly gravel surfaced, 37 km of urban roads confined mainly to Greater Banjul area but excluding primary/secondary roads intercepted by Greater Banjul Urban boundary, and 2,556 kms of rural feeder roads; of gravel/earth surface:

- air transport system provided by Banjul International Airport at Yundun, and
- maritime and river transport consisting of the Banjul Port and The Gambia River.

The Gambia Transport Sector development had been informed by the country's spatial geography of being divided into two by the River Gambia This called for the connection of its two banks for national integration, the need to coordinate sector development with Senegal that surrounds the country except for its small coastal strip; the export driven development strategy of The Gambia that requires appropriate transport infrastructure to port gateways and across frontiers within ECOWAS; and for its transport system to service the transit traffic and re-export trade to its hinterland countries of Senegal, Guinea Bissau, Mali and Guinea Bissau.

The obligation to use its transport system to service the transit traffic of its neighbor, Senegal calls for Good Neighborliness, Good Partners and Good Prospects, and requires the leveraging of national sovereignty for mutual interest in transport policy, regulation and coordination for the development of the sector and regional economic development within the context of ECOWAS Inter State Road Transport (ISRT) Convention and the bilateral/ tripartite transit agreements signed with Senegal and Mali.

The Vision 2020 launched in 1996 and under implementation by successive National Development Plans, and the economic reforms that were initiated since it was launched, particularly the introduction of a free market economy and loosening controls had delivered major changes to the structure of the economy. Over the period 2000 to 2009, the real GDP growth rate stood at over 5.1% per annum, population growth rate was estimated at 2.6% per annum while the per capita income growth rate stood at 2.5% per annum Agriculture including fisheries remain the mainstay of the economy accounting for about 30% of the GDP, and provides livelihood for about 70% of the population. The cash crop production is mainly groundnut and vegetables, with groundnuts accounting for 60% of domestic exports. Transport, sto-

rage and communication sector account for about 11% of GDP in 2010 (out of 53% contribution by the Service sector). The tourism sector is the main earner of foreign exchange and accounts for about 9% of GDP while the industrial sector accounts for about 12% of GDP in 2010.

The demand for transport is a derived demand, coming from the productive and social sectors of the economy. Increasing and sustained growth in the agricultural, industrial and tourism sectors will impose higher demand on the transport system, and the transport sector has to respond by quantity and quality of transport infrastructure and services that do not only improve connectivity between producers and markets but also improve access to socio-economic facilities in order not to constrain the overall social economic development of the country. PAGE 2012 – 2015, the latest of the National Development Plans is based on implementation of Vision 2020 and various sector strategies and is aligned to the Millennium Development Goals (MDGs) of The Gambia with principal strategic objective to accelerate growth and employment and reduce poverty. According to the African Infrastructure Country Diagnostic Study (2010), for The Gambia's transport sector to meet the basic connectivity role, there is a need of about USD 35.8 million per annum, which is equivalent to 7.75% of GDP. But, this is mainly for maintenance and improving conditions of existing infrastructure.

The PAGE recognizes the role of Transport as the artery of the modern economy and for accelerated growth and employment creation under 'Pillar II – Improving and Modernizing Infrastructure' of its five pillars and as a sine-qua-non for expansion of productive capacity, competitiveness of the economy and also as a facilitator of an growth. The transport sector must therefore respond to the following challenges among others in the National Transport Policy Document 1998-2006:

- isolated regions within the country;
- meeting the mobility needs of the population estimated at 1.713 million with increased rate of urbanization;
- integration of various transport modes so that each mode is provided in appropriate quantity, quality and form;
- appropriate transport policies and regulations to achieve operational efficiency;
- transport infrastructure financing;
- road traffic safety/excessive axle load management;
- institutional and capacity building needs;
- private sector involvement/local construction industry.

C. Sector Policy, Institutions and Regulatory Framework

The policy objectives of the sector besides technical, financial and economic aspects addressed the issues of adequacy, efficiency, safety, reliability, sustainability, equity and environmental protection as guiding principles. So, the policy objectives of the Government were focused on four themes:

- each element of transport should be provided in the appropriate quantity, quality and form;
- all components of transport are combined in a technological optimal way for each mode of transport to carry the traffic it is best suited and at least cost to the economy;
- each mode is operated most efficiently in a level policy play field environment;
- appropriate institutional mechanisms exist to ensure effective inter-modal coordination and communication between the user, operator, regulator and the Government.

The institutional framework for implementing the directives of national transport policy and PAGE Transport Sector Programme include the Ministry of Works, Construction and Infrastructure (MOWCI). It has responsibility for overall policy direction and oversight (including regulation of the road sub-sector) and the other parastatals and agencies in charge of operation and regulation of the various modes. The National Roads Agency (NRA) with a Road Fund under the same Board is responsible for the planning, construction and maintenance of the national road system; the Gambia Civil Aviation Authority (GCAA) has operational and regulatory responsibilities for the civil aviation sub-sector; while the Gambia Ports Authority (GPA) is responsible for the planning, construction, operation and maintenance of maritime/inland waterways infrastructure and the nascent Maritime Transport Administration created in 2010 is the sub-sector regulator.

Deepening of institutional reform and improved governance for the Civil Aviation subsector is recommended. This for separation of operational and regulatory functions of the GCAA as traffic increases to a level of commercial profitability for the Banjul International Airport (BIA). Also for the Roads sub-sector, creation of a separate Road Fund Board apart from the Board for the NRA to improve governance and for checks and balances to enable the

Road Fund carry out the required technical and financial audit of the sub-sector projects for value for money is recommended for further sector reform.

The institutional mechanism for sector wide regulation and integration of all the transport modes as a basis for prioritization and in determining the appropriate quantity, quality and form of infrastructure recommended in the National Transport Policy (1998-2006) document by upgrading the Transport Planning Unit within the MOWCI to a National Transport Agency (NTA); has led to the recurring problem of uncoordinated transport infrastructure planning and lack of a Transport Sector Data base to inform sector wide policy formulation and planning. To improve sector efficiency, this reform need to be carried through and the NTA established as proposed in the Policy document. The two units of:

- policy/regulation and
- planning should be increased to three to include a unit for Public Private Partnership to drive the privatization policy of government in the sector.

The road sector is the weak link in the enforcement of existing traffic laws and regulations. Besides, some of the traffic laws and the penalties specified there in have become obsolete and irrelevant as deterrents. Some regulations in terms of level of service and technical standards of vehicles needed to be reviewed and updated for the efficiency of the sub-sector.

D. The Road Sub-Sector

The total classified road network of The Gambia is estimated at about 3,920.53 km of primary, secondary, urban and rural roads. About 818.53 km (20.88%) of the network of which 686 km is paved function as the primary road system, connecting important economic centers to gateways (sea port, airport, and border crossings) and the capital city of Banjul. About 93.0% of the primary network is oriented in a latitudinal way running in a West-East direction on the North and South Banks of the Gambia River as per the shape of the country while the balance of only about 85 km connect the two primary West-East highways on both banks of the Gambia River in a longitudinal axis. The secondary road network of 359 km, mainly gravel surfaced accounts for 9.16% and connect the secondary towns/economic centres to the primary road network. The urban roads estimated at 187 km (excludes

the primary and secondary roads intercepted by Banjul urban boundaries - 4.77% of the network) are confined to the Banjul/Greater Banjul Area. The rural feeder roads consist of 2,556 km of gravel/earth roads and account for 65.19% of the classified network.

The quantity of national road infrastructure in terms of coverage (road density of 34.7 km/100km²), connectivity and accessibility is above the average for most sub-Saharan African countries and meets the established base benchmark for The Gambia as established under the AICD Study. But there is a big challenge in terms of required infrastructure quality due to neglect of maintenance which has affected level of service with 82.50% of the network in poor condition resulting in high levels of vehicle operating costs. There is a big backlog of periodic maintenance and considerable part of the network requires major rehabilitation; except the primary roads system, where ongoing periodic maintenance through annual maintenance contracts, upgrade and rehabilitation works contracts to the private sector supported by donors has restored the network to about 80% in good condition. A rehabilitation programme on the most trafficked part of the rural road network covering about 240kms has been prepared under the EU/TA to bring part of the rural network to good condition is finalize and recommended for donors' support if the agricultural transformation agenda and all inclusive growth under the PAGE is to be achieved.

There is the challenge for the Government carrying through the reform in the sector by putting in place a second generation Road Fund for sustainable financing of road maintenance based on fuel charges as main source of revenue as in most African countries. The subvention provided from the budget over the years 2006-2011 has been consistently less than 30% of annual maintenance needs estimated at about GMD 250 million. As per the EU/TA on proposed Road Sector Policy, it is estimated that a levy of an average of GMD 3.0 (US12 cents) per litre on approximately 75 million litres of diesel and petrol currently sold per annum would raise an additional revenue of between GMD 180 million and GMD 200 million annually. This complemented by other sources of revenue for the Road Fund will more than meet the required annual maintenance cost estimate of about GMD 250 million for a sustainable road network. Fuel levy will to a large extent reflect the intensity of use of the road network by the road user and to some extent the vehicle

size. Resolving this is a major challenge to new investment in the road subsector.

Other operational issues of the sub-sector concern safety and excessive axle loads; with over 36% of trucks overweighted in a recent survey of 2009. A programme of weigh bridges is proposed to be financed under the EU grant resources. The institutional framework to address road safety is not in place and little attention is given to promoting road safety; though now back in the forefront of Government policy agenda as a high powered committee is handling the issue and needs to involve all the major organization including education, health, police, and private sector. The other sector issues are:

- prioritized road plan based on system connectivity instead of individual link approach for which the NRA is being capacitated by the EU,
- development of the local construction industry, and
- trade and transport facilitation measures on regional road networks and establishment of Corridor Management Organizations driven mainly by the private sector to improve efficiency of transport and trade corridors based on Banjul Port. Action Plans covering all these issues have been recommended as they will improve the efficiency of the subsector and have a multiplier effect on the economy.

E. Urban Transport Sub-Sector

The urban transport infrastructure of the Gambia consist of 187km of road of which 37 km are in Banjul and 150km are in the Greater Banjul Area. The primary focus in the urban transport sub-sector is to address the emerging transport crisis in the Greater Banjul Metropolis, which is facing the challenge of rapid urbanization. A key deficiency in managing urban transport is lack of institutional authority due to multiplicity of agencies involved. Currently, there is a blur with respect to institutional responsibilities for the hierarchy of urban roads network and regulation of urban transport services on the arterial, collector and local roads in urban centres. This would need to be rationalized and strengthened in order to improve efficiency of the urban transport system and accountability for system failure particularly for the interrelated plans covering road network, bus network and truck routes, and traffic management plan for Central Business District (CBD) in the city environment.

For the future, the direction in improving performance of urban transport in the Greater Banjul Metropolis should

be in prioritization of urban transport infrastructure to protect movements of public transport and Traffic (NMT) against unrestricted expansion of private motorized trips. An incentivized private sector may need to be drawn into Public Transportation activities particularly those that can operate big buses on the arterial and collector roads and invest in terminals combined with route allocation on the local and secondary roads based on an agreed level of service. Enhanced traffic laws and regulations however need strict enforcement by the police to complement traffic management measures at intersections and thereby improve urban traffic circulation in Banjul and its peri-urban areas. In the long term, it is necessary with the increasing rate of urbanization to plan ahead for a Bus Rapid Transit System which could be the core of the transport plan for Greater Banjul Area, but would need building appropriate public sector institution for urban transport regulation and partnering with the private sector concessionaires for operation.

The policy stream with respect to infrastructure, traffic management, service quality and route network development has been discussed as the way forward. A Greater Banjul Land Use and Transportation Plan Study to be based on Bus Rapid Transit System has been recommended to inform medium to long term solution, with institutional development leading to establishment of a Banjul Metropolitan Transport Authority in charge of both infrastructure and public transport. Some key issues for action to improve current poor road infrastructure and chaotic situation of unregulated para-transit mode has been recommended for Action; viz -

- definition of responsibility for hierarchy of road infrastructure (of arterial, collector and local);
- funding of urban road maintenance, traffic regulation and enforcement; and
- introduction of traffic demand management measures and signalization at intersections.

F. Maritime and River Transport Sub-Sector

The Port of Banjul is the only maritime port managed by the GPA and is the gateway for the export/import trade of the Gambia accounting for over 80% of total international trade. The Gambia Maritime Administration is responsible for the regulation of the maritime trans-

port sector. The Banjul Port presently has two jetties, the Banjul Wharf and the New Banjul Jetty with combined quay length of 428 metres. The two installations comprise at inner and outer sides five berths and a Ro-Ro Ramp facility at the northern end of the New Banjul Jetty. Depth at approach channel and at berth sides are a constraint to the bigger vessels in the changing trends in the port and shipping industry.

The port throughput was recorded as 1,402,135 metric tonnes in 2010 and increased to 1,718,938 metric tonnes in 2011 representing an increase of 9.0% over the previous years. Based on berth occupancy ratio of 65% applied in the 2008 Ports Master Plan Study as trigger for additional berth capacity, the GoTG is planning for a port expansion with a 200 metre wharf extension with capacity to handle larger vessels of over 20,000 DWT. But this is on the proviso that there is concessioning of the container terminals which will lead to increased efficiency to restore the ports competitive edge to participate in transit and re-exports trade currently threatened by increased competition from neighbouring ports of Dakar and Conakry that have moved to landlord model ports. The Banjul Port is still a public service port model. This has affected its efficiency compared to these neighbouring ports; resulting in erosion of its competitive position for the same hinterland. Other infrastructure constraints include additional container storage area needed to improve the capacity and efficiency of the Port of Banjul, inter-modality in terms of inland transport connections particularly on regional road networks with trade and transport facilitation instruments and use of Gambia River complemented with Inland Container Depots. Major investment in infrastructure, however, needs to be preceded by port reforms.

Due to collapse of river transport, river ports infrastructure are not in use and have fallen into disrepair. Thus, infrastructure supply alone would not revive the river transport industry, as analysis of flow of freight based on origin/destination survey on the road network indicated weekly movements of construction aggregates, cement and building materials, and other bulky freight on the road that can be shifted to river transport given a level playing field for all modes. Participation of the private sector in river transport services therefore would require a holistic transport sector multi/intermodal planning and appropriate infrastructure pricing

policies and incentives; including axle load control on the road network, increase in road access fees, fuel levy charges on road user vehicles and tax holidays to water transport operators for bulk haulage by barges. Besides, trade technologies have changed and the use of RoRo ships and intermodal terminals to back up policy changes and other tax incentives are needed to get the private sector operators back into the river transport business in The Gambia.

G. Air Transport Sub-Sector

Air Transport plays a major role within the Gambia Transport System in providing international gateways for the business community with the rest of the world and is of critical importance for the Gambia Tourist Industry. Because of the small size of the country, domestic air transport has not been part of the internal transport system. Transport by Air into and out of The Gambia is via the Banjul International Airport (BIA) situated at Yundum, about 24 kilometers to the south-east of Banjul and it is the only airport. The passenger traffic at the BIA has seen a steady decline from 345,040 in 2007 to 293,305 in 2009 after which it recovered with an upward trend and recorded a high of 318,240 passengers in 2011, resulting in a positive growth rate of 5% between 2010 and 2011.

The current capacity at the Banjul International Airport (BIA) is only optimally utilized during the tourist season of November to April each year; waiting for new business case for the rest of the year. The GCAA is vigorously marketing the BIA for capacity utilization during the off tourist season; an emerging strategy is that of promoting the BIA as an air transport hub in West Africa. This vision for an aerogropolis at Yundun requires a lot of buy-in from stakeholders both within and outside of The Gambia to justify any capacity expansion both for the passenger terminal and runway. Assessment under the sector diagnostic indicate that the exception in the medium term is with respect to apron and taxiway that are constraining during the peak tourist season and for upgrade of navigational aids for safety reasons. Given current traffic level of about 300,000 passengers a year, the BIA may not be attractive for private sector investment; except for a long term management contract which can be reviewed in detail by the PPP Unit to be located in the proposed NTA of MOWCI.

H. Strategies for Future Support

Each development partner based on their country assistance strategy and modal preference could proceed on programmatic engagement with The Gambia based on the Summary of Priority Indicative Projects Pipeline in Table 1 below which are based on the PAGE (2012-2015) and for programming under successive National Development Plan 2016 – 2020; in consistency with the time horizon under The Gambia Incorporated Vision - 2020. In engaging the Government, it is important that donors should be united with respect to outstanding regulatory and policies issues of the sector and collectively engage the GoTG on policy dialogue backed up

with ESW and AAA in order to convince the government on completing the outstanding reform agenda particularly in the Road and Port Subsectors before new investments.

Given the huge investments needed particularly for the missing links on the ECOWAS regional road network and port expansion, it might be necessary for donors to work together and jointly to finance some of the projects. In the port sub-sector where Public Private Partnership could be possible, efforts should be made to have the necessary legislations and institutional changes to invite the private sector. A lot of the ESW and AAA can be made piggybacked to investment projects instead of being stand.

Table 1 : Summary of Priority Indicative Projects Pipeline for Development Partners

Agency	Project Description	Indicative Cost (USD million)	Comments
MOWCI	National Transport Policy Update	0.26	Non lending activity likely to be supported through Trust Funds
NRA	Road Infrastructure Master Plan	0.10	Non lending activity likely to be supported through Trust Funds. Road Infrastructure Master Plan to be upgraded to Transport Sector Integrated Master Plan and to include set up of Transport Data Base at cost of USD 0.5 million.
NRA	Lamikoto - Passamus (48.31km)	55.50	IDB and EU are likely to be interested donors given interest in regional road corridors
NRA	Basse - Fatoto - Koina (48.31km)	22.16	IDB and EU are likely to be interested donors given interest in regional road corridors
NRA	Road Maintenance	13.72	Budget support through common basket if sector reform is carried through
NRA	Feeder Roads Rehab.	34.16	EU and AfDB support likely
NRA	*Bamba-Yelli Tenda - Trans Gambia Bridge	91.06	AfDB financing secured
MOWCI/NRA	Replacement/Installation of Weigh Bridges	1.63	EU financing likely
MOWCI	Greater Banjul Transport and Land Use Master Plan	0.50	AfDB – Trust Fund likely to be interested
GPA	Construction of Container Facility at Half Die Property	6.52	Needed subject to further reform of the port sector;
GPA	Rehabilitation of North and South Terminals	7.92	Needed to preserve existing assets
GPA	Construction of new quay by 200 metres	35.64	Needed subject to further reform in the port sector; Technical Assistance for sector reform can be included as a soft project
GPA	Port Computerization	1.95	Needed to improve port productivity
GPA	Cargo Handling Equipment	2.60	Needed to improve port productivity
GCAA	Expansion of the Parking Apron	4.14	KFAED and BADEA are likely to be interested
GCAA	Construction of additional Taxiway	18.62	KFAED and BADEA are likely to be interested
GCAA	Upgrading the Rescue and Fire Fighting Facilities	0.83	KFAED and BADEA are likely to be interested
	TOTAL	297.31	

Source: The Gambia- Programme for Accelerated Growth and Employment 2012 - 2015 & Gambia Ports Authority (GPA)

*Financing already secured from the ADF





THE SECTOR DEVELOPMENT BACKGROUND

1.1. The Geographic and Demographic Factor

1.1.1 The Gambia has a land area of about 11,300 km², and is one of the smallest countries in continental Africa. Its land area stretches 450km along the Gambia River and except for a 60km Atlantic Ocean front, The Gambia is surrounded by Senegal. The Gambia itself is divided into two distinct parts - the north and south banks by the Gambia River. This geography imposes not only on The Gambia the imperative to connect its two banks for national integration but also to use its transport system for the integration of Senegal by facilitating transit traffic from the south to the north of Senegal. The north and south banks are connected across the river by means of ferry services in nine strategic locations and as integral part of the road network. This obligation to integrate the country and also service the transit traffic of its neighbor, Senegal, calls for good neighborliness, good partners and good prospects. It also requires the leveraging of national sovereignty for mutual interest in transport policy, regulation and coordination for the development of the sector and regional economic development.

1.1.2 The Gambia had an estimated population of about 1.731 million in 2010 and a small land area; but given its geographic location on the West Coast of Africa, the country has historically looked beyond its borders to generate the transportation density required to spur economic growth and social economic development. The natural port of Banjul at the mouth of the Gambia River and the river itself, navigable for about 500km downstream, serve as a major transport mode and had been an enabler that made the country play a significant trading role for the port hinterland countries of Senegal, Guinea Bissau and Mali. The Government of The Gambia (GoTG) in planning the development of the port into the future has always been informed by the vision of a Trade Gateway Project and as a regional warehouse to service these hinterland countries.

Figure 1 : The Gambia Map



Source : Google Website Maps

1.2. The Gambia Development strategy and priorities

The Gambia’s Long Term Vision - 2020

1.2.1 The Gambia has since 1985 made considerable progress in laying the foundation for economic growth through the successful implementation of a wide range of macro-economic, structural and financial reforms. The economic restructuring started with the Economic Recovery Programme that ended in 1990, the Programme for sustained Development in 1996 and then followed by - ‘The Gambia Incorporated - Vision 2020’ that described Government’s general long term aspirations and outlined the policies and strategies for accelerated economic growth and poverty reduction for the country. The Government strategy, in achieving this long term vision, is through the formulation and implementation of successive five-year National Development Plans - PRSP I & PRSP II that ended in 2011. The strategic objectives of the Vision 2020 are stated as :

- making use of free market principle to ensure that the role of the government is largely confined in defining a transparent and stable regulatory framework and providing tangible economic incentives for private investments;
- curbing rural-urban drift;
- building a solid infrastructure base for industrial development;

- improving connections to regional trade centres;
- developing reliable transport networks;
- strengthening linkages between tourism and other sectors of the national economy;
- investing in human capital resources;
- encouraging investment programmes with innovative financing options;
- promoting public investment programmes that ensure the modernization of infrastructural facilities at the Port and Airport, a complete network of main highways and feeder roads;
- encouraging the private sector to take advantage of the public sector facilities by investing in transport

1.2.2 The National Transport Plan prepared in 1997 in response to Vision 2020 focused mainly on maintenance and development of transport infrastructure, neglecting the policy, institutional and regulatory framework, that make infrastructure function more efficiently and deliver the ultimate service to the productive and social sectors of the economy. The GoTG filled this gap by preparing the ‘National Transport Policy 1998-2006’ with the support of the African Development Bank (AfDB). The document though provides the applicable sector policies; still remain in final draft form. Government has to date not fully implemented and carry through some of the main policy, institutional and regulatory recommendations therein, thereby making the sector function sub-optimally in servicing the economy.

1.2.3 Most of the Policy Objectives as stated therein remain relevant to date though minor changes to face the challenges of changing socio-economic environment since 2006 need to be taken into account in its update particularly that of regional integration of transport services within ECO-WAS. The policy objectives as per the National Transport Policy 1998 -2006 document are as follows:

1. government institutions will be reformed in order to support the implementation of the National Transport Policy and National Transport Plan and to enhance coordination and cooperation between various institutions dealing with transport issues;
2. the construction of new transport infrastructure and facilities will be based on sound economic criteria;
3. the operating efficiency and the life of transportation system infrastructure and facilities will be enhanced by comprehensive programmatic routine and periodic maintenance;
4. development of economically viable mode of transport will be supported and integration between various modes of transport stimulated in order to minimize duplication and waste;
5. Banjul International Airport will be developed to meet increase in air transport demand in terms of adequate expansion of the airport buildings, infrastructure and facilities and upgrading of services and equipment;
6. the Port of Banjul will be developed as a main gateway to the country and as a port for the transshipment of goods by providing and expanding port infrastructure facilities, equipment and buildings and by upgrading services as required to meet the increase in water transport demand;
7. development of inland river transport facilities and river ports will be supported if proven to be economically viable;
8. development of a national freight transport industry policy within the overall framework of the free market policy will be supported; and
9. options for privatization and greater private sector involvement in the field of transport in general will be evaluated.

The Gambia Medium Term Development Strategy 2012-2015 - (PAGE)

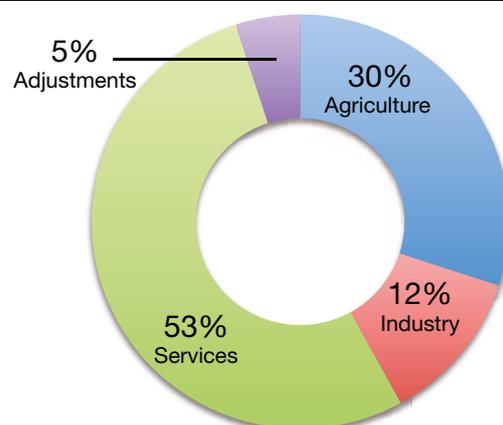
1.2.4 The latest Medium Term Development Strategy of the Government of The Gambia that replaced PRSP II was launched in 2012 with the “Programme for Accelerated Growth and Employment (PAGE)- 2012 – 2015” with a programme size of USD 943.05 million of which USD 278.71 equivalent to 29.55% of programme size, is allocated to the Transport Sector. PAGE is based on implementation of Vision

2020 and various sector strategies and is aligned to the Millennium Development Goals (MDGs) of the Gambia with principal strategic objective to accelerate growth and employment and reduce poverty. The PAGE recognizes the role of Transport as the artery of the modern economy and for accelerated growth and employment creation under ‘Pillar II – Improving and Modernizing Infrastructure’ of its five pillars and as a sine-qua-non for expansion of productive capacity, competitiveness of the economy and also as a facilitator of an growth.

1.2.5 Looking into the future, the transport system must respond to the basic mobility needs of the population estimated at 1.731 million in 2010 and rising to 2.049 million in 2015, communities and businesses and also service the economy at least cost in line with Vision 2020. Over the period 2000 to 2009, the real GDP growth rate stood at 5.1% per annum, population growth rate was estimated at 2.6% per annum while the per capita income growth rate stood at 2.5% per annum. In order to service freight traffic into the future, the demand on the transportation system will be growing at about 7.0% per annum while, that of passenger services would need to grow at the combined annual growth rates of the population and the GDP per capita which is equivalent to about 5.2%.

1.2.6 The high level of urbanization and continuing urban drift has resulted in the Greater Banjul/Brikama area in the west of the Gambia accounting for about 60% of the population; and also remain the country’s main population, economic and transport centres, imposing increasing demand on the transport system. Stemming the rural- urban drift would involve investment in rural feeder roads and increasing the productivity of the rural population by providing all weather access to markets and social services.

Figure 2 : Sectoral Contribution to Overall GDP in 2010

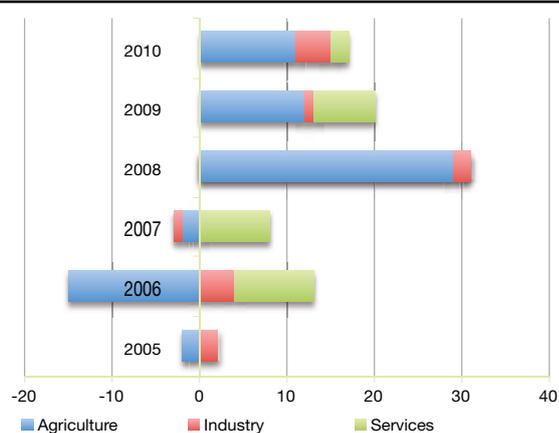


Source : Google Website Maps

The low economic and population density moving east of the country is a challenge to the transport system development for an growth under the GoTG development strategy. Based on the Vision 2020, the Government has to make a delicate balance between investment in the economic transport network and the network that responds to the social needs of basic mobility for the rural population.

1.2.7 Agriculture including fisheries remain the mainstay of the economy accounting for about 30% of the GDP, and provides livelihood for about 70% of the population. The cash crop production is mainly groundnut and vegetables, with groundnuts accounting for 60% of domestic exports. Transport, Storage and Communication sector account for about 11% of GDP in 2010 (out of 53% contribution by the Service sector). The tourism sector is the main earner of foreign exchange and accounts for about 9% of GDP while the industrial sector accounts for about 12% of GDP in 2010. The demand for transport is a derived demand, coming from the productive and social sectors of the economy. Increasing and sustained growth in the agricultural, industrial and tourism sectors will impose higher demand on the transport system, and call for additional transport infrastructure and services in order not to constrain the overall social economic development of the country.

Figure 3 : Sectoral Growth Rates 2005 - 2010



Source: Gambia Bureau of Statistics.

1.2.8 The nose-diving of the growth rates of the Services Sector for which Transport, Communications and Storage are important components call for action under PAGE 2012-2015. It therefore begs the question: what kind of transport system is needed in the future and how it is going to be paid for? In responding to the challenges of sustained GDP growth rate above 5.1%, the Transport

Sector must therefore respond to the following challenges among others in the National Transport Policy 1998-2006 policy document :

- isolated regions within the country,
- integration of various transport modes,
- appropriate transport policies and regulations,
- road and road transport financing,
- road traffic safety/excessive axle load management,
- institutional and capacity building needs,
- private sector involvement/local construction industry.

1.3. The Regional Economic Factor

1.3.1 The Gambia is a member state of the Economic Community of West African States (ECOWAS), made up of 15 member states with a combined population of 295.3 million (2009), a combined GDP of USD 256.025 billion and with an average per capita income of USD 867 (2009). The ECOWAS Vision 2020 aims at deepening the integration process and to promote a West African identity and community among the population. The ECOWAS Vision Statement is: 'To create a borderless, peaceful, prosperous and cohesive region, built on good governance and where people have the capacity to access and harness its enormous resources through the creation of opportunities for sustainable development and environmental preservation'.

1.3.2 In order for The Gambia to reap the economies of scale, which regional integration within ECOWAS offers, it has to develop part of the ECOWAS regional road corridors of Trans-Sahelian (Dakar – Ndjamen) and the Trans Coastal (Dakar – Abidjan – Lagos) within its territory and in addition strategically develop coastal shipping for effective trading within ECOWAS. But this should not only be about infrastructure but putting in place trade and transport facilitation measures and harmonization of cross border customs and immigration barriers that affect the level of and efficiency of regional transport services and trade.

1.3.3 The Republic of Senegal is strategic to The Gambia for its objective of an export led growth particularly with respect to its transit and re-export trade with Senegal and other ECOWAS member states which have to be facilitated through the Senegalese transport system as it is surrounded by Senegal except for its Atlantic frontier. Senegal with an estimated population of 12.9 million in 2011, a land

area of 196,712 km² and per capita income of USD 1200 (2010) is a critical market for The Gambia and particularly the southern part of Senegal that has the Port of Banjul as its immediate gateway port. Zinguinchor and Kolda regions (both in catchment areas of Banjul Port) play major economic roles in southern Senegal and have major natural and mineral resources (textiles, cotton, wood and paper, phosphate and rice) which can be exported through Banjul port. A harmonized geo-economic space through transport and trade facilitation and harmonized policies would result in the medium to long term in macro-economic convergence and mutual benefit to both countries.

1.3.4 The capacity of the Gambia transport system to service regional trade however depends on the first hand on Senegalese authority's willingness to facilitate transit and re-export trade and on the second hand on the political will of member states of ECOWAS to implement the existing transport and trade facilitation conventions that provide the framework for transport and trade facilitation along regional trade corridors and the bilateral and tripartite Road Transport Agreements with The Gambia; viz:

- The Lagos Treaty of 1975, which established ECOWAS, provided for a staged approach to a Customs Union, including elimination of physical and barriers to trade among member states and joint development of regional transport network;
- ECOWAS Convention A/P/2/5/82 on Inter-State Road Transport (ISRT Convention) that adopted a simplified regional customs arrangement by which goods can be transported, exempt from taxes and duties from one customs office of departure of a member state to the customs office of destination in another member state. It provides for elimination of excessive road checks, equitable access to the freight generated by the external trade of contracting parties, harmonized regulation of the highway code and transport, established sufficient autonomy to ensure supplies to landlocked countries;
- Bilateral Agreement on Road Transport between The GoTG and Government of Senegal signed on 5th October 2004;
- Tripartite Road Transport Agreement between the Governments of The Gambia, Senegal and Mali;

1.3.5 There were several other decisions and resolutions of the ECOWAS Conference of Heads of State and Government to back up the Inter State Road Transport

(ISRT)/Transport Routier Inter Etat (TRIE) Convention. The extensive legal and regulatory frameworks are not implemented and trade and transport facilitation still remain a challenge on the ECOWAS regional road network (See Annex 2 on Existing Transport and Trade Facilitation on ECOWAS regional roads networks as review under a JICA financed study in 2011). Non physical barriers to transport along the regional road network as observed and reported by the Gambia National Transport Controllers Association (NTCA) include:

- i) Numerous checkpoints along the corridor;
- ii) Occasional closures of the borders for periods of days or weeks;
- iii) Inefficient (multi-stop), disorderly processing at poorly equipped border posts;
- iv) Commercial road traffic rights issued via inter-state transport permits, a system that promotes inefficiency;
- v) Inefficient transit arrangements;
- vi) Overloading of trucks, including those involved in international transport operations;
- vii) Difficult in implementing the Brown Card System for third-party motor liability insurance, including difficulties in claims settlement due to a lack of a guarantee fund and underinsurance, problems in harmonizing the contents of liability insurance policies, ultimately liquidation of companies; and
- viii) High unauthorized charges at checkpoints and demanded at the borders.

1.3.6 The Gambia Transport system is made of three modes of transport:

- i) A road transport system consisting in a primary network of 818.53 km of inter-urban trunk roads, 303 km of secondary roads, 37 km of urban roads confined mainly to Greater Banjul area, excluding primary and secondary roads intercepted by Greater Banjul Urban boundary and 2,556 km of rural feeder roads;
- ii) An air transport system provided by Banjul International Airport at Yundun; and
- iii) A maritime and River Transport consisting in the Banjul Port and The Gambia River. In the following chapters, sector regulation, challenges and performance of each of the transport modes are reviewed. The necessary Action Plan and pipeline of investment projects based on the PAGE are recommended for the African Development Bank (AfDB) and other development partners' that would like to intervene in the sector.





SECTOR POLICY, INSTITUTIONS AND REGULATORY FRAMEWORK

2.1. National Transport Policy

2.1.1 The National Transport Plan that was prepared in 1997 focused on maintenance and development of transport infrastructure. Government noting that infrastructure alone was not sufficient for the smooth functioning of the transport system decided to put in place a comprehensive policy framework to guide the development of the sector. This led to the preparation of the National Transport Policy 1998-2006 that limited the role of the Government Ministry in charge of the sector to policy formulation and oversight, while regulatory, operational and management functions were made the responsibility of the parastatals and other agencies in the sector. The policy objective was to ensure the application of commercial principles in the management of the sector and contribute to the national objectives of facilitating the optimal development of the economy.

2.1.2 The policy emphasized integration of the modes as a basis for prioritization and in determining the appropriate size and quality of infrastructure, which must be based on a long term and integrated transport infrastructure planning. In the institutional restructuring recommended in the National Transport Policy (1998-2006) document, the upgrading of the Transport Planning Unit to National Transport Agency (NTA) was recommended to function as a unit within the Ministry and staffed with high level professionals and organized in two divisions :

- i) Transport Regulatory Office (TRO) for enforcement of the policies, legislations and rules and their update ; and
- ii) Transport Policy Office (TPO), responsible for preparation and update of the National Transport Policy and intermodal coordination including the preparation of an overall transport master plan consistent with the Transport Policy and Strategy. Though the Transport Planning Unit was not upgraded to a National Transport Agency (NTA) as recommended, it is under staffed with only one professional that has not the training and capacity to perform the functions of the NTA recommended under the policy.

2.1.3 The policy objectives of the sector besides technical, financial and economic aspects addressed the issues of adequacy, efficiency, safety, reliability, sustainability, equity and environmental protection as guiding principles. So the policy objectives of the Government were focused on four themes:

- each element of transport should be provided in the appropriate quality, quantity and form;
- all components of transport are combined in a technological optimal way for each mode of transport to carry the traffic it is best suited and at least cost to the economy;
- each mode is operated most efficiently in a level policy play field environment;
- appropriate institutional mechanisms exist to ensure effective inter-modal coordination and communication between the user, operator, regulator and the Government.

2.1.4 Most of the recommendations in these respects particularly those that relate to soft issues of ‘institutional mechanisms for coordinated planning and sector regulation’ were not taken forward by the Ministry of Works, Construction and Infrastructure (MOWCI) that had the oversight responsibility. This has affected the efficient functioning of the transport system; particularly intermodal coordinated planning and improvement of the regulatory environment to make the market function more efficiently.

2.2. Institutional and Regulatory Framework

2.1.1 For The Gambia, the legal basis and regulations pertaining to transport are summarized in the publication ‘The Laws of the Gambia’ which collated the relevant laws in the area of transport following the Law Revision Act of 1990; particularly Section 24 of the document that covers matters of relevance to the sector. The MOWCI is responsible for setting the overall policy objective and strategic role for the sector and as well as oversight of the performance of the institutions under its mandate, including the regulatory and operator institutions in the Transport sector. While enforcement is a major concern; some of the existing regulations are not adequate, not sufficiently comprehensive or in some cases outdated to meet current realities of the sector.



2.2.2 The Gambia Civil Aviation Authority (GCAA) was established as an autonomous body in July 1991 (under the Public Enterprise Act of 1989) for monitoring and regulating the aviation industry in The Gambia, and also entrusted with the management of the Banjul International Airport (BIA). The GCAA is overseen by a Board of Directors and Management is structured into eight directorates under the leadership of a Director General supported by a Deputy and had an established staff position of 548 in 2011. The GCAA plays the dual role of both regulator and operator of the Banjul International Airport and the navigational services for the industry; but only as regulator of Air Transport Services in which the Gambia International Airlines (GIA) is the operator with room for private sector operators. In its regulatory role, the GCAA strives to fully comply with ICAO Standards and Recommended Practices (SARPS), and secondly the acquisition of International Aviation Safety Assessment Program (IASA); which are based on regular audits respectively by ICAO and United States Federal Aviation Administration (FAA). The GCAA as regulatory authority have technical units for civil aviation including Air Safety Operations (ASO), Aircraft Safety (AS), Aviation Security (AVSEC) and Air Safety Infrastructure (ASI) in ensuring compliance with ICAO standards.



2.2.3 For the maritime transport subsector, The Gambia Ports Authority (GPA) is in charge of construction, maintenance and operation of the infrastructure and ferry services while the nascent Maritime Transport Administration created in 2010 is the regulator. The GPA is overseen by a Board of Directors and the Management is structured into seven directorates under a Managing Director assisted by a Deputy with an establishment summary of 759 staff in 2011.

2.2.4 Also for the road subsector, the MOWCI has the dual role of policy formulation and regulation of roads/road transport; while the National Roads Authority (NRA) is charged with operational responsibilities of construction, maintenance and management of the road network in a sustainable way. The NRA is overseen by a Board of Directors, while the management is structured in four directorates overseen by a Director General assisted by a Deputy. The NRA Board also oversees the Road Fund attached to the NRA. To deepen sector reform and improve sector governance, it is necessary that a separate Board is set up for the Road Fund. The Road Fund Board will appropriate checks on the NRA to ensure value for money generated from tax pays and road users. The NRA

has an established staff position of as of December 2012 of which is at management and directorate level. The road public transportation is liberalized and services are to be provided by both the public (Gambia Public Transport Corporation now defunct) and private sector operators.

2.2.5 The institutional responsibilities under the sector for policy, regulation and operational activities for all modes of transport are as indicated in the Table 2.1 below. What is important is the clarity with which sectoral responsibilities have been shared between the regulator, operator and the Government Ministry and with other Government Agencies. In discussing the dual role of the GCAA as regulator and operator with respect to aeronautical and airport issues, it was clarified that the Office of the Director General focuses more on regulation while that of the Deputy handles operations; which is understandable for a small country with only one airport. However with growth in traffic into the future which may lead to increased commercialization for profitable operations of the airport, it will become imperative for the GoTG to deepen institutional reform in the subsector so that GCAA confines itself to regulation of civil aviation while the operation and management of the Banjul International Airport is then passed over to a new institution, a Gambia Airport Authority as operator.

2.2.6 There are concerns with respect to regulation of the road transport industry in respect of pricing policy, control and penalties, technical regulation of standards for roads and vehicles, quality standards for services/route allocation, environmental regulations, Safety, axle load regulations, carriage of hazardous materials/liquids; and control of pollution emissions among others. Some of the laws and regulations particularly with respect to insurance, market economy are obsolete and need to be revised in the currently liberalized road transport industry environment. For example, as a matter of policy while private sector is invited into the sector, there is currently no law on Toll Roads. Enforcement of regulations for the road transport sector, a quadrangle responsibility of the MOWCI/NRA/Police/Local Government is not effective since it has led to a laissez-faire approach in operational activities in road transport services. Regulation of the road transport services should be reviewed with the objective of improving the overall quality of the entire transportation system and mainly in support of public transport industry.

Table 2.1 : Transport Sector Institutional and Jurisdictional Responsibilities

Sub Sector	Activity	Agency Responsible
Air Transport	Formulation of Aviation Policy	MOWCI
	Regulation of Aviation Sector	GCAA
	Construction of Aviation Infrastructure	GCAA
	Maintenance/Rehab. of aviation infrastructure	GCAA
	Airline Transport	GIA
	Airports operation	GCAA
Maritime Transport	Formulation of Maritime Policy	MOWCI
	Regulation of Maritime Sector	GMA
	Construction of Maritime Infrastructure (Ports)	GPA
	Maintenance/Rehab of Maritime Infrastructure	GPA
	Maritime Transportation	GPA
	Ports Operation	GPA
Roads	Formulation of road policy	MOWCI
	Regulation of road sector	MOWCI
	Construction of inter-city roads	NRA
	Maintenance of inter-city roads	NRA
	Construction/Maintenance of urban roads	NRA
	Construction/Maintenance of village/rural roads	NRA
	Building and Operating passenger/freight terminals	MOWCI
	Public Transportation	GPTC

Source: Ministry of Works, Construction and Infrastructure (MOWCI)

2.2.7 The Gambia Maritime Administration (GMA) was just set up in 2010 for the regulation of maritime transport industry and is at point of establishment for carrying out its mandate to ensure that Maritime transport meets the requirement and standard set up by the International Maritime Organization (IMO) for vessels above 500 tons Gross Tonnage and also meet the national standards that are derived from the IMO for those with gross tonnage less than 500 tons. The GMA regulatory functions include review and update of norms and legislation, with respect to maritime safety, licensing of ships and vessels for both coastal and inland waterways, maritime personnel licensing, regulations and administrative procedures with respect to ship registration for vessels carrying The Gambia flag and issue survey certificates for seaworthiness among others.

2.3 Transport System Planning

2.3.1 The Gambia has not put in place a Transport Sector-wide Master Plan as a follow up of the National Transport Policy 1998-2006 as basis for investment in the sector. This is important for the harmonious development of the Road Transport, Air Transport, Port/Maritime and River Transport modes. Though the National Transport Policy 1998-2006 emphasized Integration and Prioritization in Transport Investment Planning to ensure that goods and passengers move by the mode that is least costly to the economy, in practice multi-modal and integrated transport system planning is not in place. The National Transport Agency (NTA) within (MOWCI) that was to be charged with overall res-

ponsibility for the preparation and implementation of National Transport Policy and National Transport Plan recommended under the Policy was not implemented. Thus the institutional capacity to drive and implement measures for the coordinated development of the modes recommended under the policy was not in place.

2.3.2 There is however at the level of each mode except the road-subsector a master-plan that is being implemented and continuously revised to take into account projected demand for infrastructure and facilities developments. At the level of the Ports, there is the Banjul Port 2002 (updated in May 2008) Master Plan. As for the Air Transport sub-sector, there is the Banjul International Airport Master Plan (prepared by the Netherland Airport Consultants B.V. (NACO) in 1977), which is being updated. For the two master plans, the strategy is to a large extent supply driven, focusing on capturing regional markets, with both air and sea ports serving as hubs in the sub-region. A Transport Sector Master Plan that responds to Sector Policies and Strategy in a harmonized and integrated manner is urgent to enable the transport sector effectively respond to the increasing and diversified demand coming out from the productive and social sectors of the economy over a time horizon of 20 to 30 years. This will support the prioritization of investment projects under this sector over the medium to long term.

2.3.3 Based on the African Infrastructure Country Diagnostic Study estimates, as indicated in the Tables below,

and as guide to sector programming, Gambia would need a total investment of USD 35.0 million per annum, equivalent to 7.75% of its GDP on its transport infrastructure in the short to medium term to meet the basic connectivity

needs for servicing the economy and the mobility needs of its population. The amount is mainly to improve current condition of existing infrastructure and for maintenance than for expansion of capacity.

Table 2.2 : The Gambia - Cost of Spending to Meet Connectivity Standard (US \$ Million)

US\$ millions per annum		Improve condition	Upgrade category	Expand capacity	Maintenance	Total
Roads	Regional	0.6	0.0	0.0	1.3	1.9
	National	1.5	2.8	0.4	4.4	9.1
	RAI	0.0	0.0	0.0	0.0	0.0
	UAI	11.8	0.0	0.0	8.5	20.3
	Railways	0.0	0.0	0.0	0.0	0.0
	Ports	3.0	0.0	0.0	1.1	4.1
	Airports	0.0	0.0	0.1	0.2	0.4
Total		16.9	2.8	0.5	15.5	35.8

Source: AICD Transport Country Data Base

Table 2.3 : The Gambia - Cost of Spending to Meet Connectivity Standard (%GDP)

US\$ millions per annum		Improve condition	Upgrade category	Expand capacity	Maintenance	Total
Roads	Regional	0.13	0.00	0.00	0.28	0.41
	National	0.33	0.61	0.09	0.95	1.98
	RAI	0.00	0.00	0.00	0.00	0.00
	UAI	2.56	0.00	0.00	1.84	4.40
	Railways	0.00	0.00	0.00	0.00	0.00
	Ports	0.65	0.00	0.00	0.23	0.88
	Airports	0.01	0.00	0.02	0.05	0.08
Total		3.67	0.61	0.11	3.35	7.75

Source: AICD Transport Country Data Base

2.3.4 Development of Transportation Databases is a major constraint to planning in the Transport Sector. There are no regular manual or automatic traffic counts, Origin – Destination surveys, road inventory surveys on the classified road network as a basis for planning.

In road public transportation, there are no regulation compelling public transport operators to provide information on fleet size, passenger-kilometers, tonne-kilometers and other operational statistics etc. While the situation is better with respect to Airport and the Ports mainly because of oversight of ICAO and IMO but they still need to enhance their data information by establishing enhanced data computerization systems like Electronic Data Interchange (EDI) system to provide timely information to the Gambia Bureau of Statistics to support Government Policy formulation and decision making. It is noted that GPA is currently putting in place enhanced data information system.

The Transport Agencies and their operators are the primary producers of data for the Gambia Bureau of Statistics and for effective sector planning; they should be compelled by law in this regards.





3

THE ROAD SUB-SECTOR

3.1. The Road Network Profile and Condition

3.1.1 The total classified road network of The Gambia is estimated at about 3,920.53 km of primary, secondary, urban and rural roads. About 818.53 km (20.88%) of the network function as the primary road system, connecting important economic centers to gateways (sea port, airport, and border crossings) and the capital city of Banjul. About 93.0% of the primary network is oriented in a latitudinal way running in a west-east direction on the North and South Banks of The Gambia River as per the shape of the country while the balance of only about 85km connect the two primary west-east highways on both banks of The Gambia River in a longitudinal axis. The secondary road network of 359 km accounts for 9.16% of the network and connect the secondary towns/economic centres to the primary road network. The urban roads estimated at 187km (4.77%) are confined to Banjul and Greater Banjul Area; and excludes the primary and secondary roads intercepted by Banjul urban boundaries. The rural feeder roads consist of 2,556 km and account for 65.19% of the classified network.

3.1.2 The Primary and Secondary Roads system service the wealth creating economic activities that are the backbone of the export driven economic strategy of The Gambia. The rural feeder roads connect the rural poor to markets, social services and integrate them to the market economy. The profile of the national road networks is as indicated in Table 3.1 below, while Annex 3.1 shows the location map.

3.1.3 Road density, a measure of connectivity within a country, shows that The Gambia has a road density of 34.7 km/100km², a situation that is comparable to that of some other Sub-Sahara African countries as indicated in the Table 3.2 below. However, the network coverage level is still far below the African average of 50km/100km². The network has expanded considerably since the early 1990s. Much of the increase had been in rural feeder roads while the first two tiers had remained almost stable. Most of the rural feeder roads were built by the United Nations Sahel Organization (UNSO) over the period 1978-1985 and the European Development Fund over the period 1992-1997. The African Development Bank financed the Banjul Urban roads in the 1990s.

Table 3.1 : The Gambia National Road Networks Profile

Classification by Category	Length (km)	% Share of Network
A : Primary Network	818.53	20.88
A.1 - North Bank	341.00	
A.2 - South Bank	392.53	
A.3 - North- South Bank	85.00	
B. Secondary Road Network	359.00	9.16
B.1 - Kombo Coastal Roads	168.00	
B.2 - Kombo St. Mary Roads	38.00	
B.3 - Other Secondary Roads	153.00	
C. Urban Roads	187.00	4.77
C.1 - Banjul Urban Streets	37.00	
C.2 - Other Urban Roads in Greater Banjul Area	150.00	
D. Rural Feeder Roads	2,556.00	65.19
Total National Road Network	3,920.53	100.0

Sources: National Roads Authority- The Gambia & 2009 Network Survey under EDF Support - TA

Table 3.2 : The Gambia Road Density Compared to Other African Countries

Country	Land Area Km ²	Population	Total Road Length	Km/100 km ²	Km/1000 people
Gambia	11,295	1,731,000	3,920	34.7	2.26
Zambia	752,614	11,477,577	77,671	10.3	7.00
Kenya	582,650	36,913,761	160,883	27.6	4.00
Nigeria	923,768	146,951,000	200,000	21.6	1.36

Source : AICD - Transport Country Data Base and NRA

3.1.4 There are no regular road condition surveys for the classified network. The road condition survey carried out in 1998, indicated that only 20% of the whole classified network was in good condition and the balance of 80% vary from fair to poor condition. Based on the outcome of road condition survey of 2009 on the primary network and road condition cum visual inspection of the other tiers of the network, the national road system has deteriorated further from the 1998 situation of 80% in poor condition to 82.5% in poor condition by 2011.

Only 686 km (18.5%) of the national network of 3,714.53 km is currently paved and consist mainly of the primary road network. Upgrading works from gravel to bitumen standard and rehabilitation/periodic maintenance works implemented on the primary road network, which were financed by the EU and the Arab Funds had improved the condition of the primary

road network (including on-going upgrade/rehabilitation works) to 79.3% in good condition (See Table 3.3 below). The current road condition aggravates vehicle operating costs and increases passengers travel time which is a serious burden on the economy.

3.1.5 The Urban, Secondary and Rural Feeder Roads are in very poor condition. The condition survey cum visual inspection carried out under the EDF Support Technical Assistance for preparation of a new Feeder Roads intervention in 2010 confirmed that no recurrent/periodic maintenance had been undertaken on the Feeder Roads network since construction.

Some of the roads have/are now being re-constructed (54 km in Foni region, Nium – Hakalang, and Soma – Mansakonko Feeder roads) at heavy costs which should have been avoided if regular periodic maintenance interventions were in place. The very poor condition of the Secondary and the Rural Feeder Roads networks indicates poor service levels that penalize rural access for agricultural inputs, extension services, markets for produce and in addition constrain access to economic opportunities and social services for the rural population.

This is a challenge under the PAGE, if an inclusive and sustainable growth is to be achieved during its implementation.

Table 3.3 : Current Condition of the Classified Network

Network Class	Length (km)	Paved (Km)	Gravel/Earth (km)	Poor (%)	Fair (%)	Good (%)
1 - Primary Roads	818.53	649	169.53	20.7	0.0	79.3
2 - Secondary Roads	359.00	168	191.00	53.2	46.8	0.0
3 - Urban Roads	187.00*	37	150.00	100.0	0.0	0.0
9 - Rural Feeder Roads	2556.00		2556.00	100.0	0.0	0.0

Source: National Road Authority – The Gambia/MOWCI Roads Transport Policy 2011.2015.

*Excludes primary and secondary roads intercepted by city boundaries

3.1.6 Besides the overall road density and condition indicated above, other connectivity indices based on the key geographic and demographic features of The Gambia and quantity of road transport infrastructure needed to connect those features using GIS to measure the necessary distances shows that the performance of The Gambia has been at least at par with the required base benchmark for infrastructure quantity as established under the African Infrastructure Country Diagnostic Study carried out by the World Bank; except for the poor infrastructure conditions which affects level of service in terms of travel time and vehicle operating costs.

- Regional (or international) connectivity: - Regional connectivity refers to the road infrastructure needed to connect national capitals and all other large cities (those with a population of more than 250,000) to the main international border crossings and major deep sea ports/airports. The road infrastructure considered appropriate to achieve this regional connectivity includes 137 kms of interurban roads with at least two paved lanes and hard shoulders of at least 2 meters on each side. This is attained by The Gambia in terms of infrastructure quantity. However, The Gambia fall short in terms of quality of infrastructure which should be about 100% as against about 80% for The Gambia for this class of transport infrastructure.
- National connectivity: - National connectivity refers to the road infrastructure needed to connect provincial capitals and other secondary cities (with a population of at least 25,000) to the regional network described above. The infrastructure considered appropriate to achieve this national connectivity for The Gambia consists of a minimum of one-lane paved roads of 564 kms and given the length of the two lane paved primary road network of over 500 kms excluding the roads for regional connectivity, this index is about achieved; though fall short in terms of quality of infrastructure that required infrastructure in good to fair condition to be at about 90 to 100%.
- Rural connectivity. Rural connectivity is based on the World Bank's Rural Accessibility Index (RAI), which expresses the percentage of the rural population living within two kilometers of an all-season road. The Gambia requires a rural roads network of 1,143 km to achieve this target and with a rural road network of over 2,500 kms, the infrastructure quantity target has been achieved; though the poor condition of infrastructure affect level of and cost of services.

3.2. Vehicle Fleet and Network Traffic Levels

i) Vehicle Fleet

3.2.1 The Roads Transport Policy Study in May 2011 estimated the vehicle fleet at 33,500 vehicles based on structure of road user revenue received by the Gambia Revenue Authority (GRA) in 2010 and the 2011 distribution by vehicle type reported by the GBoS. This results in a motorization rate of about 51 people per vehicle. This estimated fleet size is however far below the record of 42,000 registered vehicles provided by the police in 2007 and higher than the estimated fleet of some 15,556 vehicles in 2011 as per data collected from the GBoS. The motor road vehicles (excluding motor cycles) fleet has been growing at an average annual growth rate of 2.23 percent in the past five years. About 73.0% of the motor vehicle fleet is made up of light vehicles (car, van/station wagon, mini-bus). See Table 3.4 below for the revised 2010 estimated vehicle fleet size and Annex 3.3(a)(b)(c) for the Gambia Bureau of Statistics (GBoS) Vehicle Statistics.

Table 3.4 : Estimated Vehicle Fleet by Vehicle Type (Numbers)

Vehicle Type	Number	%
Car	20,896	62.4
Van/Station Wagon	2,902	8.7
Minibus 12 -22 pax	474	1.4
Bus > 22 pax	2,618	7.8
Goods Vehicle	1,626	4.8
Other	2,397	7.2
Government/Diplomatic	2,587	7.7
TOTAL	33,500	100.0

Source : MOWCI - Roads Transport Policy 2011-2015, May 2011

3.2.2 Over the years 2003 to 2011, about 20% of the vehicles registered annually in The Gambia are imported second hand. The average age of vehicles in the national fleet is over five years. There is a high preponderance of over aged vehicles in the fleet that has resulted in low availability and high spare parts requirements. This, compounded by the poor road conditions, would result in high vehicle operating costs. This also raises safety concerns due to poor mechanical inspections facilities for establishing vehicle road worthiness and environmental issues of pollution emission in The Gambia.

ii) Network Traffic Levels/Vehicle Operating Costs

3.2.3 There are no regular and periodic traffic surveys on the road network in The Gambia. However, a comprehensive traffic survey program was implemented during the month of August to October of 2009, as part of the long term EU technical assistance to the NRA. The nation-wide survey carried out simultaneously consisted of two components:

- i) classified traffic count ; and
- ii) axle load survey.

Traffic levels on the main network are highest on the South Bank and in the west of the country ; and they ranged from an Average Daily Traffic (ADT) of 7415 on the Banjul – Mandina Ba section to 206 ADT on the Basse – Fatoto section. On the north bank, also the heaviest traffic is around Barra – Farafenni section with ADT of 2312 and decreasing to ADT of just over 50 at the eastern end of the north bank axis. On the longitudinal axis, the heaviest traffic is on the Trans- Gambia highway from Farafenni to Soma recording an ADT of about 1000 vehicles. Besides these urban and peri-urban roads serving the Greater Banjul and Kombo districts, most inter-urban and secondary roads carry traffic of between 200-500 vehicles per day. Most of the feeder roads have traffic of less than 100 vehicles per day. (See Annex 3.4 for the average daily traffic on the main primary road network - 2009)

3.2.4 Traffic composition on the network indicated that light vehicles (cars, special utility vehicles and vans including taxis) account for about 70% of the traffic, trucks for 5%, buses for 9% and the other vehicles (mainly Government and Diplomatic Vehicles) account for the balance of 16%. Although there is no historic data to estimate growth trends of traffic, but on the basis of trends in fuel consumption and sales over the years 2006 – 2010, it has been estimated that the traffic on the primary network had been growing at over 5% per annum. For the transport sector to sustainably support GDP growth of over 5% over the PAGE horizon of 2012 -2015, an elasticity of traffic growth with respect to GDP growth of about 1.4 for freight traffic and 1.2 for passenger traffic will be necessary. Traffic on the secondary and feeder roads have to grow at a rate higher than 7-8% per annum in order to support the agricultural sector that has been growing at over 10% per annum over the last seven years and thereby sustain the agricultural transformation agenda under the PAGE (See Fig.3 above).



3.2.5 The Vehicle Operating Costs input data for each vehicle category on the various classes of road surface condition in the network calibrated for The Gambia is being developed and would be completed under the EU Technical Assistant support to NRA that include the supply/ installation and use of a Pavement Management System and HDM IV Tool for the road network planning. The Vehicle Operating Cost Submodel of the HDM IV is to simulate the effects of the physical characteristics and conditions of a road network on the operating speeds of the vehicle fleet on the network, on their consumption of fuel and lubricants, on their maintenance requirements, man-hours of labour and to determine their total operating costs. VOC Input data provided into future work for a calibrated HDM IV for The Gambia is as in Annex 3.

iii) Axle Load Regulation and Enforcement.

3.2.6 As part of the Traffic Survey undertaken in 2009, an axle loads survey of freight vehicles was also undertaken

on the primary road network. The result of the survey indicated that over 36% of all trucks surveyed exceeded the axle loads limit of 11.5 tonnes established by the ECO-WAS Convention on regional transportation and ratified by The Gambia. The situation is also true of transit trucks from the neighbouring countries of Senegal, Mali and Guinea Bissau using the network. This situation of excessive axle loads has led to the rapid deterioration of the primary road network as evidenced from rutting that is observed on several sections as per the recent condition survey.

3.2.7 The EU is currently financing an Axle Load Management Study in which installation of weigh stations on five strategic locations on the primary road network has been proposed. The most critical issue is the management of axle load system and the enforcement of the axle load regulation. There is thus an urgent need for implementing a holistic programme of control and enforcement that may be recommended by the on-going study and for effective collaboration with member states of ECOWAS. See Annex 3.5 for the proposed location of the Weigh Stations under the EU financed Study.

3.3 Road Maintenance

i) Organization of Maintenance

3.3.1 Following the institutional restructuring in the Road Subsector, separating policy and regulatory issues from operations and management of the network in 2003, the NRA undertakes the maintenance operations of its network through private contractors, while keeping a lean force account team that partake in routine maintenance activities including pothole patching and minor shoulder rehabilitation in addition to emergency works under its two maintenance provincial divisions – Western Provincial Division and Eastern Provincial Division. Each maintenance provincial division of NRA is headed by a District Manager Operations responsible for planning, budgeting, and monitoring of maintenance activities under his provincial division and reporting directly to the Technical Director of the NRA. There is also a Manager for Feeder Roads reporting to the Technical Director in charge of maintenance of feeder roads. For the nascent NRA, only managerial positions are still filled to date in these directorates.

3.3.2 The maintenance of the primary and secondary road network is let to private international contractors through

annual maintenance contracts. This approach will definitely preserve the investment in the primary road network instead of use of force account. For long term sustainability however, the GoTG should in tandem focus on the development of the local construction industry and use of long term maintenance contracts with defined level of service for the highly trafficked part of the network. The performance of the contractors under such long term maintenance contracts should be closely monitored by ensuring that service levels under such contracts are achieved; and experiences and lessons documented.

The contractors in The Gambia are mainly in building construction and have limited experience in road works. To date, there is only one local firm in road works. For the heavily trafficked sections of the network, there is need for the GOTG to use long term maintenance contracts to the private sector for a maximum period of five years with defined level of service.

ii) Financing of Maintenance

3.3.3 As part of the reform of the road sub-sector, the National Roads Authority established by an Act of Parliament in 2003 and vested with the responsibility of the administration, control, construction and maintenance of all roads in The Gambia, also establishes a Road Fund under the Authority, which shall be used exclusively to finance the operation of the Authority in the performance of its functions. The target sources of funds for the Road Fund are:

- (a) road user tax levied on road users;
- (b) vehicle licensing fees;
- (c) vehicle registration fees;
- (d) grants, donations and endowments that may be received within and outside The Gambia;
- (e) subventions from the Government, and
- (f) any other road user charges that may, from time to time, be allocated to the Road Fund by any other law (e.g. levy on fuel).

3.3.4 In spite of the 2003 Act setting up the NRA with a Road Fund, that has to provide the required flow of funds for the maintenance of the road network, the GoTG has not operationalized the Road Fund. The subvention provided from the budget over the years 2006-2011 has been consistently less than 30% of maintenance needs as indicated in Table 3.5 below. Given the huge shortfall between needs and actual subvention most of the planned repair works had to be deferred resulting in mounting backlog of periodic maintenance.

Table 3.5 : Road Maintenance Needs and Funding Gap : 2006 -2011 - (GMD Million)

Year	Estimated Needs	Approved Budget	Govt. Actual Subvention	Financing Gap	Gap/Needs (%)
2006/2007	200.00	60.00	17.51	182.49	91.24
2008	250.00	80.00	32.70	217.30	86.92
2009	300.00	60.00	64.40	235.60	78.53
2010	275.00	100.00	57.00	218.00	79.27
2011	200.00	100.00	76.00	124.00	62.00

Source: National Roads Authority

Table 3.6 : Revenue from Vehicle Non-Fuel Charges and Taxes – 2010-2012 (GMD)

Road User Charges	2010	2011	2012*
Road Tax	17,752,654.00	12,381,880.00	16,857,820.00
Motor Vehicle Licences	29,266,817.00	19,675,693.00	27,513,035.00
Ordinary Number Plates	3,473,700.00	4,657,400.00	3,084,300.00
Personal Number Plates	230,500.00	218,500.00	80,600.00
International Driving Licences	504,300.00	863,000.00	677,000.00
International Motor Vehicle Certificates	69,800.00	189,000.00	1,200.00
Motor Vehicle Dealers Licences	76,400.00	133,700.00	31,200.00
Miscellaneous Licences	8,418,183.00	5,884,875.00	7,137,300.00
Mandatory Traffic fines	9,500.00	3,500.00	3,390.00
Car Parking Fees (Area Councils)	17,056,586.00	12,787,583.70	14,717,385.00
Bicycle Licenses		181,355.00	112,800.00
Totals	76,858,440.00	56,976,586.70	70,216,030.00

Source: Gambia Revenue Authority. *As at October 2012

3.3.5 The Road User Charges related revenue collected by The Gambia Revenue Authority (GRA) from 2010 – 2012 is as indicated in the Table 3.6 below. Except for 2011, the actual subvention for maintenance of the network is even less than the revenue collected from road users. The amount collected annually is not enough to meet annual maintenance needs estimated at over GMD 250 million annually; not to mention the clearance of the heavy backlog of periodic maintenance.

3.3.6 As per the outcome of a study conducted under the EU Technical (May 2011) for sustainable funding of the road sector, the introduction of a second generation road Fund based on fuel levy is the way out for GoTG to close the funding gap for maintenance and ensure sustainability of the road network. A levy of an average of GMD 3.0 (US12 cents) per litre on approximately 75 million litres of diesel and petrol currently sold per annum would raise an additional revenue of between GMD 180 million and GMD 200 million annually. Fuel levy will to a large extent reflect the intensity of use of the road network by the road user and to some extent the vehicle size (See Table 3.7 below and Annex 3.6 on estimated fuel levy revenue on various scenarios of levy per litre).

3.3.7 Government may also consider adjusting the present structure of Road User Non-Fuel Charges to raise additional revenue (See Annex 3.7 for current structure of

Road User Charges). A case in point is with respect to vehicle license fees that do not reflect vehicle weight and therefore the damage inflicted on road pavements. Transit fees should also be considered for foreign vehicles using the Gambian network. A predictable, regular and steady flow of funds for maintenance is necessary for good road network management which can only be done by introduction of fuel levy. The GoTG has to complete the reform agenda in the sector by putting in place the second generation Road Fund with levy on fuel as the main source of revenue. This is a necessary condition for further investment in the road network.

Table 3.7 : Estimated Road User Revenue from Levy on Fuel

GMD/ litre Levy	Elastic Demand revenue (GMD million)	Inelastic Demand revenue (GMD million)
1	64.3	66.3
2	124.1	132.6
3	179.5	198.9
4	230.7	265.2
5	276.9	331.5
6	316.8	397.8

Source: EU/TA - MOWCI - National Roads Transport Policy 2011-2015, May 2011

3.3.8 Based on predictable flow of funds, Government should prepare a Maintenance Action Plan (MAP) for the period 2012 to 2015 for the road sector consistent with Macro Economic and Fiscal Framework underpinning PAGE and the Medium Term Expenditure Framework for

the road sub-sector. This is necessary once a second generation Road Fund based on fuel levy is put in place. The plan should reflect commitment to contracting out of routine and periodic maintenance works with identified resources and sources of funds for its implementation. Development partners can then clear the maintenance backlog through a common basket budget support. The NRA/Road Fund should develop road financial and technical audit system so that road maintenance activities by the private sector are effectively monitored to ensure that road users get value for money.

3.4 Road Engineering and Construction

i) Road Engineering

3.4.1 Most of the studies and designs for large and complex projects are undertaken by foreign consultants. Local consulting firms of which there are about 3 in The Gambia function only as sub-consultants and work in association with the foreign consultants. They are usually requested to field non-professional staff members of the team and function more as local agents to international consultants. Most of the work of the engineering operations of NRA is devoted to the supervision and review of feasibility studies and detailed engineering carried out by international consultants. NRA's capacity for feasibility and detailed engineering design review is weak. Capacity building for strengthening the NRA is currently under preparation through EU/TA funding to enable the nascent NRA fulfill its mandate.

ii) The Local Construction Industry

3.4.2 The development of the Construction Industry is critical for all infrastructure sectors as it is the means through which the infrastructure is created. The local construction industry therefore has to grow in line with sector needs. It is noted that a system of classification of contractors depending on their capabilities exists for building contractors. From consultation during the Study, it was noted that most Gambian contractors are in the building sector and not in road works. There is no Contractors Registration Board in The Gambia for classifying civil works contractors based on their capabilities and for driving the development of local civil works contractors.

3.4.3 The road works contracting market is dominated mainly by foreign firms registered and established in the Gambia to seek market opportunities. Based on the information provided by NRA on works contract awarded between 2007 and 2012, for a total contract value of EUR 76.35 million, only 1.67% of the value of the contracts went to local contractors. The local contractors cannot meet the pre-qualification requirements for most upgrading, rehabilitation and reconstruction works; so the contracts are let mainly to international firms. Maintenance contracts are awarded by the NRA on an annual basis. For the nationally tendered works with a total value of about EUR 13.4 million over the last five years, only 9.6% of the contract value went to local contractors (See Table 3.8 below).

Table 3.8 : Road Works Contracts Value - Share by Foreign and Local Firms

Nature of Tender	Total Value EUR	Foreign Firms' Share (%)	Local Firms' Share (%)
International Tender	62,999,447.67	100.0	0.0
National Tender	13,354,013.22	90.43	9.57
Total	76,353,460.89	98.33	1.67

Source: National Roads Authority



3.4.4 Only one local firm has ventured into road works contracting, and only assured market and policy support from the Government can grow the local construction industry from its embryonic stage. Small Scale Enterprises in building works can be encouraged to enter the road works contracting industry, with GoTG encouragement and support using labour based methods for road construction and maintenance particularly for rural feeder roads. The experience in Kenya, Uganda, Ethiopia and Ghana has shown that with assured market for road works coupled with steady and regular flow of funds for maintenance, small scale contractors starting with labour based road projects can progress to big civil works contractors.

3.4.5 The Gambian Agency for Management of Public Works (GAMWORKS) established in 1993 by GoTG and the World Bank as a Project Implementation Agency or as delegated management contractor can work with donors and the International Labour Organization (ILO) in this direction for the development of domestic labour based contractors. This is necessary particularly for the sustainability of investment in the rural feeder road system.

3.4.6 The Government has to formulate appropriate policy measures and incentives for the growth of the Local Construction Industry. A Study financed by the EU to encourage the development of the private sector in this regard is ongoing and when concluded its recommendations need to be implemented. The most significant elements in fostering the growth of local construction industry in road works should include training in labour based methods, encouragement of the private sector to set up equipment leasing companies, an adjudication board for settling disputes, licensing of construction equipment as bank collateral and the provision of mobilization advances for private contractors, sub-contracting in big civil works to locals, packaging works to allow participation of local firms in the tendering process, skills development in managing construction company and technical skills in managing works sites and construction activities among others. A Works Registration Board with the secretariat in MOWCI has to be put in place to lead the scaling up of the assistance to the local construction industry while Gambia Agency for Management of Public Works (GAMWORKS) should support their development.

3.5 Road Transport Industry

3.5.1 The Gambia Public Transport Corporation was set up by the Act of Parliament in 1976 to solve the public transport needs of the Gambia population, with following major objectives:

- to play a critical and important socio-economic role as a national transporter by providing a safe, reliable, affordable and comfortable service;
- to operate on a sound commercial venture basis by extending the operations to the entire country and even to neighbouring Senegal;
- to set up tariffs that can earn sufficient returns to replace ageing fleet;
- to provide for reserves sufficient to finance the cost of commercially justifiable expansion.

From 1976 to 2002, the GPTC was successful in carrying out these core mandates, while posting substantial return on investment. From 2003 onwards however, the fortune of the company changed with purchase of old Pegaso and Mercedes Benz buses; with operation results not



able to service the huge overdraft contracted to purchase the buses. GPTC has become bankrupt and is currently awaiting a renewed mandate.

3.5.2 The road transport market for both passengers and freight has since then been fully liberalized with the private sector as the sole provider of services. The Government as a matter of policy has decided to continue to support of road transport services so that competition between operators is further intensified. There is the freedom of entry and exit into the public transportation services and there are no route allocations. However, members join any of the two umbrella associations of National Transport Controllers Association (NTCA) and National Transporters Associations. The NTCA has 27,000 members countrywide and vehicle/truck ownership ranges from 1 to 30. These associations to which membership fees are paid provide some cooperative assistance to their members in the form of support in case of accidents but not for fleet renewal which is a challenge for the sector.

3.5.3 Regulation within the road subsector is with respect to road transport services and it involves licensing of vehicles for specific type of service; issuing of various categories of drivers licenses, formulating and reviewing code of conduct for providers and users of transport services, overseeing investigations in road accidents and monitoring national and international benchmarks in service provision. The MOWCI/Police oversee the NTCA's regulation of the privately operated public transport services to improve passenger and freight services for safety, terminal and en-route facilities for inter-urban services and to ensure that the operators are appropriately licensed and the vehicle is road worthy and comply with all traffic regulations. However enforcement of regulations is a recurring problem like in many African countries.

3.5.4 Economic Regulation of road transport is with respect to avoiding monopoly or oligopoly situation for which the price, investment and service quality commitment of operators require supervision to protect transport users. At the same time, it is the obligation of Government to create an enabling environment to ensure that the rights of the transport operators that enter the transport industry under a liberalization regime are protected. In this context Government ensures that tariff setting is market based and geared to cover all costs with some return on investment and that services meet the required standard. In case of

increases in any element of cost such as fuel or spare-parts, the Associations engage the Government Committee in this regard for a negotiated and agreed fare. Where operators feel that the costs are not fully covered, they result to short tripping to cover costs.

3.5.5 The ageing vehicle fleet is due to prevalence of second hand vehicles; which in return is due to the fact that new vehicles are very expensive to buy due to the low fares. This situation has made fleet renewal difficult; and requires appropriate response from the Government in terms of policy support. In this situation where transport operators do not invest enough for fleet renewal, the Government can consider incentives (such as tax relief on vehicles, spare parts) to encourage fleet renewal and improved vehicle standard for public service vehicles operators.

3.5.6 The MOWCI is the regulator for Road Transport but the National Regulatory Office recommended in the National Transport Policy 1998-2006 to be located in the Ministry has not been created to date and so the technical capacity for regulation is not in place. Creating such a unit and training officers of the Unit in the necessary technical skill to become effective technical and economic regulators will enhance the effectiveness of regulation of road transport services.

3.5.7 Regional Road Transport service providers are essential element in the integration of the haulage industry in the ECOWAS region and for free movement of people and freight in the sub-region. Enforcement of ECOWAS Convention (A/P2/582) on cross border road transportation is delegated to the National Transport Controllers Association (NTCA) in The Gambia. NTCA main complaint is with respect to the several stops along the routes and of trade and transport facilitation instruments across frontiers. This will need to be handled at the level of ECOWAS that is vigorously implementing the One Stop Border Posts at the borders on the regional road network to ensure harmonization of customs and immigration procedures and putting in place other ICT backed infrastructure to facilitate cross border transport and trade. This should be an important component of the Trans Gambia Bridge Corridor.

3.5.8 The establishment of Corridor Management Organizations driven mainly by the private sector and other stakeholders has become important in the performance of transport



and trade corridors. This has resulted in improved logistic chains through the setting up of observatories to monitor corridor performance, facilitate private sector involvement in corridor improvement projects and advocate for the interest of shippers, transporters and other stakeholders. This is recommended on regional networks passing through The Gambia which have been subject of Memorandum of Understanding between The Gambia, Senegal and Mali to strengthen conventions already signed at ECOWAS level.

3.5.9 Though these legal documents called for setting up of Corridor Management Committee (a partnership of public and private stakeholders in all corridor member states) for facilitating the provision of efficient transport services along the length of the corridor and its hinterland; such institution based on Banjul Port as gateway is not yet created. GoTG should put more pressure on its partner states using Banjul Port to set up such a corridor management group/committee for facilitating transit traffic movement with following main responsibilities in their advisory role:

- facilitating the removal of physical and non-physical barriers to goods and persons transiting along Banjul Port based corridors;
- setting up stakeholders network;
- monitor corridor performance through observatories;
- corridor promotion;
- advocacy for infrastructure improvements.

3.5.10 Key issues as below, necessary in implementing the legal instruments will to a large extent determine the membership of the Committee:

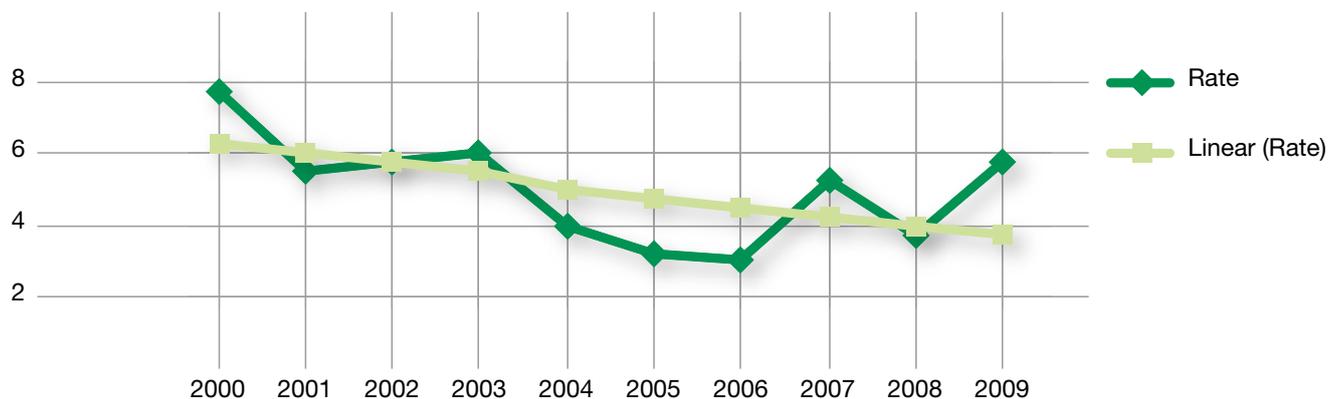
- transit facilities and procedures;
- harmonization of customs procedures and documentation;

- border post facilities (One Stop Border Post), management and operating hours;
- road Infrastructure provision and maintenance;
- road Transport Policy;
- road Traffic and road traffic law enforcement;
- axle load control;
- transportation of hazardous materials;
- road safety;
- development opportunities along the transport corridor.

3.6 Road Safety

3.6.1 The overall Road Transport Accident (RTA) reported over the period 2000 – 2009 totaled 7750 of which 618 of the reported accidents were fatal representing about 8% of the total (See Annex 3.8). On the average, 67 fatal road transport accidents occurred annually in The Gambia. Road traffic fatality rate per 100,000 population peaked at 8/100,000 population in 2000, and then declined steadily to a little above 3/100,000 population during 2004 – 2006 before peaking up again in 2007. Figure 4 below summarizes the trend in RTA in The Gambia. Based on level of motorization, the 67 people that die on the average annually as a result of road transport accident result in a fatality rate of 20/10,000 motor vehicles based on estimated vehicle fleet of 33,500 in The Gambia. In 2009, there were 91 deaths due to road traffic accidents resulting in a fatality rate of 27.2 deaths per 10,000 motor vehicles. A comparison with traffic fatality rates in other countries puts The Gambia amongst those with poor road safety records requiring immediate remedial action (e.g. Bangladesh with a Fatality Rate of 42, China- 27, India -20 , South Africa – 17, and Russia -15, while United Kingdom, Norway, Japan and Australia have fatality rate of 1-2/10,000 vehicles).



Figure 4 : Road Accident Fatality Rate per 100,000 populations - 2000 - 2009

Source: Gambia Police Force

3.6.2 On the average, more males (about 50) died annually from Road Traffic Accidents (RTA) as against about (18) for females which gives a ratio of about 3:1; a finding that is in line with global realities. According to WHO reports, in 2002, males accounted for 73% of all road traffic deaths, with an overall rate almost three times that for females. RTA data in all regions of The Gambia regardless of income level, and also across all age groups point to the same gender profile in RTA. The cumulative death by risk factor indicated that 22.6% are accounted for by reckless parking, followed by careless driving and inefficient breaking system each accounting for 17%; then Exceeding Speed limit account for 13.8% while 13.2% was due to reckless and dangerous driving. This points to lack of enforcement of existing regulations by the police (See Annex 3.9).

3.6.3 The Cost of Road Traffic Crashes on The Gambia economy has not been estimated but definitely have a serious economic cost to The Gambia, as well as a significant social and humanitarian impact on the victims and their families. International research has shown that the economic cost alone of traffic accidents represent between 1-2% of a country's Gross Domestic Product, which represents a major drain on the national economy and should be avoided. Traffic accidents are also a major public health issue and have serious impacts on emergency services (police, fire and ambulance), hospitals and medical services.

3.6.4 The United Nations declared 2011 as the start of the decade of Road Safety with the overall goal of halving the global number of annual deaths due to road traffic accidents by 2020. The Road Traffic Accident statistics of The Gambia definitely present a deteriorating road safety situation that has to be addressed by the three 'Es' – Enfor-

cement, Education and Engineering solutions. In addition, Road Traffic Accident issues are multi-agency and multi-dimensional requiring coordination by all agencies involved in drawing up the appropriate response in the form of a coordinated action plan to address the safety problem.

3.6.5 The GoTG has set up in July 2012 a Coordination Committee in this respect to see how best the Government could respond to the Road Safety challenge to meet the UN decade target of reducing fatality rate by 50% by 2020. The Committee has recommended high level commitment and sustainable funding, that should be managed and coordinated by a multi-agency National Road Safety Council supported by a small dedicated Technical Secretariat. In order to function effectively, the Council when set up requires secured funding. Likely source could be from the Road Fund that is based on fuel levy and the legislation of the Fund may need to be amended to this effect. Government also has to give the necessary legislative support to the lead agency for clear lines of authority and to define the responsibilities of other involved agencies. The Council should be accountable and report annually to the highest political organ of government, preferably to the Council of Ministers as political leadership on road safety sends a powerful message to government departments, the police and the general public.

3.6.6 The Coordinating Committee recognized that the challenges highlighted with respect to Road Safety can be aligned with the African Policy frame-work; that is consistent with the five pillars of the United Nations global plan for the decade of action on road safety. These are:

- Pillar 1: Road safety management;
- Pillar 2: Safer roads and mobility;

- Pillar 3: Safety of vehicles ;
- Pillar 4: Safer road users ;
- Pillar 5: Post crash response.

3.6.7 Besides setting up the Council and necessary legislations to back it and revision of existing traffic laws and regulations, it is recognized that necessary actions need to be effected with respect to i) Crash Data System, ii) Infrastructure Improvement via road safety engineering of road projects and audit/remedial actions with respect to black spots, iii) Enforcement of traffic regulations by the Traffic Police, iv) Road Safety Education and Publicity, v) Driver Training and Testing, vi) Vehicle Testing and Inspection, and vii) Emergency services for crash victims requiring well equipped emergency response services as appropriate (police, fire brigade, ambulance/hospital emergency services).

3.7 Institutional Support and Capacity Building

3.7.1 The National Roads Authority (NRA) is responsible for overall planning, construction, maintenance and management of the country's classified road network with a Board of Directors appointed by the Government to oversee the authority and guide its strategic management of the road network to meet the priority needs of the economy. A capacity building programme has been developed under the EU -Technical Assistance to improve the skill levels and ability of the organization to perform its functions. The program was developed based on training needs assessment and the strategic objectives outlined in the NRA Strategic Plan. It is recognized that Procurement, Pavement Management Systems, Contract Administration, Design Review and network planning, Information and Communication Technology, Economic and Financial Analysis, Social and Environmental Impact Assessment, and Management Information Systems are main areas of institutional weakness. For the NRA to fully discharge its mandate, it is necessary that institutional support be focused on these areas in order to deliver effective support to the Government in managing the road network

3.7.2 Some training activities have already been provided in 2009 under the EU - TA project in the operationalization and institutionalization of systems and procedures pertaining to network management using the Highway Design and Management Tool Model (HDM -4). There are currently no civil engineering courses being offered at the University of the Gambia or at the Gambia Technical Training Institute from

which the sector could draw appropriate manpower. Creation of engineering courses in the University should be pursued by GoTG to provide the pool of man power for the construction industry. The EU is already preparing a Technical Assistance support to the NRA that could be co-financed by other development partners. The TA involves training of NRA staff focused mainly on skill enhancement through advanced training courses in foreign institutions with assistance in tranches. The first tranche covering 6 managerial staff, 6 professionals and upgrading of 24 technical and clerical staff in overseas and in local institutions have been finalized (See Annex 3.10) and would cost EUR 330,000. Overseas training will also be required in the field of photogrammetric, road design, hydrology, bridge design, and material testing in a second tranche of technical assistance.

3.8 Road Investment Planning and Financing

i) Road Planning

3.8.1 Investment in the Road network has not been based on a prioritized plan, where individual links on the network are ranked based on their economic internal rate of return (EIRR) or Net Present Value (NPV) and in consistency with the macro-economic and fiscal framework and a Medium Term Expenditure Framework. Based on the strategy, recommended in the National Transport Policy- 1998 – 2006, investment in the subsector had concentrated on inter- urban roads in the Greater Banjul area and moving eastwards thereafter with the focus on addressing bottlenecks on the most trafficked links eastward from Banjul. While this focus has been right, in addressing the investment needs on the highly trafficked part of the network, but there remains a gap in ascertaining how the road sector investment has contributed to national and local development needs by using network approach that take into account connectivity and the opportunity cost to the economy. Roads are enablers of other opportunities in an economy and the issue of connectivity and opening up of areas with development potentials would demand a network approach in investment planning, which is not the case under current approach to investment in the sector.

3.8.2 So far the development and investment in the road network had been driven by individual links feasibility studies and not by a Sector Wide Approach of a prio-

ritized Road Sector Development Programme for the whole classified road network. Such holistic approach will take into account new construction/upgrading to bitumen, rehabilitation, periodic maintenance, routine maintenance, capacity buildings/studies, all competing for the limited funds that takes into cognizance the connectivity of the network to support overall socio economic development and inclusive growth process. The EU is currently preparing an intervention in the rural feeder roads where all the links are taken into account and prioritized for a Feeder Roads Rehabilitation Programme in The Gambia. For evaluation purposes, all the links were evaluated based on parameters for social, economic and technical feature to arrive at a ranking determined by cost-effectiveness and multi-criteria analysis, and in cases where the ADT is between 50 -100, the parameters are combined with economic analysis criteria using the RED software.

3.8.3 The absence of a prioritized plan is a constraint to investment planning in the Primary and Secondary Roads System. With the EU Technical Assistant already provided to the NRA for HDM-IV, it is important that this be done for the Primary and Secondary Roads during the PAGE horizon of 2015 and a Ten Year Road Sector Development Programme can be developed as a basis for the orderly development of the sector post 2015. Technical Assistance in this regards can be sought from development partners intervening in the sector.

ii) Capital Investment Financing

3.8.4 The investment on sections of the Primary Roads Network from 2007-2012 has been estimated at EUR 62.99 million including on-going works (See Table 3.9 below). The funding has been provided mainly by development partners (EU and the Arab Funds).

Table 3.9 : Investment in the Primary Road Network - 2007 - 2012

Project Name	Amount (EUR)
Barra - Amdallai Road (20km)	6,055,969.63
Mandinaba - Seleti Road (12.7km)	3,241,720.54
Soma - Basse Road(192km)	22,425,236.29
Trans-Gambia Highway (24.4km)	7,699,801.98
Sankulay Kunda Bridge	3,750,000
Basse - Velingara Road (28km)	10,438,237.96
Brikama - Dimbaya - Darsilami Road (25km)	9,388,481.27
Total	62,999,447.67

* Exchange rate: 1 Euro = 44 Dalasi (GMD)

iii) Periodic Maintenance Funding

3.8.5 On abolishing the force account system and coming into effect of the NRA with the Road Fund in 2006, the GoTG strategy in management of the primary road network has been the use of long term maintenance contracts of minimum period of five years awarded in Lots to domestically registered foreign firms. This has led to higher quality of maintenance work as contractors are committed to a level of service specified as per contract. For the primary network between 2009 and 2011 a total amount of EUR 13.54 million had been spent. The long term maintenance contract approach will ensure sustainability of the investment and value for money. The periodic maintenance funding is through subvention from the Government budget in spite of the fact that the Road Fund has been established since 2006. However, it is also important that the Road Fund does technical audit to ensure that road users are fully protected particularly when the fuel levy is introduced as one of the sources of revenue for the Road Fund.

Table 3.10 : Periodic Maintenance Funding - 2009 -2011

Maintenance Lots	Amount (EUR)
Banjul Serrekunda Highway	2,584,506.55
2009 Road Maintenance : Lot 1	793,449.29
2009 Road Maintenance: Lot 2	539,263.32
2009 Road Maintenance : Lot 3	235,573.86
2010 Road Maintenance: Lot 1	535,088.70
2010 Road Maintenance :Lot 2	607,875.03
2010 Road Maintenance : Lot 3	512,952.59
Concrete Roads Project 2010	
Churchill's Town to Abuko Earth Station	1,486,162.51
Churchill's Town Drainage	909,090.90
2011 Road Maintenance : Lot 1	666,003.31
2011 Road Maintenance : Lot 2	939,490.28
2011 Road Maintenance : Lot 3	338,815.65
Bund Road	1,681,169.45
Sting Corner	1,524,571.79
Total	13,354,013.22

Source: National Roads Authority

3.9 Action Plan for Reform and Sector Investment Pipeline

i) Key Issues for Reform and Action Plan

3.9.1 The key issues to be addressed in the Road Subsector both from an operational and investment perspective relate to the following for which necessary action plans are called for:

- development of a Prioritized Five Year Road Development Programme for the primary and secondary roads

network consistent with the macro-economic and fiscal framework and Medium Term Expenditure framework for the road sector under the PAGE;

- development of a Prioritized Five Year Feeder Roads Rehabilitation Programme based on multi-criteria analysis to support the agricultural sector and all inclusive growth under PAGE; the 244 km of Rural Feeder Roads Rehabilitation Programme prepared under the EU/TA can be a basis for donor involvement as it meets the sector planning criteria;
- establishment of sustainable Funding for Road Maintenance by introduction of Fuel Levy charge on road users as main source of road maintenance funding for the network and revision of current schedule of user charges and road access fees to reflect damage cause to pavements by the vehicle type and introduction of transit fees;
- development of a Five Year Road Maintenance Action Plan (R-MAP) based on a revitalized Road Fund with main revenue source coming from Fuel Levy;
- development of Heavy Vehicle Management Programme to prevent pre-mature damage to road pavements;
- Initiation of a Road Safety Programme with creation of necessary institutional framework-National Road Safety Council with a secretariat to develop its work programme;
- institutional capacity building for the NRA to be able to exercise its mandate for planning, programming and execution of road works and managing contractors and consultants;
- there is need for the GOTG to explore options and strategies for introducing Civil Engineering and other relevant engineering courses in the University to meet Gambia's medium term and long term man-power needs;
- programme for the development of the Local Road

Construction Industry; starting with Labour based method in collaboration with ILO and other development partners and GAMWORKS; and private sector management of heavily trafficked road corridors;

- review and update of road and road traffic laws and regulations to respond to the current realities of road use and operation and to improve road transport services (passenger and freight) and to improve road safety;
- creation of Corridor Management Committees essential for Transit and Trade Facilitation improvement on Gambia Port based regional road corridors should be implemented as follow up action on the ISRT and Bilateral and Tripartite Agreements entered into by the GoTG.

ii) Road Subsector Investment Pipeline

3.9.2 The Gambia Programme for Accelerated Growth and Employment (PAGE), 2012 – 2015, contain eleven priority projects/technical assistance activities with a total amount of USD 254.01 million. On the basis of the review of the road subsector and the strategic areas which needed support, the projects and the non-lending activities in the PAGE could form the core of operational activities for development partners including the African Development Bank Group for the period 2013-2016 (See Table 3.11 below). For these projects, the African Development Bank Group has to work in partnership with other donors particularly the EU and the Arab Funds that have been very active in the road-sector in order that synergies to achieve development effectiveness could be maximized.

3.9.3 There are also a lot of policy challenges for the Road Sector for which the EU has provided a lot of Technical

Table 3.11 : Road Subsector Priority Projects Pipe Line- 2012 -2015

Agency	Project Description	Indicative Cost (USD million)	2012 (USD million)	2013 (USD million)	2014 (USD million)	2015 (USD million)
MOWCI	National Transport Policy Update	0.26	0.26			
NRA	Road Infrastructure Master Plan	0.10		0.10		
NRA	Lamikoto – Passamus Road : (121km)	55.50		18.50	18.50	18.50
NRA	Basse – Fatoto – Koina (48.31km)	22.16			11.08	11.08
NRA	Brikama-Darsilami	17.08	17.08			
NRA	Road Maintenance	13.72	3.43	3.43	3.43	3.43
NRA	Feeder Roads Rehab.	34.16	8.54	8.54	8.54	8.54
NRA	West Field- Sukata Road-Janban Jelly Road	8.00		4.00	4.00	
NRA	*Bamba-Yelli Tenda –Trans Gambia Bridge	91.06	28.02	28.02	28.02	7.00
NRA	Equipment for Emergency Repairs	10.34		10.34		
MOWCI/ NRA/GRA	Replacement/Installation of Weigh Bridges	1.63	0.10	0.51	0.51	0.51
	Total	254.01	57.4 3	73.44	74.08	49.06

Source: The Gambia- Programme for Accelerated Growth and Employment 2012 – 2015

*Financing already secured from the AD

Assistant support, particularly with respect to the National Road Authority and the Road Fund, Axle Load Control on the Road Network through a Heavy Vehicle Management System Study, Capacity Building for the NRA and a Rural Feeder Roads Rehabilitation Programme (See Annex 3.11), which are ready areas for effective collaboration between the EU and other development partners. The output of the Technical Assistant studies on the National Road Policy, Axle load Management Study and Rural Feeder Roads Rehabilitation Project should be a basis for a collective donors' dialogue with the GoTG for a possible common basket support to clear periodic maintenance backlog and support for investment in the sector.

3.9.4 For the PAGE period 2012 – 2015, the GoTG has a programme size of USD 254.01 million for the Road Subsector. Table 3.11 above provides a summary of the Road Subsector Priority Projects and Technical Assistance Activities admitted into the PAGE. These projects are consistent with the subsector challenges and could be a basis for programmatic engagement with The Gambia and collaboration with development partners. However, the allocation for maintenance at GMD 100 million per annum for the classified road network is too low given the annual maintenance need estimated at GMD 250 million in addition to the maintenance backlog.

3.9.5 This allocation is based on subvention from the Government budget as in the past, which is indicative of to reform agenda. Additional investment in the Road-Subsector will not be sustainable if the Government fails to fully implement the reform agenda in the sector. It is imperative that Government raises additional revenue through a ring fenced Road Fund with main revenue source coming from fuel levy. The allocation of USD 10.34 million for equipment for emergency repairs also appears to be on high side except if it is to back up equipment leasing arrangements to private sector, otherwise this is in direction of a probable policy reversal to maintenance using the force accounts.



4

URBAN TRANSPORT SUB-SECTOR

4.1. Introduction

4.1.1 With the rapid urbanization and continuous rural-urban migration taking place in The Gambia, the Greater Banjul area presently hosts close to 50% of the population. This situation overstretches the transport system and affects the productivity of the city economy. There is currently growing traffic congestion and pollution in particular in the Greater Banjul area. In recognition of the importance of the Greater Banjul Area to the country's economy, the GoTG has recognized the need to improve urban transport and land use planning, improve hierarchical road and integral drainage systems for the benefit of road users in big towns but particularly in the Greater Banjul Area where this has become an urban transport challenge.

4.2 Infrastructure and Transportation Services

a) Infrastructure Development.

4.2.1 The current stock of urban road infrastructure in Banjul and Greater Banjul area is given as 187 km (exclude the primary and secondary roads that cross the urban boundaries) and most of the urban road network is in very poor condition. The institutional responsibility for construction, maintenance and management of urban roads and drainage infrastructure lies with the National Roads Authority that also has the power under the enabling Act to delegate the construction and management of some roads to Municipal Authorities or the Local Administration. Currently, there is a blur with respect to institutional responsibilities for the hierarchy of urban roads network and regulation of urban transport services on the arterial, collector and local roads in urban centres. This would need to be rationalized and strengthened in order to improve efficiency of the urban transport system and accountability for system failure particularly for the interrelated plans covering road network, bus network and truck routes, and traffic management plan for Central Business District (CBD) in the city environment.



4.2.2 Though The Gambia has growing towns, only the Greater Banjul metropolis for now requires a long term transport needs study within an urban framework based on the future land use plan in order to contain current sprawl of the Banjul-Brikama area. But any further development of urban transport infrastructure in the Greater Banjul area should be based on integrated land use and transport planning approach. This will enable effective planning between the Central Business District and residential areas and the transport system that would respond efficiently to urban mobility needs.

4.2.3 There is no hierarchical road system, a network of arterial, collector and local roads, established for the Greater Banjul Area and other emerging cities; which will form the basis on which the NRA can delegate some local roads to lower Agencies such as the Municipal Authorities and Local Councils. The arterial and collector roads can then be the responsibility of the NRA while the local roads are left to the Municipal Councils. Institutional responsibility is currently blurred both for the road infrastructure and the leadership for urban transport services.

4.2.4 Urban connectivity in terms of ready access to a one-lane paved road capable of supporting year-round access by a bus service or equivalent motorized vehicle to ensure that no resident had to walk more than a specified distance to a paved road require a minimum length of paved road per urban resident of about 1,011 kms for The Gambia.

The current urban road network including primary and secondary roads that cross urban boundaries for the Gambia are half this figure; even then most are in poor condition. For the future the direction in improving performance of urban transport should be in prioritization of urban transport infrastructure to protect movements of public transport and Traffic (NMT) against unrestricted expansion of private motorized trips. Information on traffic congestion levels, level of pollution due to vehicle emission causing degraded air quality, traffic congestion and consequent travel time per average trip are not available to deepen further assessment of performance of urban transport sub-sector.

b) Regulation of Public Transportation Services

4.2.5 The wider issue of the Laws of the Gambia with respect to Regulations of urban transport and traffic need to be reviewed to make the Government play the triple role of facilitator, regulator and enforcer while the private sector take on operational responsibilities. The regulatory environment will include measures to control stationary vehicles, giving priority to persons over motor vehicles, and preference to mass transit public transport systems; off street and on street parking regulation, safe stopping areas along the streets, loading and unloading zones, and public transport and commercial vehicle terminals among others. An incentivized private sector may need to be drawn into Public Transportation activities particularly those that can operate big buses on the arterial and collector roads and invest in terminals combined with route allocation on the local and secondary roads based on an agreed level of service. Enhanced traffic laws and regulations however need strict enforcement by the police to complement traffic management measures at intersections and thereby improve urban traffic circulation in Banjul and its peri-urban areas.

c) Central Business District Traffic Management

4.2.6 In the long term, it is necessary with the increasing rate of urbanization to plan ahead for a Bus Rapid Transit System which could be the core of the transport plan for Greater Banjul Area, but would need building appropriate public sector institution for urban transport regulation and partnering with the private sector concessionaires for operation.

4.2.7 The large volume of trucks servicing the Banjul port and its immediate area have exacerbated the congestion in the city, some using the streets to unload and offload, instead of having an Inland Container Depots (ICD) outside the city boundary and using dedicated river transport container vessels to deliver to the ICD, particularly for transit traffic to Senegal, Guinea Bissau and Mali. This is an area of intermodal coordination can be explored both for the Banjul Port Master Plan and Greater Banjul Transportation and Land Use Plan. This would leverage the overall efficiency of the transport system in servicing the Greater Banjul Metropolitan Area and the Banjul port.

4.3 Key Issues for Action Plan

i) Infrastructure

4.3.1 Institutional responsibility for hierarchy of roads contributes to the poor condition of urban roads network: Urban road infrastructure provision and management calls for definition of hierarchy of roads in the city and the shared institutional responsibilities for their construction and maintenance. The poor state of urban road infrastructure is impeding flow of traffic, leads to loss of transit time for urban dwellers and higher vehicle operating costs which are real cost to the economy. In the case of the Greater Banjul Area, there is no definition of the hierarchy of Roads Infrastructure (arterial, collector and local roads) and their integral drainage systems; and Institutional Responsibilities between the NRA and the Municipalities.

4.3.2 Given the institutional responsibility for the development of the road network given to NRA, there is confusion on the part of Municipalities as to the ownership of the lower classes of urban road infrastructure. Neither the Municipal Councils nor the NRA takes responsibility for planning, programming, construction and maintenance of the feeder/local urban roads infrastructure that support the main arterial corridor roads in the urban network that is primarily the main pre-occupation of the NRA accounting for 60% of maintenance interventions. The implementation of the Act setting up the NRA provides room for the NRA to share responsibility and delegate to the Municipalities the feeder/local roads in the city while focusing on the arterial corridors and collector roads. In the short to medium term and to enable the Greater Banjul Municipality prepare to take on this role; there will be need for institutional support for strengthening the Banjul Municipal Council Transport Department to effectively take on this role.

4.3.3 Funding for Urban Road Maintenance: The focus of NRA is on inter-city roads which has penalized the urban roads system. The definition of hierarchy of road in the urban centres and institutional responsibility should be accompanied by some allocation from the Road Fund resources to the Municipal Councils for maintenance of city roads under their jurisdiction.

4.3.4 Land Use/Transportation Plan: One of the key parameters in planning urban transport infrastructure is the

relationship with the land use plan. The two needs to be integrated to enable transport infrastructure respond to the needs of the land use and the residents. For the Greater Banjul Metropolitan Area (Banjul-Brikama Area), this is now compelling in order to stop the urban sprawl, a major issue for the city planners.

ii) Public Transport Services

4.3.5 Regulatory Enforcement: Non enforcement of existing regulations on driver behavior and traffic management has resulted in chaotic traffic situation in the Greater Banjul Area. Lack of effective control on parking and commercial activities on sidewalks and even on pavements are common place reducing capacity of the urban network. Much could be done in this respect in shorter time and at low cost to improve traffic circulation.

4.3.6 Transition to Regulation of Small Informal Sector and Bus Rapid Transit: There is no Bus Rapid Transit system in the Banjul metropolitan area with priority bus lanes. There is currently a laissez-faire approach with para-transit system consisting mainly of the small informal sector that now controls the provision of public transport in the city following the demise of GPTC that call for urgent regulation of current chaotic service provision. This could be done through route allocation that confines them to feeder routes. This should however be accompanied by incentives to the private sector for big bus operators to run on the arterial routes with high volume, uncongested routes with priority bus lanes where higher productivity can be achieved and protected from minibuses that are confined to collector and the feeder routes.

4.3.7 Fleet Renewal is a challenge for the urban transport operators and has resulted in ageing fleet of public service vehicles on the urban road system. This has implications for road safety. This may require more franchising agreements that could provide more secured streams of future income and help facilitate bank financing, Government can also provide incentives such as reduction of import duties on buses/spare-parts and tax holidays for bus operators that operate the main arterial corridors.

iii) Central Business District Traffic Management

4.3.8 Managing traffic in the Central Business District of the Greater Banjul Metropolitan Area will require com-

plementing a Bus Rapid Transit System that maximizes accessibility to the CBD destinations with high impact solutions, such as Bus priority lanes/exclusive bus lanes, removal of on street parking, signalization at intersections, one way streets and widening of road infrastructure for improve capacity. This would require the introduction of road hierarchy that identifies primary distributor roads linking arterial roads for inter zonal traffic and collector roads used for intra-zonal traffic movements.

4.3.9 The Greater Banjul Urban transportation operation and improvement will thus be based on the four pronged actions of:

- i) vehicular traffic control improvement;
- ii) vehicular flow control by parking policies;
- iii) development/improvement of traffic control centres, and
- iv) improvement of intersection traffic management system and signal management.

It is important that all these issues be considered as vital component of a Greater Banjul Land Use/Transportation Plan.

4.3.10 There should also be policy measures to mitigate urban environmental degradation. This should include enhancement of gas emission control through establishment of vehicle inspection stations and policy of Traffic Demand Management that favors public transportation service as against use of private vehicles.

4.3.11 The above stated policy streams and measures are to be implemented over the short, medium and long term with respect to Infrastructure, Traffic Management, Service Quality and Route Network development. In the long term, following the commissioning of Greater Banjul Land Use and Transportation Plan Study, there may be institutional development leading to establishment of a Metropolitan Transport Authority in charge of both infrastructure and public transport (See Annex 4.1 on policy stream and measures that should accompany this process).

4.4 Urban Transport Sub-sector Investment Pipeline

4.4.1 Over the PAGE horizon of 2012 - 2015, only the Greater Banjul Area drainage system has found its way into the Government's investment plan with a total indicative allocation of USD 1.11 million as indicated in Table 4.1 below.

Table 4.1 : Urban Roads Subsector Priority Projects Pipe Line- 2012 - 2015

Agency	Project Description	Indicative Cost USD million	2012	2013	2014	2015
MOWCI/NRA	Construction and Rehab.of Banjul Drains	1.01		0.43	0.43	0.15
MOWCI/NRA	Greater Banjul Drainage Master Plan	0.10		0.10		
	Total	1.11		0.53	0.43	0.15

Source: The Gambia - Programme for Accelerated Growth and Employment 2012 - 2015

4.4.2 The deplorable situation of urban roads infrastructure has not been explicitly stated though its maintenance might be presumed under the allocation to the National Road Authority for maintenance of the road network, which is not even enough to meet the annual cost of maintenance needs. If there is definition of clear responsibilities for hierarchy of roads in the Greater Banjul area, there should be in the short term a capacity building support to the Banjul City Transport Department on planning,

programming, construction and maintenance of its local roads network, and this could be included as a capacity building activity in the PAGE.

4.4.3 The GoTG should take a holistic view of urban land use and urban transport master plan and commission a study to guide future urban development and improve the livelihood of urban dwellers and the productivity of the urban economy that are engine of growth for The Gambia.



5

MARITIME AND RIVER TRANS- PORT SUB-SECTOR

5.1. Introduction

5.1.1 The advantage of geography, with Banjul situated on the mouth of The Gambia River had made the port of Banjul to serve as a regional trading centre, with river transport providing deep links hinterland and servicing the transit traffic to Senegal, Guinea Bissau, Mali and Guinea Conakry. Up till the 1960s, the Banjul Port and its integral River Gambia was the backbone of The Gambia Transport System. Ocean going vessels of up to 300 gross tonnage can go up the river for about 240 km and smaller ships could go up to 500km from Banjul. Principal river ports were at Kaur, 193km upstream from Banjul and Kuntaure on the river for handling the traffic that then consisted mainly of groundnuts and cotton for export. The River is still navigable up to Fatoto, which is 477km from Banjul. However, this strategic role of the subsector has weakened over the years due to competition from the road transport. This has led to collapse of river transport system and most of the river ports infrastructure is currently in disrepair. As a result, the reinstatement of the competitive position of the port of Banjul and the river transport mode for inter-modal and multi-modal transport continues to be a challenge for The Gambia Transport Sector.

5.2 Institutional, Port Management and Logistic Issues

i) Gambia Ports Authority

5.2.1 The Gambia Ports Authority (GPA) is responsible for the construction, maintenance, administration and operation of port infrastructure and facilities in The Gambia and also responsible for the River Ports, ferries and associated infrastructure for the inland waterways transport on the River Gambia. The Port of Banjul is the only maritime port managed by the GPA and is the gateway for the export/import trade of The Gambia accounting for over 80% of total international trade. The Gambia Maritime Administration is responsible for the regulation of the maritime transport sector.

5.2.2 The maritime transport strategy of the GoTG focuses on the strengthening of the position of the Port of Banjul as a gateway to The Gambia and the ECOWAS region in line with the Freeport initiative. The Banjul port hinterland apart from The Gambia includes Senegal, Guinea Bissau, Guinea Conakry and Mali. But this means that the Banjul port is faced with intense competition from other regional ports in these hinterland countries of the port of Banjul except Mali that is landlocked. To stay ahead of its competitor, and also to be a major gateway port, continuous improvement of services in the port itself must be complemented by improved logistic chain on the transport corridors linking it to its hinterland countries.

5.2.3 Though the National Transport Policy 1998-2006 underscored the fact that the growth potentials for the Port of Banjul will be further enhanced by a comprehensive package of supportive actions in the field of trade, management, cooperation, deregulation, efficiency and privatization of certain functional services and operational activities, the Banjul Port management still remains that of a Public Service Model in a changing industry environment. Most ports have moved from Public Services Model to Landlord Ports to enhance their productivity and efficiency and to create room of private sector intervention, currently the business case for all regional ports competing with the Banjul port and servicing the same hinterland (See Table 5.1 below).

Achieving the port vision and mission to continue to be the gate way for exports and imports of The Gambia; and above this as the major/leading port in the region serving as the vital transit hub for worldwide shipping lines will be difficult to achieve without out institutional changes below; even then a tall order in the face of current competition among regional ports.

5.2.4 Though within the general policy objective of commercialization of parastatals, the GPA had prepared a Banjul Port Master Plan updated in 2008, articulating the corporate vision and strategy in terms of infrastructure and system needs to cope with the future in face of fierce com-

petition from neighboring ports and benchmarking its operational performance, the Banjul Port Master Plan however now faces enormous challenges in the face of emerging trends not only in neighboring ports but also generally in the Port and Shipping Industry.

5.2.5 Economic forces appear to be favoring the hub and spoke system and there is today the emergence of super-hubs and a changing pattern of port calls (Trace, 1997). It has been suggested that ports must have throughput of 5 million Twenty Feet Equivalent Unit (TEU) and logistics facilities to support the efficient flow of cargo (Lloyd's List 2002) to be a hub. For the Port of Banjul with a container throughput of 71,932 TEU in 2011, and other competing regional ports that have restructured from a public service ports to landlord ports (Senegal, Guinea Conakry, Liberia, Sierra Leone, Nigeria, Ghana and Cote D'Ivoire); only improved operational efficiency and rehabilitation/construction of inland transport connection to hinterland countries with appropriate cross border trade and transport facilitation measures with Inland Container Depots will enable Banjul port retain its competitive position.

5.2.6 The fierce competition among regional ports in West Africa has led to multi-loops system of alliances with smaller vessels than running very large vessels on a few loops. The bargaining power of shippers that ensures the principle of ship follow cargo result in the liner service network becoming a customer oriented differentiation exercise, with less transshipment and more direct ship calls based on traffic density and overall logistic chain efficiency for the shipper. This is a challenge for any future major expansion in Banjul port capacity unless certain policy options are vigorously pursued.

5.2.7 Policy objectives for the GPA should be on exploring new policies on the port organization, port facilities and regulations in the following areas:

- redefine port governance and organization to tackle emerging issues, particularly moving from a public service model to a landlord model like other regional ports;

Table 5.1 : Basic Port Management Models

Type	Infrastructure	Superstructure	Port Labour	Other Functions
Public Service port	Public	Public	Public	Majority Public
Tool Port	Public	Public	Private	Public/Private
Landlord port	Public	Private	Private	Public/Private
Private Service Port	Private	Private	Private	Majority Private

Source: World Bank – Port Sector Review



Copyright Banjul - Barra crossing point - Ferry

- privatize and promote partnership between public and private sectors in order to enhance efficiencies and productivity particularly with respect to the superstructure of the port ;
- establish port cluster by :
 - exploring free port system ;
 - introducing free trade zones for international logistic industry ;
 - developing industry complexes around the port ;
 - concentrating logistics related industry – shipbuilding, ship equipment, ship spare parts ;
- develop intermodal Infrastructures such as regional roads linking hinterland countries of the port, inland waterways on the River Gambia connecting to Inland Container Depots ;
- strengthen the marketing Strategy ;
- use Information Technology such as e-commerce and On-line transactions.

Partnership with local community of shippers and other government organizations particularly customs.

5.2.8 Most of the above policy objectives are contained in the Transport Sector Policy 1998- 2006. While renewal of port infrastructure and super structure require huge capital outlay and may constitute implementation impediments for a small country and economy like The Gambia; access to private capital is also constrained due to port sector reform. The GoTG has financed its port expansions through donors support with concessionary funds, a situation that is not possible in the current environment. In the changing industry environment, the dependence on donors for port expansion that is driven mainly by transit and transshipment traffic based on a hub strategy with competing regional ports that have adjusted to changing industry environment may be difficult to achieve.

i) Ferries Services and River Transport

5.2.9 River Transport, including the operation and management of ferry services, is not a core mandate of a Port Authority; though they are under the Ferries Department

in the GPA. The ferries are managed as integral part of the road network to connect the North and South River banks along the primary North – South road networks. In order to revive the River Transport on the River Gambia, it would be necessary to create an Inland Waterways Department in the MOWCI or a River Transport Authority that would focus on the strategy to bring River Transport back in the modal mix.

5.2.10 In addition river transport cannot be revived in a situation where the transport infrastructure pricing policy subsidizes one mode against the other even when it is not providing services at least cost to the economy. Such efforts to revive the river transport should first start with the axle load control measures on the road sector as proposed Section III above and appropriate road access charges vehicles on the road network. The proposed institutional change will enable the Government to develop the appropriate policy and strategy for river transport infrastructure and operations.

5.3 Banjul Port and River Transport Infrastructure

(i) Banjul Port Infrastructure

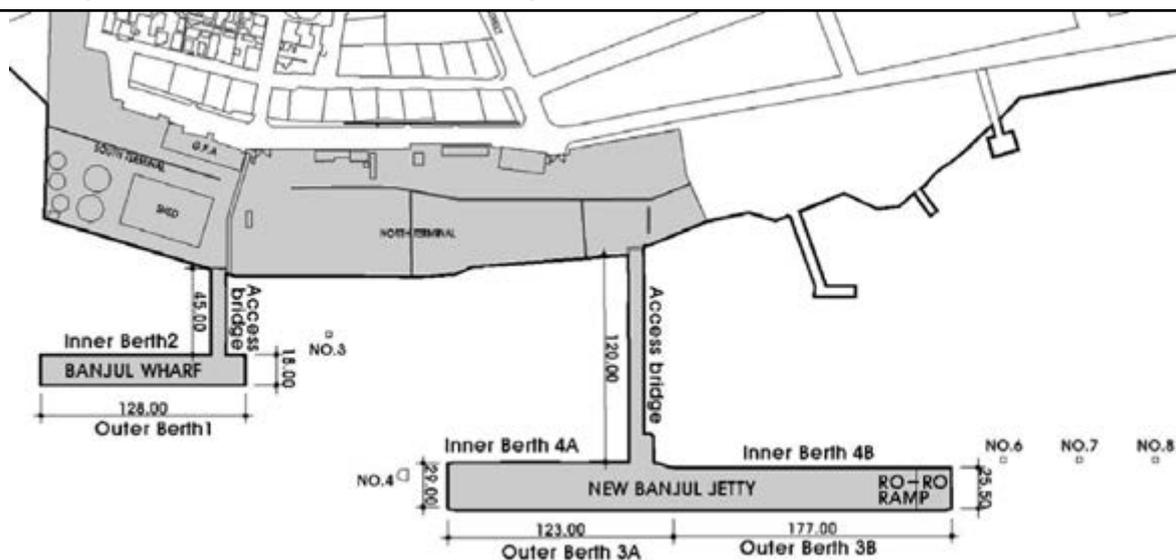
5.3.1 The Banjul Port presently has two jetties, the Banjul Wharf and the New Banjul Jetty with combined quay

length of 428 metres. The two installations comprise at inner and outer sides five berths and a Ro-Ro Ramp facility at the northern end of the New Banjul Jetty.

Out of these five berths only the three outer berths (1, 3A and 3B) have safe and sufficient water depth (9.5 metres) for vessels with more than 6 metre draught. Access to berths is limited in many cases for large vessels (large vessels are defined to be bigger than 15,000 tons dead weight). Both inner berths can be approached or left only under certain tide conditions, which can vary slightly depending on the intensity of tide. The approach channel water depth is 9.5 metres at Mean Low Water Spring Tide (MLWST). With trends towards larger vessels a study financed under the AfDB Bilateral Funds, has revealed that dredging a 10.5 meter channel would be possible in line with meeting the objectives of Government’s Freeport strategy. Sixty percent of the berths are in good condition while 40% is in need of rehabilitation.

5.3.2 Other facilities at the port include a container freight station, 2.4 hectares of open storage for containers, Sheds A and B for general cargo storage and a workshop for maintenance of port handling. The African Development Bank Group has been one of the main financiers of the port expansions (Banjul Port I approved with Bank Group participation of UA 6.99 out of total of UA 17.47 million co-financed with IDA, KWF and GoTG in 1982 and Banjul Port II with an ADF loan of UA 16.0 million approved in 1993).

Figure 5 : Banjul Port Infrastructure / Facilities Layout



5.3.3 At the three outer berths container vessels enjoy berthing priority. Petrol tankers bound for Banjul Wharf to discharge cargo via pipeline enjoy priority berthing as well. Vessels without berthing priority are however compensated by the arrival vessel that has to pay shifting charge. Access to berths is limited in many cases for large vessels greater than 15,000 DWT. Due to this priority scheme for certain time-sensitive trades, the port achieves an acceptable service level. Based on berth occupancy ratio of 65% applied in the 2003 Ports Master Plan Study as trigger for additional berth capacity, the GoTG is planning for a port expansion with a 200 metre wharf extension with capacity to handle larger vessels of 20,000 DWT. But this is on the proviso, that there is concessioning of the container terminals which will lead to increased efficiency to restore the ports competitive edge to participate in transit and re-exports trade currently threatened by increased competition and efficiency from neighbouring ports of Dakar and Conakry that have moved from public service model ports to landlord model ports.

5.3.4 Other infrastructure constraints include additional container storage area, needed to improve the capacity

and efficiency of the Port of Banjul. In this regards, the Old Half Die Area with approximately 18,000 square metres of container storage space has been acquired by the GPA. The project when implemented would create a single compact container yard with earlier investments under Banjul Port I and Port II projects above. Rehabilitation works are also needed on the Access Bridge between Berths 3A (North Terminal) and 3B (South Terminal) due to damages by small vessels riding on the tide. The heavy duty pavements at the North and South Terminals of the port that facilitated movement of heavy handling equipment need to be demolished and rehabilitated for smoother driving surface and improved drainage systems. The Indian Export Import Bank has been approached by GPA for financing of the procurement of cargo handling equipment, while the Africa Finance Corporation (AFC) based in Nigeria has been approached with respect to the infrastructure rehabilitation works.

(ii) River Transport Infrastructure

5.3.5 There are terminals at nine strategic locations for the ferry services (Banjul–Barra, Farafenni –Mansakonko; Janjangbureh (former Georgetown),



Bansang, Basse and Fatoto) which are integral part of the north-south road network, and are maintained by the GPA. The Government in 1984 constructed 12 concrete jetties at strategic locations, three of these at Kaur, Kuntaur and Basse. The inland port of Kaur has the facilities to accommodate minor sea-going vessels and had been used in the past mainly for transshipment of groundnut and cotton to Banjul. Due to collapse of river transport, these infrastructures are not in use and have fallen into disrepair. Thus, infrastructure supply alone would not revive the river transport industry, as analysis of flow of freight based on origin/destination survey on the road network indicated weekly movements of construction aggregates, cement and building materials, and other bulky freight on the road that can be shifted to river transport given a level playing field for all modes.

5.3.6 Participation of the private sector in river transport services therefore would require a holistic transport sector multi/inter modal planning and appropriate infrastructure pricing policies and incentives; including axle load control on the road network, increase in road access fees, fuel levy charges on road user vehicles and tax holidays to water transport operators for bulk haulage by barges. This would among others provide the necessary level playing ground for investors in water transport. Besides, trade technologies have changed and the use of RoRo ships and intermodal terminals to back up policy changes and other tax incentives are needed to get the private sector operators back in to the river transport business in The Gambia.

5.4 Ports Operation and Traffic

a) General Cargo Traffic

5.4.1 The overall cargo handled by the Banjul port increased from 956,767 metric tonnes in 2005 to 1,402,135 metric tonnes in 2010 representing an annual growth rate of 8.2%. Containerized traffic account for over 50% of total throughput followed by dry bulk cargo that on the average accounted for 31%. The dry bulk cargo consists mainly of cement which accounts on average for about 16% of import annually, rice, sugar and flour. Import of motor vehicles has peaked at about 6% of total traffic, with an average of 65038 vehicles imported per annum indicating increased motorization and vehicle ownership. Bulk liquid freight account for about 11.0% of total traffic while break bulk account for only 1.3% on the average annually.

5.4.2 Imports account for over 91.0% of the throughput on the average annually while exports account for the balance of about 9.0%. The exports consists mainly of general cargo, textiles, groundnuts, groundnut cake, groundnut oil, cashew, mineral sand, fish and fish products, cotton and other manufactured goods, which are exported about 94% as containerized traffic. The share of containerized cargo in import traffic has increased from 45% in 2005 to 55% of imports in 2010 and about 98% of exports consist of container traffic, indicating the increasing level of containerization of trade.

Figure 6 : Cargo Throughout 2005 - 2010 (Metric Tonnes)

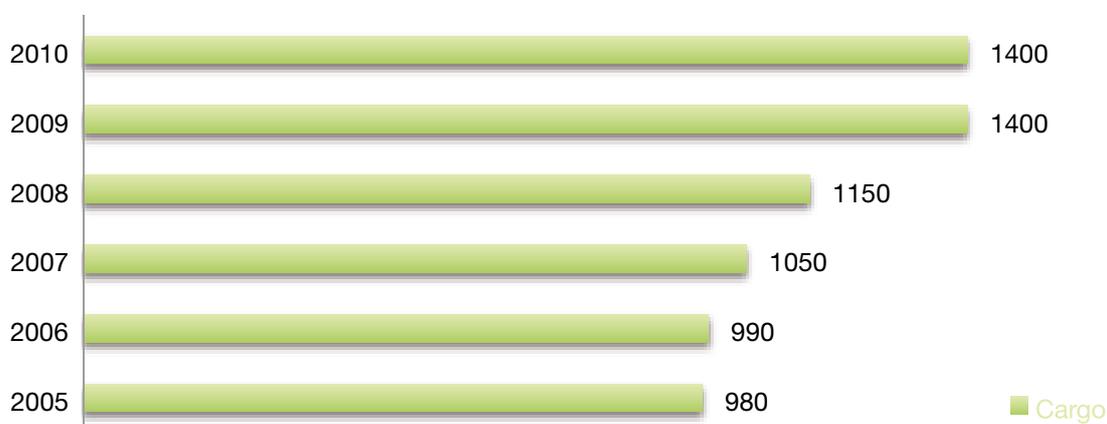


Table 5.2 below summarizes the trend in cargo throughput over the period 2005 -2010. The composition of the traffic by 2010 indicated that general cargo accounted for 1.20%, containerized cargo for 70.75%, dry bulk for 26.94% and liquid bulk for 1.11%. Details of the cargo handled by category of cargo are as shown in Annex 5.1.

Table 5.2: Cargo Throughput - 2005 - 2010 (Metric Tonnes)

Year	Cargo Traffic	Growth rates (%)
2005	956,767	
2006	983,511	2.29
2007	1,042,903	6.04
2008	1,140,377	9.35
2009	1,390,561	21.94
2010	1,402,135	0.83

Source : Gambia Ports Authority

b) Container Traffic

5.4.3 The container throughput has increased from a level of 45,246 Twenty Feet Equivalent Units (TEU) in 2005 to 71,932TEUs in 2010, registering an average annual growth rate of 8.9% over the period (See Table 5.3 below). The export of containerized traffic indicated that 83% go to Asia, 6% to Europe, 6% to the Americas and only 5% to African countries. The breakdown of exports in TEU by type of commodity indicated that cashew account for 25%, Timber 23%, Scrap metals for 15%, General Goods for 8%, Seafood for 7% and Groundnuts for the remaining 3%. The increasing rate of containerization and annual growth rate of containerized traffic per annum point to the need for investment in container terminals and increasing the container stacking area at the port in addition to increasing efficiency in container handling activities.

Table 5.3: Container Traffic Trade: 2005-2011 (TEU)

Year	TEU	Growth rates (%)
2005	45,256	
2006	45,454	0.46
2007	52,297	15.05
2008	56,975	8.94
2009	52,745	(0.74)
2010	58,521	10.95
2011	71,932	18.64

Source : Gambia Ports Authority

c) Container Transit Cargo Traffic

5.4.5 The transit container cargo traffic has increased from a low of 559 TEU in 2008 to 2491 TEU in 2011 with

its share of containerized cargo throughput markedly increasing from a low 1.0% in 2008 to about 3.5% in 2011 (See Table 5.4 below). GPA vigorous marketing of the Banjul Port and other incentives has definitely yielded benefit of attracting increasing transit traffic to the Banjul port ; in addition to the fact that a great number of freight forwarders have now moved to containerization of their cargo to improve transit time and increased safety and security.

5.4.6 It is also noted that this performance may also be linked with improvement in the primary road network that connects The Gambia to its hinterland countries and increased peace and stability in some neighboring countries (northern Guinea Bissau, northern Guinea and south- west Mali) that are now on growth paths and more importantly to the relaxation of tension between Senegal and The Gambia with border opened after the 2008 crisis. Improved trade and transport facilitation on the ECOWAS trade corridors will lead to greater container traffic trade as the current practice of stripping containers before inland journey will be abandoned. Recent developments however in ownership structures of regional ports from public to public private partnerships in Senegal, Guinea Conakry and Liberia pose serious threat to the future of transit and re-export business if The Gambia does not reform its port system.

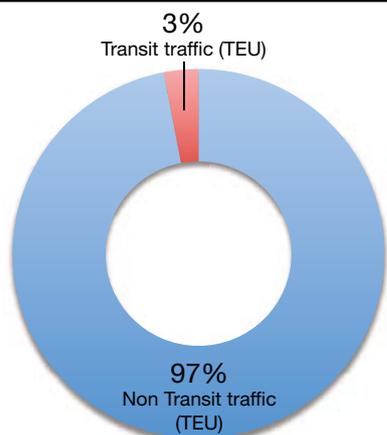
5.4.7 The import tax and port dues differential between Senegal and The Gambia has narrowed significantly in recent years; thus port efficiency and overall logistic chain efficiency are critical to shippers as basis of choice of ports. Physical road infrastructure linking The Gambia to hinterland countries and trade and transport facilitation measures are critical for the port's future. Recent road infrastructure improvement between Banjul – Siliti at the Senegal border, and Banjul and Soma have led to increased truck traffic between Banjul and Zinguichor; while the Dakar – Kaolack – Trans Gambia Bridge-Zinguichor when completed will also remove physical constraints to trade with Casamance and Guinea Bissau. For southern Mali the need to develop the missing links (Lamikoto – Passamus Road -121km and Basse – Fatoto – Koina – 48.3km) on the Gambia – South Bank Primary Road network to link with the Dakar – Tambacounda – Saraya – Bamako regional road network on the Trans Sahelian Road Corridor of Dakar – Ndjemina is strategic for port's future transit and re-export trade.

Table 5.4 : Transit Container Share of Container Throughput: 2008-2011

Year	Total Throughput (Teu)	Non Transit Traffic (Teu)	Transit Traffic (Teu)	Transit Traffic Share (%)
2008	56,975	56416	559	0.98
2009	52,754	51495	1259	2.39
2010	58,521	57026	1495	2.55
2011	71,932	69441	2491	3.46

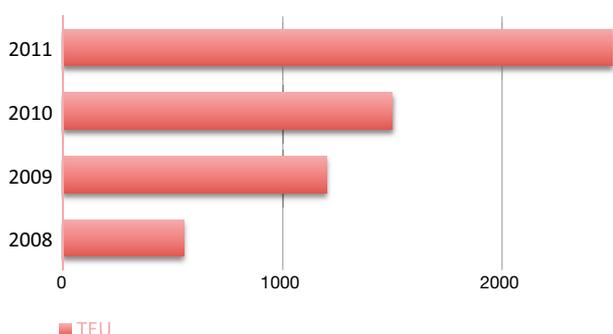
Source: Gambia Ports Authority

Figure 8 : Distribution of container traffic 2011



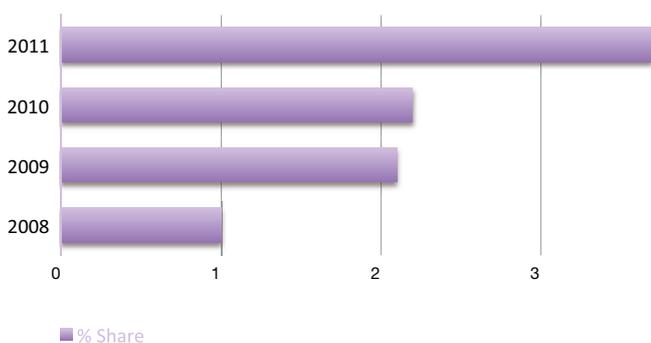
Source: Gambia Ports Authority

Figure 9 : Banjul Port Container Share of Traffic (TEU)



Source: Gambia Ports Authority

Figure 10 : Transit Container Share of Total Traffic 2008-2011(%)



Source: Gambia Ports Authority

d) Shipping Traffic

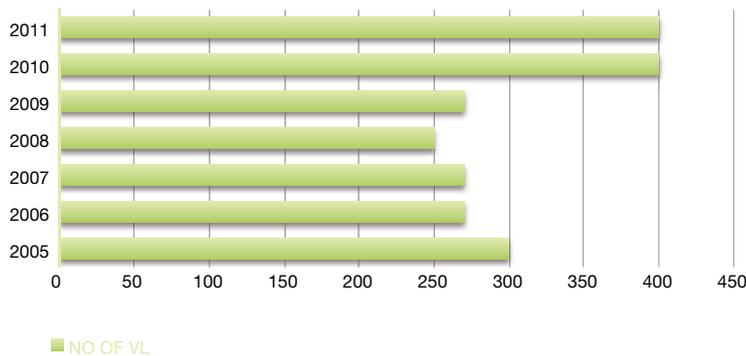
5.4.8 The number of vessels calling at Banjul Port followed a steady decline from 283 in 2005 to 244 in 2008, when it started to rise and went up to 368 ship calls in 2011. The Net Registered Tonnage (NRT) also followed the same decline from 1,562,440 in 2005 to 1,186,094 in 2008; and thence took an upward trend reaching 1,488,959 in 2008 after which it plateau and docked at 1,412,069 in 2011. The Gross Tonnage (GRT) also followed the same downward trends from 3,132,312 in 2005 to 2,606,731 in 2008 and thence rose to 3,151,766 on which it about stabilized up to 2011. The figures indicate the continuing change in vessel size and load factor perhaps due to physical constraints of port infrastructure and channel depth (See Table 5.5 below).



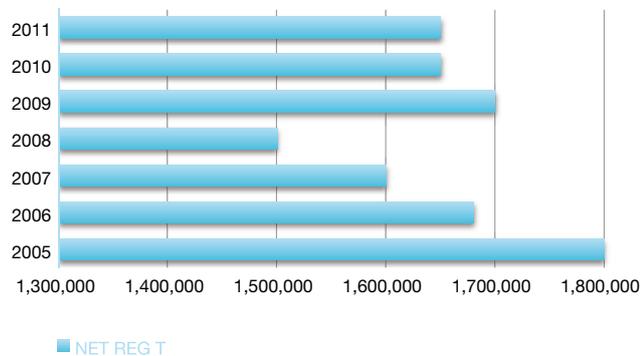
Table 5.5 : Ship Calls and Registered Tonnages : 2005 - 2011

Year	Number of Vessel Calls	Net Registered Tonnage	Gross Registered Tonnage
2005	283	1,562,440	3,132,312
2006	258	1,337,453	2,729,402
2007	266	1,264,340	2,843,227
2008	244	1,186,094	2,606,731
2009	276	1,488,958	3,151,766
2010	360	1,372,360	3,083,326
2011	368	1,412,059	3,058,000

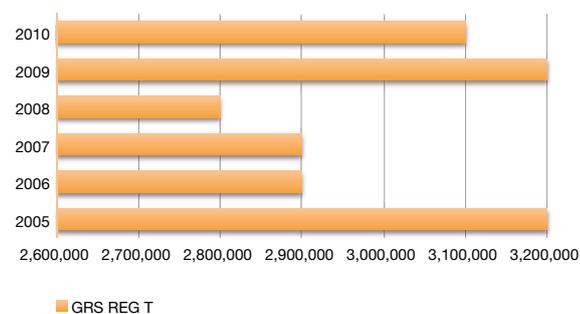
Source: Gambia Ports Authority

Figure 11 : Banjul Port Number of Vessels Calls


Source: Gambia Ports Authority


Figure 12 : Net registered tonnage


Source: Gambia Ports Authority

Figure 13 : Gross registered tonnage


Source: Gambia Ports Authority

e) Port Productivity and Performance

5.4.7 The GPA is concerned with improving overall performance of the port particularly given the fierce inter port competition within the sub-region and the impact of inefficiencies on the competitiveness of The Gambia economy. The key performance indicators as reflected in Table 5.6 below indicated that based on industry benchmark, the GPA has to work on the Container Dwell time (days) which is between 10-15 days as against the benchmark of less than 7 days, Truck processing time of 5 hours against the industry average of less than one hour, and Crane Productivity in terms of containers per hour which is at a low of 10 moves per hour compared to industry average of 20-30 moves per hour. However, for handling of general cargo, the Banjul Port's achievement of 42 tonnes per gang hour is international benchmark of greater than 30 tonne per hour (See Table 3.6. below on the Banjul Port Performance Indicators compared to industry benchmark).

5.5 Financial Situation

5.5.1 The GPA financial performance continues to be satisfactory as can be seen from the Annex 5.3 on the GPA Financial and Statistical Summary.

Table 5.6 : Banjul Port Productivity and Performance Indicators

Indicator	Banjul Port	International Benchmark
% Berths in good condition	65	80 -100
Container Dwell Time (Days)	10 - 15	< 7
Truck Processing Time (Hours)	5	<1
Crane Productivity (Container/Hour)	17	20-30
Crane Productivity (Tonnes/Gang Hour)	42	>30
Bulk Cargo (Metric Tonnes/Day)	1000	
Container Handling Charges (USD/TEU)	100-130	80-150
General Cargo Handling Charge (USD/Tonne)	8 - 10	7 - 9

Source: Gambia Ports Authority and Consultant

The Turnover decreased from GMD 399 million in 2006 to GMD 376 million in 2007 and GMD 373 million in 2008 after which it rose to GMD 500 million in 2009, decreased to GMD 427 million in 2010 but rose again to GMD 568 million in 2011; a 33% increase of previous year that was due to increased cargo throughput, Net Registered Tonnage (NRT) of vessels and depreciation of the Dalasi against the invoicing currency Euro. In 2011, Harbours contributed about 32% to total revenue while cargo handling accounted for 68%.

5.5.2 The operating profit increased from a low of GMD 20 million in 2007 to GMD 147 million in 2008 after which it took a deep and reducing to GMD 47 million in 2010. This resulted from relative lower turnover in 2010 and provision for other receivables with respect to the Authorities Third Party Institutions. Net Profits before tax and Net Profit after tax have been positive and all financial and liquidity ratios point to a solid financial position as indicated in Annex 5.3. The GPA has also acted as lender of last resort, providing financing on Government's directives to other transport parastatals (GPTC, GCAA) and investments in other non GPA core functions. This may remain a threat to future soundness if the loans are not recovered particularly as the GPTC has gone under.

5.6 Key Issues and Action Plan

5.6.1 A number of issues need to be addressed with respect to Maritime and River Transport in The Gambia. These issues require urgent actions on the part of the GPA and the GoTG in the face of globalization of shipping, port and logistic industry.

- The role of the private sector in the further development of the Sector calls for institutional restructuring of the GPA from a public service model to that of a Landlord model in order to improve operational efficiency and

hold its competitive position in the fierce competition with other regional ports. Globalization has affected the port and shipping industry in a way that the port management model has moved from public service ports to landlord model in order to improve efficiency in the face of increasing containerization of world trade that is growing and has replaced break bulk cargo.

- Banjul is a port city and the urban sprawl has led to significant urban development in areas adjacent to the port, leaving little room for port expansion or port service industries to develop in the future. This will call for development of inland transport connection and effective coordination between the Banjul Port Master Plan, the Banjul Urban Development Master Plan and National Transportation Master Plan, that require intermodal coordination of surface transport that may necessitate use of container barges to off port ICD on the bank of the River Gambia outside the urban boundary;
- Better handling capacity for bulk cargo and container logistics to improve current operational performance; and
- Improved regional road connections with trade and transport facilitation measures to the hinterland countries of the port.

5.7 Port and Maritime Transport Sub-Sector Investment Pipeline

5.7.1 An Investment Plan of EUR 118.5 million to reverse the decline in competitive position of the Banjul Port and improvement of Ferry services has been proposed under Port and Maritime Transport Sub-Sector by the Gambia Ports Authority under Pillar 2: Improving and Modernizing Infrastructure of PAGE 2012 – 2015 (See details in Annex 5.4).

Table 5.7: Gambia Ports Authority Prioritized Projects 2012-2015

Project/Programme	Executing Agency	Amount (EUR Million)
Construction of Container Terminal at half die acquired property	GPA	5.0
Rehabilitation of North and South Terminals	GPA	6.0
Construction of new quay by 200 metres	GPA	27.0
Port Computerization	GPA	1.5
Cargo Handling Equipment	GPA	2.0
Total	GPA	41.5

Source: Gambia Ports Authority (GPA)

Out of the long list of the priority projects listed in Annex 5.4, the GPA priority projects for its core functions are esti-



ated at total cost of EUR 41.5 million with details as in Table 2.1 below. African Finance Corporation and Indian Exim Bank have been approached respectively for infrastructure and handling equipment but financing arrangements have not yet been finalized and secured.

5.7.2 Following consultations during the study, Government is not interested in the privatization of the Banjul port and restructuring of its management to a landlord port model. This may be a serious constraint in raising funds in the capital market or borrowing from private sector window of Development Partners given their credit policies. The construction of new quay of 200 metres recommended by the recent study financed by the Korean Trust Fund hosted by the AfDB has made the privatization of container terminal a condition for the berth expansion. As per the

AfDB Group credit policy, The Gambia is an ADF country and grants only; thus the expansion of berth capacity through construction of a new quay of 200 metres cannot be financed through concessionary resources. The AfDB may however undertake a study on the privatization of the Banjul Port through the Bilateral Funds hosted to provide Government an informed basis for dialogue to undertake the necessary reform of its port sector.

5.7.3 Other maritime transportation investment projects pipeline under active consideration by GPA relate to ferry services and rehabilitation of the dockyard at a total cost of EUR 36.0 million. The details of projects proposed are as indicated Annex 5.5. The rehabilitation of the dockyard will be important for the rival of the River Transport if private sector is incentivized to enter the river transport industry.



6

AIR TRANSPORT SUB-SECTOR

6.1. Introduction

6.1.1 Air Transport plays a major role within The Gambia Transport System in providing international gateways for the business community with the rest of the world and is of critical importance for the Gambia Tourist Industry. Because of the small size of the country, domestic air transport has not been part of the internal transport system. Transport by Air into and out of The Gambia is via the Banjul International Airport (BIA), situated at Yundum, about 24 kilometers to the south-east of Banjul and it is the only airport. The Gambia Civil Aviation Authority (GCAA), established in 1991, operates the airport, manages and regulates the civil aviation industry, and is responsible for ensuring compliance with International Civil Aviation Organization (ICAO) set Standards and Recommended Practices (SARPs).

6.1.2 The Gambia International Airlines Limited (GIA) was incorporated under the Companies Act 1955 as a flag bearer airline to engage in air transportation and related activities and commenced operation same year. Following operational losses on regional routes using wet lease and chartered aircrafts, it has discontinued flight operations since 2005 and only involved in ground and cargo handling, travel agency and hajj operations. GIA is currently in search of a strategic partner for development of BIA as a hub in the sub-region.

6.2 Airport Infrastructure and Facilities

6.2.1 The Banjul International Airport (BIA) Master Plan is supply driven in its development strategy of a hub airport for the ECOWAS sub-region. In forecasting and design of the facilities, the binding factor is the peak tourist traffic. The vision of positioning the airport as a hub and its progression from a traditional airport model to a fully fledged airport city has informed the implementation of the Banjul International Airport Master Plan in Phases. The disadvantage is that infrastructure and facilities needed for peak tourist traffic are very much comparable to what is required by larger airports receiving much more traffic.

6.2.2 The BIA is composed of a single 3,600 metres long runway, a terminal building with capacity to handle one million passengers annually, a Control Tower and an International Freight Centre (approximately 550 sq. metres). Air Traffic Control and Navigational Aid facilities at the airport include:

- VHF Transceivers;
- VSAT;
- Doppler Very High Frequency Omni-directional Radio Range (DVOR);
- Distance Measuring Equipment (DME);
- Instrument Landing System (ILS);
- Aeronautical Fixed Telecommunication Network (AFTN)/Voice Link.

6.2.3 The above infrastructure and facilities were upgraded following the studies carried out by Belgian Airport Consultants (BEAC), in 1994; the economic part of which was updated by DHV Consultants in 1998.

6.3 Route Development and Air Traffic

a) Route Development

6.3.1 In its effort to market the Banjul International Airport (BIA) as a hub, the GCAA has entered into Bilateral Air Service Agreements (BASA) with 22 countries, whose airlines can now operate commercially at BIA; 19 are already initiated, while one is a proposal under discussion. The GCAA, in entering into BASA with any African country ensures that the fifth freedom right under the Yamoussoukro Decision is inserted. Of the fourteen Airlines that currently operate into the BIA; seven are for scheduled air services, six for non-scheduled inclusive Tour Charter and one for Non Scheduled Air Services. Regional air transport connection to Banjul is provided by Arik Air (Nigeria), Royal Air Maroc (Morocco), Senegal Airline (Senegal), Asky Airlines (Togo) and Fly 6 Airlines (Sierra Leone). Other routes development efforts are with respect to European routes which are serviced by My Travel (Denmark), Monarch (Britain), Spain Air (Spain), Thomas Cook (Britain), Transavia (Dutch), TUI/Arke Fly (Dutch), Brussels Airline (Belgium) and Condor (Germany) mainly for non-scheduled inclusive Tour Charter services.

b) Passenger Traffic

6.3.2 The passenger traffic at the BIA has seen a steady decline from 345,040 in 2007 to 293,305 in 2009 after

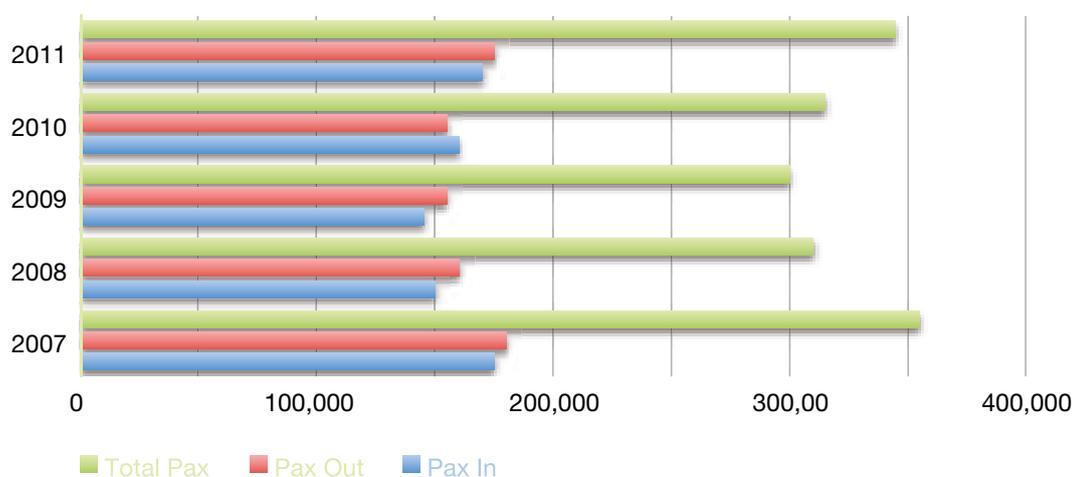
which it recovered with an upward trend and recorded a high of 318,240 passengers in 2011, resulting in a positive growth rate of 5% between 2010 and 2011. There was decline in tourist traffic between 2007 and 2009 due to austere situation in Europe, the supply base of the tourism industry. The decline was however reversed with an upward trend in passenger traffic attributed to increase in regional passenger traffic, which accounted for a total of 88,634 passengers in 2011 compared to 75,071 in 2010. This was due to two additional African carriers operating into Banjul. Though there has been increasing trend in the share of regional passenger traffic from a low share of 28.3% of all arrivals in 2008 to 45.7% in 2010; non regional traffic of mainly European tourists still dominate the passenger traffic accounting for over 60.0% of passenger arrivals on the average per year. Of the total passenger traffic of 318,240 in 2011, European based tourist arrivals accounted for 229,950 which is over 72.2% of total passenger traffic (See Table 6.1 and Fig. 14 below).

6.3.3 The current capacity at the Banjul International Airport (BIA) is only optimally utilized during the tourist season of November to April each year; waiting for new business case for the rest of the year. Traffic levels are discussed in sections below and details are in Annexes 6.1 to 6.3. The GCAA is vigorously marketing the BIA for capacity utilization during the off tourist season; an emerging strategy is that of promoting the BIA as an air transport hub in West Africa. This vision for an aerogropolis at Yundun requires a lot of buy-in from stakeholders both within and outside of The Gambia to justify any capacity expansion both for the passenger terminal and runway. Assessment in this diagnostic indicate that the exception for infrastructure upgrade in the medium term is with respect to apron and taxiway that are constraining during the peak tourist season and for upgrade of navigational aids for safety reasons.

Table 6.1 : Banjul International Airport - Passenger Traffic Summary - 2007- 2011

Year	Passengers (Pax) In	Passengers (Pax) Out	Total Passengers (Pax)
2007	170,856	174,184	345,040
2008	151,305	158,306	309,611
2009	145,395	147,910	293,305
2010	152,524	149,950	302,474
2011	158,279	159,961	318,240

Source: Gambia Ports Authority (GPA)

Figure 14 : BIA Passenger Traffic Summary 2007-2011

Source: Gambia Civil Aviation Authority

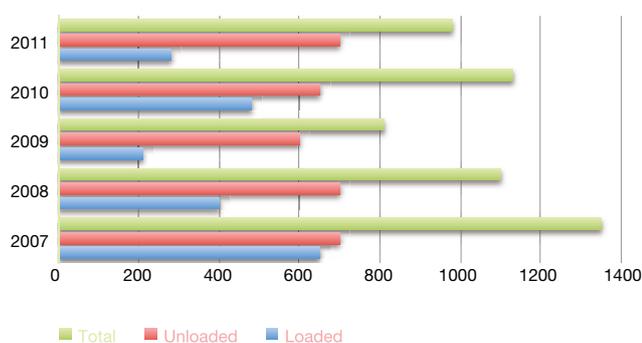
c) Cargo Traffic

6.3.4 Over the years 2007 – 2011, the cargo handled at the BIA has declined from about 1361 tonnes in 2007 to 820.94 tonnes in 2009 after which it picked up and reached the level of 1102.34 tonnes in 2010 but dramatically dropped by 11% to 980.36 tonnes in 2011. The cargo traffic has not shown any steady growth but averaged about 1071.2 tonnes per annum (See Table 6.3 and Figure 15 below).

Table 6.2 : Banjul International Airport Freight Traffic (Tonnes): 2007 - 2011

Year	Loaded	Unloaded	Total
2007	657.10	703.80	1360.90
2008	399.02	692.39	1091.41
2009	220.69	600.25	820.94
2010	460.51	641.83	1102.34
2011	280.86	699.50	980.36

Source: Gambia Civil Aviation Authority

Figure 15 : Banjul International Airport Freight Traffic

Source: Gambia Civil Aviation Authority

d) Aircraft Movement

6.3.5 There had been a steady decline in Aircraft movements since 2007; from 5292 movements in 2007 to 3865 movements in 2009. This trend was reversed with an upward trend from 2009 level of total aircraft movement of 3865 and reaching 5117 movements in 2011. The 2011 total movement of 5177 indicated that activities have bounced back to 2007 levels and compared to the 3979 movement in 2010, this resulted in a percentage increase of 28%. This was a result of vigorous marketing of The Gambia as a tourist destination; spring, resumption of flights by Condor (Germany) and Senegal Airlines and increase in frequencies of some of the existing operators namely: Air Nigeria, Royal Air Maroc and Brussels Airlines (See Table 6.4 below).

Table 6.3 : Banjul International Airport Aircraft Movement: 2007 - 2011

Year	European Airlines	Regional Airlines	Other Airlines	Total
2007	3332	1522	438	5292
2008	1767	1704	452	3923
2009	2083	1296	486	3865
2010	2587	978	414	3979
2011	3819	909	389	5117

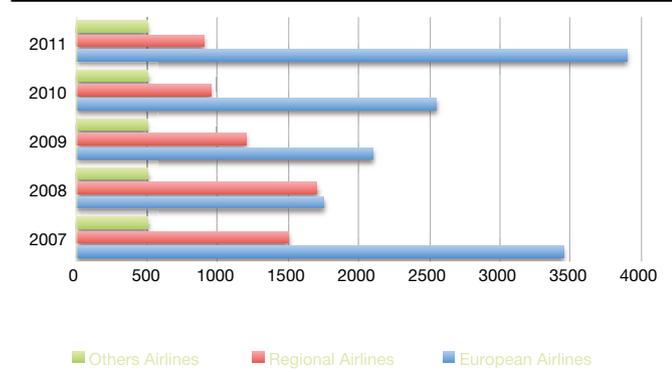
Source: Gambia Civil Aviation Authority

6.4 Sub-Sector Financing and Investment

6.4.1 A total investment of about USD 27.14 million has been made on improving the Banjul International Airport infrastructure and facilities between 1997 and 2012 as per Table 6.1 below. Except for the construction of the new ter-

minimal building, the investment in the airport infrastructure and facilities has been mainly financed by Development Partners, with GoTG handling some counterpart funds.

Figure 16 : Banjul International Airport Aircraft Movement



The AfDB Group through its Nigeria Trust Fund window financed the construction the runway at the airport in the 1970s but since then the Bank has been absent from the subsector. The two main donors in the sector since the 1990s have been the Kuwait Fund for Arab Economic Development (KFAED) and the Arab Bank for Economic Development in Africa (BADEA) that have co-financed the Fast Track and Phase I – Airport Improvement Projects with the Government.

Table 6.4 : Banjul International Airport Investments: 1997-2012

Phase	Project Components	Financiers	Cost (USD million)	Status
Fast Track Phase	Construction of New Main Terminal Building	GOVT	10.28	Completed in 1997
	1. Reconstruct access road to a dual carriage way including street lighting.	KFAED	2.86	Started in 2001,
	2. New Airport Internal perimeter fencing	BADEA		Completed and handed over 2005
	3. Upgrade the secondary power supply with additional 640 KVA			
	4. Provide and install new DVOR and other NAVAIDS instruments	GOVT		
Airport Improv. Phase I	1. Complete overlay of the runway including the shoulders;	KFAED	14.0	Completed in 2007
	2. Upgrading of the Airfield Ground Lighting (AGL) system	BADEA		
	GOVT			
Total Investment (USD)			27.14	

Source: Gambia Civil Aviation Authority

6.5 Air Traffic Control/ Navigation and Safety Issues

6.5.1 The GCAA is conscious that Air Traffic Control, Air Navigation and Safety issues are paramount and should be in the forefront of management agenda in the air transport industry. This is particularly so for the tourism industry that is the main driver of the air transport industry in The Gambia, as the subsector is very vulnerable to safety issues and safety perceptions at the airport can lead to collapse of the industry. For air traffic control, the control tower is equipped with VHF transceivers, and VSAT is also used based on cooperation agreement between Banjul and ASECNA relating to provision of ATS in the flight information region.

6.5.2 Navigational Aids Facilities also include DVOR, which is one of the primary navigational aids in the Gambia's

airway system, transmitting omni-directional signals that enable an aircraft to determine its bearing relative to location of the airport. The DVOR is used for homing, approach and landing and provides enroute navigation guidance for aircraft over flying the territory of The Gambia. Other Nav aids used in conjunction with the DVOR are Distance Measuring Equipment (DME) that provides distance information in slant range from the aircraft to the facility, Instrument Landing System (ILS) and The Aeronautical Fixed Telecommunication Network (AFN)/Voice Link that provides flight information from the tributary to the Flight Information Region.

6.5.3 Aviation Safety and Security are given prime place, through the Cooperative Development of Operational Safety and Continuing Airworthiness Programme – Banjul Accord Group (COSCAP-BAG) that strengthen the safety oversight capabilities of BAG member states with assistance of ICAO. Also the GCAA continuously enhances the capacity of civil



aviation security staff through training in Preventive Security Measures and Cargo Security Programmes under the auspices of the United States Transport Security Administration and USA Department of Homeland Security respectively. The BIA in view of the above still maintains its status as a Last Point of Departure (LDP) to the United States of America.

6.6 Financial Situation

6.6.1 Based on the Income Statements for the year ended 31st December 2011, from the audited GCAA Annual Activity Report, the Revenue position increased from GMD 137,776,000 in 2010 to GMD 299,741,000 in 2011, an increase of over 138%. However this gross profit was consumed by burgeoning operating expenses with resulting operating profit in 2011 of GMD 68,894,000 as against a loss of GMD 28,045,000 in 2010. Taking into account the net financing cost, the GCAA incurred losses of GMD 67.902 million in 2011 as against a loss of GMD 76.604 million in 2010.

6.6.2 Over all the BIA, is fully dependent upon capital investment from the Government and other development

partners for undertaking airport development and improvement. It is anticipated that government support will continue to be necessary given the strategic nature of the airport to the tourism sector until such a time that the airport traffic has grown to a size that it can support itself by generating enough revenue to be a profitable.

6.7 Key Issues and Action Plan

6.7.1 There is an institutional issue of dual role of GCAA as regulator and at the same time operator of the Banjul International Airport and its facilities. There is a perceived concern of possible conflict of interest in the two roles which may compromise safety standards. The GCAA explained that it has dealt with this perceived conflict with definition of roles under an unwritten rule of shared responsibility between the Director General and the Deputy. The Deputy is directly responsible for managing the Banjul International Airport and its facilities, while the Director General handles the regulatory issues. It is necessary to move beyond this as traffic matures for better commercial management of the Banjul International Airport. The



GCAA should then take on only regulatory functions while an Airport Authority is created for management of the airport and its facilities.

6.7.2 The peak traffic generated by the tourists during the tourist season is the main determinant of the capacity requirements of the Banjul International Airport. Thus there is idle capacity during 6 months of the year after the tourist season of November to April. The dimensioning of airport infrastructure and facilities in this context, call for marketing the airport for business during the off tourist season. With small business travel given the low per capita income of The Gambia and the small population, other export promotion opportunities are being explored including marketing the airport as a hub in the sub-region. However, a hub must have the necessary domestic traffic density and a functional Gambian-based airline both of which are not the case. Getting all stakeholders to get the business case to make the BIA viable is a major challenge for the sub-sector. Given current traffic level of about 300,000 passengers a year, the BIA may not be attractive for private sector investment; except for a long term management contract which can be reviewed in detail by the PPP Unit proposed to be in the proposed NTA of MOWCI.

6.8 Air Transport Sub-Sector Investment Pipeline

6.8.1 The airport Improvement project Phase II is at final designs stage. The total budget for the project including the government counterpart funding is US\$ 33 million. There is a funding gap of USD 12.0 million for possible intervention by Development Partners. The components and scope of this phase are as listed below:

1. Airside Pavements (Apron and Taxiway)
 - rehabilitation of existing apron ;
 - expansion of the parking apron ;
 - construction of two new taxiways ;
 - supply and installation of apron and taxiway Lighting.
2. Instrument Landing system
 - rehabilitation of the ILS but maintaining the Category ;
 - change the ILS to dual system for both runway ends.
3. New Fire and Rescue Station
 - construction of a new Fire and Rescue Station for Aerodrome Cat. 9 ;
 - design and construct the connecting road to the runway ;
 - procure a new fire tender.
4. Structural assessments (New Terminal and Control Tower)

- appraisal and structural assessment of the New Terminal and Control Tower;
- design and Expansion of the terminal building to create more traffic space;
- upgrading of equipment and facilities in the terminal and tower.

6.8.2 Based on screening of GCAA proposals for the PAGE 2012-2015, the component with respect to the

Structural Assessments (New Terminal and Control Tower) were left out. Given that the design capacity of the New Terminal is for one million passengers per annum ad current traffic of less than 400,000 per annum, the decision to postpone investment in expansion of terminal building is a right judgment. Therefore no financing gap is anticipated for the Air Transport Sub-Sector Investment Pipeline as per Table 6.5 below.

Table 6.5 : Air Transport Sub-Sector Priority Projects Pipeline: 2012 -2015

Agency	Project Description	Indicative Cost USD million	2012	2013	2014	2015
GCAA	Expansion of the Parking Apron	4.14	4.14			
GCAA	Construction of additional Taxiway	18.62	18.62			
GCAA	Upgrading the Rescue and Fire Fighting Facilities	0.83	0.83			
	Total	23.59	23.59			

Source: The Gambia - Programme for Accelerated Growth and Employment 2012 – 2015



7

STRATEGIES FOR FUTURE SUPPORT

7.1. Development Plan Priorities

7.1.1 As noted in Chapter 1, The Gambia Incorporated - Vision 2020 that is being implemented by series of medium term plans, of which the current one is the PAGE 2012 -2015, under Pillar 2 places high priority to improving and modernizing the infrastructure base of the Gambia in support of accelerated growth of the economy and creation of employment. Under the PAGE, a total indicative allocation of USD 254.01 million has been provided for the road sub-sector, while an allocation of USD 23.59 million has been made to the Air Transport Subsector for upgrading the Rescue and Fire Fighting Facilities, construction of additional aprons and taxiways, which are constraining infrastructure during peak tourist season. The PAGE did not provide any indicative allocation for the Maritime and River Transport Sub-sector in spite of the pipeline forwarded to the GoTG for inclusion in the PAGE and discussed during consultations with the GPA. The Urban Transport subsector has an allocation of a mere USD 1.1 million mainly for the construction and rehabilitation of Banjul drains and for a Greater Banjul Drainage Master Plan.

7.1.2 For the road subsector indicative allocation of USD 254.01 million, about 73.15% is for improving and upgrading the missing links on the primary road network mainly for the regional road network within the Gambia and complementary to supporting the Banjul Ports competitive edge in its transit and re-export trade business with its hinterland countries. An indicative allocation of USD 32.4 million which is about 12.76 % of the subsector allocation has been made to rural feeder roads rehabilitation. For the maintenance of the classified network an allocation of USD 13.72 million has been provided under the plan while for procurement of equipment for emergency repairs USD 10.34 million is provided both accounting for 9.47% of the subsector programme. The allocation under procurement of equipment for emergency repairs appears high and point to a likely policy reversal to force account maintenance system which is not advisable. Soft aspects of update of Transport Sector Policy, axle load control and Road Sector Master Plan study are also included in the plan.

7.1.3 The three missing road links on the regional trade corridors to support the competitiveness of the Banjul Port included in the PAGE are as listed in Table 7.1 below. The Bamba – Yelli Tenda - Trans Gambia Bridge Corridor which is the section within The Gambia of the Dakar – Kaolac – Trans Gambia Bridge – Zinguinchor Corridor with an allocation of USD 91.0 million is already fully financed by the AfDB. While these links on the regional network are critical in order

to restore the competitive edge of the Banjul port in transit and re-export trade, the soft issues of trade and transport facilitation/privatization of Banjul Port should be agreed upon before investment in physical infrastructure. Economic Sector Work to support policy dialogue both at ECOWAS and national levels may be required to support the actualization of the regional conventions/protocols, bilateral and tripartite agreements already signed by the countries concerned.

Table 7.1 : Missing Links in The Gambia on Regional Trade Corridors.

Road Link	Amount USD	Remarks
Bamba-Yelli Tenda - Trans Gambia Bridge Corridor	91.00	Financing secured from the AfDB. At procurement stage
Lamikoto - Passamus Road : (121km)	55.50	To connect the Gambia to South west Mali and northern Guinea Conakry and Guinea Bissau. Studies are required
Basse - Fatoto - Koina (48.31km)	22.16	To connect the Gambia to South west Mali, northern Guinea Conakry and Guinea Bissau. Studies are required

Source: The Gambia – Programme for Accelerated Growth and Employment

7.2 Donors intervening in the Sector

7.2.1 The donors intervening in the Transport Sector over the last ten years are mainly the European Union, the Arab Funds (KFAED, BADEA, OPEC Fund, Saudi Fund, and Abu Dhabi Fund) and ECOWAS Bank for Investment and Development (EBID). The AfDB Group re-engaged in the sector in 2011 after a long absence through its concessionary window of the African Development Fund (ADF) for regional projects by supporting the financing of the Trans Gambia Bridge Corridor.

7.2.2 The Kuwait Fund for Arab Economic Development and BADEA have provided the financing for the implementation of the Banjul International Airport Development Master-plan that is being implemented in phases and they are the likely candidates for financing jointly with GoTG of the Airport Improvement Phase II projects identified under the PAGE above.

7.2.3 For the road sector particularly, all the Arab Funds listed above and the EU have been the main financiers of the investment in rehabilitation and upgrading works for the primary road network to paved standards. A high proportion of the investment under the PAGE is for carry over projects from the Poverty Reduction Strategy Paper II (PRSP II) that was closed in 2011. The EU has been the lead donor on Technical Assistant Studies and Capacity Building in the road sector and has recently completed a study on Rural Feeder Roads Rehabilitation Project that has been accep-

ted into the PAGE for which co-financing would be required. The Economic Sector Work and Analytical and Advisory Activities of the EU through its Technical Assistance on restructuring the road sector provide powerful instruments for donors' joint action and policy dialogue in the sector. EU will need development partners to jointly push some of the reform agenda coming out of these studies for which the Arab Funds intervening in the sector could be approached. The AfDB after a long absence is back in the sector in 2011 mainly intervening on regional road networks.

7.3 Bank Group Country/ Regional Integration Strategy Papers

7.3.1 The Joint Assistant Strategy II (JAS-II) jointly prepared by the AfDB and the World Bank proposed to support the PAGE under two pillars viz :

- **Pillar 1:** Enhancing the Productive Capacity and Competitiveness in order to strengthen resilience of the economy to external shocks, which is aligned to the PAGE pillars I, III and IV ;
- **Pillar 2:** Strengthening the institutional capacity for Economic Governance and Public Service Delivery that is aligned to the PAGE pillars (II) and (IV).

7.3.2 The AfDB focus in the joint strategy for The Gambia as stated in its November 2012 Memorandum ADF/BD/WP/2012/102 to its Board of Directors will be mainly in Economic Governance and Agriculture. The indicative lending programme over the JAS II – 2012-2015 period is for 4

Table 7.2 : AfDB Indicative Lending Programme - 2012 - 2015 (UA million*)

Project/Programme	Year	Amount	Sector	JAS Pillar
1.Budget Support (2 tranches)	2012/2013	3.0	Multi (Governance)	2
2.Contribution GAFSP Project	2014	2.2	Agriculture	1
3.Budget Support	2014	5.0	Governance	2
4.Sahel Resilience Project (Multinational)	2014	0.8	Agriculture	1
Total		11.0		

Source: The Gambia: AfDB/World Bank Joint Assistance Strategy 2012-2015

*1 UA=USD 1.552

operations with a total indicative amount of UA 11.00 million (USD 16.742 million) as indicated in the Table 7.1 below :

7.3.3 Under JAS II, there is no possibility of supporting the Transport Sector Projects listed under the PAGE using Project Grant / and or Loan instruments. The lending program is however complemented with a small non-lending program (ESW, AAA) of an Ancillary Study of The Gambia Bridge. Infrastructure development is capital intensive and the small amount of allocations under successive ADF Cycles for The Gambia cannot deliver the required infrastructure needed for improving and modernizing the infrastructure to achieve competitiveness of the economy unless donors come together to leverage their resources to achieve the necessary impact.

7.3.4 However, policy reforms in the sector can be assisted under the Budget support project. Leveraging resources through the Trust Funds hosted by the AfDB is also a possibility for support for Economic and Sector Work (ESW) and Analytical and Advisory Activities (AAA) under the sector.

7.3.5 The Regional Integration Strategy Paper (RISP) for West Africa 2011-2015 (ADF/BD/WP/2011/72/Rev.1), provides the framework for the AfDB programmatic engagement on regional projects. Under Pillar I of the RISP, the AfDB is to support investments in regional transport infrastructure (missing links) in the Trans-Coastal and Trans-Sahelian highways; rehabilitation of priority road corridors; trans-boundary river transport, and transport and trade facilitation measures.

7.4 Investment Opportunities for Donors' Pipeline

7.4.1 The strategic areas of possible AfDB and other development partners support have been identified following the assessment above of the three sub-sectors of transport (Road, Maritime/River Transport and Air Transport) of The Gambia, the Institutional and Regulatory environment, the Transport component of the PAGE 2012 -2015, review

of the sub-sector master plans, though sub-optimal where they exist, development partners past interventions in the sector and country assistance strategies.

i) Transport Sector Coordination

7.4.2 The support to planning for the coordinated development of the transport modes requires the preparation of a multi-modal 10 Year Transport Sector Master Plan covering all the modes of transport based on an overall sector policy and strategic objectives. At present the planning is undertaken at the subsector level which might produce adequate plans for each mode; but does not lead to an optimum plan for the whole transport sector due to lack of multi and inter-modality in the planning process. Such long range planning will lead to a situation where each mode will have a level playing ground and enable the sector to provide services at least cost to the economy. The preparation of a National Transport Policy Update and the Road Sector Master Plan for which indicative allocations respectively of USD 0.26 million and USD 0.10 million have been made under the PAGE can be subsumed under this Study which would require about USD 500,000 to implement.

7.4.3 The MOWCI would also need capacity building for an effective Transport Planning Unit to support policy assessment and implementation and for effective regulation of the sector. The National Transport Agency (NTA) recommended under the National Transport Policy 1998-2006 to function as small unit and staffed with high level professionals can be established in this regards. Given the emerging need for increased role of the private sector in the sector, a desk can also be established in the NTA to promote and investigate projects for private sector participation. This will enable policy formulation, planning, regulation and PPP issues to be coherently dealt with for the efficient development of the sector. It is recommended that a three year capacity building support be provided in this regards to establish the Agency at a total cost of about USD 500,000.

ii) Roads Subsector

7.4.4 The missing links on the ECOWAS regional road network are potential candidates for donors' intervention. Programmatic engagement on the regional network is consistent with the RISP for West Africa and the PAGE. Sections of the ECOWAS regional roads network admitted into the PAGE that passes through The Gambia include the Bamba-Yelli Tenda –Trans Gambia Bridge Corridor on the ECOWAS Trans Coastal Highway (Dakar – Abidjan – Lagos Corridor). Financing is already secured for this project from the AfDB regional envelop in December 2011. This project is at procurement/pre-start off stage. The Bank will take this opportunity to draw lessons from implementation experience of the project to inform better design of future interventions.

7.4.5 Other Development partners that might support investment in the regional network are the EU and the Islamic Development Bank (IDB). The IDB can mobilize other Arab Funds already engaged in the primary roads network to invest on sections of the spur to Banjul on the Trans-Sahelian Route (Dakar – Kaolack – Tambacounda – Bamako – Niamey – Ndjemina Corridor). The missing links on the spur to Banjul in The Gambia are i) Lamikoto – Passamus Road (121km) and ii) Basse – Fatoto – Koina (48.31km) which is to connect to the corridor through the Senegalese network at Tambacounda. The investment required is of the order of USD77.66 million which will require donors' joint financing for maximum impact to deliver the corridor.

7.4.6 Feeder Roads Rehabilitation project and the Replacement/Installation of Weigh Bridges have been prepared under the EU Technical Assistance support at an investment cost respectively of USD 34.16 million and USD 1.63 million. JAS II has Agricultural Sector as one of its pillars of support for 2012 – 2015 and rehabilitation of rural feeder roads will be an appropriate area of intervention in support of the sector's access to market and delivery of inputs. Partnership between the AfDB, the EU and other bilateral donors will be necessary to have the desired impact given the amount involved. The component of feeder roads rehabilitation should have a complementary component for capacity development of the local construction industry using labour based methods.

7.4.7 However, it is necessary to underscore the fact that the completion of the institutional reform agenda in the road sub-sector of operationalizing a second generation Road Fund based on fuel levy and with its own Board, implementation of other soft issues of transport and trade facilitation and axle load

control measures should be resolved before such support by the Bank Group and other development partners. Other thematic issue of the sector is with respect to road safety, which has not received adequate attention in spite of current fatality rate of about 21 deaths per 10,000 vehicles which is high by international standards given the low motorization rate of the Gambia compared to other countries with lower accident rates. There is no coordination mechanism in place for the multi-agencies involved and no budget allocation to tackle this on continuous basis. Institutional support to establish the necessary multi-agency council and its secretariat in the MOWCI could be area of necessary donors' technical assistant support.

iii) Urban Transport

7.4.8 In order to stop the uncontrolled urban sprawl of the Greater Banjul Area and the emerging uncoordinated urban transport system, there is need for donors support for the Greater Banjul Area Transportation and Land Use Master plan. This will lead to future projects for donors' intervention in the urban sector beyond 2015. The overall goal should be to achieve a mobility strategy based mainly on public transport. An indicative estimate for such a study is of the order of USD 500,000. This support programme would require complementary components to support capacity building and institutional strengthening of the Transportation Department of the Greater Banjul Municipalities to take on some roles of planning, programming and construction and maintenance when hierarchy of roads and responsibilities are determined and to support traffic demand management measures for the CBD of the Greater Banjul Municipality.

iv) Maritime and River Transport Subsector

7.4.9 Given the need for further reform in the port sector from public service port to the landlord port model, and increased fierce competition from other neighboring regional ports that service the same hinterland, there appears to be no justification for donors' major investment for expansion of infrastructure in the Banjul Port until the resolution of the institutional restructuring and policy issues of privatization. GPA has estimated EUR 41.5 million of public sector investment in the ports for core project which have been proposed for inclusion in the PAGE but failed to get a place. Donors should intensify policy dialogue for reform for the private sector investment in the port. However current discussion with the Indian EXIM Bank and the AFC respectively with respect to port handling to improve productivity levels and rehabilitation of north and south terminals if conclusive will help sustain port throughput into the future before major capacity

expansion in the medium to long term. A technical assistance support in institutional restructuring and privatization in the port subsector should be undertaken and supported by donors as a basis for policy dialogue with the Government.

7.4.10 With respect to River Transport and ferry services, infrastructure pricing policy that gives level playing field for all modes of transport is critical for future support. The effective implementation of axle load control on the primary road network may lead to reallocation of traffic between modes; and bulky low value products will then move by river transport given appropriate incentives and inter modal transfer facilities. Policy engagements that will give appropriate incentives to water transport operators will therefore be necessary and the support necessary in the short term should be mainly in the form of Analytical and Advisory Activities (AAA).

v) Air Transport

7.4.11 The Banjul International Airport is of strategic importance for the tourism industry which has rebounded and is a major earner of foreign exchange for The Gambia. Significant amount of assistance has already been mobilized from various development partners for the BIA Improvement Project II in the PAGE for an amount of about USD 23.57 million. There is no funding gap. Given current level of traffic, attractiveness of the

investment to the private sector is in doubt. The Bank Group and other multilateral donors given their credit policies may not see the projects proposed under the sub-sector as possible candidates for support given its commercial nature in spite of its strategic importance to the Gambia tourism sector.

7.5 The Way Forward

7.5.1 Each Development partner based on their country assistance strategy and modal preference could proceed on programmatic engagement with The Gambia based on the Summary of Priority Indicative Projects Pipeline in Table 7.2 below which are based on the PAGE. In engaging the Government, it is important that donors should be united with respect to outstanding regulatory and policies issues of the sector and collectively engage the GoTG on policy dialogue backed up with ESW and AAA in order to convince the government on completing the outstanding reform agenda particularly in the Road and Port Sub-Sectors before new investments.

7.5.2 Given the huge investments needed particularly for the missing links on the ECOWAS regional road network and port expansion, it might be necessary for donors to work together and jointly to finance some of the projects. In the port sub-sector where Public Private Partnership could be possible, efforts should be made to have the necessary legislations and institutional changes to invite the private sector.

Table 7.2 : Summary of Priority Indicative Projects Pipeline for Development

Agency	Project Description	Indicative Cost (USD million)	Comments
MOWCI	National Transport Policy Update	0.26	Non lending activity likely to be supported through Trust Funds
NRA	Road Infrastructure Master Plan	0.10	Non lending activity likely to be supported through Trust Funds. Road Infrastructure Master Plan to be upgraded to Transport Sector Integrated Master Plan and to include set up of Transport Data Base at cost of USD 0.5 million.
NRA	Lamikoto - Passamus (48.31km)	55.50	IDB and EU are likely to be interested donors given interest in regional road corridors
NRA	Basse - Fatoto - Koina (48.31km)	22.16	IDB and EU are likely to be interested donors given interest in regional road corridors
NRA	Road Maintenance	13.72	Budget support through common basket if sector reform is carried through
NRA	Feeder Roads Rehab.	34.16	EU and AfDB support likely
NRA	*Bamba-Yelli Tenda-Trans Gambia Bridge	91.06	AfDB financing secured
MOWCI/NRA	Replacement/Installation of Weigh Bridges	1.63	EU financing likely
MOWCI	Greater Banjul Transport and Land Use Master Plan	0.50	AfDB – Trust Fund likely to be interested
GPA	Construction of Container Facility at Half Die Property	6.52	Needed subject to further reform of the port sector;
GPA	Rehabilitation of North and South Terminals	7.92	Needed to preserve existing assets
GPA	Construction of new quay by 200 metres	35.64	Needed subject to further reform in the port sector; Technical Assistance for sector reform can be included as a soft project
GPA	Port Computerization	1.95	Needed to improve port productivity
GPA	Cargo Handling Equipment	2.60	Needed to improve port productivity
GCAA	Expansion of the Parking Apron	4.14	KFAED and BADEA are likely to be interested
GCAA	Construction of additional Taxiway	18.62	KFAED and BADEA are likely to be interested
GCAA	Upgrading the Rescue and Fire Fighting Facilities	0.83	KFAED and BADEA are likely to be interested
	TOTAL	297.31	

Source: The Gambia- Programme for Accelerated Growth and Employment 2012 – 2015 & Gambia Ports Authority (GPA)

*Financing already secured from the ADF

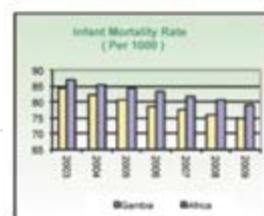
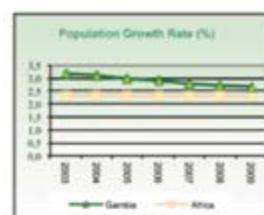
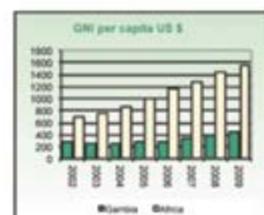
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Annexe 1

The Gambia, comparative socio - economic indicators

	Year	Gambia	Africa	Developing Countries	Developed Countries
Basic indicators					
Area (000Km ²)		11	30 323	80 976	54 658
Total Population (million)	2010	1.8	1,031.5	5,659	1,117
Urban Population (% of Total)	2010	58.1	39.9	45.1	77.3
Population Density (per Km ²)	2010	48.9	34.0	59.9	20.4
GNI per Capita (US \$)	2009	440	1 525	2 968	37 990
Labor Force Participation - Total (%)	2010	45.0	40.1	61.8	60.7
Labor Force Participation - Female (%)	2011	46.3	41.0	49.1	52.2
Gender-Related Development Index Value	2007	0.452	0.433	0.694	0.911
Human Develop. Index (Rank among 187 countries)	2011	151	n.a	n.a	n.a
Popul. Living Below \$ 1 a Day (% of Population)	2005-06	...	42.3	25.2	...
DEMOGRAPHIC INDICATORS					
Population Growth Rate - Total (%)	2010	2.6	2.3	1.3	0.6
Population Growth Rate - Urban (%)	2010	4.0	3.4	2.4	1.0
Population < 15 years (%)	2010	42.1	0.3	29.0	17.5
Population >= 65 yaers (%)	2010	3.0	3.8	6.0	15.4
Dependency Ratio (%)	2010	81.6	77.6	55.4	49.2
Sex Ratio (per 100 female)	2010	98.4	99.5	93.5	94.8
Female Population 15-49 years (% of total population)	2010	23.9	24.4	49.4	50.6
Life Expectancy at Birth - Total (years)	2010	56.6	56.0	67.1	79.8
Life Expectancy at Birth - Female (years)	2010	58.3	57.1	69.1	82.7
Crude Birth Rate (per 1,000)	2010	35.8	34.2	21.4	11.8
Crude Death Rate (per 1,000)	2010	10.9	12.6	8.2	8.4
Infant Mortality Rate (per 1,000)	2010	74.0	78.6	46.9	5.8
Child Mortality Rate (per 1,000)	2010	111.6	127.2	66.5	6.9
Total Fertility Rate (per woman)	2010	4.9	4.4	2.7	1.7
Maternal Mortality Rate (per 100,000)	2008	400.0	530.2	290.0	15.2
Women Using Contraception (%)	2005-08	61.0	...
HEALTH & NUTRITION INDICATORS					
Physicians (per 100,000 people)	2008	4.0	58.3	109.5	286.0
Nurses (per 100,000 people)	2008	44.6	113.3	204.0	786.5
Births attended by Trained Health Personnel (%)	2006	56.8	50.2	64.1	...
Access to Safe Water (% of Population)	2008	92.0	64.5	84.3	99.6
Access to Health Services (% of Population)	2005-07	...	65.4	80.0	100.0
Access to Sanitation (% of Population)	2008	67.0	41.0	53.6	99.5
Percent. of Adults (aged 15-49) Living with HIV/AIDS	2007	0.9	4.9	0.9	0.3
Incidence of Tuberculosis (per 100,000)	2009	269.0	294.9	161.0	14.0
Child Immunization Against Tuberculosis (%)	2009	92.0	85.3	81.0	95.1
Child Immunization Against Measles (%)	2009	88.0	77.9	80.7	93.0
Underweight Children (% of children under 5 years)	2006	15.8	30.9	22.4	...
Daily Calorie Supply per Capita	2007	2 385	2 465	2 675	3 285
Public Expenditure on Health (as % of GDP)	2008	5.3	5.7	2.9	7.4
EDUCATION INDICATORS					
Gross Enrolment Ratio (%)					
Primary School - Total	2010	84.7	102.7	107.2	101.3
Primary School - Female	2010	85.5	90.0	109.2	101.1
Secondary School - Total	2010	50.3	37.8	62.9	100.1
Secondary School - Female	2010	49.5	33.8	61.3	99.6
Primary School Female Teaching Staff (% of Total)	2008	33.4	47.0	60.5	81.4
Adult literacy Rate - Total (%)	2008	45.3	64.8	80.3	98.4
Adult literacy Rate - Male (%)	2008	56.7	74.0	86.0	98.7
Adult literacy Rate - Female (%)	2008	34.3	55.9	74.8	98.1
Percentage of GDP Spent on Education	2006	...	4.6	3.8	5.0
ENVIRONMENTAL INDICATORS					
Land Use (Arable Land as % of Total Land Area)	2008	39.0	7.8	10.6	10.9
Annual Rate of Deforestation (%)	2005-09	...	0.7	0.4	-0.2
Annual Rate of Reforestation (%)	2005-09	...	10.9
Per Capita CO2 Emissions (metric tons)	2009	0.3	1.1	2.9	12.5



Source: ADB Statistics Department Databases; World Bank: World Development Indicators; UNAIDS; UNSD; WHO, UNICEF, WRI, UNDP; Country Reports. Last update : May 2011. Note : n.a. : Not Applicable ; ... : Data Not Available.

Annexe 2

1. Existing Transport and Trade Facilitation along ECOWAS regional roads corridors

A. Existing Legal Regulatory Framework

There are a number of legal and regulatory texts of the Economic Community of West African States (ECOWAS, of which Senegal and The Gambia are members) and of the Union Économique et Monétaire Ouest-Africaine (UEMOA, the West African Economic and Monetary Union, of which Senegal is a member), which provide the framework for the transport and trade facilitation along the corridor. These regional legal and regulatory texts¹ including the following:

- (i) The Lagos treaty of 1975, which established ECOWAS, called for a staged approach towards a Customs Union, including elimination of restrictions to trade between partners and joint development of transport infrastructure.
- (ii) ECOWAS Convention A/P/2/5/82 on Inter-State Road Transport (also known as the ISRT Convention) adopted a simplified regional customs arrangement by which goods can be transported, exempt from taxes and duties, from one customs office of departure of a member state, to the customs office of destination in another member state. It also regulates conditions for road transport between member states, addressing a number of aspects, including the elimination of excessive road checks, ensuring equitable access to the freight generated by the external trade of the contracting parties, harmonizing the regulations concerning the highway code and transport, establishing sufficient autonomy to ensure supplies to landlocked countries, setting of annual quotas (by countries) of vehicles authorized to undertake interstate transport, and defining rules on the distribution of freight between transit states and landlocked countries.
- (iii) ECOWAS Convention A/P.4/5/82 Relating to Inter-States Road Transit of Goods (also known as the TRIE Convention, Convention sur le Transit Routier Inter-États) supplements the ISRT Convention by establishing a mechanism inspired by the Convention on the International Transport of Goods under Cover of TIR [International Road Transport] Carnets, 1975, of the United Nations Economic Commission for Europe. It is based on a declaration through which it is possible to approve the fiscal characteristics of the means of transport; identify goods, the vehicle, and the purpose of the transit; trace the itinerary and offices visited, including frontiers and destinations; specifying journey deadlines and other requirements; determine the scope of the application of the transit arrangements and declaration; and determine the liability of the principle obligee (carrier/forwarding agent). Application of the TRIE Convention is the responsibility of customs services and consular offices appointed to protect national interests in administering a TRIE guarantee fund.
- (iv) ECOWAS Supplementary Protocol A/SP/1/590 of 30 May 1990 established a guarantee scheme for the ISRT/TRIE program, requiring the establishment of national guarantors and the constitutions of the guarantee funds.
- (v) UEMOA a Directive 08/2005/CM/UEMOA provides that complaint commercial means of transport in transit are to be controlled only at departure, arrival, and border crossing
- (vi) ECOWAS Protocol A/P.1/5/82, supplemented by ECOWAS Decision C/DEC.2/5/83, established the ECOWAS Brown Card for third-party motor liability insurance.
- (vii) ECOWAS Decision A/DEC.2/8/81 recommends that member states ratify the 1968 Vienna Conventions on Road Traffic and Road Signs and Signals, and adopt standardized vehicle equipment, driving licenses, and vehicle documents. ECOWAS Resolution C/DEC.7/91 requested member states to adopt a 11.5-ton axle load limit. ECOWAS Resolution C/RES.5/5/90 urged member states establish weighbridges monitor axle load limits. UEMOA Regulation 14/2005/CM/UEMOA specified vehicle norms, dimensions, and axle load limits, as well the modalities for control and enforcement.
- (viii) ECOWAS Resolution C/RES.1/12/88 called for member states to reduce the number of checkpoints, ratify the ISRT and the TRIE Conventions, enforce the 11.5-ton axle load limit, and implement the waybill relating to the TRIE Convention.
- (ix) The ECOWAS Conference of Heads of States and Governments issued Decision A/DEC.13/01/03 on 31 January 2003, to establish a regional road transport and transit facilitation program, including harmonization and simplification of regulations and procedures (e.g., introduction of a single document, harmonization of the guarantee system for interstate transit operations) and construction of joint border posts.

¹ Much of this section draws upon Egis BCEOM, ECOWAS Technical Assistance Project, Regional Transport and Transit Facilitation Program, West African Road Transport and Transit Facilitation Strategy, December 2008. This –/BCEOM report is referenced in terms of the reference for the current assignment and the legal aspects in it were prepared by Kristiaan Bernauw, Senior Legal Advisor, PADECO.

- (x) ECOWAS Decision A/DEC.9/1/05 established three layers of institutions: national facilitation committees, cross-border management committees, and a regional interstate road transport and transit facilitation committee.
- (xi) Règlement No. 15/2009/CM/UEMOA Portant Régime Juridique des Postes de Contrôle Juxtaposés aux Frontières des États Membres de L'Union Économique et Monétaire Ouest-Africaine sets out the legal framework for implementation of joint borders posts between UEMOA states.

In addition, there is an Agreement on Road Transport between the Governments of the Government of Senegal, signed on 5 October 2004. It addresses: (i) reciprocity in transport by road of passengers and goods (Article 3), (ii) issuance of commercial travel forms and permits (Article 6), (iii) issuance of temporary permits (Article 7), (iv) maximum weights and dimensions (Article 8 and 10), (v) the testing of vehicles and the issuance of roadworthiness certificate (Article 11), (v) compliance with road traffic regulations in either state (Article 12); (vi) mutual recognition of driving licenses (Article 13), (vii) mandatory third-party motor liability insurance (Article 14); (viii) tax exemption (Article 15); (ix) conditions of ferry crossings (Article 16); and (x) exchange of information (Article 17).

B. Impediments to Trade along the Corridor

The extensive legal and regulatory framework notwithstanding, there remain a number of physical and non-physical barriers to trade along the subject corridor (as well as along other corridors in West Africa).

Regarding physical barriers, at present, only one (old) ferry is optional; even if when a new ferry being currently on standby in the port starts operating, the situation is not likely to improve considerably. Roads also requires upgrading especially in the region of Kaolack in Senegal, in particular on the section between Niro du Rip and Keur Ayib at the border with The Gambia; the road network on the Gambian side is in relatively better condition.

Nonphysical barriers to transport along the corridor observed or reported by others include:

- (i) numerous checkpoints along the corridor, particularly along sections in The Gambia²;
- (ii) occasional closures of the border for periods of days or weeks, as in April-May 2011³;
- (iii) inefficient (multi-stop), disorderly processing at poorly equipped border posts⁴ (see figure 1, showing Gambian facilities);
- (iv) commercial road traffic rights issued via inter-state transport permits, a system that promotes inefficiency⁵;
- (v) inefficient transit arrangements;
- (vi) overloading of trucks, including those involved in international transport operations (e.g. 36% of the freight vehicles in The Gambia exceed the ECOWAS axle load limit of 11.5 tons, and a "very high" percentage of Guinea-Bissau trucks are overloaded and virtually exceed the ECOWAS height restrictions on loads)⁶;
- (vii) difficulty in implementing the Brown Card system, including difficulties in claims settlement due to a lack of a guarantee fund and underinsurance, problems in harmonizing the contents of liability insurance policies, and untimely liquidation of companies⁷; and
- (viii) high unauthorized charges at checkpoints and demanded at the border.

While the ECOWAS ISRT and the TRIE Conventions provide a regional framework for joint cooperation on road transport, these conventions have not been implemented, "not even partially"⁸. Too often exhaustive checks are still performed on transit cargo and transshipment occurs and (paid) customs escorts are required, all contrary to the goal of the ISRT/TRIE Conventions⁹. Guarantee funds have not been constituted, and the guarantee are limited to the issuing country. For the trader/transporter this situation is detrimental in terms of (i) a loss of time; (ii) the cost of unloading/reloading work; and (iii) the loss and damage of the cargo. In addition, unlike the situation with the TIR Conventions, the ISRT Convention does not provide an exception from escorts, the cost of which must be borne by the trader.

2 During site reconnaissance in September 2011, five police checkpoints and two customs barriers were encountered on the rather short section of less than 100 km in The Gambia inking Farafenni at the Senegalese border and Barra, the location of the ferry port. Only one (police) checkpoint was observed over a similar distance between Kaolack and Keur Ayib (border with The Gambia) in Senegal. See, e.g., "Gambia-Senegal Border Situation" in Foroyaa Online, 9 April 2011, downloaded from <http://www.foroyaa.gm/modules/news/article.php?storyid=6576> [reopening after agreement on an MOU between the Gambian and Senegalese Transport Unions].

3 The situation includes "informal parking of trucks waiting to be processed, and extensive activities by local traders". WSP International Management Consulting Updating of the Gambia's National Road Transport Policy, Draft National Road Transport Policy Report, February 2011, p.18.

4 A permit system entails a number of drawbacks and accordingly many countries in the world have liberalized their transport services market and have abolished market access regulation (through permits). Road Freight Transport Services, World Trade Organization Council for Trade in Services, Background Note by the Secretariat, S/C/W/324, 29 October 2010, p. 93 and following. Specific drawbacks of a permit system are that it: (i) creates opportunities for bribery; (ii) is expensive because it requires the printing of original forge-proof paper documents (the system is based on a tangible hard copy original and a unique paper document as evidence of the permit and to be carried on board of the vehicle in order to avoid simultaneous use in another vehicle); and (iii) is vulnerable to counterfeiting and fraud.

5 WSP International Management Consulting Updating of the Gambia's National Road Transport Policy, Draft National Road Transport Policy Report, February 2011, p.18 and Appendix p. 4. ECOWAS axle load and height restrictions are found in ECOWAS Convention A/P/2/5/B2 on Inter-State Road Transport, Articles 4 and 5.

6 Egis BCEOM, ECOWAS Technical Assistance Project, Regional Transport and Transit Facilitation Program, West African Road Transport and Transit Facilitation Strategy, December 2008, p.63.

7 Egis BCEOM, ECOWAS Technical Assistance Project, Regional Transport and Transit Facilitation Program, West African Road Transport and Transit Facilitation Strategy, December 2008' p. 47. The ALISA project of ECOWAS is (still) developing an electronic transit system, including harmonization of all national systems, to implement or replace the ISRT/TRIE system. National sureties (e.g., the Gambia Chamber of Commerce and Industry) have been appointed for coordination and implementation of the system. World Trade Organization, Trade Policy Review Report by the Gambia, 10 August 2010, p. 16 paragraph 68.

9 A Meeting of UEMOA Ministers on 10 December 2004 officially noted that despite this convention, transit cargo is being submitted to declaration in each country of which it traverses.

Annexe 3

3.2. The Gambia - Current status of primary road network

North Bank	Length (km)	Status	Funding Agency	Physical Condition
		Completed in 1988 (Periodic Maintenance being undertaken as part of the 2010 Road Maintenance Programme)	Taiwan	Paved
Essau - Kerewan	53			
Kerewan - Farafenni	52	Completed in 2006	IDB	Paved
Farafenni - Laminkoto	115	Completed in 2005	OPEC AND BADEA	Paved
Laminkoto - Passimus	121	Financing being sought	Unpaved	
SUB TOTAL	341			
South Bank	Length (km)	Status	Funding Agency	Physical Condition
Mandiba - Soma	141	Under Construction	Kuwait FUND,	Paved
			BADEA OPEC FUND,	Paved
Soma - Basse	192	Completed in 2012	SAUDI FUND,	
Basse - Fatoto	38.4	Financing being sought	ABU DHABI FUND	Paved
Fatoto - Koina	9.91	Financing being sought	AND EBID EU	
Banjul - Serrenkunda	11.2	Completed in 1990	-	Unpaved
		(Periodic maintenance undertaken in 2010)	-	Paved
Serrenkunda - Mandinaba	28	Completed in 2009	GOG, OPEC 1 IDB	Paved
SUB TOTAL	420.53			
North - South	Length (km)	Status	Funding Agency	Physical Condition
Amdellai - Barra	20	Completed in 2012	EU	Paved
Mandinaba - Seleti	13	Completed in 2009	EU	Paved
TransGambia	24	Completed in 2012	EU	Paved
TOTAL	818.53			

Source : National Roads Authority

3.3.a. Estimated vehicles registered in The Gambia by type of vehicle : 2007 - 2011

Type of vehicle	Year				
	2007	2008	2009	2010	2011
Car	8845	8990	9011	9107	9335
Van & Station Wagon	1433	1453	1475	1525	1563
Mini-bus (12-22 passengers)	286	300	340	352	450
Bus (more than 22 passengers)	1003	1031	1028	1087	1095
Goods vehicles	804	900	911	943	957
Other	929	951	927	927	920
Government and diplomatic Vehicles	1150	1186	1200	1214	1218
Grand Total	14450	14811	14892	15155	15556

Source : The Gambia Bureau of Statistics (GBoS)

3.3.b. Estimated number of road vehicles registered in The Gambia by nature of licence 2007-2011

Nature of licence	Year				
	2007	2008	2009	2010	2011
Private	7595	7795	7615	7665	7970
Commercial passengers	4318	4344	4500	4639	4731
Commercial goods	637	688	792	852	852
Other	750	798	785	785	785
Government and Diplomatic Vehicles	1150	1186	1200	1214	1218
Grand Total	14450	14811	14892	15155	15556

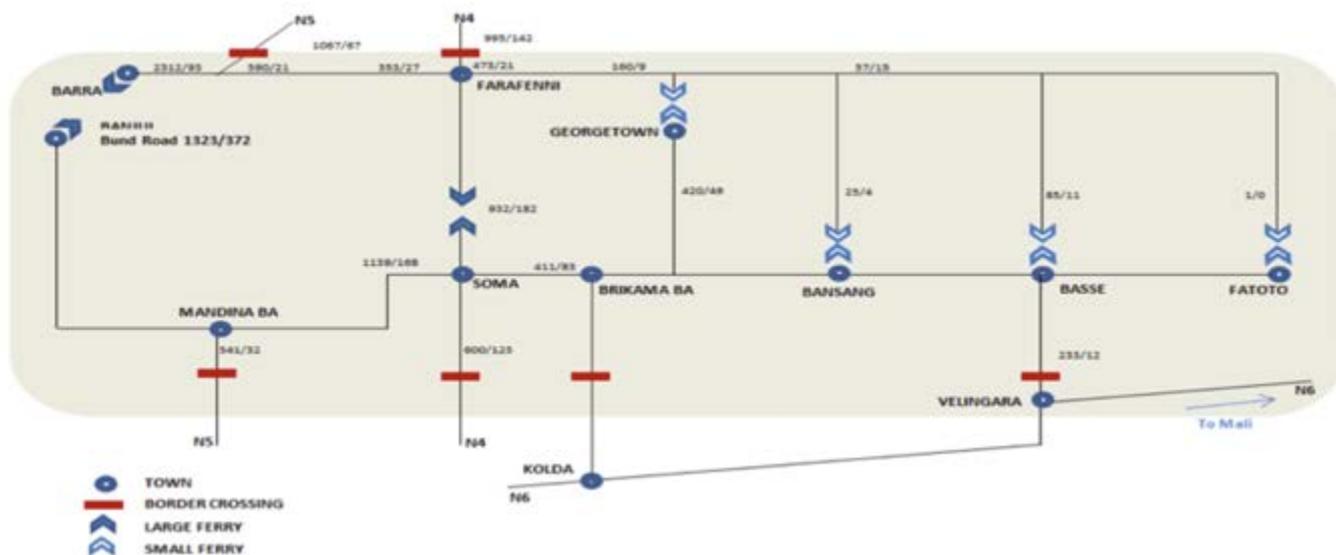
Source : The Gambia Bureau of Statistics (GBoS)

3.3.c. Number of motor cycles and tricycles registered from 2005 to 2010

Year	Number of Motor Cycles Registered	Number of Tricycles Registered	Total Number Registered in both Categories
2005	1900	—	1900
2006	2191	—	2191
2007	2398	—	2398
2008	2418	23	2441
2009	2519	5	2524
2010	2762	12	2774
Total	14188	40	14228

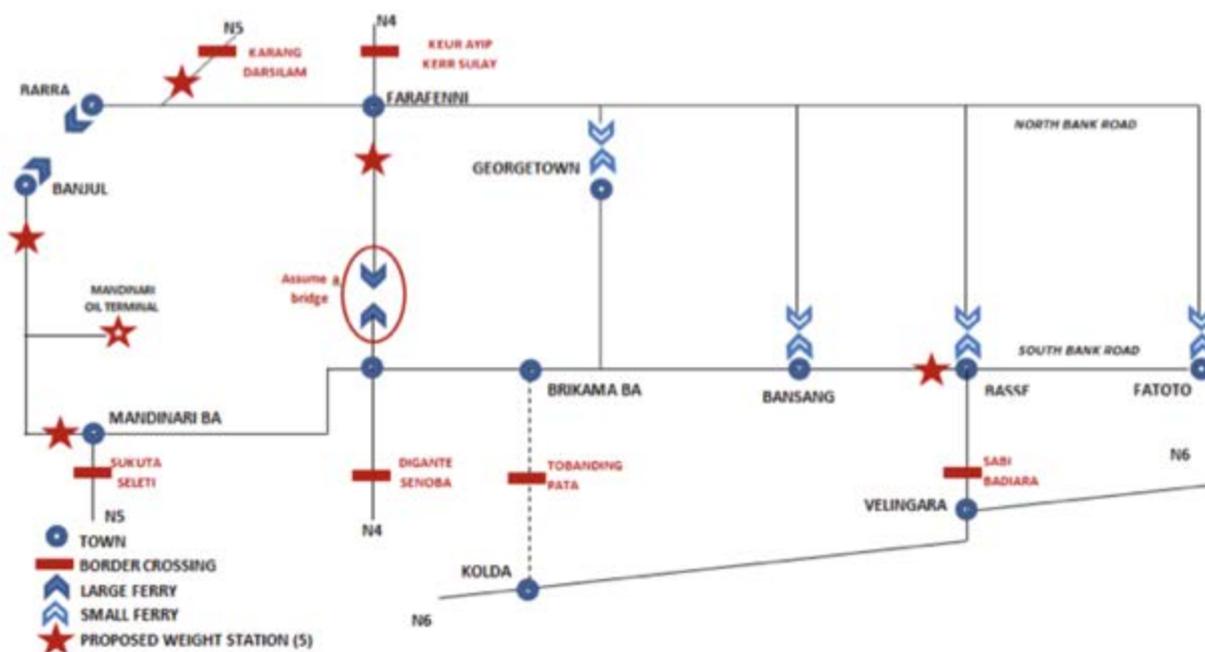
Source : The Gambia Bureau of Statistics

3.4. Average daily traffic, 2009



Total (excluding motorcycles) / Trucks (excluding light trucks)

3.5. Locations of weight stations



3.6. Estimated road fund revenues from fuel levy charge

2010 pump price increase from GMD/Lt	Petrol	GMD/Litre increase	Unit price % increase	Elastic dd volume % reduction	Inelastic dd volume 2010 annual	Elastic dd M. Litres	Elastic revenue GMDm	Inelastic dd revenue GMDm
38	39	1	2.6	2.6	18.158	17.686	17.7	18.2
38	40	2	5.3%	5.5	18.158	17.160	34.3	36.3
38	41	3	7.9%	8.3%	18.158	16.651	50.0	54.5
38	42	4	10.5%	11.0	18.158	16.161	64.6	72.6
38	43	5	13.2%	14.2%	18.158	15.580	77.9	90.8
38	44	6	15.8%	17.3%	18.158	15.017	90.1	108.9
2010 pump price increase from GMD/Lt	Diesel	GMD/Litre increase	Unit price % increase	Elastic dd volume % reduction	Inelastic dd volume 2010 annual	Elastic dd M. Litres	Elastic revenue GMDm	Inelastic dd revenue GMDm
31	32	1	3.2%	3.2%	48.138	46.598	46.6	48.1
31	33	2	6.5%	6.8%	48.138	44.889	89.8	96.3
31	34	3	9.7%	10.3%	48.138	43.180	129.5	144.4
31	35	4	12.9%	13.8%	48.138	41.519	166.1	192.6
31	36	5	16.1%	17.3%	48.138	39.810	199.1	240.7
31	37	6	19.4%	21.5%	48.138	37.788	226.7	288.8

Source : EU/TA - Ministry of Works Construction and Infrastructure - National Roads Transport Policy 2011-2015, May 2011

3.7. The Gambia: Structure of road user charges - 2010

1. Commercial Passenger Vehicles

N° of pax	Vehicule license	Road Tax	LGA car park fee	Vehicule test fee	Total
3	520	390	1,000	50	1,960
4-6	780	520	1,000	50	2,350
7-12	975	780	1,500	50	3,305
13-15	1,300	1,040	1,600	50	3,990
16-20	1,560	1,300	1,700	50	4,610
21-26	1,690	1,495	1,800	50	5,035
27-30	1,885	1,560	2,000	50	5,495
31-36	2,015	1,755	2,100	50	5,920
37-45	2,275	1,950	1,2200	50	6,475
46-60	2,600	2,145	2,300	50	7,095
>60	2,925	2,600	2,400	50	7,975

2. Commercial Passenger Vehicles

N° of pax	Vehicule license	Road Tax	LGA car park fee	Vehicule test fee	Total
< 3 tons	1,950	1,040	2,500	50	5,490
3-6 tons	2,600	1,300	2,600	50	6,500
7-9 tons	3,250	1,560	2,700	50	7,510
10-15 tons	3,510	1,755	2,800	50	8,065
16-19 tons	4,550	1,950	2,900	50	9,400
20>20 tons	5,200	2,275	3,000	50	10,475

3. Private Vehicules

N° of pax	Vehicule license	Road Tax
<1 ton	400	300
'1-2.5 tons	600	400
>2.5 tons	1000	500
Moped	53	52
Motor-cycle	64	52

3.8. Road Traffic Accident Data - Number Of Road Traffic Accidents And Casualties By Sex - 2000 To 2009

Year	N° Of Accident Cases Reported	Fatal Accident Cases/Number Reported	Number Of Fatalities	Fatality By Sex		Number Sustaining Serious Injuries	Serious Injury By Sex		Minor Injuries By Sex		
				M	F		M	F	M	F	Total
2000	1102	84	84	54	30	100	70	30	150	79	229
2001	837	63	63	40	23	75	40	35	80	74	154
2002	799	54	66	49	17	158	140	18	310	22	332
2003	972	73	80	62	18	167	157	10	294	98	392
2004	864	53	55	44	11	229	145	84	352	181	533
2005	391	46	47	39	8	119	89	30	143	27	170
2006	455	44	46	35	11	149	113	36	120	52	172
2007	738	73	82	66	16	232	155	77	220	68	288
2008	724	39	60	44	16	257	177	80	199	79	278
2009	868	89	91	66	25	200	130	70	132	80	212
Total	7750	618	674	499	175	1686	1216	470	2000	760	2760
Average	775.0	6.18	67.4	49.9	17.5	168.6	121.6	47.0	200	76	

Source: Gambia Police Force

3.9. Road Traffic Accidents - Cumulative Deaths By Risk Factor, 2000 To 2009

Year	Deaths By Rdd	Deaths By Cd	Deaths By EsL	Deaths By lbs	Deaths By Pccr	Deaths By Anc	Deaths By Dp	Deaths By Dmc	Deaths By Oh	Dad	Total Deaths
2000	15	25	10	10	0	0	20	4	0	Nd	84
2001	10	5	18	0	0	15	0	15	0	Nd	63
2002	8	6	7	0	0	0	16	0	23	Nd	66
2003	6	21	9	23	0	0	21	0	0	Nd	80
2004	11	0	10	14	0	0	20	0	0	Nd	55
2005	0	20	0	18	0	0	9	0	0	Nd	47
2006	8	10	0	8	0	0	8	0	12	Nd	46
2007	13	12	15	22	0	0	20	0	0	Nd	82
2008	8	6	14	14	0	0	18	0	0	Nd	60
2009	10	10	10	9	10	3	20	17	0	2	91
Total	89	115	93	118	16	18	152	36	35	2	674

Source: Gambia Police Force

Note: Rdd=Reckless Or Dangerous Driving Cd= Careless Driving EsL=Exceeding Speed Limit lbs=Inefficient Breaking System Pccr= Pedestrian Carelessly Crossing Road Anc=Animals Not Under Control Dp=Dangerous Parking Dmc=Driving Motor Vehicle Which Does Not Conform With Requirements Oh =Obstruction On The Highway Dad=Driving Under The Influence Of Alcohol Or Drug.

3.10. National Roads Authority 5-Year Staff Training Programme 2010-2014

Designation	Current Qualification	Preferred Further Qualification	Cost In Euro
Technical Director	Msc.	Phil. Phd, Ceng. Mice	15,000
Director Finance/Admin.	Acca	Mba	15,000
Planning/Design Manager	Msc.	Phil. Phd, Ceng. Mice	15,000
Operations/Safety Manager	Beng	Msc.Ceng, Mice	30,000
Feeder Roads Manager	Msc.	Msc, Management), Ceng, Mice	15,000
Principal Project Engineer	Bsc	Msc, Mice	30,000
Accountant Project Engineer	Aat	Acca Final	30,000
Divisional Engineer-West	Bsc	Msc	30,000
Divisional Engineer-East	Ond	Hnd	30,000
Assistant Quantity Surveyor	Ond	Hnd	10,000
Senior Secretary		Diploma It/Management	10,000
Trainee Engineer	Russian Uni-5Yrs	Bsc	10,000
Trainee Engineer	Russian Uni-5Yrs	Bsc	10,000
Hr Manager			10,000
Snr. Laboratory Technician	Ond	Hnd	10,000
Technician	Ond	Hnd	10,000
Foreman	Ond	Hnd	10,000
Foreman	Ond	Hnd	10,000
Technician	Ond	Hnd	10,000

3.10. National Roads Authority 5-Year Staff Training Programme 2010-2014 (Suit)

Designation	Current Qualification	Preferred Further Qualification	Cost In Euro
Personal Assistant	Cert. In It	Dip/Advance It	5,000
It Assistant	Cert. In It	Dip/Advance It	5,000
It Assistant	Cert. In It	Dip/Advance It	5,000
It Assistant	Cert In It/Adv.Diploma In Business Studies	Hnc Programming	5,000
Records Clerk		Diploma In Management	5,000
Records Clerk		Diploma In Management	5,000
Accounts Clerk	Aat	Acca	10,000
Accounts	Aat	Acca	10,000
Receptionist/Telephone Operator		Diploma It/Management	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Trainee Technician	Ond	Hnd	10,000
Total			330,000

3.11. Feeder Roads Rehabilitation Programme

Road N°	Road Name	District	Region	Length (Km)	Standard	Eur 000
6	Gunjur-Gunjur Tenda (Sea Side)	Kombo South	W.R	2.6	Access (M)	250,000
23	Fass Omar Saho-Albreda	Upper Niimi	N.B.R	14.7	Access (L)	412,000
25	Fass Omar Saho-Albreda (Main Rd.)	Upper Niimi	N.B.R	6.0	Access (M)	312,000
28	Fass-Kerr Jane	Lower Niimi	N.B.R	17.0	Access (M)	476,000
29	Kerr Jane-Balli	Lower Niimi	N.B.R	18.1	Access (M)	941,000
34	Kerewan-Jawala	Lower Baddibu	N.B.R	9.6	Access (M)	499,000
37	Illiasa-Katchang Road	Upper Baddibu	N.B.R	6.7	Access (L)	348,000
39	Sukoto Fula - Sara Kunda	Upper Baddibu	N.B.R	17.2	Access (M)	894,000
41	Choya-Jessadi Wharf Town	Niamina Dankunku	C.R.R	20.1	Access (M)	563,000
42	Njawo-Charmen Road	Nianja/Upper Saloum	C.R.R	7.0	Access (L)	196,000
44	Chamen-Tenda (Carol Wharf)	Nianja/Upper Saloum	C.R.R	3.5	Access (L)	98,000
52	Sare Teneng-Jar Kunda-Saregai	Wuli District	U.R.R	4.0	Access (L)	208,000
53	Yorobawol-Sutukunding-Basse	Wuli West	U.R.R	13.1	Collector	1,258,000
54	Sotomasire-Gambissara	Fulada East	U.R.R	6.9	Collector	662,000
55B	Main Road-Gunjur Kuta	Wuli West	U.R.R	8.1	Access (M)	227,000
59	Sambar Kunda-Kulari Ndimba	Tumana/Kantora	U.R.R	17.4	Collector	1,114,000
60	Suduwol-Nyama-Lari-Fatoto	Kantora	U.R.R	23.4	Collector	1,498,000
101	Alkali Kunda-North Bank Trunk Road	Upper Baddibu	N.B.R	2.6	Access (L)	156,000
104	Soto Masamba-Trunk Road (Sb)	Fulada East	U.R.R	4.9	Access (L)	294,000
107	Balja Kunda-Boro Kandese	Wuli	U.R.R	7.6	Access (L)	456,000
109	Trunk Road-Dingiri	Fulada East	U.R.R	4.2	Access (L)	252,000
110	Chamoi-Dampha Kunda-Tamba Sansang	Fulada East	U.R.R	7.8	Access (M)	468,000
112	Main Road-Galleh Manda	Fulada West	C.R.R	7.4	Access (L)	444,000
115	Trunk Road-Baro Kunda-Sutukung-Bureng Trunk Road	Jara East	L.R.R	14.2	Access (M)	852,00
				244.1 Km		12,877,000

Source: Eu/Ta- Pre-Identification Study For Feeder Roads Réhabilitation Project

3.12. The Gambia: Vehicle Operating Cost Submodel Input Data

Vehicle	Vehicle Class Rep. Vehicle			Motor Car	Car Corolla 1.8	4Wd Hi-Lux	Small Bus 15 Seat Coaster	Large Bus Nissan 30 Seat	Small Truck Toyota-Dyna	Medium Truck Merc 1523A	Heavy Truck Merc 3341A	Artic. Truck Actros 2251
Price	Fin	Dalasi		856,424	1,044,108	1,140,740	1,520,000	2,600,000	2,611,943	4,026,750	4,100,144	
	Eco	Dalasi	34,800	566,683	696,185	762,861	960,250	1,738,000	1,693,391	2,607,408	2,471,449	
Tyre	Size			195-R14	700-15	700-15	900 X 18-20	750 X 20	1000 X 20	1200 X 20	1200 X 20	
	Price	Fin	Dalasi	900	3,100.0	4,500.0	4,500.0	6,200.0	5,700.0	7,200.0	9,500.0	9,500.0
	Eco	Dalasi	657.6	2,368.4	3,500.0	3,300.0	4,736.8	4,850.0	6,050.0	7,500.0	7,500.0	

3.12. The Gambia: Vehicle Operating Cost Submodel Input Data (Suit)

Vehicle	Vehicle Class	Rep. Vehicle	Motor Car	Car Corolla 1.8	4Wd Hi-Lux	Small Bus 15 Seat Coaster	Large Bus Nissan 30 Seat	Small Truck Toyota-Dyna	Medium Truck Merc 1523A	Heavy Truck Merc 3341A	Artic. Truck-Actros 2251
Fuel	Fin	Dalasi	33	33	33	33	33	33	33	33	33
	Eco	Dalasi	18	18	18	18	18	18	18	18	18
Lube Oil	Eco	Dalasi/Lt	60	60	60	60	60	60	60	60	60
Mtce Labor	Eco	Dalasi/Lt	45.9	45.9	45.9	45.9	45.9	45.9	45.9	45.9	45.9
Crew Wage	Eco	Dalasi/Hr	17.6	17.6	19.0	29.6	29.6	31.7	35.2	35.2	42.4
Annual Interest	Eco	%	12	12	12	12	12	12	12	12	12
Passenger											
Vot	Eco	Dalasi/Hr	11.81	19.14	19.14	19.14	19.14	0.00	0.00	0.00	0.00
Passenger Non Work											
Vot	Eco	Dalasi/Hr	2.90	5.80	5.80	5.80	5.80	0.00	0.00	0.00	0.00
Pcse			0.5	1	1	1.4	1.6	1.4	1.4	1.7	1.8
No. Of Axles			2	2	2	2	3	2	2	3	5
No. Of Wheels			2	4	4	6	10	4	6	10	18
Utilization		Annual Km	10,000	15,000	15,000	30,000	40,000	50,000	50,000	50,000	50,000
		Annual Hours	500	600	500	2,000	3,000	2,000	2,500	3,000	3,000
Service Life		Yrs	6	12	12	10	15	15	15	15	15
Esalf		As In									
Gww		'South B Road Links & North B Road Links' Tons	0.2	1.2	2.3	1.5	16.7	3.8	13.8	26	45

Annexe 4

Urban Transport Improvement Strategy And Policy Streams

Infrastructure	Traffic Management	Service Quality	Network Development
	Short Term Measures		
Increase Road Funding	Enforce Existing Regulations		
Improve Road Maintenance		Control Overloading	Improve Vehicle Inspection
Road Rehabilitation	Medium Term Measures Traffic Management Measures		Set Minimum Service Standards
		Set Frequency, Fares And Other Service Conditions	Develop New Route Structure Issue Route Licenses Formation Of Route Association Cooperatives Put Route Franchise Out To Tender
		Longer Term Institutional Change	
Set Up Metropolitan Road Authority		Set Up Metropolitan Public Transport Authority	
		Metropolitan Transport Authority	

Source: Ssatp Working Paper No.82, Africa Region, World Bank, July 2005

Annexe 5

5.1. Port Throughput - Cargo Traffic Analysis - 2005-2010 (Metric Tonnes)

Imports	2005	%	2006	%	2007	%	2008	%	2009	%	2010	%
Containers	400,776	45	443,314	48	469,032	45	555,025	49	643,856	55	725,209	64
General	20,108	2	16,546	2	10,212	1	8,913	1	8,617	1	8,662	1
Rice	130,484	15	75,434	8	84,654	9	102,617	9	80,117	7	90,477	8
Sugar	22,018	2	50,894	6	93,320	10	83,196	7	70,194	7	7,500	1
Flour	53,999	6	26,690	3	23,783	2			28,366	2	17,888	2
Cement	158,891	17	117,193	13	139,763	14	179,878	16	205,515	17	204,780	18
Petroleum	67,408	8	85,557	9	78,518	7	83,655	7	38,625	3	9,104	1
Heavy Fuel	34,997	4	37,335	4	48,791	5	48,959	5	27,593	2	0	0
Fatty Acid	2,990	0	4,560	0	1,500		3,100		1,500	0	0	0
Vehicle/Roro			65,697	7	77,794	7	56,812	5	67,779	5	57,106	5
Fertilizer	7,004	1		0	3,481		0				0	
Miscellaneous					1,544		8,307	1	5,000	0	0	
Sub Total	898,675	100	923,220		1,032,392	100	1,130,462	100	1,176,162	100	1,120,726	100
Exports	2005	%	2006	%	2007	%	2008	%	2009	%	2010	%
Containers	84,786	100	107,932	90	106,070	98	129,89	99	213,297	99	266,795	95
General	50		240					40		256		
Groundnut	0		11,511	10						14,358	5	
Miscellaneous	0				1,915	2	858	1	1,062	1		
Sub Total	84,836	100	119,683	100	107,985	100	130,547	100	214,399	100	281,409	100
Grand Total	956,767		983,511		1,140,377		1,140,377		1,390,561		1,402,135	

Source : Gambia Ports Authority

5.2. Port Throughput - Cargo Handled By Category Of Cargo - 2005 - 2010 (Metric Tonnes).

Imports	2005	2006	2007	2008	2009	2010
Containers	400,776	442,746	469,032	555,025	642,856	725,209
General	20,108	17,114	10,212	8,913	13,617	8,662
Dry Bulk	372,396	270,211	424,295	430,810	451,971	377,751
Liquid Bulk	105,395	193,149	128,853	135,714	67,718	9,104
Sub Total	898,675	923,220	1,032,392	1,130,462	1,176,162	1,120,726
Exports	2005	2006	2007	2008	2009	2010
Containers	84,786	107,932	106,070	129,689	213,297	266,795
General		240	60	700	40	8,123
Dry Bulk	50	6,535		158	0	0
Liquid Bulk		4,976	1,855		1,062	6,491
Sub Total	84,836	119,683	107,985	130,547	214,399	281,409
Grand Total	956,767	983,511	1,042,903	1,140,377	1,390,561	1,401,135

Source : Gambia Ports Authority

5.3. Banjul Port - Ship Traffic Handled - 2005-2010

		2005	2006	2007	2008	2009	2010
Ships Arrival	No	286	258	256	244		
Total Grt	Tonnes	3,132,312	2,729,402	2,843,227	2,606,731	3,151,765	3,083,326
Toral Grt	Tonnes	1,562,440	1,337,453	1,264,340	1,185,094	1,488,958	1,372,360
Berth Occupied	Days	190	198	199	205	210	220
Berth Unoccupied	Days	175	167	166	160	155	145

Source : Gambia Ports Authority

5.4. Gambia Ports Authority Financial And Statistical Summary 2006-2010

Gmd'000S	31/12/2006	31/12/2007	31/12/2008	31/12/2009	31/12/2010
Revenue	399,162	376,084	372,735	500,308	426,931
Working Expenses	280,516	364,897	263,535	398,692	386,879
Net Earnings	118,646	11,187	109,200	101,616	40,052

5.4. Gambia Ports Authority Financial And Statistical Summary 2006-2010 (Suit)

Gmd'000S	31/12/2006	31/12/2007	31/12/2008	31/12/2009	31/12/2010
Debt Service Charges	44,415	84,675	104,167	60,773	25,131
Other Income/ (Charges)	34,250	28,316	47,536	17,585	26,232
Corporation Tax	44,053	47,546	15,877	21,864	14,776
Surplus For Year	64,428	76,632	36,692	36,564	26,377
Net Fixed Assets	293,287	311,902	303,600	333,854	349,176
Net Current Asset	724,122	590,671	568,673	587,517	710,249
Net Operating Assets	1,017,409	902,573	872,273	921,371	1,059,425
Capital Work- In-Progress	2,601	123	12,068	267	17,101
Long Term Investment	18,000	18,000	97,840	109,390	86,290
Intangibles	-	-	-	-	-
Net Assets	1,038,010	920,696	982,181	1,031,028	1,162,725
Public Debt	524,076	331,130	356,923	369,205	474,525
Equity And Reserves	513,934	589,566	625,258	661,823	688,200
Total Debt And Equity	1,038,010	920,696	982,181	1,031,028	1,162,725
Returns (%)					
Working Expenses					
To Revenue	70.28	97.02	70.70	79.69	90.62
Net Earnings To Net					
Oper Asset	11.66	1.24	12.52	11.03	3.78
Net Earnings To Net Asset	11.43	1.22	11	9.86	3.44
Net Earnings To Equity					
& Reserves	23.09	1.90	12	15.38	5.82
Net Earnings Less Debt					
Services To Equity & Reserve	14.44	16.26	17.46	6.17	2.17
Current Ratio	7.36	5.16	5.30	4.89	10.62
Quick Ratio	7.20	5.0	5.16	4.79	10.27
N°. Of Time Interest Is					
Covered By Rev.	8.99	-	3.58	8.23	16.99
Debt Service To Net					
Cash Inflow	0.21	0.38	1.51	2.88	1.69

Source: Gambia Ports Authority

5.5. Port And Maritime Transport Subsector Investment Pipeline: 2012-2015

Project/Programme	Agency	Cost (Millions Euros)				
		2012	2013	2014	2015	Total
Construction Of New Container Terminal At The Half Die	Gpa	5.0				5.0
Acquired Properties						
Rehabitation Of North And South Terminal	Gpa	6.0				6.0
Construction Of New Quay By 200 Meters	Gpa			27.0		27.0
Procurement Of New Tug Boat	Gpa		4.0			4.0
Port Computerisation	Gpa		1.5			1.5
Acquisition Of Residential Properties And Construction Of New Container Terminal	Gpa				12.0	12.0
Studies, Capital And Maitenance Dredging Of Acces Channel	Gpa				25.0	25.0
Procurement Of Cargo Handling Equipment	Gpa		2.0			2.0
Banjul Shipyard Rehabilitation	Gpa	8.0				8.0
Procurement Of A New Ferry	Gpa/Ferries		7.0			7.0
Rehabilitatin Of Ferry Landing Facilities	Gpa/Ferries		8.0			8.0
Acquisition Of A New Suction Dredger For Ferries	Gpr/Ferries		8.0			8.0
Acquisition Of Equipment & Machinery For Rehabilitation Of Existing Ferries	Gpa/Ferries	3.0				3.0
Construction Of Dry Port	Gpa	2.0				2.0
Total		24	30.5	27	37	118.5

Source: Gambia Ports Authority

European Flights Year 2007

Month: January 2007		
Airline	Pax In	Pax Out
Air Europa	239	143
Air Finland	515	565
Astreus	1517	2124
Condor	1010	1168
Excel	1505	1591
Sn Brussels	909	1142
First Choice	2026	2213
My Travel	2697	2716
Monarch	2408	2618
Span Air	132	314
Thomas Cook	4259	4162
Transavia	1178	1511
Tui / Arky	1263	1423
N. American A/L	151	375
Total	19809	22065

Month: March 2007		
Airline	Pax In	Pax Out
Air Europa	241	357
Astreus	1103	1143
Condor	961	1094
Excel	1733	1660
First Choice	1791	1719
My Travel	2885	2930
Sn Brussels	1035	1290
Monarch	2460	2631
Span Air	243	109
Thomas Cook	3799	3531
Transavia	1234	1156
Tui / Arky	1055	1454
Total	18540	19074

Month: May 2007		
Airline	Pax In	Pax Out
Astreus	1374	1515
Condor	598	787
Span Air	862	913
Sn Brussels	733	1138
Tui / Arky	920	982
Special Flt	100	0
Iberworld	68	167
Total	4655	5502

Month: July 2007		
Airline	Pax In	Pax Out
Astreus	1442	1460
Condor	499	580
Sn Brussels	719	949
Tui / Arky	963	1141
Iberworld	17	34
Total	3640	4164

Month: September 2007		
Airline	Pax In	Pax Out
Air Europa	76	165
Astreus	1221	1229
Condor	461	458
Sn Brussels	1002	1464
Span Air	824	879
Tui / Arky	906	789

Month: February 2007		
Airline	Pax In	Pax Out
Air Europa	220	244
Air Finland	207	187
Astreus	1301	1617
Condor	1097	1073
Excel	1546	1587
Sn Brussels	902	1031
First Choice	1724	1755
My Travel	2398	2531
Monarch	2342	2519
Thomas Cook	3652	3659
Transavia	1135	1145
Tui / Arky	1273	1247
Total	17797	18595

Month: April 2007		
Airline	Pax In	Pax Out
Air Europa	68	167
Astreus	214	560
Condor	510	909
Excel	1009	1609
First Choice	1142	1752
My Travel	530	1477
Sn Brussels	774	1054
Monarch	1936	3423
Span Air	1001	870
Thomas Cook	2581	3806
Transavia	152	477
Tui / Arky	714	743
Total	10631	16847

Month: June 2007		
Airline	Pax In	Pax Out
Astreus	1500	1554
Condor	570	503
Tui / Arky	1030	887
Sn Brussels	715	1103
Iberworld	165	97
Total	3980	4144

Month: August 2007		
Airline	Pax In	Pax Out
Astreus	1500	1764
Condor	436	563
Sn Brussels	710	1192
Span Air	1044	1129
Tui / Arky	858	1047
Special Flt	12	113
Iberworld	237	254
Total	4797	6062

Month: October 2007		
Airline	Pax In	Pax Out
Astreus	1886	1558
Condor	785	572
First Choice	696	442
Sn Brussels	856	588
My Travel	1357	465
Span Air	1065	947

	Month: September 2007	
Special Flt	56	57
Total	4546	5041

	Month: November 2007	
Airline	Pax In	Pax Out
Astreus	1602	1474
Condor	868	566
First Choice	3013	2452
My Travel	3725	3468
Monarch	1491	1425
Sn Brussels	916	928
Span Air	1092	907
Thomas Cook	3537	2997
Transavia	534	553
Tui / Arky	1212	1209
Total	17990	15979

	Month: October 2007	
Thomas Cook	2077	881
Tui / Arky	1056	945
Special Flt	137	0
Iberworld	89	101
Total	10004	6499

	Month: December 2007	
Airline	Pax In	Pax Out
Astreus	1738	1447
Condor	1024	601
First Choice	2693	2064
My Travel	3581	3254
Sn Brussels	1173	747
Monarch	1715	1320
Span Air	1171	782
Thomas Cook	2768	2233
Transavia	1434	909
Tui / Arky	999	799
Liningston	114	0
Girjet	187	63
Total	18597	14219

Pax Summary European Flights 2007 : Pax In 134,986 Pax Out 138,191 Total 273,177

Regional Flights 2008

	Month: January 2008	
Airline	Pax In	Pax Out
Air Senegal	1045	1263
Bellview	318	316
G.I.A	278	271
Total	1641	1850

	Month: March 2008	
Airline	Pax In	Pax Out
Air Senegal	1083	1198
Bellview	421	386
Slok Air	753	847
G.I.A	212	213
Elysian	25	27
Total	2494	2671

	Month: May 2008	
Airline	Pax In	Pax Out
Air Senegal	1036	1195
Bellview	334	324
Slok Air	680	598
G.I.A	147	159
Elysian	96	104
Total	2293	2380

	Month: July 2008	
Airline	Pax In	Pax Out
Air Senegal	1175	1285
Bellview	390	580
Elysian	152	167
G.I.A	340	395
Total	2057	2427

	Month: September 2008	
Airline	Pax In	Pax Out
Air Senegal	1012	1039

	Month: February 2008	
Airline	Pax In	Pax Out
Air Senegal	1131	1120
Bellview	370	319
Slok Air	389	372
G.I.A	280	211
Elysian	17	17
Total	2187	2039

	Month: April 2008	
Airline	Pax In	Pax Out
Air Senegal	1002	1171
Bellview	284	249
Slok Air	771	801
G.I.A	183	305
Elysian	89	84
Total	2329	2610

	Month: June 2008	
Airline	Pax In	Pax Out
Air Senegal	1308	1317
Bellview	498	465
Slok Air	0	0
G.I.A	272	286
Elysian	114	161
Total	2192	2229

	Month: August 2008	
Airline	Pax In	Pax Out
Air Senegal	1104	1150
Bellview	637	697
Elysian	116	149
G.I.A	383	322
Total	2240	2318

	Month: October 2008	
Airline	Pax In	Pax Out
Air Senegal	1035	1187

Month: March 2008		
Tui / Arky	876	923
Livingston	139	181
Sn Brussels	1255	1353
Total	18396	19582

Month: April 2008		
Tui / Arky	737	810
Sn Brussels	834	1254
Gird Air	35	89
Total	9846	15268

Month: May 2008		
Airline	Pax In	Pax Out
Monarch	1474	1637
Span Air	806	1046
Tui / Arky	775	785
Sn Brussels	981	1384
Total	4036	4852

Month: June 2008		
Airline	Pax In	Pax Out
Monarch	1028	1091
Span Air	868	882
Tui / Arky	660	722
Sn Brussels	876	1299
Total	3432	3994

Month: July 2008		
Airline	Pax In	Pax Out
Monarch	1793	1904
Span Air	1345	1121
Tui / Arky	1043	785
Sn Brussels	955	1184
Total	5136	4994

Month: August 2008		
Airline	Pax In	Pax Out
Monarch	1664	1969
Span Air	1241	1437
Tui / Arky	939	1213
Sn Brussels	790	1310
Total	4634	5929

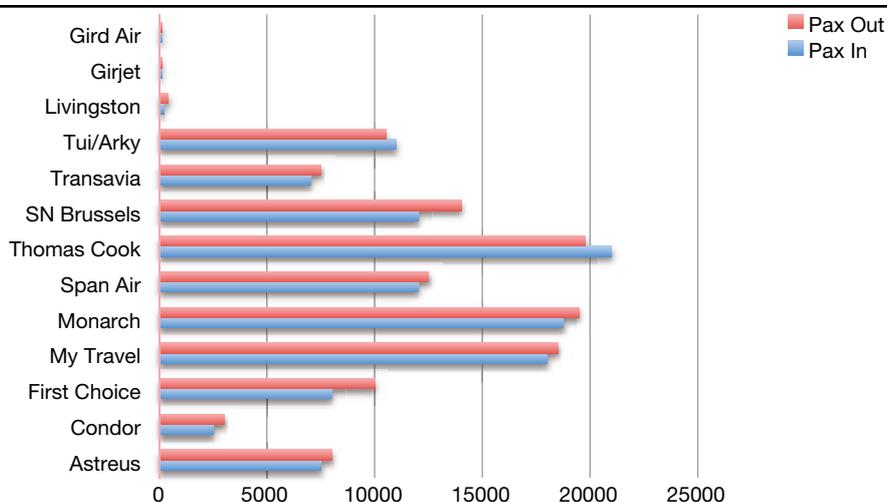
Month: September 2008		
Airline	Pax In	Pax Out
Monarch	1612	1523
Span Air	931	1349
Tui / Arky	813	742
Sn Brussels	874	711
Total	4230	4325

Month: October 2008		
Airline	Pax In	Pax Out
My Travel	1229	448
Monarch	1978	1681
Span Air	781	725
Tui / Arky	1312	1157
Sn Brussels	1281	1078
Special Flt	44	116
Total	6625	5205

Month: November 2008		
Airline	Pax In	Pax Out
My Travel	2180	2005
Monarch	1838	1697
Span Air	1069	1045
Thomas Cook	3688	2334
Transavia	455	412
Tui / Arky	785	757
Sn Brussels	1509	1443
Hamburg Int.	981	738
Thomson Fly	1349	947
Total	13854	11378

Month: December 2008		
Airline	Pax In	Pax Out
My Travel	3925	3695
Monarch	2716	2362
Span Air	1405	963
Thomas Cook	3447	2802
Transavia	800	789
Tui / Arky	1232	1075
Hamburg Int.	1270	1091
Special Flt	39	6
Sn Brussels	1247	914
Total	16081	13697

Pax Summary European 2008 : Pax In 124,851 Pax Out 130,488 Total 255,339



Regional Flights Calendar Year 2009

	Month: January 2009	
Airline	Pax In	Pax Out
Air Senegal	2186	1208
Bellview	728	597
Elysian Air	169	159
Gia	330	274
Adhoc	124	122
Total	3537	2360

	Month: March 2009	
Airline	Pax In	Pax Out
Air Senegal	1239	1310
Bellview	555	634
Adhoc	56	49
Elysian Air	86	146
G.I.A	415	352
Total	2351	2491

	Month: May 2009	
Airline	Pax In	Pax Out
Bellview	628	546
Adhoc	51	21
Elysian Air	116	133
G.I.A	534	455
Total	1329	1155

	Month: July 2009	
Airline	Pax In	Pax Out
Bellview	305	296
Adhoc	29	12
Arik Air	512	935
Elysian Air	96	128
Virgin Nigeria	626	593
G.I.A	859	544
Total	2427	2508

	Month: September 2009	
Airline	Pax In	Pax Out
Bellview	187	221
G I A	342	364
Elysian	115	122
Arik Air	655	788
Virgin Nigeria	271	194
Total	1570	1689

	Month: November 2009	
Airline	PAX IN	PAX OUT
G I A	331	320
Elysian	0	0
Arik Air	1496	1489
Air Traffic	69	94
Royal Air Moroc	348	316
Hajj		1031
Virgin Nigeria	511	467
Total	2424	3397

	Month: February 2009	
Airline	Pax In	Pax Out
Air Senegal	1112	1144
Bellview	382	452
Adhoc	98	197
Elysian Air	133	123
G.I.A	271	259
Total	1996	2175

	Month: April 2009	
Airline	Pax In	Pax Out
Air Senegal	806	901
Bellview	572	583
Adhoc	57	34
Elysian Air	124	110
G.I.A	410	415
Total	1969	2043

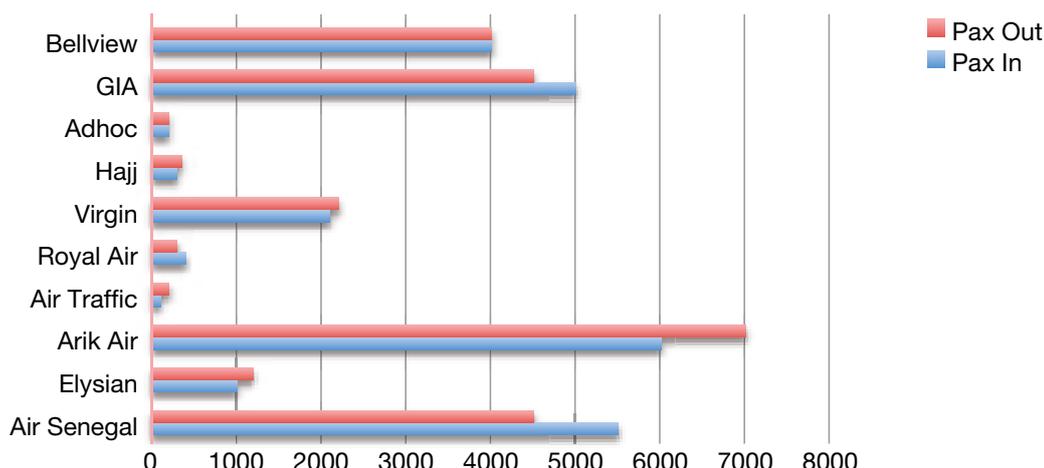
	Month: June 2009	
Airline	Pax In	Pax Out
Bellview	412	422
Adhoc	30	53
Arik Air	292	412
Elysian Air	139	207
Virgin Nigeria	89	94
G.I.A	603	712
Total	1565	1900

	Month: August 2009	
Airline	Pax In	Pax Out
Bellview	388	416
G I A	495	466
Elysian	124	137
Arik Air	880	907
Virgin Nigeria	237	349
Total	2124	2275

	Month: October 2009	
Airline	Pax In	Pax Out
Bellview	36	57
G I A	309	247
Elysian	68	99
Arik Air	1089	1066
Royal Air Moroc	85	52
Virgin Nigeria	317	451
Adhoc	91	82
Total	1959	1997

	Month: December 2009	
Airline	PAX IN	PAX OUT
G I A	250	337
Elysian	71	75
Arik Air	1334	1471
Air Traffic	116	150
Royal Air Moroc	541	383
Virgin Nigeria	290	327
Hajj	995	0
ADHOC	105	73
Total	3452	2479

Pax Summary Regional flights 2009 : Pax In 27,320 Pax Out 27,183 Total 54,503



European Flights Year 2009

Month: January 2009		
Airline	Pax In	Pax Out
My Travel	3327	3700
Sn Brussels	1191	1337
Monarch	2512	2709
Span Air	1026	1527
Thomas Cook	4196	4229
Transavia	727	626
Tui / Arky	1215	1307
Hamburg Int.	647	1027
Livinston	300	299
Thomson	2016	2065
Total	17157	18826

Month: February 2009		
Airline	Pax In	Pax Out
Sn Brussels	1231	1389
My Travel	3227	3237
Monarch	2182	2281
Span Air	856	937
Thomas Cook	4876	4542
Transavia	542	690
Tui / Arky	951	1056
Hamburg Int.	449	541
Livinston	239	242
Thomson	1810	1844
Total	16363	16759

Month: March 2009		
Airline	Pax In	Pax Out
Sn Brussels	1243	1314
My Travel	2746	2984
Monarch	2298	2425
Span Air	760	1038
Thomas Cook	5611	5700
Transavia	500	659
Tui / Arky	904	977
Hamburg Int.	545	571
Livinston	159	180
Thomson	1788	1818
Total	16554	17666

Month: April 2009		
Airline	Pax In	Pax Out
Sn Brussels	1484	1684
My Travel	631	1460
Monarch	1834	2430
Span Air	605	1118
Thomas Cook	3523	5185
Tui / Arky	971	997
Hamburg Int.	238	424
Thomson	1411	2055
Total	10697	15353

Month: May 2009		
Airline	Pax In	Pax Out
Sn Brussels	1407	1889
Span Air	31	151
Tui / Arky	822	1038
Viking	1443	1624
Total	3703	4702

Month: June 2009		
Airline	Pax In	Pax Out
Sn Brussels	1622	1775
Tui / Arky	483	475
Viking	1400	1468
Total	3505	3718

Month: July 2009		
Airline	Pax In	Pax Out
Span Air	977	584
Sn Brussels	1622	1923
Tui / Arky	906	733
Viking	1153	1275
Total	4658	4515

Month: August 2009		
Airline	Pax In	Pax Out
Sn Brussels	1274	1899
Tui / Arky	550	814
Viking	1179	1463
Total	3003	4176

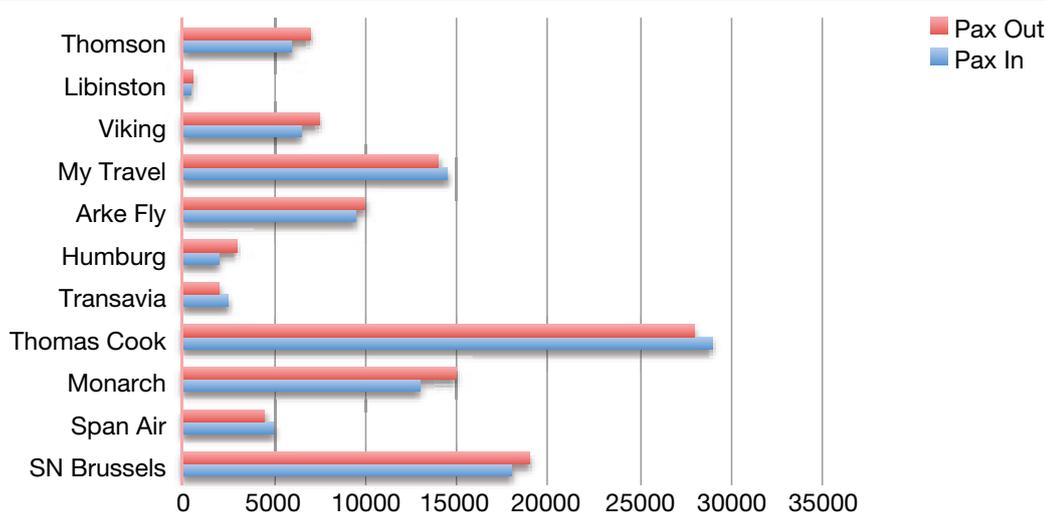
Month: September 2009		
Airline	Pax In	Pax Out
Sn Brussels	1137	1126
Span Air	783	711
Arke Fly	625	546
Viking	1328	1156
Total	3873	3539

Month: October 2009		
Airline	Pax In	Pax Out
Sn Brussels	1679	1547
Span Air	644	575
Monarch	417	223
Arke Fly	1159	973
My Travel	418	141
Viking	1195	1120
Total	5512	4579

Month: November 2009		
Airline	Pax In	Pax Out
Sn Brussels	2603	2041
Span Air	930	447
Monarch	2219	1897
Thomas Cook	5859	3628
Transavia	670	414
Hamburg	471	354
Arke Fly	1013	895
My Travel	2380	1620
Total	16145	11296

Month: December 2009		
Airline	Pax In	Pax Out
Sn Brussels	2322	1792
Span Air	1267	670
Monarch	2568	3412
Thomas Cook	5649	5425
Transavia	978	913
Hamburg	756	507
Arke Fly	846	801
My Travel	2519	2078
Total	16905	15598

Pax Summary European Flights 2009 : Pax In 118,075 Pax Out 120,727 Total 238,802



Regional Flights Year 2010

Month: January 2010		
Airline	Pax In	Pax Out
Air Traffic	36	65
Arik Air	1241	1172
Asky	6	11
Elysian Air	78	56
Gia	19	29
Royal Air Marroc	409	522
Air Nigeria	207	266
Adhoc	9	2
Total	2005	2123

Month: February 2010		
Airline	Pax In	Pax Out
Air Traffic	57	42
Arik Air	1246	1065
Asky	114	143
Elysian Air	59	90
Air Mauritania	72	58
Royal Air Marroc	355	388
Air Nigeria	182	205
Adhoc	41	150
Total	2126	2141

Month: March 2010		
Airline	Pax In	Pax Out
Air Traffic	16	22
Arik Air	1187	1227
Asky	276	283
Elysian Air	73	100

Month: April 2010		
Airline	Pax In	Pax Out
Arik Air	1154	1118
Asky	348	493
Elysian Air	48	52
Royal Air Marroc	494	639

	Month: March 2010	
Royal Air Maroc	445	560
Air Nigeria	275	246
Adhoc	8	0
Air Mauritania	159	158
Total	2439	2596

	Month: May 2010	
Airline	Pax In	Pax Out
Air Mauritania	292	326
Arik Air	1387	1313
Asky	978	688
Elysian Air	19	29
Royal Air Maroc	797	649
Air Nigeria	565	654
Total	4038	3659

	Month: July 2010	
Airline	Pax In	Pax Out
Air Mauritania	200	250
Arik Air	1065	1054
Asky	628	609
Royal Air Maroc	558	654
Air Nigeria	430	353
Adhoc	19	21
Total	2900	2941

	Month: September 2010	
Airline	Pax In	Pax Out
Air Mauritania	135	181
Arik Air	993	1075
Asky	661	532
Royal Air Maroc	705	765
Air Nigeria	607	518
Adhoc	6	6
Total	3107	3077

	Month: November 2010	
Airline	Pax In	Pax Out
Air Mauritania	79	101
Arik Air	824	1100
Asky	813	723
Royal Air Maroc	970	767
Air Nigeria	776	707
Adhoc	89	14
Hajj	1038	0
Total	4589	3412

	Month: April 2010	
Air Nigeria	405	367
Air Mauritania	158	249
Total	2607	2918

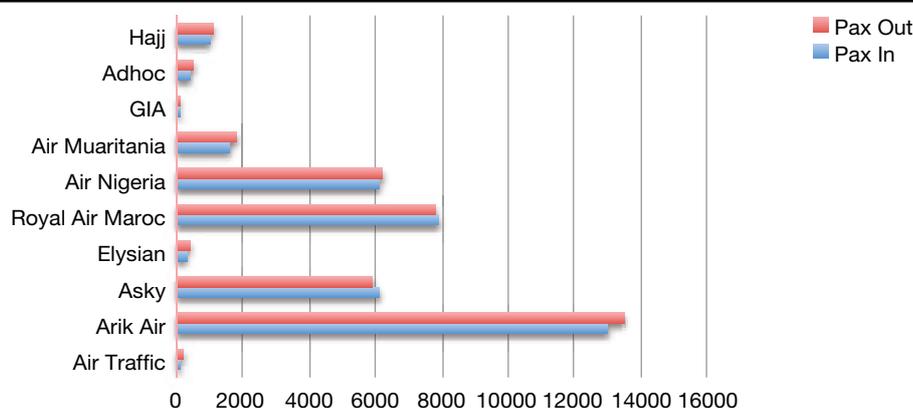
	Month: June 2010	
Airline	Pax In	Pax Out
Air Mauritania	201	272
Arik Air	876	1051
Asky	559	661
Royal Air Maroc	483	564
Air Nigeria	300	327
Adhoc	15	15
Total	2434	2890

	Month: August 2010	
Airline	Pax In	Pax Out
Air Mauritania	166	231
Arik Air	1244	1233
Asky	567	538
Royal Air Maroc	574	753
Air Nigeria	1435	1649
Adhoc	212	196
Total	4198	4600

	Month: October 2010	
Airline	Pax In	Pax Out
Air Mauritania	143	167
Arik Air	1090	1095
Asky	863	646
Royal Air Maroc	831	636
Air Nigeria	463	440
Hajj		1036
Total	3247	3853

	Month: December 2010	
Airline	Pax In	Pax Out
Air Mauritania	17	10
Arik Air	1086	1289
Asky	599	691
Royal Air Maroc	1485	1104
Air Nigeria	789	764
Adhoc	45	18
Total	4021	3876

Pax Summary Regional Flights 2010 : Pax In 37,711 Pax Out 38,086 Total 75,797



European Flights Year 2010

	Month: January 2010	
Airline	Pax In	Pax Out
My Travel	2525	2481
Sn Brussels	1629	2296
Monarch	2037	2565
Span Air	1101	1433
Thomas Cook	6669	6224
Transavia	654	600
Tui / Arky	1233	1022
Hamburg Int.	562	917
Total	16410	17538

	Month: February 2010	
Airline	Pax In	Pax Out
Sn Brussels	2173	2122
My Travel	2401	2516
Monarch	2344	2374
Span Air	797	984
Thomas Cook	6070	6130
Transavia	669	705
Tui / Arky	999	1027
Hamburg Int.	383	572
Total	15836	16430

	Month: March 2010	
Airline	Pax In	Pax Out
My Travel	1655	1881
Sn Brussels	1767	2268
Monarch	2434	2509
Span Air	821	934
Thomas Cook	5453	5317
Transavia	645	786
Tui / Arky	923	989
Total	13698	14684

	Month: April 2010	
Airline	Pax In	Pax Out
My Travel	205	836
Sn Brussels	1706	2044
Monarch	1779	2244
Span Air	496	868
Thomas Cook	2558	4421
Transavia	257	402
Tui / Arky	893	925
Total	7894	11740

	Month: May 2010	
Airline	Pax In	Pax Out
Sn Brussels	1618	1943
Span Air	637	822
Tui / Arky	704	811
Viking	1324	1451
Total	4283	5027

	Month: June 2010	
Airline	Pax In	Pax Out
Span Air	622	700
Sn Brussels	1550	1786
Tui / Arky	485	517
Viking	1347	1601
Total	4004	4604

	Month: July 2010	
Airline	Pax In	Pax Out
Span Air	877	649
Sn Brussels	1556	1895
Tui / Arky	665	623
Viking	1512	1540
Total	4610	4707

	Month: August 2010	
Airline	Pax In	Pax Out
Span Air	1151	1360
Sn Brussels	1322	2022
Tui / Arky	420	540
Viking	430	515
Total	3323	4437

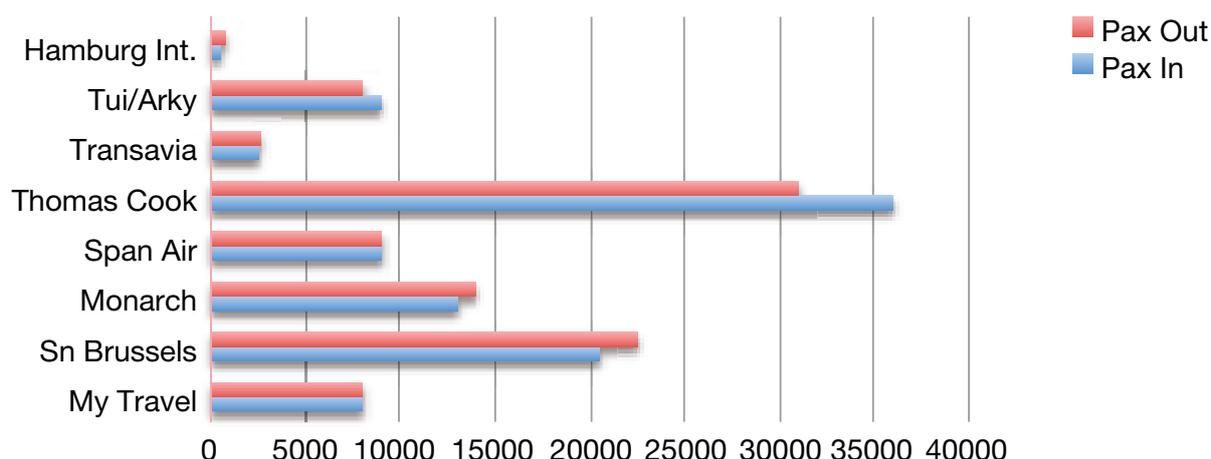
	Month: September 2010	
Airline	Pax In	Pax Out
Span Air	665	598
Sn Brussels	1660	1291
Tui / Arky	496	424
Viking	1255	1227
Total	4076	3540

	Month: October 2010	
Airline	Pax In	Pax Out
Span Air	856	615
Sn Brussels	1867	1640
Tui / Arky	985	819
Viking	1483	1228
Monarch	432	410
My Travel	207	0
Thomas Cook	227	0
Total	6057	4712

	Month: November 2010	
Airline	Pax In	Pax Out
Span Air	1026	568
Sn Brussels	2239	2071
Tui / Arky	1021	710
Transavia	651	389
Monarch	2204	2124
My Travel	855	519
Thomas Cook	10548	3422
Total	18544	9803

	Month: December 2010	
Airline	Pax In	Pax Out
Span Air	1219	695
Sn Brussels	2205	1997
Tui / Arky	1541	1384
Transavia	673	728
Monarch	2782	2526
My Travel	1686	1330
Thomas Cook	5972	5982
Total	16078	14642

Pax Summary European Flights 2010 : Pax In **114,813** Pax Out **111,864** Total **226,677**



Regional Flights Year 2011

Month: January 2011		
Airline	Pax In	Pax Out
Arik Air	985	892
Asky	402	391
Fly 6	66	64
Royal Air Marroc	1251	1347
Senegal Air	30	13
Air Nigeria	839	828
Adhoc	10	49
Total	3583	3584

Month: February 2011		
Airline	Pax In	Pax Out
Arik Air	607	634
Asky	381	432
Fly 6	88	38
Royal Air Marroc	722	746
Senegal Air	346	521
Air Nigeria	836	742
Adhoc	132	40
Total	3112	3153

Month: March 2011		
Airline	Pax In	Pax Out
Arik Air	875	1693
Asky	594	539
Fly 6	112	105
Royal Air Marroc	600	1068
Senegal Air	467	459
Air Nigeria	1103	1078
Total	3751	4942

Month: April 2011		
Airline	Pax In	Pax Out
Arik Air	769	824
Asky	642	762
Fly 6	88	103
Royal Air Marroc	866	929
Senegal Air	534	609
Air Nigeria	824	999
Adhoc	16	11
Total	3739	4237

Month: May 2011		
Airline	Pax In	Pax Out
Arik Air	742	745
Asky	587	366
Royal Air Marroc	624	853
Senegal Air	550	604
Air Nigeria	825	994
Adhoc	2	3
Total	3330	3565

Month: June 2011		
Airline	Pax In	Pax Out
Arik Air	620	689
Asky	553	427
Royal Air Marroc	681	792
Senegal Air	632	526
Air Nigeria	778	820
Adhoc	117	13
Total	3381	3267

Month: July 2011		
Airline	Pax In	Pax Out
Arik Air	818	957
Asky	690	623
Royal Air Marroc	650	808
Senegal Air	509	387
Air Nigeria	987	1086
Adhoc	43	18
Total	3697	3879

Month: August 2011		
Airline	Pax In	Pax Out
Arik Air	811	851
Asky	325	319
Royal Air Marroc	633	810
Senegal Air	427	437
Air Nigeria	827	914
Total	3023	3331

	Month: September 2011	
Airline	Pax In	Pax Out
Arik Air	963	1050
Royal Air Marroc	744	683
Senegal Air	746	673
Air Nigeria	1046	963
Total	2453	2406

	Month: November 2011	
Airline	Pax In	Pax Out
Arik Air	1191	1228
Royal Air Marroc	601	465
Senegal Air	697	607
Air Nigeria	954	1061
Total	3443	3361

	Month: October 2011	
Airline	Pax In	Pax Out
Arik Air	918	974
Royal Air Marroc	678	589
Senegal Air	828	687
Air Nigeria	1309	1391
Hajj	1085	1086
Total	4818	4727

	Month: December 2011	
Airline	Pax In	Pax Out
Arik Air	937	1341
Royal Air Marroc	1228	630
Senegal Air	882	688
Air Nigeria	1157	989
Total	4204	3648

Pax Summary Regional Flights 2011 : Pax In 43,580 Pax Out 45,063 Total 88,643

European Flights Year 2011

	Month: January 2011	
Airline	Pax In	Pax Out
My Travel	1487	1476
Sn Brussels	1729	2126
Monarch	2014	2373
Span Air	888	1392
Thomas Cook	5812	6016
Transavia	698	500
Tui / Arky	1816	1564
Total	14444	15447

	Month: February 2011	
Airline	Pax In	Pax Out
My Travel	1669	1696
Sn Brussels	1793	1751
Monarch	2264	
Span Air	814	945
Thomas Cook	5135	5375
Transavia	646	705
Tui / Arky	1756	1650
Total	14077	14402

	Month: March 2011	
Airline	Pax In	Pax Out
My Travel	1861	1887
Sn Brussels	1756	2332
Monarch	2442	2540
Span Air	665	890
Thomas Cook/Uk	5723	5609
Transavia	599	882
Tui / Arky	1869	2079
Total	14915	16219

	Month: April 2011	
Airline	Pax In	Pax Out
Tui / Arky	1676	1925
Sn Brussels	1507	2132
Monarch	2313	
Span Air	799	1166
Thomas Cook	4563	7033
Total	10858	14904

	Month: May 2011	
Airline	Pax In	Pax Out
Tui / Arky	731	1060
Sn Brussels	1172	1475
Monarch	953	1384
Span Air	505	736
Total	3361	4655

	Month: June 2011	
Airline	Pax In	Pax Out
Tui / Arky	563	607
Sn Brussels	1541	1482
Monarch	776	
Span Air	651	704
Total	3531	3682

	Month: July 2011	
Airline	Pax In	Pax Out
Tui / Arky	823	763
Sn Brussels	1524	1904
Monarch	818	896
Span Air	1343	982
Total	4508	4545

	Month: August 2011	
Airline	Pax In	Pax Out
Tui / Arky	545	677
Sn Brussels	1122	1711
Monarch	968	
Span Air	1211	1634
Total	3846	5163

	Month: September 2011	
Airline	Pax In	Pax Out
Tui / Arky	549	536
Sn Brussels	1649	1466
Span Air	711	874
Monarch	807	768
Total	3716	3644

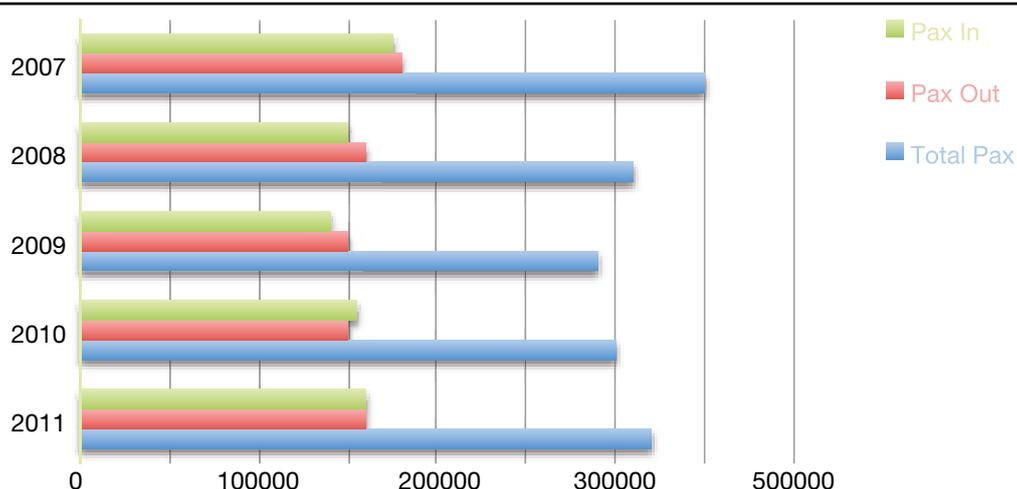
	Month: October 2011	
Airline	Pax In	Pax Out
Tui / Arky	1297	1088
Sn Brussels	1893	1317
Monarch	1210	1023
Span Air	1370	816
Thomas Cook Scan.	211	287
Total	5981	4531

	Month: November 2011			month: December 2011	
Airline	Pax In	Pax Out	Airline	Pax In	Pax Out
Tui / arky	2008	1612	tui / arky	2074	1721
Sn brussels	1890	1697	sn brussels	1992	1394
Monarch	2105	1872	monarch	2291	1930
Thomas cook	8575	5753	thomas cook	6302	5894
Thomas cook scan.	840	551	Thomas cook scan.	1908	1529
Transavia	429	405	transavia	502	288
Condor	884	590	condor	945	701
Span air	1147	890	span air	1570	879
Total	17878	13370	total	17584	14336

Pax Summary European flights 2011 : Pax In 114,699 Pax Out 114,898 Total 229,597

Annual Passenger Summary

Year	Pax In	Pax Out	Total Pax
2007	170,856	174,184	345,040
2008	151,305	158,306	309,611
2009	145,395	147,910	293,305
2010	152,524	149,950	302,474
2011	158,279	159,961	318,240



6.2. The banjul international airport – Cargo Traffic 2007 - 2011

Fereight (Tonnes) Year 2007

Month	Loaded	Unloaded	Total
Month	Loaded	Unloaded	Total
January	84	54	138
February	102	59	161
March	49.3	143	192.3
April	81	45	126
May	124	41	165
June	32	53.2	85.2
July	88.4	48.2	136.6
August	33	37	70
September	12.9	55	67.9
October	24.3	62.4	86.7
November	14.2	52	66.2
December	12	54	66
Total	657.1	703.8	1360.9

Feright (Tonnes) Year 2008

Month	Loaded	Unloaded	Total
January	60.7	46	106.7
February	55.7	93.77	149.47
March	66.17	81.42	147.59
April	56.7	66.8	123.5
May	50	44.6	94.6
June	29.8	27.9	57.7
July	16.43	44	60.43
August	8.42	54.9	63.32
September	27.73	40.27	68
October	11.48	45.24	56.72
November	5.79	41.58	47.37
December	10.1	105.91	116.01
Total	399.02	692.39	1091.41

Feright (Tonnes) Year 2009

Month	Loaded	Unloaded	Total
January	13.5	57.1	70.6
February	10.5	45.6	56.1
March	10	51.1	61.1
April	14.7	59.34	74.04
May	33.7	60.87	94.57
June	31.6	58.6	90.2
July	16	45.1	61.1
August	18.6	45.8	64.4
September	10.32	44.1	54.42
October	12.7	22.54	35.24
November	11.67	50.1	61.77
December	37.4	60	97.4
Total	220.69	600.25	820.94

Feright (Tonnes) Year 2010

Month	Loaded	Unloaded	Total
January	36.6	54.8	91.4
February	26.8	59.5	86.3
March	77.8	69.6	147.4
April	3.5	50.76	54.26
May	63.6	60.27	123.87
June	57.69	38.7	96.39
July	36.6	31.7	68.3
August	50.8	53.9	104.7
September	39.3	55.5	94.8
October	38.1	55.8	93.9
November	13.52	62.1	75.62
December	16.2	49.2	65.4
Total	460.51	641.83	1102.34

Feright (Tonnes) Year 2011

Month	Loaded	Unloaded	Total
January	12.4	67.3	79.7
February	12.6	65	77.6
March	10	59.4	69.4
April	23.2	66.4	89.6
May	17.2	66.4	83.6
June	106	46.8	152.8
July	24.1	46	70.1
August	13.36	47	60.36
September	6.6	38.4	45
October	21.9	67.3	89.2

Feright (Tonnes) Year 2011 (suit)

Month	Loaded	Unloaded	Total
November	17.5	70.8	88.3
December	16	58.7	74.7
Total	280.86	699.5	980.36

Source : Gambia Civil Aviation Authority

6.3. Aircraft movements 2007-2011**Aircraft Movement For Year 2007**

	European	Regional	Others	Totals
January	192	229	39	460
Februray	154	172	66	392
March	170	201	38	409
April	164	150	30	344
May	137	58	39	234
June	149	58	41	248
July	164	60	15	171
August	154	66	28	248
September	150	52	34	236
October	143	102	26	271
November	135	182	41	358
December	141	192	41	374
Total	2003	1522	438	3747

Aircraft Movements For Year 2008

	European	Regional	Others	Totals
January	104	249	22	375
Februray	154	206	48	408
March	171	230	79	480
April	183	158	45	386
May	201	46	38	285
June	154	48	31	233
July	137	73	31	241
August	144	78	36	258
September	130	92	31	253
October	130	96	19	245
November	124	201	50	375
December	135	227	22	384
Total	1767	1704	452	3923

Aircraft Movements For Year 2009

	European	Regional	Others	Totals
January	127	234	36	397
Februray	176	139	33	348
March	181	167	16	364
April	158	123	37	318
May	112	48	30	190
June	191	66	29	286
July	213	36	52	301
August	206	27	69	302
September	188	26	44	258
October	159	57	64	280
November	177	161	50	388
December	195	212	26	433
Total	2083	1296	486	3865

Aircraft Movements For Year 2010

	European	Regional	Others	Totals
January	195	157	54	406
Februray	186	151	45	382
March	223	123	40	386
April	195	95	14	304
May	206	41	20	267
June	203	38	21	262
July	203	35	17	255
August	211	30	24	265
September	235	34	10	279
October	254	41	64	359
November	230	112	42	384
December	246	121	63	430
Total	2587	978	414	3979

Aircraft Movements For Year 2011

	European	Regional	Others	Totals
January	269	142	14	425
Februray	279	114	37	430
March	341	133	31	505
April	334	90	38	462
May	347	24	39	410
June	334	20	20	374
July	313	18	36	367
August	329	20	18	367
September	316	27	19	362
October	324	36	54	414
November	319	154	23	496
December	314	131	60	505
Total	3819	909	389	5117

Source : Gambia Civil Aviation Authority



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