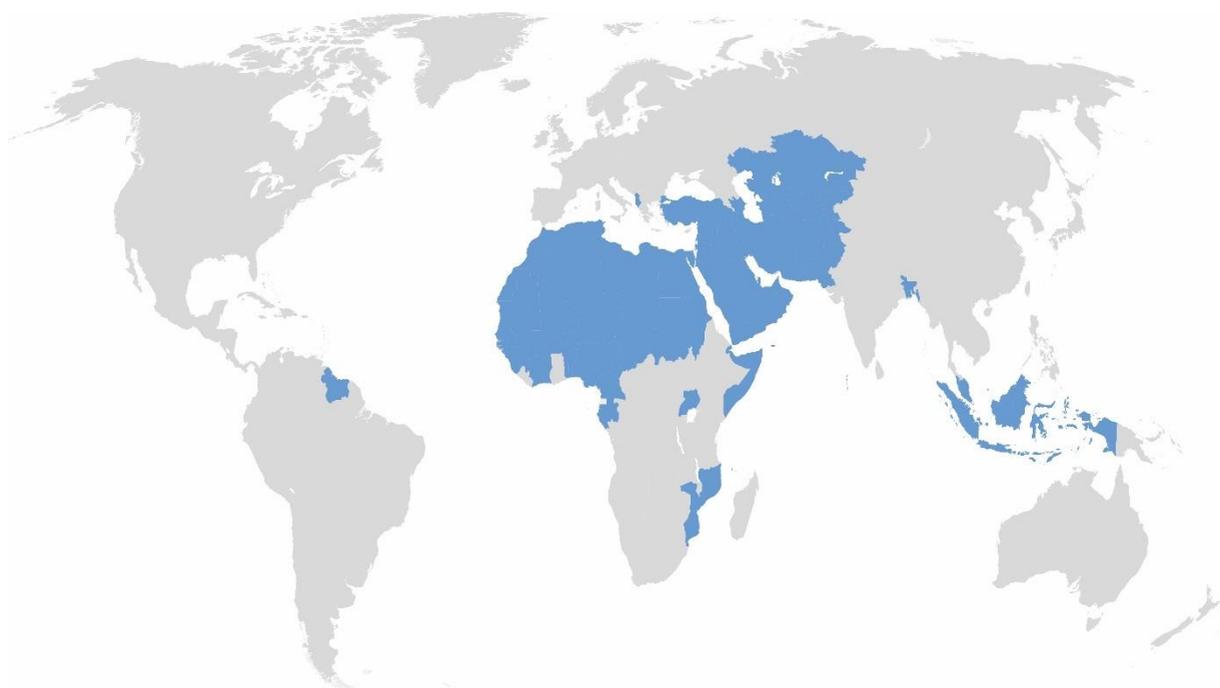




# PROSPECTS AND CHALLENGES OF OIC MEMBER COUNTRIES

## SWOT OUTLOOK 2018



**ORGANISATION OF ISLAMIC COOPERATION**  
STATISTICAL, ECONOMIC AND SOCIAL RESEARCH AND  
TRAINING CENTRE FOR ISLAMIC COUNTRIES (SESRIC)

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# PREFACE

First published in 2011 and followed by its second issue in 2012, the SWOT (Strengths, Weaknesses, Opportunities, and Threats) Outlook on OIC Member Countries has been enriched with new indicators for this new edition based on the encouraging feedback of the readers. Before the launch of this new series in 2011, OIC countries were articulating a need for a publication that would act as one of the reference points towards enhancing the level of their cooperation and integration as well as the level of their competitiveness, as a group, at both the regional and global levels. To support these cooperation and integration efforts of the member countries, SESRIC prepares and publishes the SWOT Outlook.

This new series by SESRIC uses a novel approach based on the SWOT methodology to present profiles of the group of OIC countries from the perspective of strengths and weaknesses they have, and opportunities and threats they may face in various areas. Besides, the OIC countries as a group are compared with the world and groups of non-OIC developing and developed countries to show where they stand and may move towards in various areas of concern.

Titled “Prospects and Challenges of OIC Member Countries”, the 2018 issue of the SWOT Outlook reflects the situation of the group of OIC countries in four main sections with easily understandable explanatory texts with on-focus charts and summary bubbles.

As for the selected indicators in the **Strengths** section that reflects the advantages of the OIC countries over other groupings, the readers will be able to find analyses based on new indicators in this year’s publication. The analyses on the core indicators in this section have also been updated in light of the most recent data.

Including the second highest number of indicators in this present publication, the **Weaknesses** section covers the difficulties, restrictions, and disadvantages of the OIC countries in selected major areas including agriculture, education, energy, finance, health, labour force, science and technology, transport and communication that should be minimized and overcome to take sound steps in the development path.

# PREFACE

The selected indicators from the areas of air transportation, external debt structure, foreign direct investment, maternal/new-born/child health, mobile technology penetration, participation finance, prevalence of tobacco use, trade, tourism and urbanisation are also analysed in the **Opportunities** section. This section has the highest number of indicators for 2018 edition. The common ground for the indicators selected is they are to the advantage of the OIC countries if well-informed policies can be enacted timely.

The **Threats** section focuses on the indicators that the trends observed for the period in concern may hinder the progress of the OIC countries unless urgent countermeasures are taken. The analyses carried out in this section for the selected areas of trade imbalance in agriculture, education, food security, health workforce and financing, research and development, sanitation, unemployment and water not only bring the existing impediments into perspective but also shed a light on specific areas that require concerted immediate action.

We believe that the information presented in the aforementioned sections of this publication will be helpful in providing insight to decision makers in OIC countries to prioritize cooperation areas among themselves and formulate sound strategies and plans with a view to achieving higher levels of welfare and socio-economic development.

Ambassador Musa KULAKLIKAYA  
Director General  
SESRIC

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# STRENGTHS

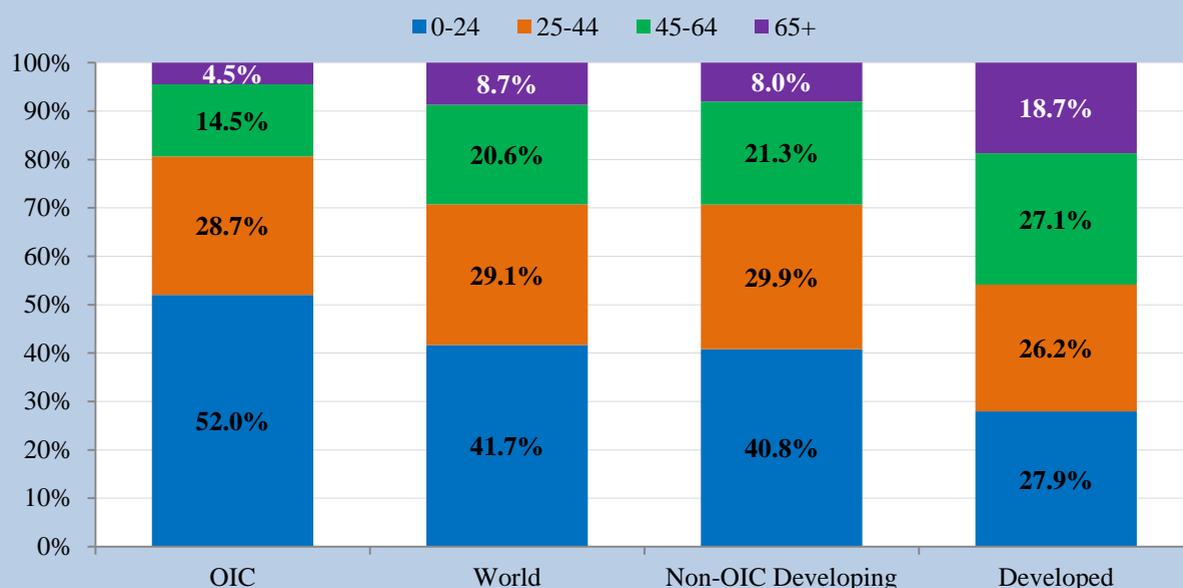
OIC countries with a population of **1.79 billion people** accounted for **23.8%** of the total world population in 2017.

Young population is an engine for socio-economic development. The share of young population (0-24 age) corresponded to **52.0%** of the total OIC population in 2017, the highest ratio among the non-OIC developing countries, developed countries and the world.

**52**  
percent

Share of 0-24 age group  
in total population in  
**2017**

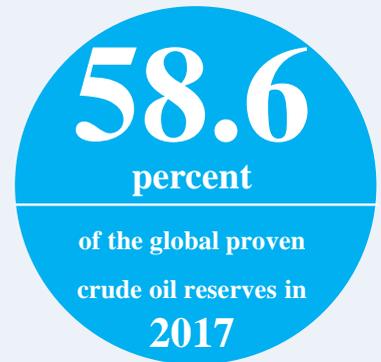
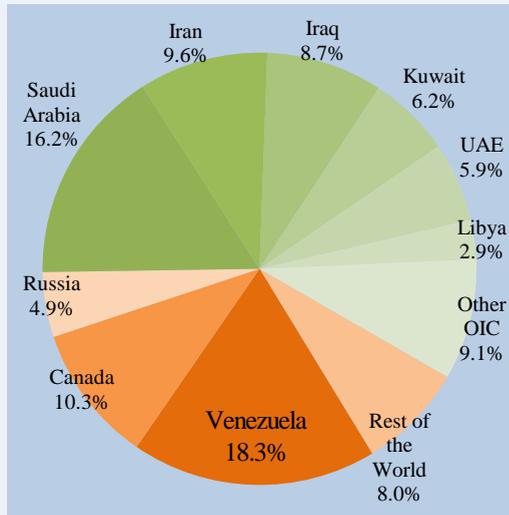
**Population by Age Group, % of Total, 2017**



*Young population with appropriate investment, improving their skills and capacities in accordance with current and prospective needs of the labour market, will significantly contribute to the socio-economic development of OIC countries in the long term.*

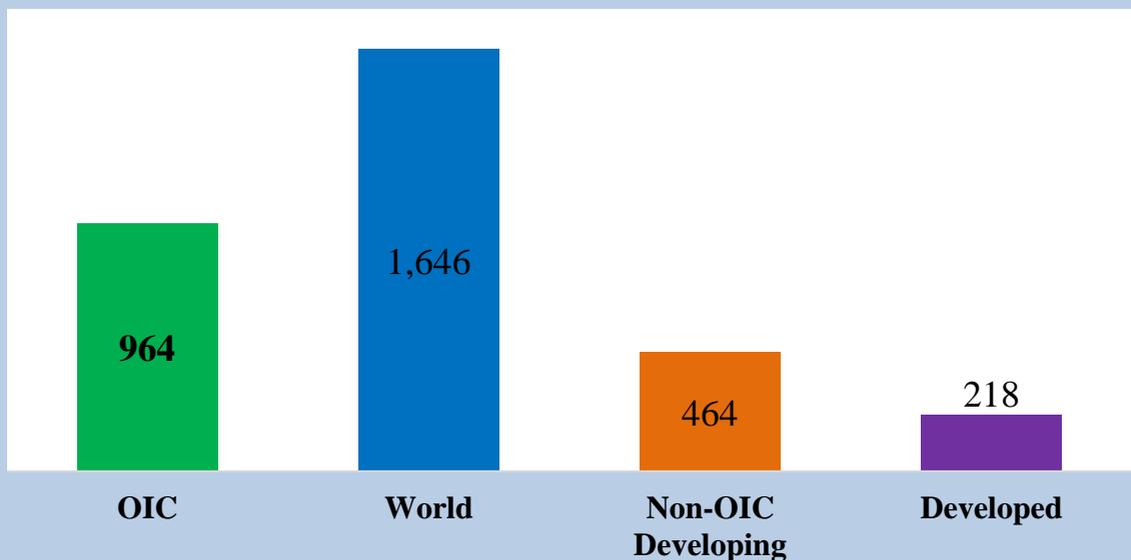
Crude oil is one of the main sources of energy and petrochemical products driving the world economy.

In 2017, OIC countries are estimated to have **964** billion barrels of proven oil reserves, equivalent to **58.6%** of the total global reserves.

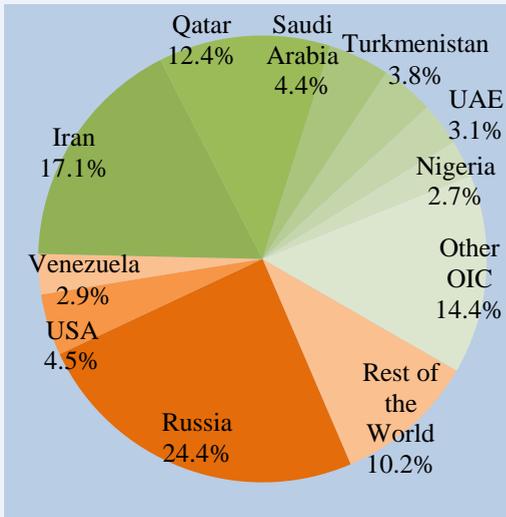


Approximately half of the global proven crude oil reserves comprised in 6 OIC countries.

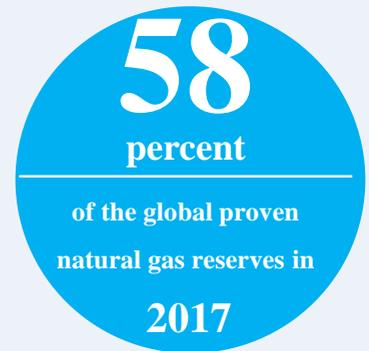
**Proven Crude Oil Reserves, Billion Barrels, 2017**



*Having most of the global proven crude oil reserves, OIC countries are in a strong position to utilise gains from these assets for sustainable growth and development.*

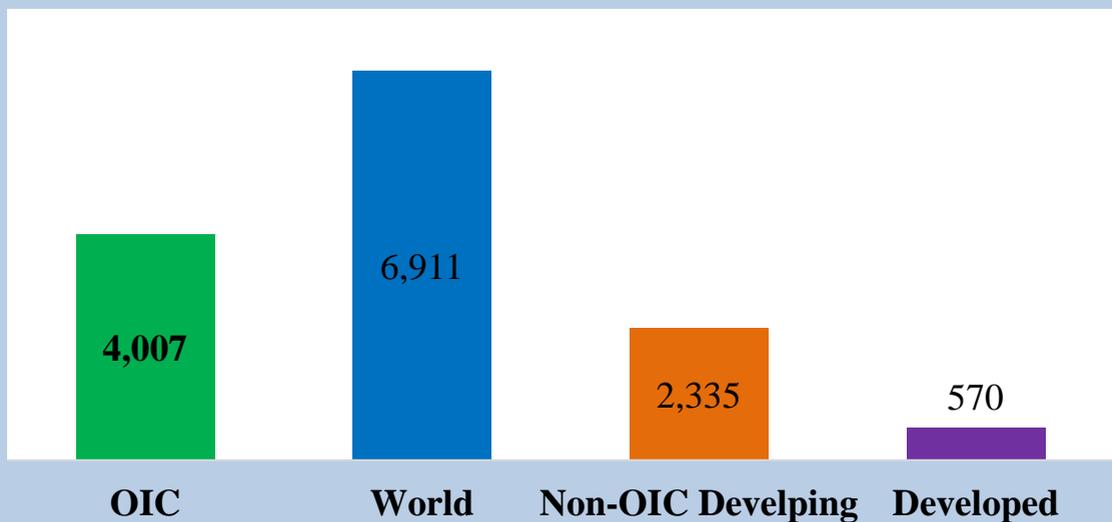


Natural gas is an important source of energy. OIC countries are estimated to have a total natural gas reserve of **4,007** trillion cubic feet, corresponding to **58%** of the global proven natural gas reserves in 2017.



Around **44%** of global proven natural gas reserves comprised in 6 OIC countries.

**Proved Natural Gas Reserves, Trillion Cubic Feet, 2017**



*Possessing most of the global proven natural gas resources, OIC countries are in a strong position to put more emphasis on long-term planning for the use of available resources.*

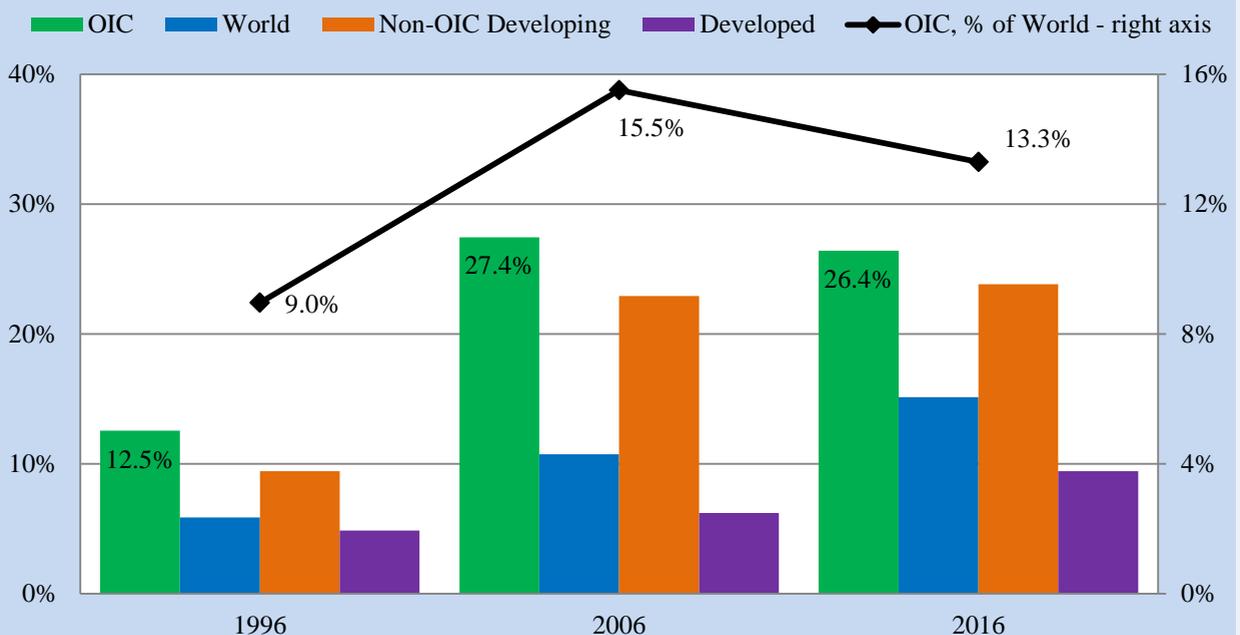
Total reserves of OIC countries, including gold, have increased significantly over the last decades. The total reserves relative to GDP were 26.4% in 2016, compared to 12.5% and 27.4% in 1996 and 2006, respectively.

The collective share of OIC countries in total world reserves increased from 9% in 1996 to 13.3% in 2016.

**13.3**  
percent

Share of OIC reserves  
in global reserves in  
**2016**

### Total Reserves Including Gold , % of GDP



*Steady increase in the reserve position of OIC countries implies lower vulnerability to external shocks, stronger buffers for future incidents of crises, and greater assurances for the continuity of external trade.*

<b>Millet</b>	Niger	Mali	Nigeria	Sudan	Burkina Faso	Chad	Senegal	Pakistan	Uganda	Guinea
	2	4	5	6	7	9	11	12	17	18
<b>Sorghum</b>	Nigeria	Sudan	Niger	Burkina Faso	Mali	Cameroon	Chad	Egypt	Yemen	
	2	3	9	11	12	13	15	19	20	
<b>Cocoa Beans</b>	Cote d'Ivoire	Indonesia	Cameroon	Nigeria	Togo	Uganda	Sierra Leone	Guinea		
	1	3	4	5	11	14	17	18		
<b>Cassava</b>	Nigeria	Indonesia	Mozambique	Cameroon	Sierra Leone	Benin	Cote d'Ivoire			
	1	4	10	12	14	17	19			
<b>Natural Rubber</b>	Indonesia	Malaysia	Côte d'Ivoire	Nigeria	Cameroon	Gabon	Guinea			
	2	6	9	12	16	17	20			
<b>Palm Oil</b>	Indonesia	Malaysia	Nigeria	Cameroon	Cote d'Ivoire	Guinea	Benin			
	1	2	4	7	12	16	20			
<b>Tea</b>	Turkey	Indonesia	Iran	Bangladesh	Uganda	Mozambique				
	5	7	11	12	13	18				
<b>Wheat</b>	Pakistan	Turkey	Kazakhstan	Iran	Egypt	Uzbekistan				
	8	11	13	15	17	20				
<b>Rice</b>	Indonesia	Bangladesh	Pakistan	Egypt	Nigeria					
	3	4	10	14	15					
<b>Sugar</b>	Turkey	Egypt	Iran	Morocco						
	5	8	11	14						
<b>Barley</b>	Turkey	Kazakhstan	Iran							
	8	14	15							
<b>Coffee</b>	Indonesia	Uganda	Côte d'Ivoire							
	4	10	15							

Many OIC countries are among **top 20** producers of major agricultural products

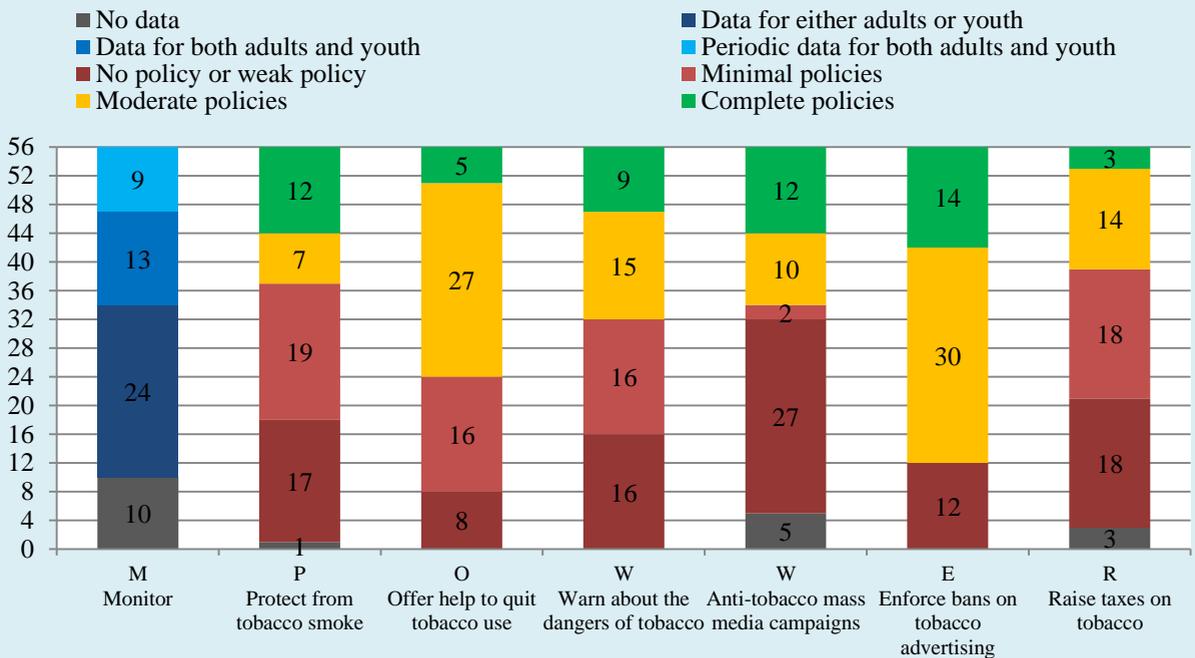
Notwithstanding the low level of development in the agriculture sector and the relatively low share of OIC countries in the global agricultural production, a significant number of OIC countries were ranked among the top 20 producers of some major agricultural products worldwide in 2016.

*To further leverage on the strength of OIC countries in the production of these commodities, it is also important to increase value-added and, therefore, their competitive advantage.*

WHO Framework Convention on Tobacco Control (FCTC) is the primary global tobacco control instrument, containing legally binding obligations for its Parties. Through providing thorough targets on tobacco control policies and legislations, it aims at reducing both demand and supply of tobacco products. WHO introduced package of measures “**MPOWER**” in order to guide countries toward implementation of effective strategies. All OIC countries except Indonesia, Palestine and Somalia have signed or ratified the WHO’s FCTC.

Many OIC countries implemented complete or moderate policies across the 7 **MPOWER** measures and were ranked among the highest achieving countries in the world. In particular, 14 OIC countries implemented complete while 30 had moderate policies on enforcing bans on tobacco advertising.

### Implementation of Tobacco Control Policies in OIC



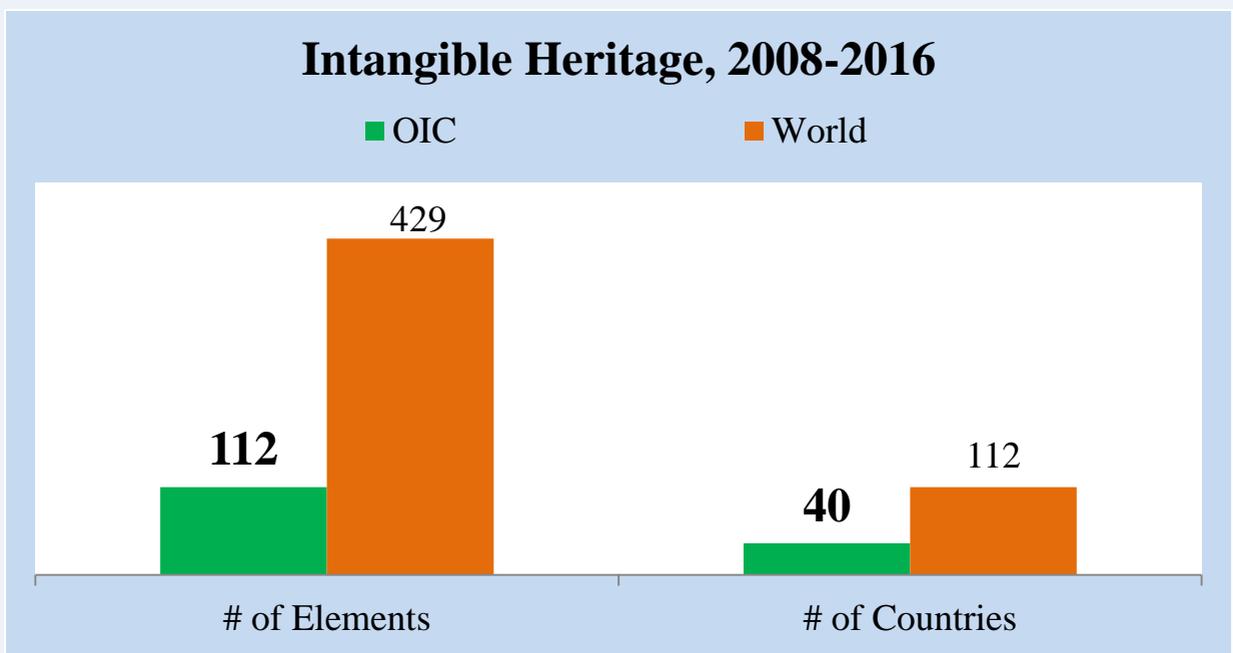
*Strong legislative and administrative commitment provides a conducive environment for curbing the prevalence of tobacco use and, thus, will ensure a healthier OIC population in the future.*

## STRENGTH

The Intergovernmental Committee for the Safeguarding of Intangible Cultural Heritage decides annually whether or not to inscribe the nominations of cultural practices and expressions of intangible heritage on the UNESCO’s *Lists of Convention for the Safeguarding of the Intangible Cultural Heritage*. A heritage element should be traditional, contemporary, inclusive, socially cohesive, representative and community-based to be included in these lists.



Since 2008, 112 heritage items of OIC countries have been inscribed in the intangible heritage lists. These 112 heritage items constitute 26% of total number of inscribed items (429) all over the world. When the number of countries inheriting these elements are analyzed, 112 heritage items manifest in 40 OIC countries which account for 36% of 112 countries with intangible heritage elements on the Convention’s Lists.



***OIC countries should endeavour for protecting and introducing their cultural heritage to develop intercultural dialogue as well as transfer them to the next generations.***



# WEAKNESSES

Measuring the capacity to provide the generations with opportunities to acquire the basic intellectual skills, literacy rate shows the effectiveness of primary education system. With an average adult literacy rate of 70.9%, OIC countries lagged far behind the averages of the world (80.9%) and non-OIC developing countries (84.7%). Meanwhile, the youth literacy rates are comparably higher than adult literacy rates in OIC countries. On average, 80.9% of youth are literate which is, however, again below the world average (88.2%) and average of non-OIC developing countries (91.0%).

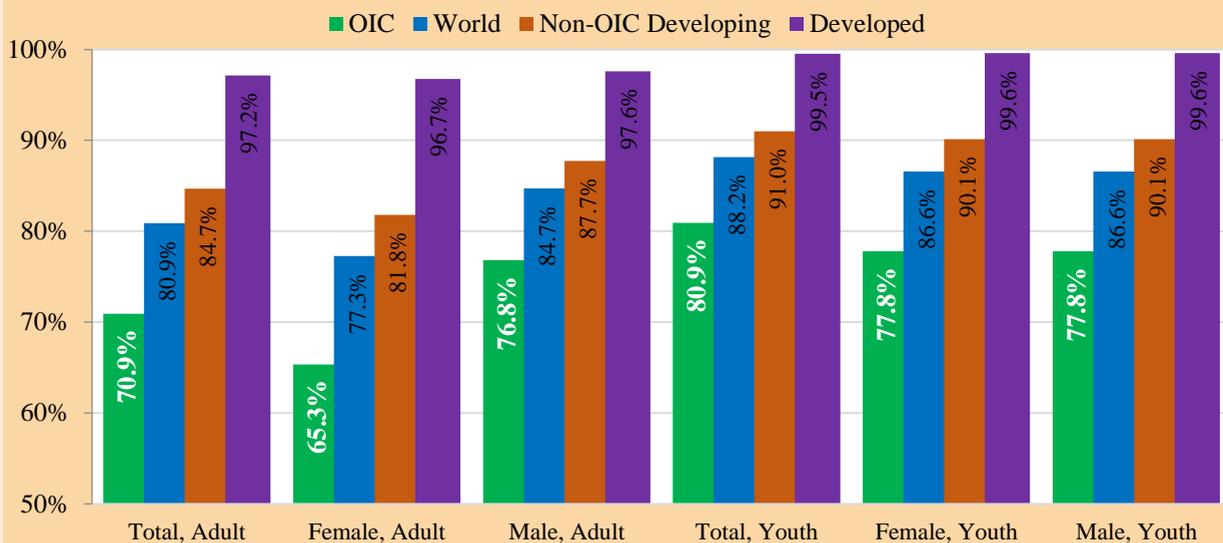
There is a large disparity across genders among OIC countries compared to other country groups. On average, out of 100 adult women, only 65.3 can read and write while 76.8 of male population are literate. Besides, the discrepancy in female literacy rates between the averages of OIC (65.3%) and the world (77.3%) is quite critical.

# 70.9

percent

Average adult  
literacy rate

## Literacy Rate, 2016



\* Latest year available between 2000 and 2016

***The gap between the OIC and rest of the world in terms of literacy rate clearly indicates that OIC countries should invest more in primary education in order to improve literacy, especially among the women and youth.***

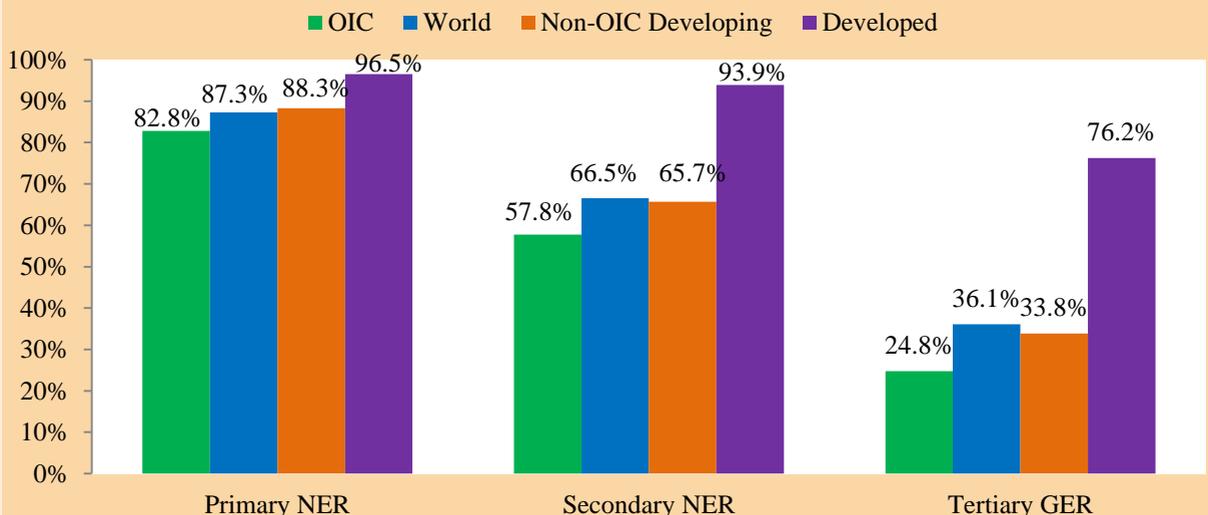
Based on the data available from 1999 to 2016, the average Net Enrolment Rate (NER) in primary schools was 82.8% in the OIC countries compared to the world average of 87.3% and the non-OIC developing and developed countries averages of 88.3% and 96.5%, respectively.

**24.8**  
percent

Average GER in tertiary  
schools

As to the average NER in secondary schools, OIC countries recorded an enrolment rate of 57.8% compared to the world average of 66.5%, and the non-OIC developing and developed countries averages of 65.7% and 93.9%, respectively. The average Gross Enrolment Rate (GER) in tertiary schools was 24.8% in the OIC countries compared to the world average of 36.1% and, the non-OIC developing and developed countries averages of 33.8% and 76.2%, respectively.

### Enrolment Rates, %, 2016\*

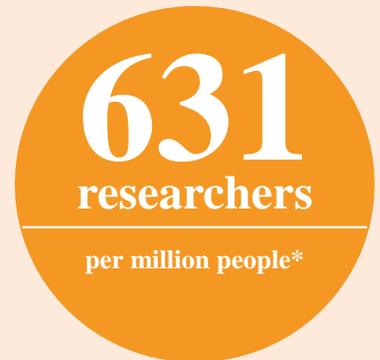


\* Latest year available between 1999-2016

***Education is a key part of human development and given the low enrolment rates at all levels, OIC countries should take necessary steps to improve their position.***

OIC countries, on average, employed 631 researchers per million people, which were equal to approximately one-tenth of developed countries' average (6,472) and almost one third of world average (1,673).

On the other hand, OIC countries are more gender equitable in terms of researchers. Women in the OIC represent around 37.1% of the total researchers, which is significantly higher than the averages of the world (31.6%) and the developed countries (27.4%), but lower than the average of the non-OIC developing countries (41.4%).

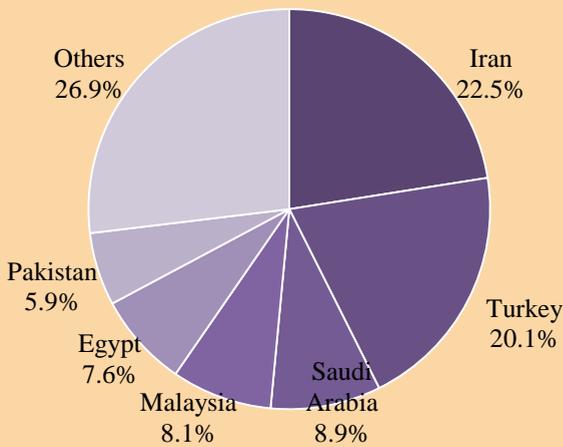


*To foster innovation and promote scientific and technological development, effective policies should be designed and implemented to increase the quantity and quality of human capacity in OIC countries.*

OIC countries, as a whole, published 181,366 articles in 2016 compared to 20,268 articles in 2000. Although there is more than eight-fold increase during this period, the total number is still below the articles published by some individual countries in the world.



**Distribution of Articles by OIC Countries, 2016**



Nearly (43%) of these articles originated from only two member countries: Iran (22.5%) and Turkey (20.1%). Together with Saudi Arabia, Malaysia, Egypt, and Pakistan, these six countries accounted for 73.1% of the total number of published articles in OIC countries.

**Number of Published Articles\***



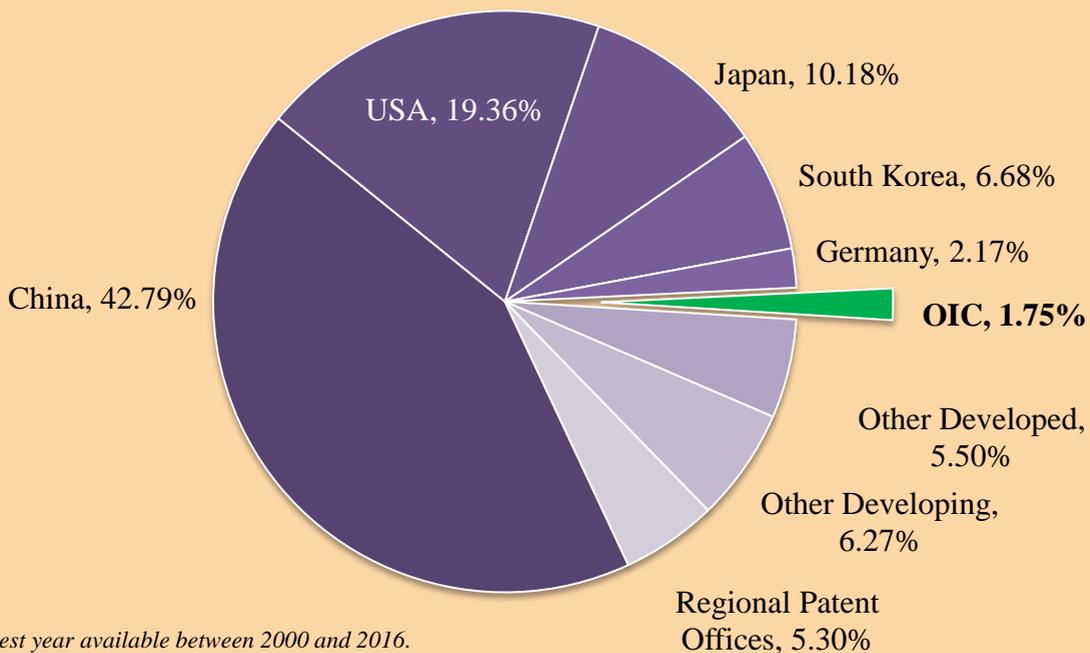
\*In journals that are covered by Science Citation Index Expanded (SCI-EXPANDED), Social Science Citation Index (SSCI), and Arts & Humanities Citation Index (A&HCI).

***The low level of published articles indicates inadequate levels of scientific research and academic activity in OIC countries and necessitates more investment in R&D and higher education.***

With a total of 54,603 patent applications, OIC countries accounted for only 1.75% of the world total. Meanwhile, the China, USA, Japan, and Republic of Korea were home to 79% of the global patent applications.



## Distribution of World Total Patent Applications by Filing Office\*



\* Latest year available between 2000 and 2016.

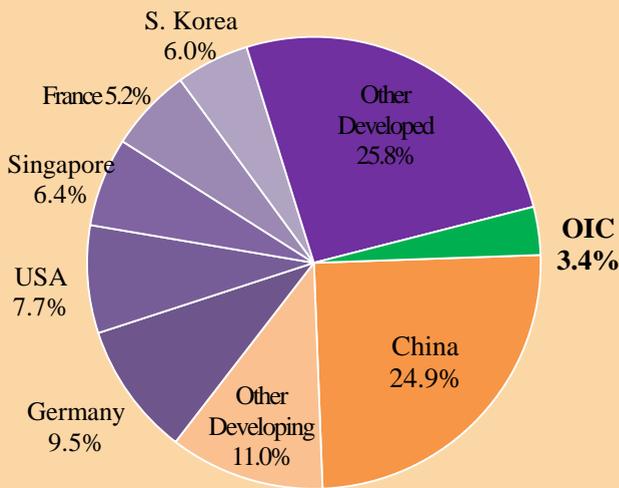
*The low level of patenting activity in OIC countries reflect the lack of adequate spending on R&D and insufficient infrastructure for innovation and technological advancement.*

OIC countries, as a group, accounted for only 3.4% of the world total high-technology exports in 2016, lagging far behind many individual countries.

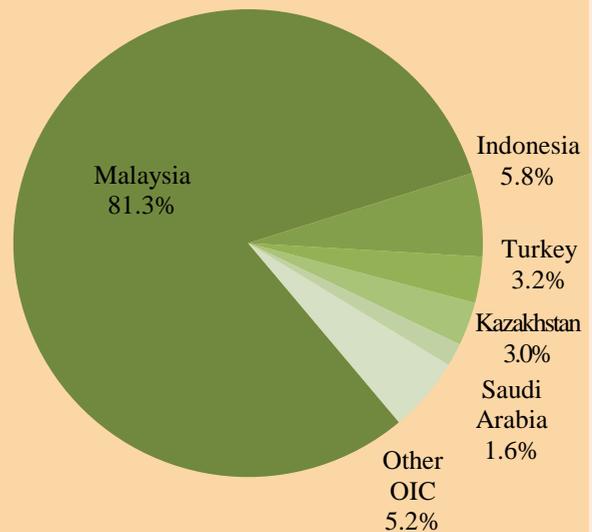
Around 81.3% of the total high-technology exports of OIC countries originated from Malaysia. Only 5 countries, namely Malaysia, Indonesia, Turkey, Kazakhstan and Saudi Arabia, accounted for almost 95% of the total high-technology exports of all OIC countries.



**High-Technology Exports, % of the World Total 2016\***



**High-Technology Exports of OIC Countries, % of OIC Total 2016\***



\*2016 or Last Year Available

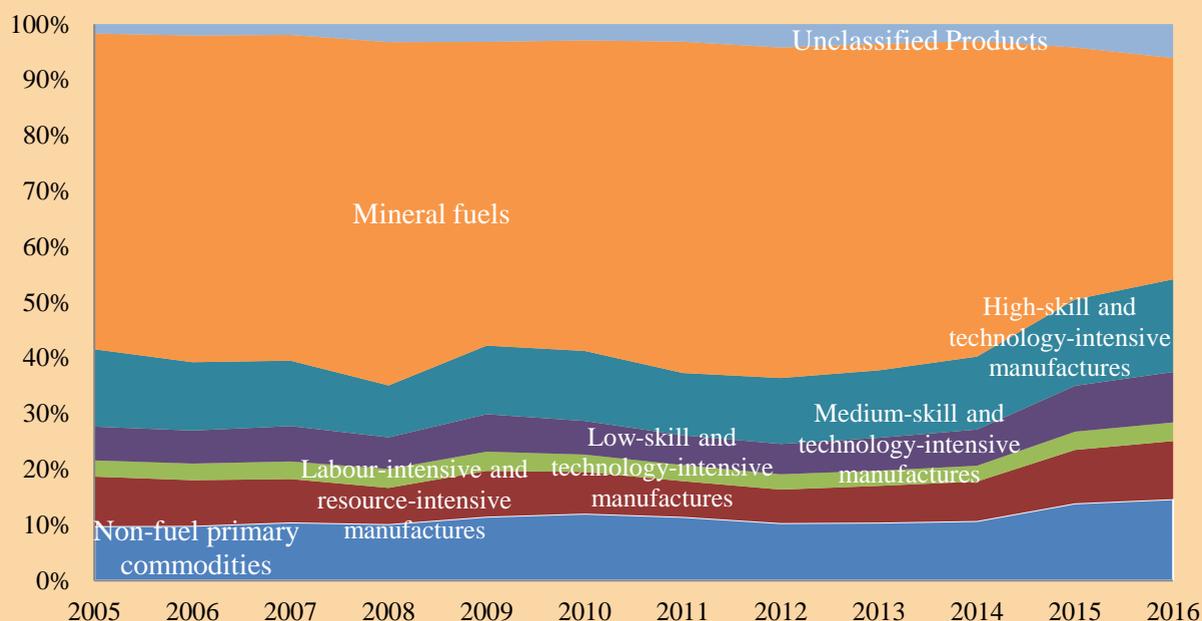
*Low share of OIC countries in world total high-technology exports reflects the weak production base in this field and the low levels of R&D in OIC countries.*

Higher technological intensity in exports generally offers better prospects for future economic growth. Trade in high-technology products has also positive spill-over effects on skills and knowledge-intensive activities. In 2016, globally 23 countries were dependent on oil and gas exports for over 50% of their total exports and 16 of them were OIC countries.

**16.7**  
percent

Share of high-tech  
intensive manufactures in  
total exports in  
**2016**

From 2005 to 2016, an increase from 13.9% to 16.7% was observed in the share of exports of high-skill technology intensive manufactures of OIC countries. Moreover, both the share of medium-skill technology intensive manufactures increased from 6.1% to 9.1% and the share of low-skill technology intensive manufactures rose from 2.9% to 3.4% over the period under consideration. On the other hand, share of mineral fuel exports, which barely changed from 2005 to 2014, dramatically fell from 56.7% in 2014 to 39.8% in 2016.



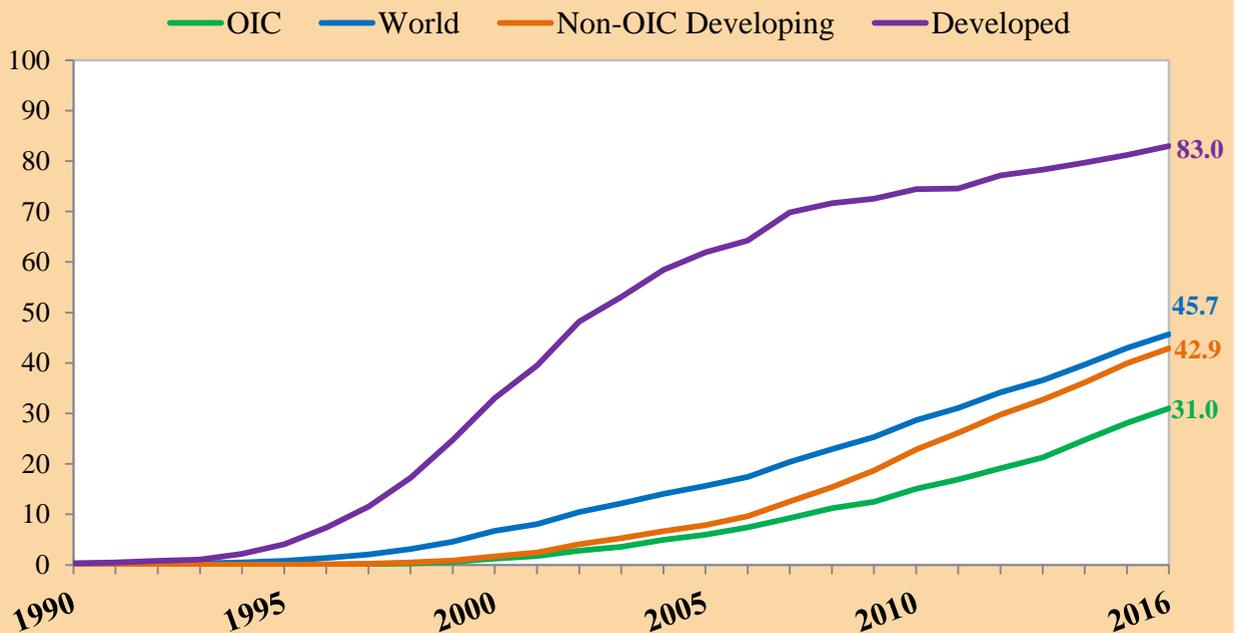
***Special efforts should be made to increase the share of high technology intensive manufactures and to reduce the dependency on mineral fuels and primary commodities in exports.***

On average, only 31 out of 100 people in the OIC countries were Internet users in 2016, a level which was still significantly lower than the averages of the world (45.7), and of the non-OIC developing countries (42.9).

The gap with the developed countries has critically widened over the last decade, making it more difficult for OIC countries to catch up with these countries.

**31**  
Internet users  
per 100 people in  
**2016**

### Internet Users per 100 People, 1990-2016



*The infrastructure development for wider Internet access should be prioritized as information access offers vast opportunities for development of knowledge-based economy.*

**9.2 percent**

Proportion of population under 5 in **2050**

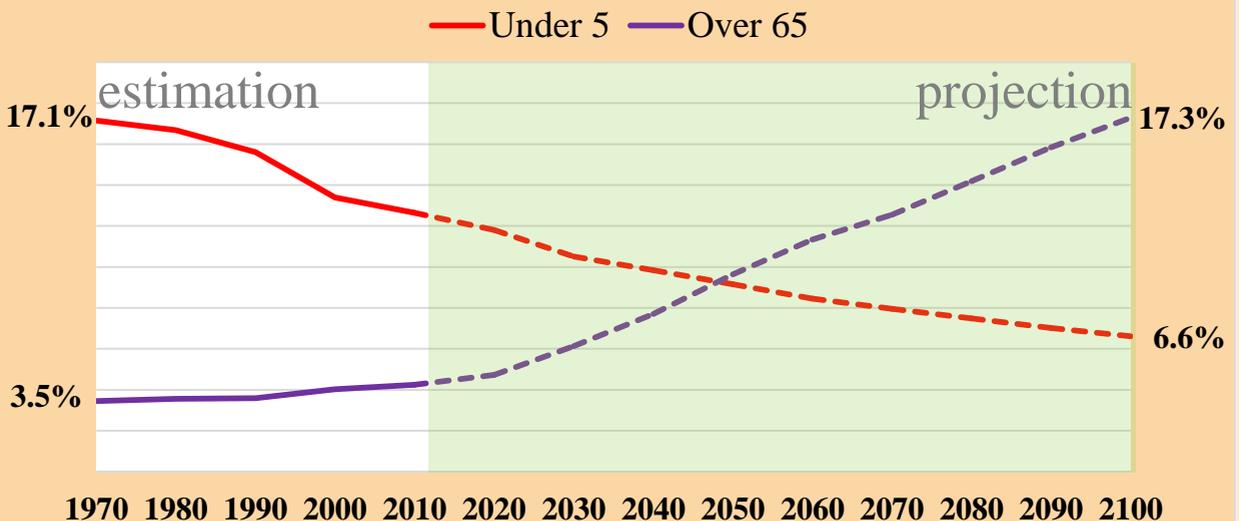
Following the world trends, the proportional increase of the elderly population aged 65 and over in the OIC countries is accompanied by the decrease in the proportion of children below age 5.

**9.6 percent**

Proportion of population over 65 in **2050**

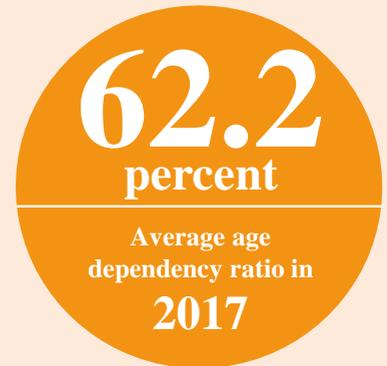
This trend is expected to accelerate from 2020 and onwards. In 2050, proportion of elderly in total population will reach 9.6% and first time in the history overpass the children aged 0-5 with 9.2% in OIC countries.

**Young Children (under 5) vs. Elderly (over 65), % of Total OIC Population, 1970 – 2100**

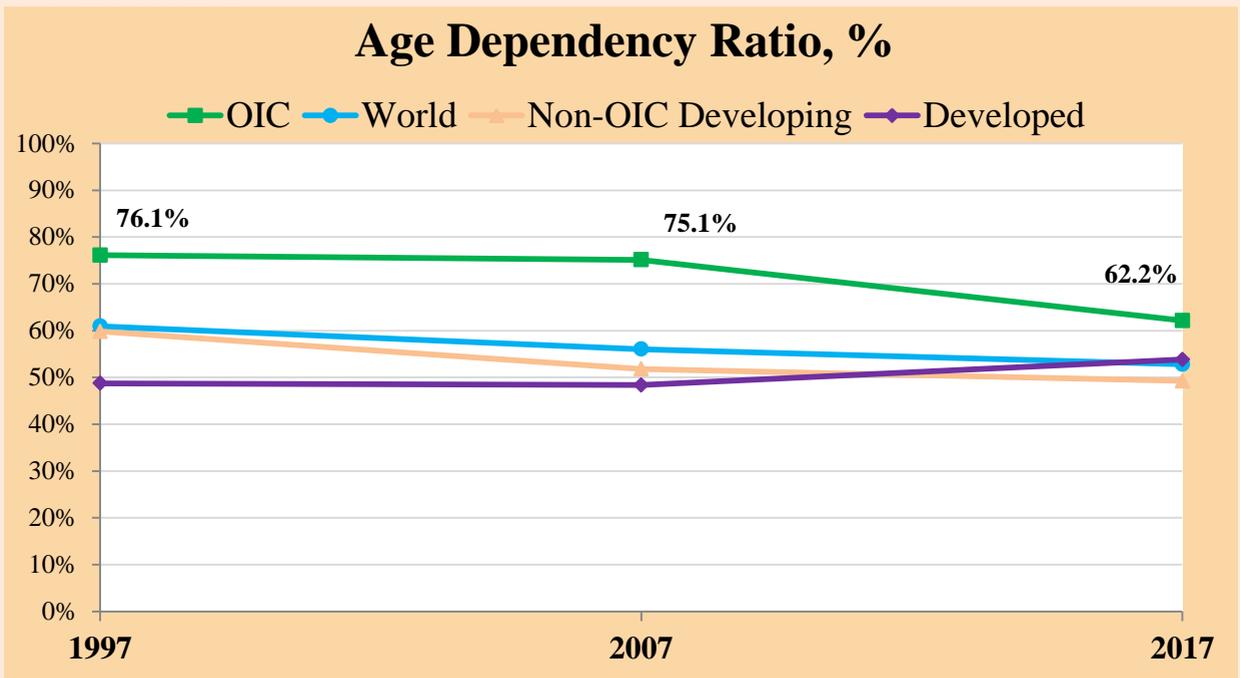


*Such changes in the population structure in OIC countries will bring population replacement rate down. It will also lead to greater public expenditures on healthcare, pension as well as the other social spending's for elderly.*

Age dependency ratio is generally used to assess the burden on the productive part of the population. The average age dependency ratio in OIC countries was estimated at 62.2% in 2017 that was higher than the averages of the world (52.8%), developed countries (53.8%) and non-OIC developing countries (49.3%).



Despite still having a higher age dependency ratio, OIC countries witnessed a rapid decrease in the ratio, significantly higher compared with the experience of the non-OIC developing countries and the world over the last decade.



*As high age dependency ratio in OIC countries will lead to a pressure on social security systems and threaten their sustainability, the current falling trend should be sustained through appropriate policies.*

**54**  
percent

of pregnant women received 4-antenatal check-ups\*

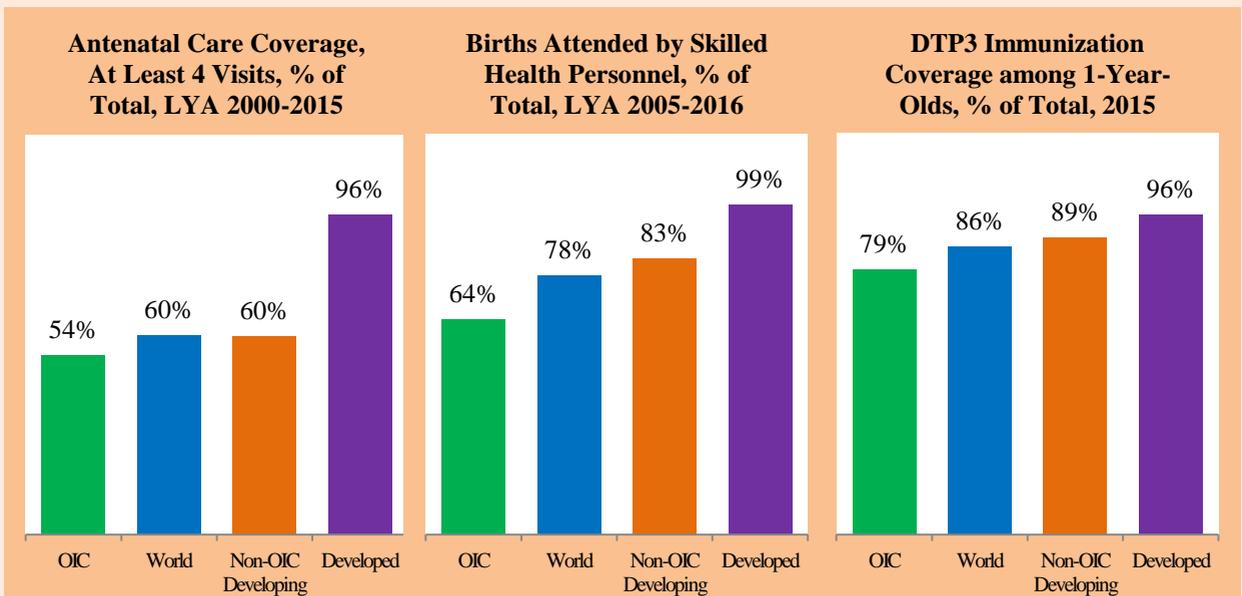
Based on the last year available (LYA) data from 2000-2015, only 54% of total pregnant women in OIC countries benefited from 4 antenatal check-ups recommended by WHO.

The LYA data from 2005-2016 shows only 64% pregnant women in OIC countries received assistance from a skilled health worker while giving birth compared to 78% in the world.

**63**  
percent

Births with skilled health personnel assistance\*

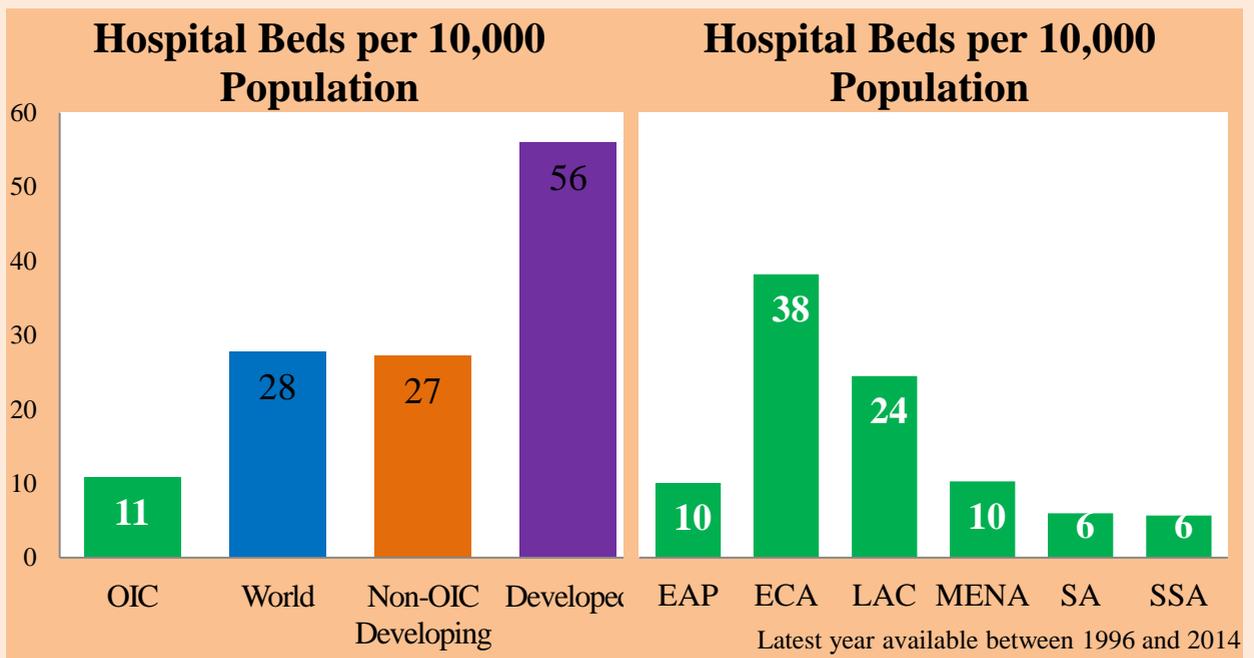
Immunization against diphtheria, tetanus and pertussis (DTP) also remained low in OIC countries with 79% of children being immunized in 2015 compared to 86% in the world.



*The low coverage of preventive health measures indicates low penetration of health care services, poor capacity of health care system, and lack of proper initiatives to increase the coverage of these services.*

Number of hospital beds is an important indicator of the overall capacity of a health care system.

The availability of hospital beds remained comparatively very low in OIC countries as there were, on average, only 11 hospital beds for 10,000 population compared to the world average of 28 beds in the same period. Among the OIC regions, the availability of hospital beds was over the world average only in the Europe and Central Asia (ECA) region with 38 beds per 10,000 population.



*Insufficient capacity of hospitals indicates weak physical health infrastructure and, hence, inadequate coverage and low quality of health care services.*

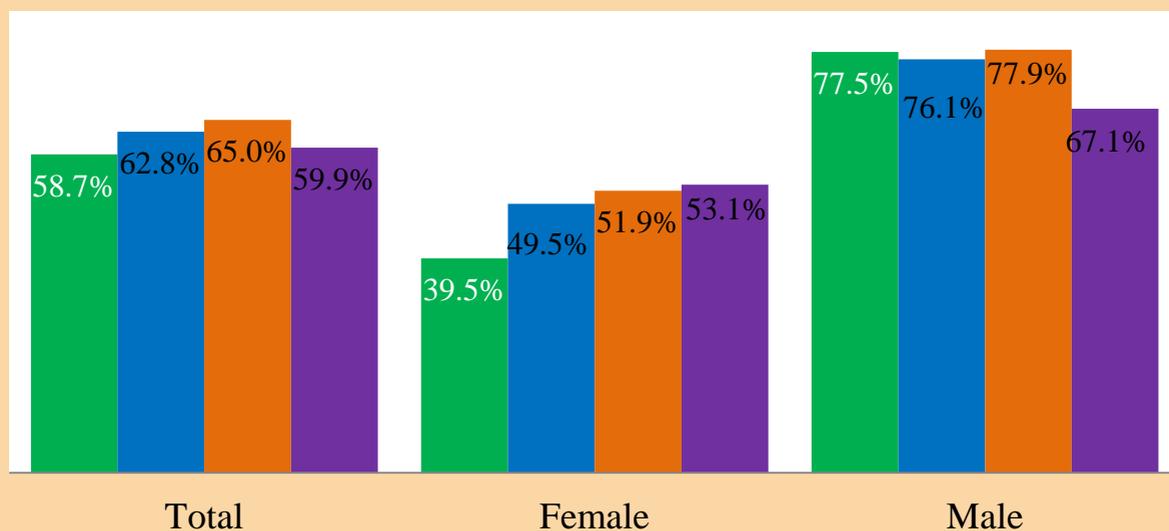
In 2016, the average labour force participation rate (LFPR) in OIC countries was estimated at 58.7% which was lower than that of non-OIC developing countries (65%) and the world average (62.8%). OIC LFPR average for males was recorded at 77.5% that was slightly lower and higher than the averages of non-OIC developing countries (77.9%) and the world (76.1%) respectively.



However, the average female LFPR in the OIC countries was only 39.5% which was 10% percentage points lower than the world average (49.5%).

### Labour Force Participation Rate, %, 2016

■ OIC ■ World ■ Non-OIC Developing ■ Developed



*Low labour force participation rates in OIC countries, particularly for women, indicate the inadequate utilisation of economically active population which, in turn, adversely affects the level of economic output.*

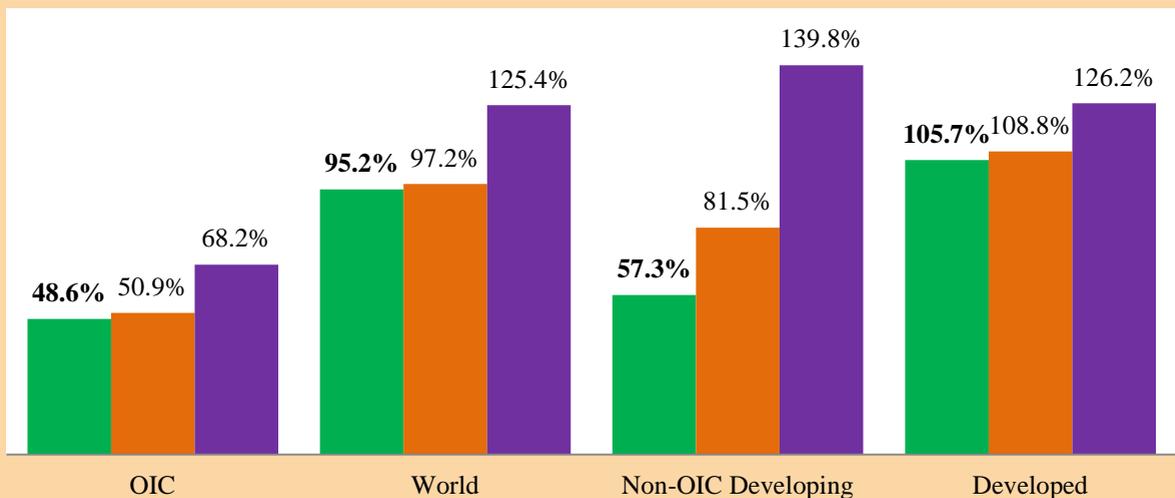
A commonly used metric for determining the degree of financial deepening is the ratio of broad money to GDP. A higher ratio is generally associated with greater financial liquidity and depth.

The average volume of broad money relative to the GDP of OIC countries was recorded at 68.2% in 2016, compared to 125.4% in the world, 139.8% in non-OIC developing countries and 126.1% in developed countries.



### Ratio of Broad Money to GDP

■ 1996 ■ 2006 ■ 2016



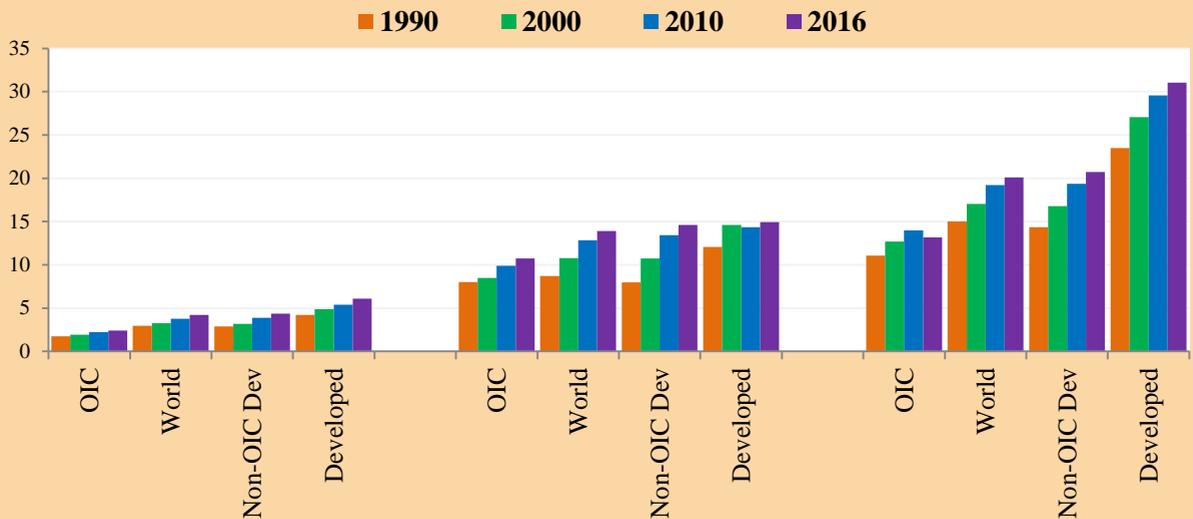
*This situation clearly indicates that the financial sector in OIC countries is lagging behind their counterparts in other developing as well as developed countries in terms of the provision of sufficient liquidity to the economy.*

The land productivity in OIC countries, in terms of cereals, fruits and vegetables production per hectare of harvested land, increased from 1.7 to 2.4 tonnes, from 8.0 to 10.7, and from 11.1 to 13.2 tonnes, respectively, between 1990 and 2016. Yet, these figures were still lower than the average land productivity for these three products in non-OIC developing countries (4.3, 14.6 and 20.7 tonnes, respectively) and developed countries (6.1, 14.9 and 31.0 tonnes, respectively) in 2016. Meanwhile, the world averages were 4.2, 13.9 and 20.1 tonnes, respectively.

# 2.4 tonnes

of cereal production per  
hectare in  
**2016**

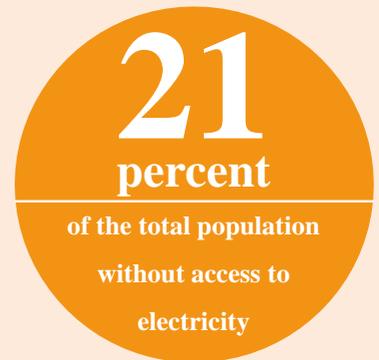
**Yield in Major Agricultural Products, Tonnes per Hectare Area Harvested**



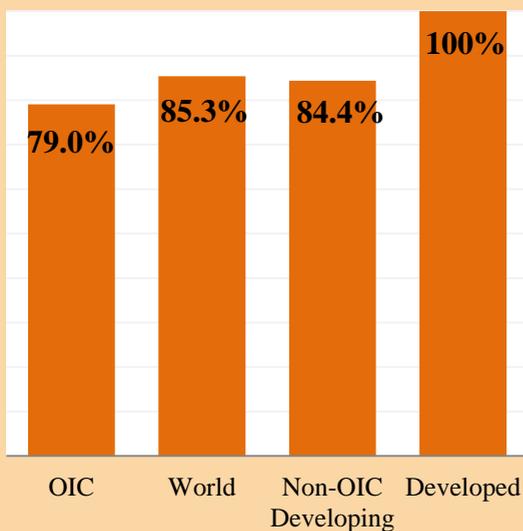
*Low agricultural productivity reflects the inadequate use of technology, including those in irrigation, and skilled labour force in agricultural activities, posing a serious fragility towards food supply amid rapidly increasing OIC population.*

Only 79% of the total population in OIC countries have access to electricity, compared to 85.3% in the world and 84.4% in non-OIC developing countries.

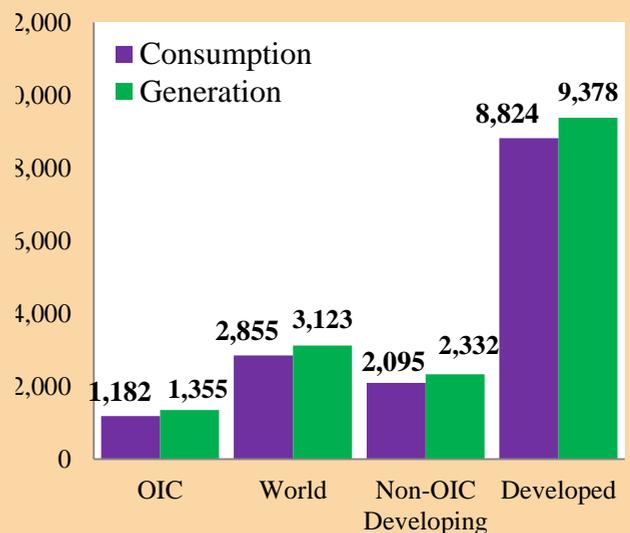
With 1,182 kwh the average electricity consumption per capita in OIC countries was equal to nearly 41.4% of the world, 56.4% of non-OIC developing countries, and just 13.4% of developed countries. Meanwhile, average electricity generation per capita was around 1,355 kwh in OIC countries in the same year.



**Access to Electricity,  
% of Population**



**Electricity Consumption  
and Generation, Kwh per  
Capita**



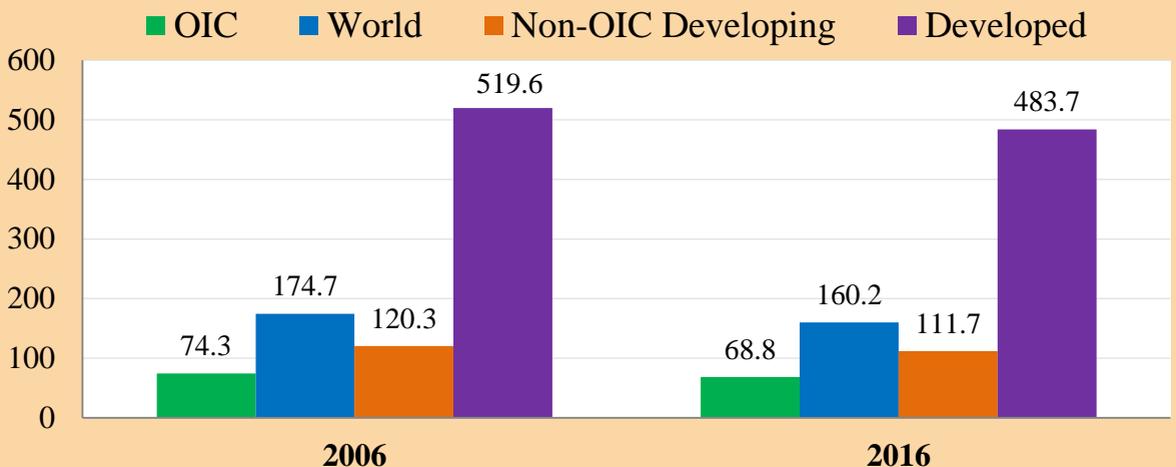
*The low levels of electricity generation and consumption constitute a serious hindrance to economic and social development in OIC countries.*

The rail transportation is one of the main facilitators of economic development through enhancing trade and mobility of production inputs.

In terms of rail network density per million people, OIC countries recorded a decrease from 74.3 km in 2006 to 68.8 km of total rail lines in 2016, which was less than non-OIC developing countries 111.7 km and the world 160.2 km in 2016.



### Total Rail Lines, km per Million People 2006\* vs. 2016\*



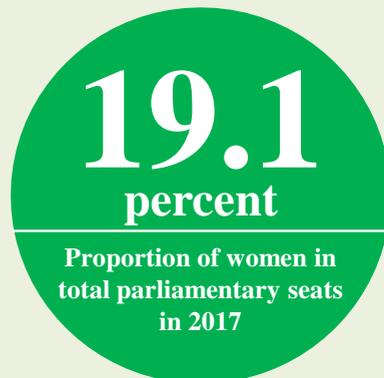
Last year available (1997-2006) and (2007-2016)

*OIC countries should improve their rail network in accordance with the increase in their population as well as prioritise the development of the sector as it is one of the most effective transportation modes.*



# OPPORTUNITIES

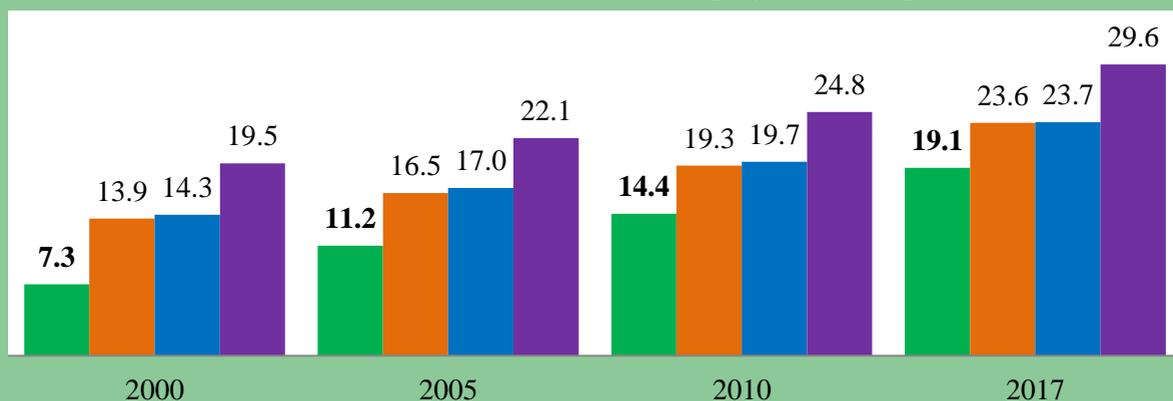
Since 2000, OIC countries accomplished a significant progress in terms of women’s representation in politics. Proportion of seats held by women in national parliaments grew from 7.3% in 2000, to 19.1% in 2017. However, OIC countries as a group have been lagging far behind the non-OIC developing countries, world and developed countries.



Over the period observed, non-OIC developing countries demonstrated a growth from 13.9% to 23.6%. Similarly, the world average values increased from 14.3% to 23.7%. Developed countries had the highest proportion of women representation in the national parliaments during the whole period under consideration, particularly in 2017, 29.6% of the parliamentary seats in developed countries have been held by women.

## Proportion of Seats Held by Women in National Parliaments (Single or Lower House), %

■ OIC ■ World ■ Non-OIC Developing ■ Developed



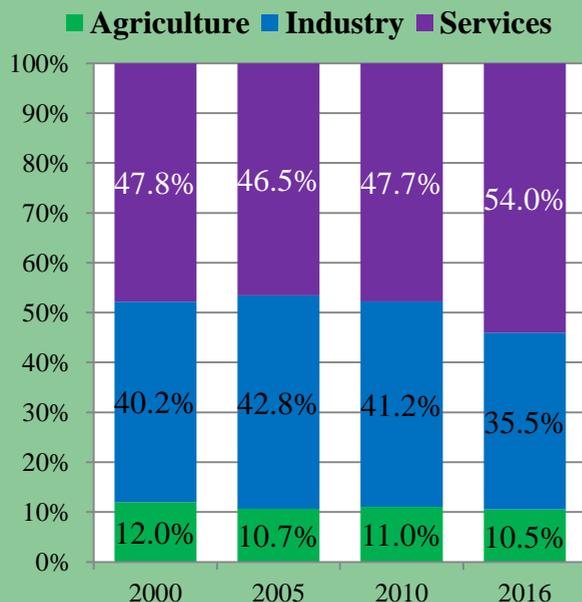
*Significant progress to be recorded in representation of women in parliaments will strengthen the OIC countries' efforts in gender equality and contribute to broader participation into decision making processes.*

Between 2000 and 2016, OIC countries, as a group, experienced a shift from agriculture to services sector oriented economies both in terms of employment share and contributions to GDP.

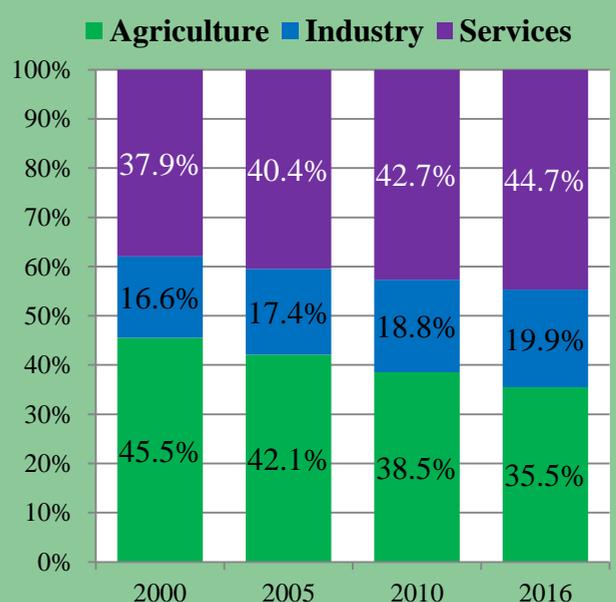
In 2016, 44.7% of the labour force in OIC countries was employed in the services sector that generated 54% of the GDP.



**Value Added by Sector in GDP of OIC Countries**



**Employment Distribution By Sector in OIC Countries**



*Labour force shifts from agriculture and other labour-intensive primary activities to the services sector are critical for stronger growth and employment performance.*

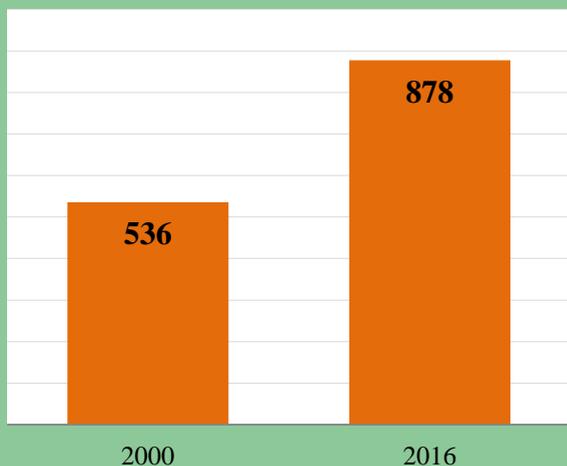
Urbanization, the demographic transition from rural to urban, is associated with shifts from an agriculture-based economy to mass industry, technology, and services.

Today more than half of the world population lives in urban areas. In parallel, the OIC countries also follow this global trend.

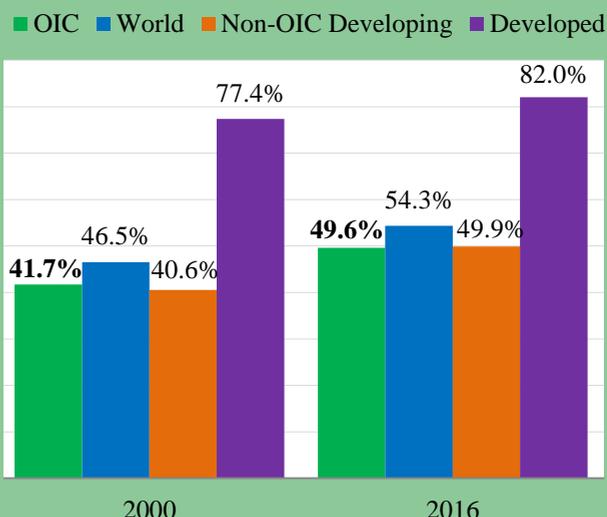
The total urban population of OIC countries increased significantly from 536 in 2000 to 878 million in 2016. As a result, the share of population residing in urban areas in total population increased from 41.7% in 2000 to 49.6% in 2016.



**Urban Population of OIC Countries, Million People**



**Population Residing in Urban Areas, % of Total**

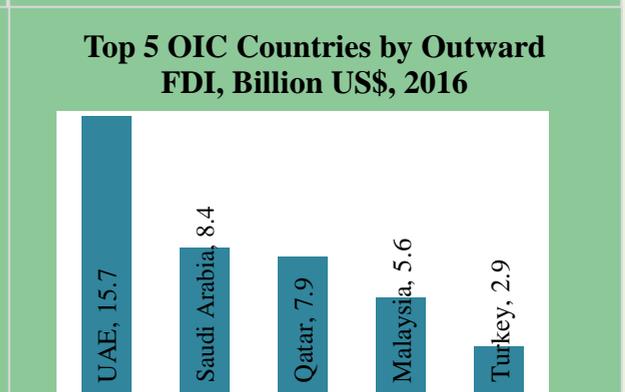
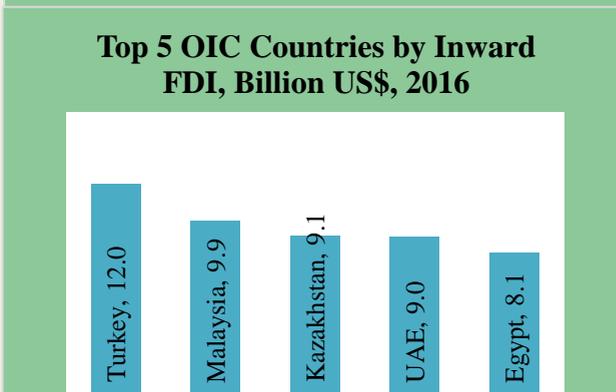
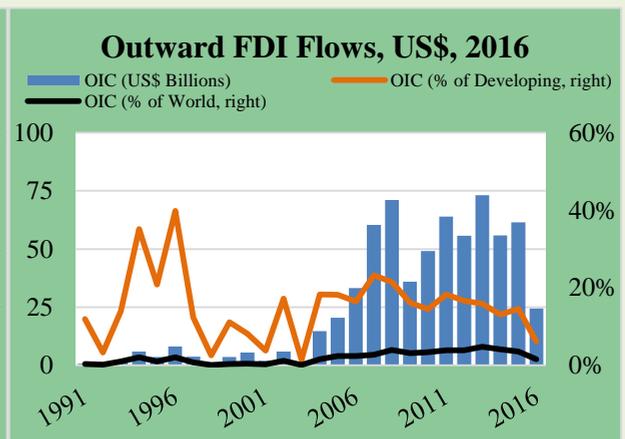
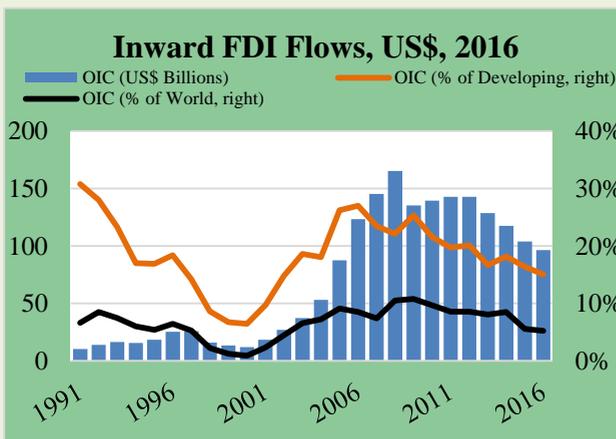


*Rapid growth in urban population necessitates effective urbanisation policies and long-term infrastructure planning in order to have better, healthier and safer cities that will foster OIC-wide trade and commerce.*

Since 1991, inward Foreign Direct Investment (FDI) to OIC countries increased until reaching a peak in 2008 (US\$ 165.2 billion) when the financial crisis hit the world economy. With the crisis, inward FDI decreased to US\$ 135.3 billion in 2009. Numbers slightly fluctuated afterwards and dropped to US\$ 96.4 billion in 2016, as a result of decrease in the global FDI flows, OIC accounted for only 15.1% of the developing countries and 5.2% of the world inward FDI in that year.



Outward FDI from OIC countries also followed a similar trend. After a sharp decline from US\$ 71.1 billion to US\$ 36 billion from 2008 to 2009, it gradually recovered to US\$ 61.5 billion by 2015 but then dropped sharply to 24.4 billion in 2016. This translated into 6.2% and 1.6% shares in developing countries and world outward FDI in 2016, respectively.



*Increasing share of OIC countries in global total FDI flows indicates growing attractiveness of OIC countries for foreign investors and improvement in economic and regulatory landscape.*

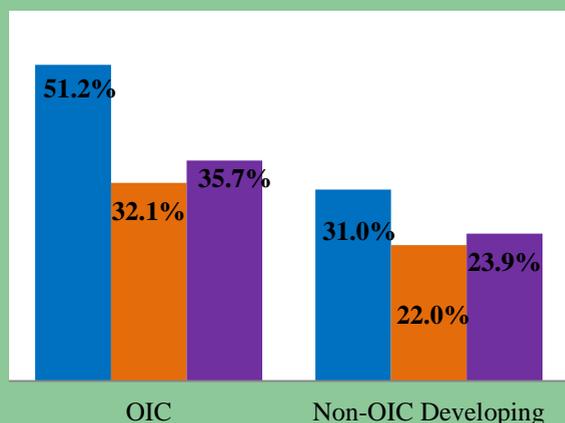
Debt ratios are useful tools for assessing the sustainability of a country's debt burden. In 2016, total external debt stock (EDS) of OIC countries as percentage of their total GDP was recorded at 35.7%. Although, this ratio was much lower than in 1996 (51.2%) and 2006 (32.1%) values, it was still higher than the average of non-OIC developing countries (23.9%) for year 2016.



The size of EDS relative to exports was also on decline in OIC countries. This ratio was recorded at 172.5% in 1996 -- below the empirically tested debt sustainability threshold of 200%. Since then, the average EDS-to-exports ratio in OIC countries decreased significantly to 89.6% in 2006 but grew afterwards and reached to 152.5% in 2016. Besides, it was still considerably higher than the average of non-OIC developing countries (103.8%) in 2016.

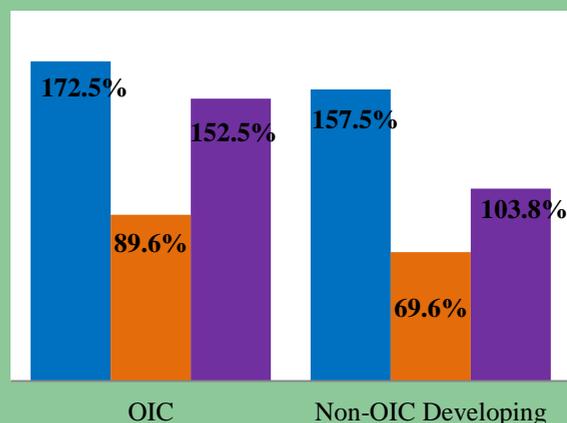
### External Debt Stock, % of GDP

■ 1996 ■ 2006 ■ 2016



### External Debt Stock, % of Exports

■ 1996 ■ 2006 ■ 2016



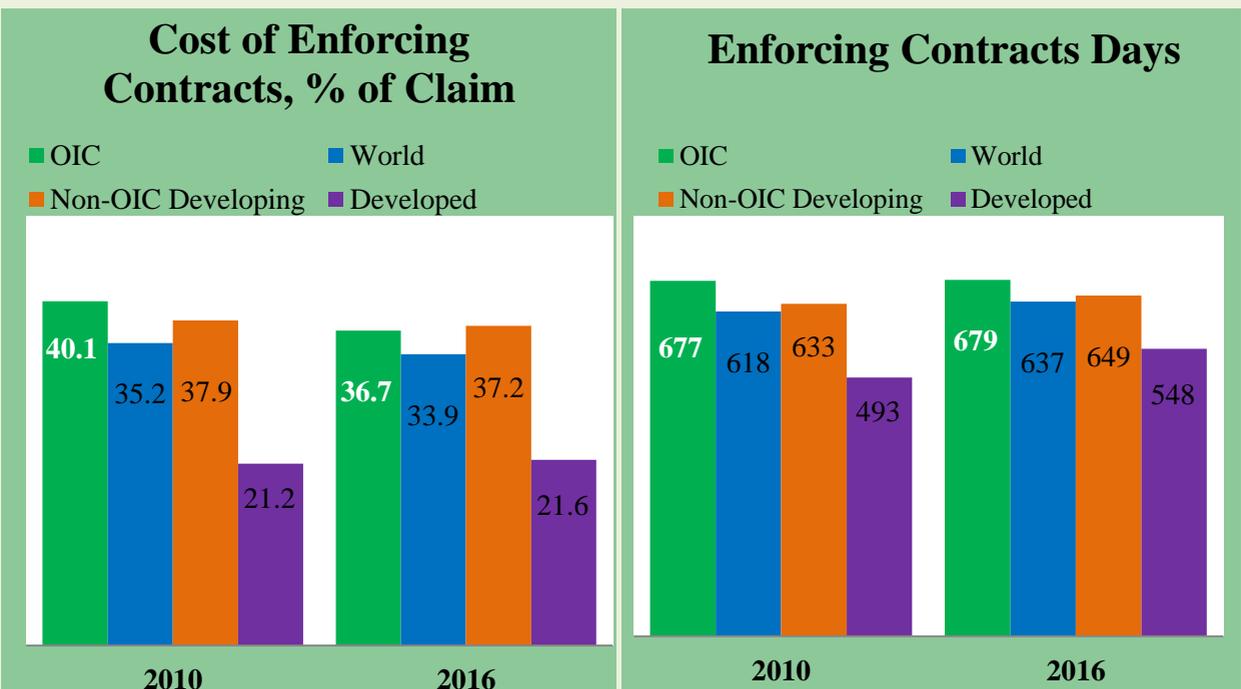
*Decreasing external debt stocks relative to both GDP and exports is indicative of strengthening international positions of OIC countries and sustainability of their debt service obligations, which will ultimately improve investor sentiment.*

Cost of enforcing a contract as a percent of claim value in the OIC countries in 2016 (36.7%) is higher than the world average (33.9%) but lower than that of the developing countries (37.2%).



Although it is higher compared to the developed countries' average (21.6%), OIC countries as a group demonstrated most influential progress through declining from 40.1% in 2010 to 36.7% in 2016.

Meanwhile, time required to enforce contracts is longest across the OIC countries. However, the increase from 2010 to 2016 was restricted to only 2 days while the other groups recorded higher values in the same period.



*Reduction in the cost of contract enforcement motivates foreign companies for engaging in contractual relationships with the local companies. Thus, it serves to increase the confidence in doing business across the OIC countries.*

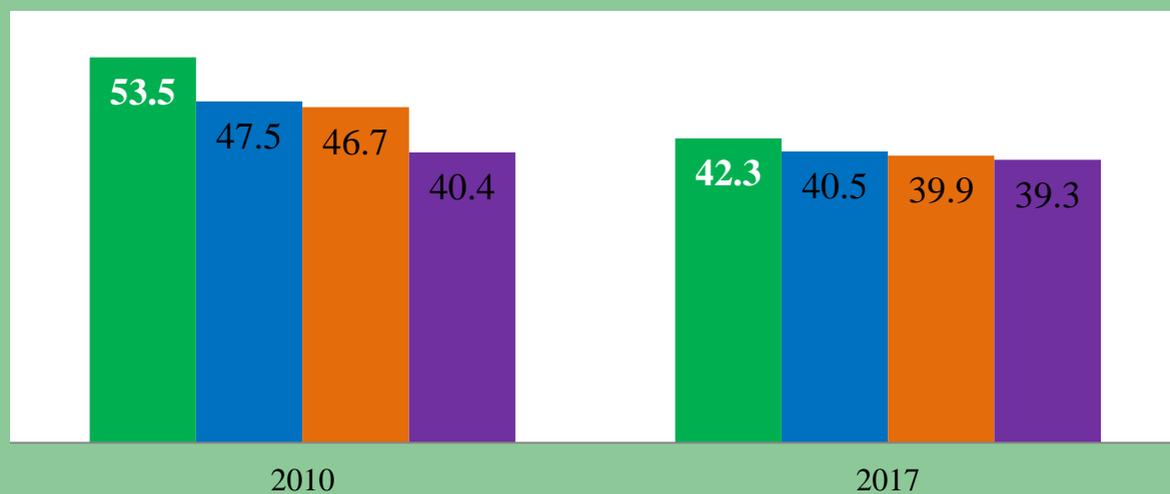
OIC countries as a group had the highest level of corporate tax rates to profit (53.5%) in 2010. There has been substantial improvements across the OIC countries that lead to narrowing the gaps in tax rates over the period observed. In 2016, corporate tax rate in OIC countries on average were 42%, compared to 40.6%, 40.1% and 39.3% in the world, non-OIC developing and developed countries respectively.

**11.2**  
percentage points  
Corporate taxes reduced  
between 2010 and 2017

Ratio of total tax to profit went down by 11.2 percentage points in OIC countries from 2010 to 2017 compared to the average decrease; in the world at 7.0 percentage points, in non-OIC developing countries 6.8 percentage points and in developed countries only 1.0 percentage points.

## Total Tax Rate, % of Commercial Profits

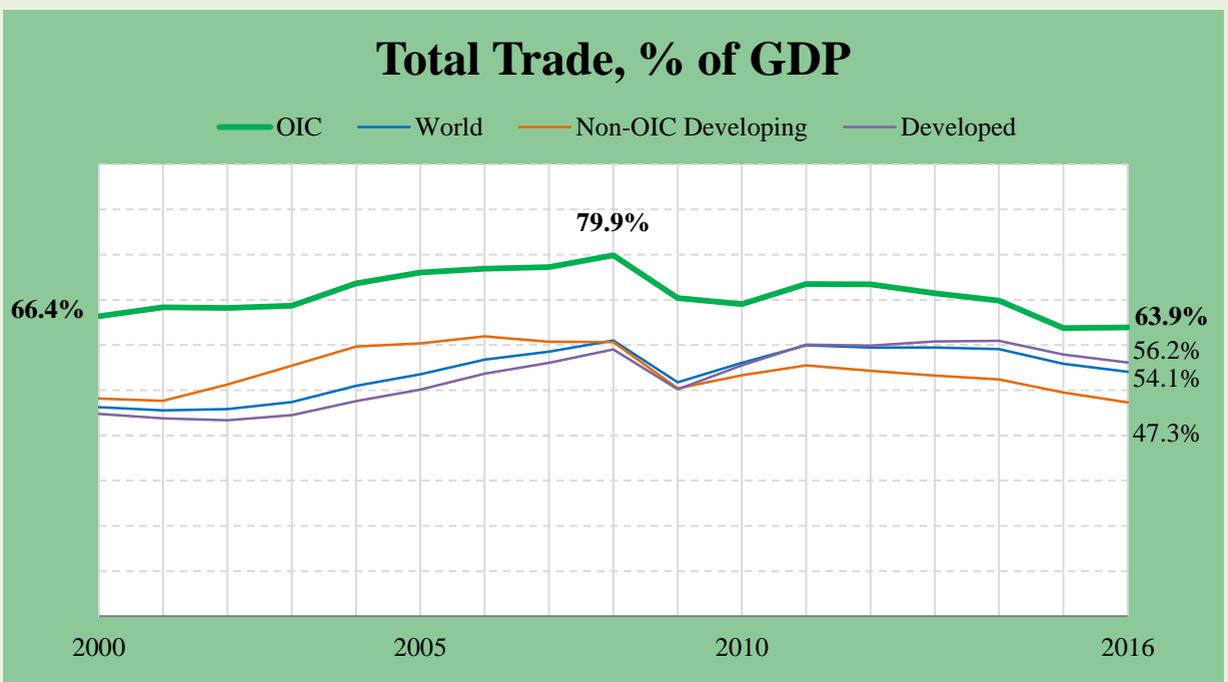
■ OIC ■ World ■ Non-OIC Developing ■ Developed



*Decrease in taxes for enterprises in the OIC countries spur business activities for private sector and attract more investments from abroad.*

Total trade (sum of exports and imports) of OIC countries as a percentage of GDP decreased from 66.4% in 2000 to 63.9% in 2016. Over the period observed indicator was above 70% on average and peaked at 79.9% in 2008.

Overall, OIC average was higher than that of the world, non-OIC developing and developed countries by around 8 to 17 percentage points in 2016.

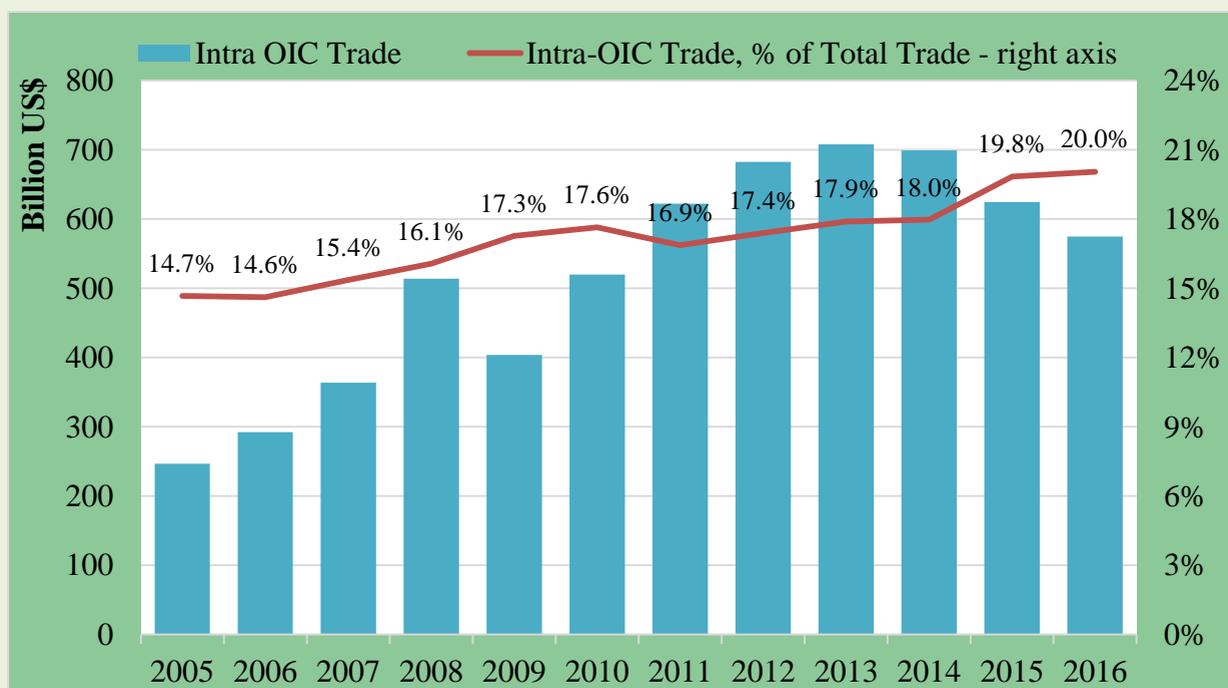


*Positive trend has been observed in total trade to GDP ratio of OIC countries. It indicates that the OIC countries became more integrated to the world economy while it also reflects more trade openness.*

Intra-OIC trade shows the level of economic integration among the OIC countries. After witnessing a sharp fall in 2009, total merchandise trade among the OIC countries rebounded to US\$708 billion in 2013 but dropped to US\$575 billion in 2016.

**20**  
percent  
Share of intra-OIC trade in  
total OIC trade in  
**2016**

From 2005 to 2016, the share of intra-OIC trade in OIC total trade increased from 14.7% to 20.0%.

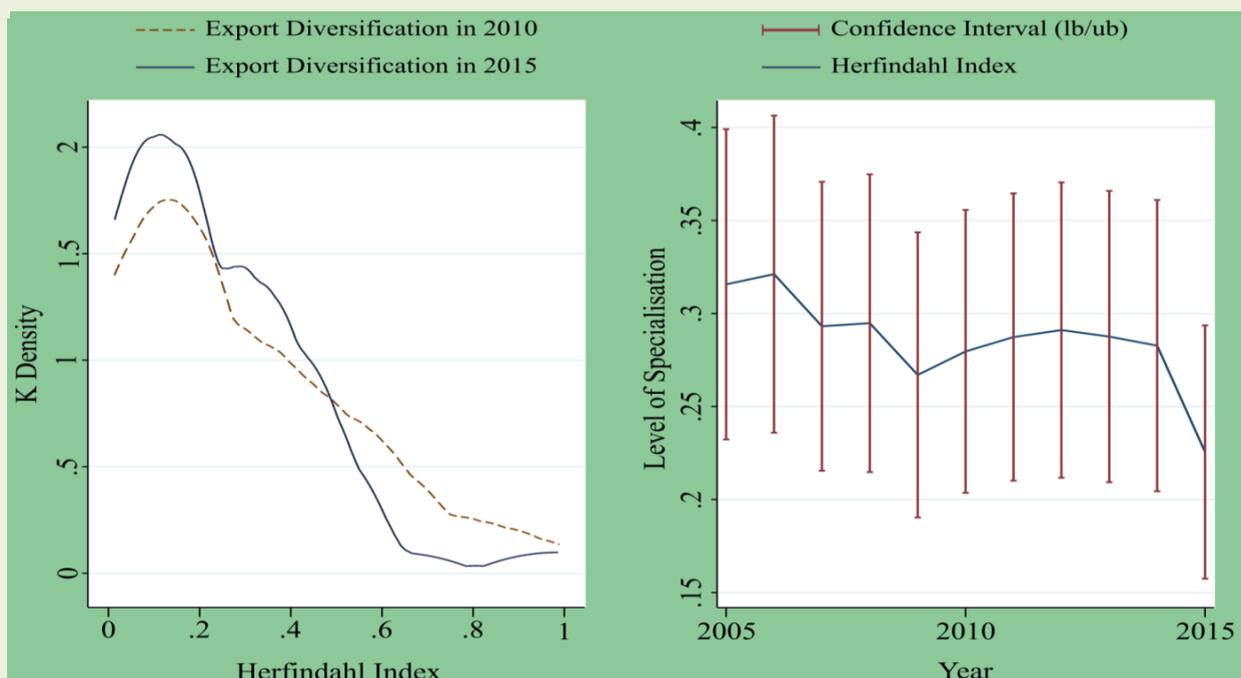


*Steady increase in intra-OIC trade presents significant potentials to be utilized, particularly after the OIC Trade Preferential System becomes operational.*

The concentration of exports in few items increases the vulnerability of countries to fluctuations in international prices and other external shocks in international markets. Herfindahl Index shows the level of export diversification. A country with highly diversified export portfolio will have an index close to zero, whereas a country which relies on a few export items will have a value close to one.

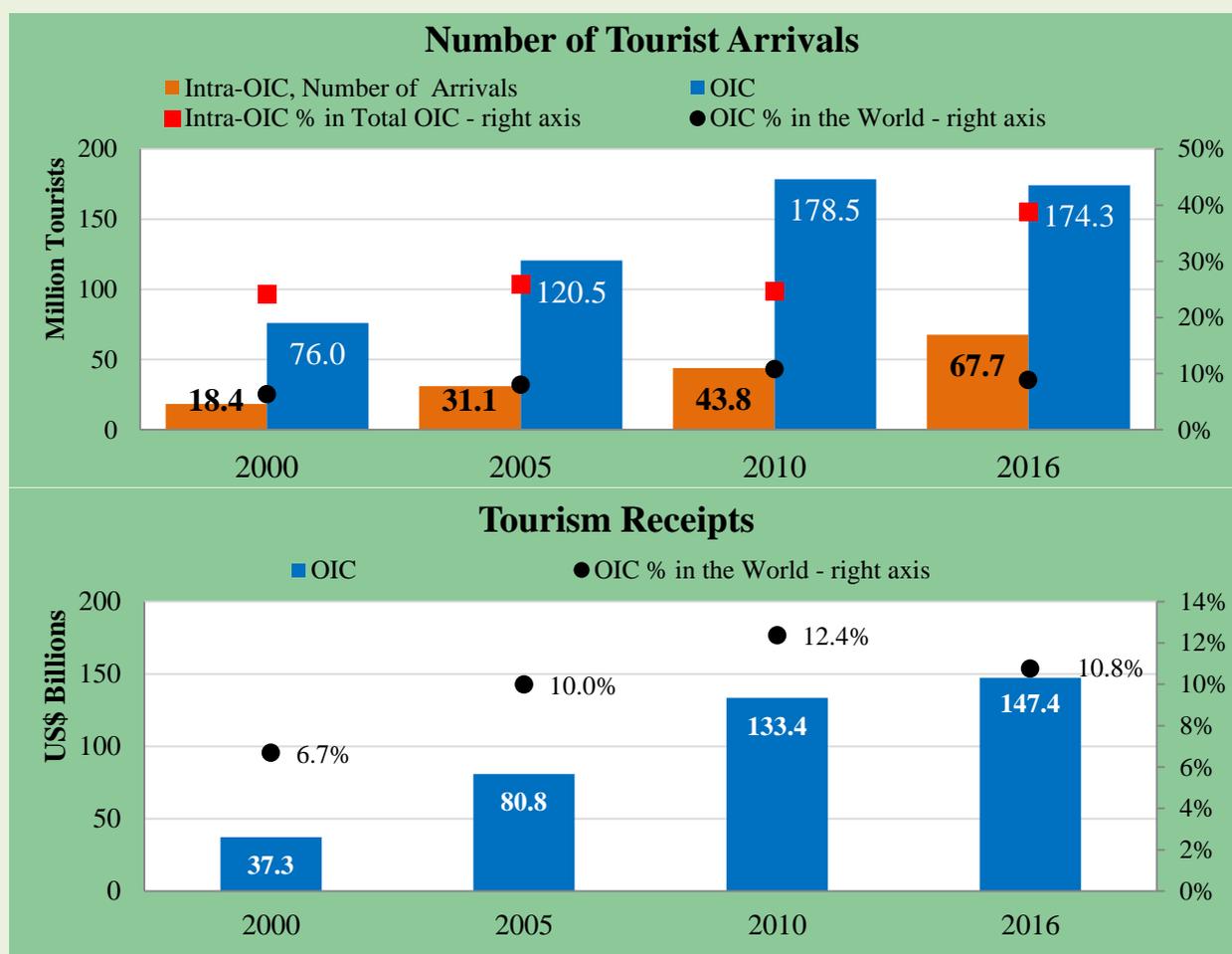


OIC countries become increasingly more diversified and relieve from high dependence on few export items. The simple average of export concentration index in OIC countries was around 0.32 in 2005, but it decreased to around 0.23 in 2015, indicating increased diversification in export products.



***Export diversification generates a potential to develop competence over a broader range of manufactured products.***

The number of tourist arrivals in the OIC countries increased steadily since 2000 and reached 174.3 million in 2016, which corresponded to 8.9% of the world's total tourist arrivals. Similarly, the number of intra-OIC tourist arrivals increased to 67.7 million in 2017 from 18.4 million in 2000. Also, the share of intra-OIC tourist arrivals in total OIC international tourist arrivals increased from 24.2% in 2000 to 38.8% in 2016. Tourism receipts earned by OIC countries reached US\$ 147.4 billion in 2016, corresponding to 10.8% of the world's tourism receipts.



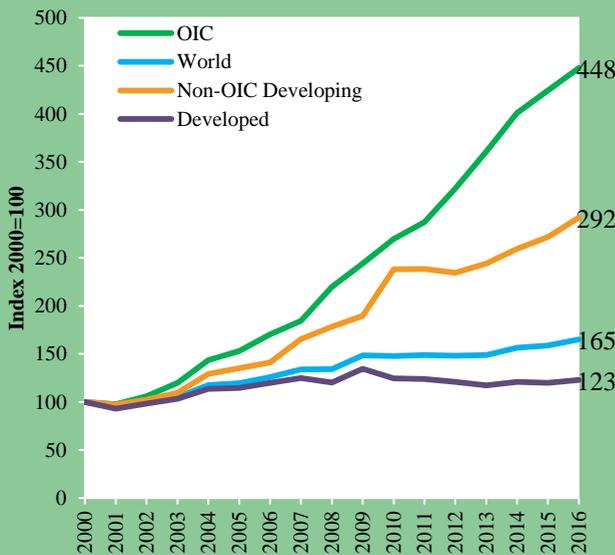
*Increasing number of tourist arrivals and tourism revenues will lead to higher economic growth, new employment opportunities and spur activities in related sectors. Intra-OIC tourism should be further encouraged via visa arrangements, joint programmes and promotional materials on tourism.*

OIC countries carried 36.4 billion ton/km of air freight in 2016 with a share of 18% in the world total. Compared to 2000, OIC countries' value of freight carried via air transport recorded an increase of 448% in 2016.

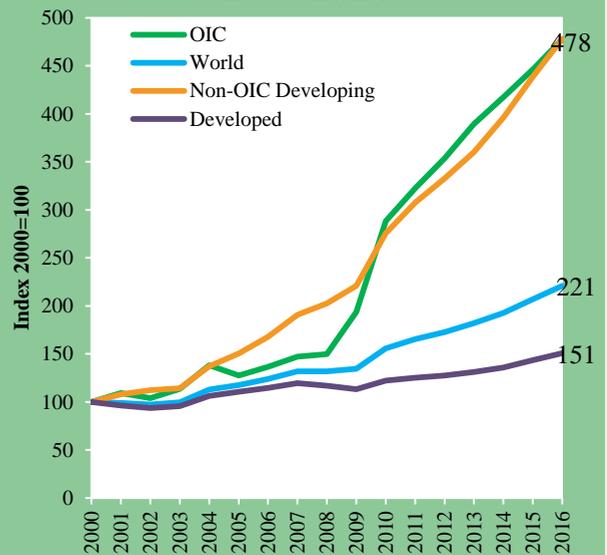
**14 percent**  
of the air passengers carried in the world in **2016**

In 2016, the number of air passengers in OIC countries was estimated at 517 million with a share of 14% in world total. Compared to 2000, the number of air passengers of OIC countries showed a 478% increase in 2016.

**Air Freight Ton/km, Indexed Growth by Group, 2000-2016**



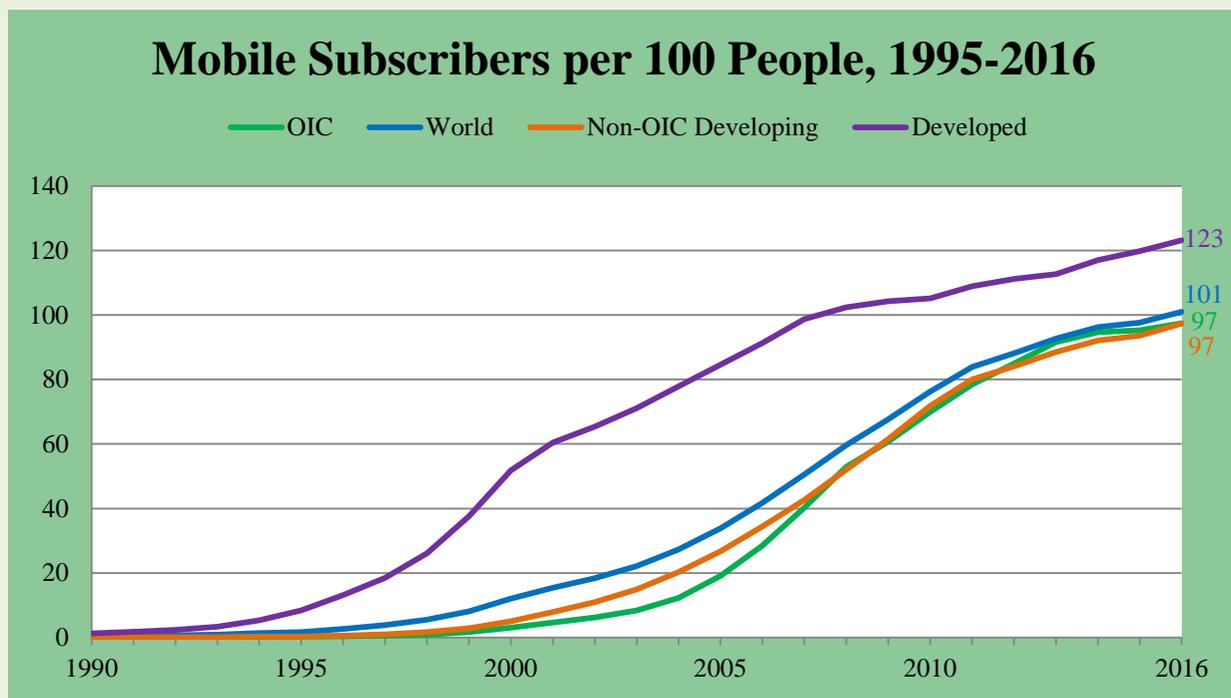
**Air Passengers Carried, Indexed Growth by Group, 2000-2016**



*Air transport industry is one of the fundamental drivers of global socio-economic development. OIC countries should continue investing in air transport industry on a sustainable basis to create employment, support tourism, and stimulate international trade.*

On average, 97 out of 100 people in the OIC countries subscribed to a mobile service in 2016, a value similar to that of the non-OIC developing countries and slightly lower than the world average of 101.

The gap with the developed countries can be narrowed over the medium term since the growth in mobile subscribers in the OIC countries has shown a more rapid growth since 2005.



*Growth in access to mobile technologies offers an opportunity, especially for the rural areas of OIC countries, to facilitate integration with the urban areas and enhance access to services of public and private sectors.*

**38.4**  
percent

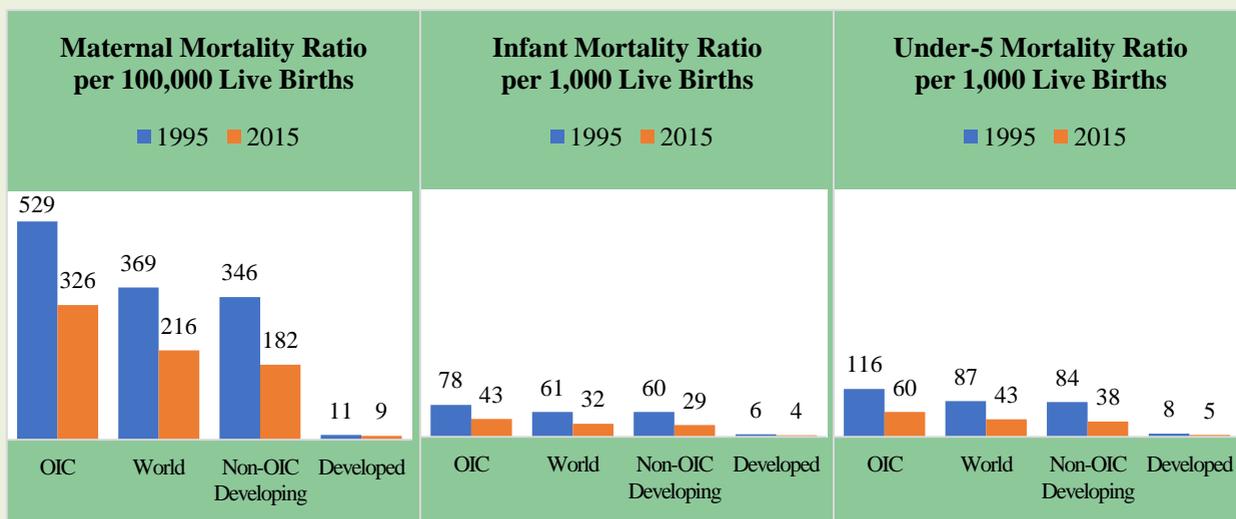
decrease in  
maternal mortality  
per 100,000  
live births

Between 1995 and 2015, OIC countries witnessed significant improvement in maternal health conditions and maternal mortality rate declined from 529 deaths per 100,000 live births in 1995 to 326 deaths in 2015, corresponding to a decrease of 38.4%.

**44.2**  
percent

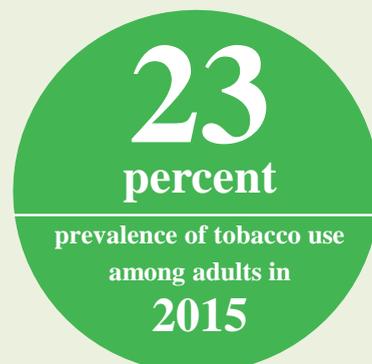
decrease in  
infant mortality  
per 1,000  
live births

A similar trend was visible in case of newborn and child health. In OIC countries, infant mortality rate declined from 78 deaths per 1,000 live births in 1995 to 43 deaths in 2015, corresponding to an impressive decline of 44.2%. On the other hand, under five mortality rate declined from 116 deaths per 1,000 live births in 1995 to 60 in 2015, corresponding to a decline of 48.2%.



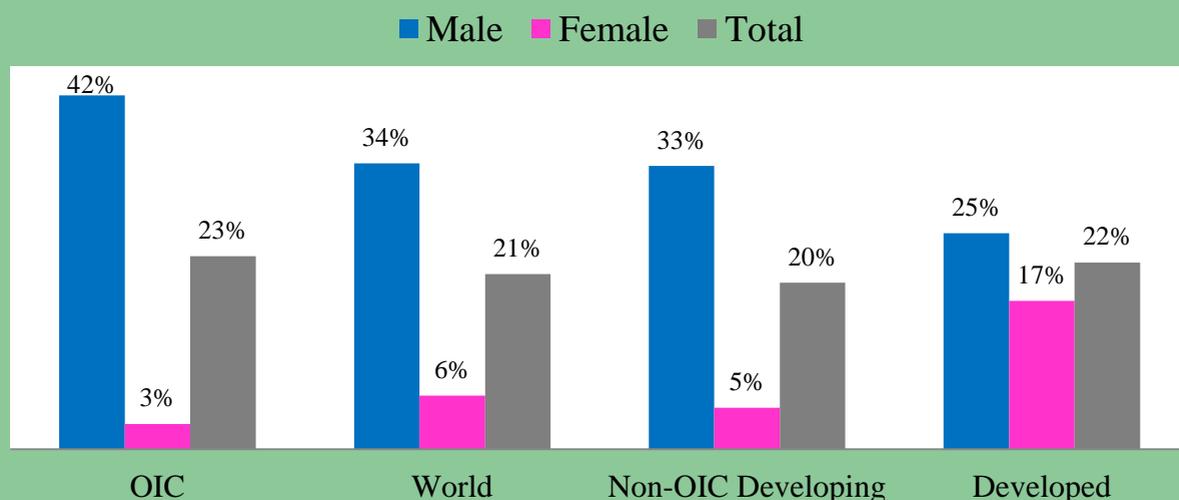
*OIC countries must build on these positive trends and strive hard to enhance the implementation of proven and cost-effective preventive measures to minimize the avoidable maternal, newborn and child death burden.*

In 2015, the prevalence of tobacco use among adults of the OIC countries was 23% with tobacco use being more common among men (42%) compared to the women (3%). Tobacco prevalence in OIC countries stayed slightly over the averages of the world and other country groups.



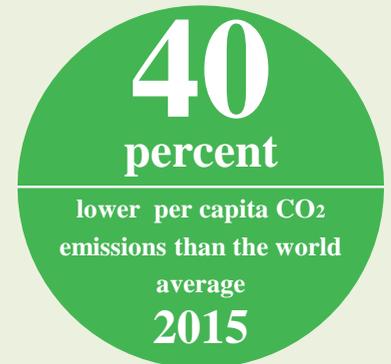
OIC countries accounted for 23% of the total, 25% of male and 10% of female adult tobacco users in the world, respectively.

**Prevalence of Tobacco Use among Adults, % , 2015**

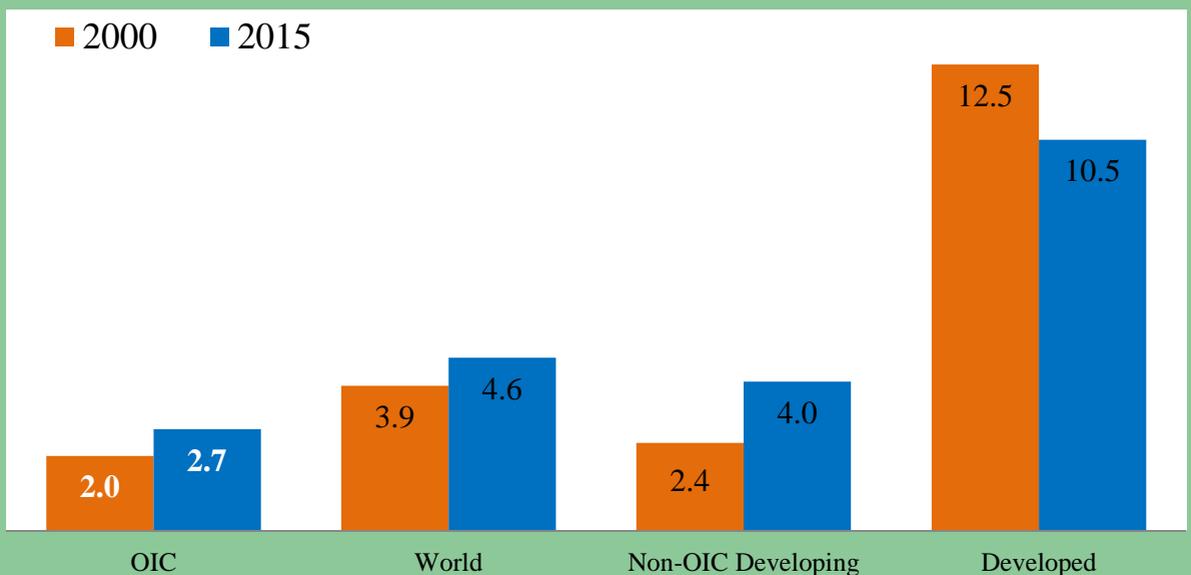


*Tobacco use is strongly associated with incidence of major non-communicable diseases (NCDs) like cardiovascular diseases, cancers and respiratory diseases. Therefore, low prevalence of tobacco use in OIC countries indicates an opportunity to curb the incidences of NCDs.*

The average Carbon Dioxide Emissions (CO<sub>2</sub>) emissions per capita of OIC countries was estimated at 2.7 metric tonnes, which was lower than the world average (4.6) and averages of both non-OIC developing countries (4.0) as well as developed countries (10.5) in 2015.

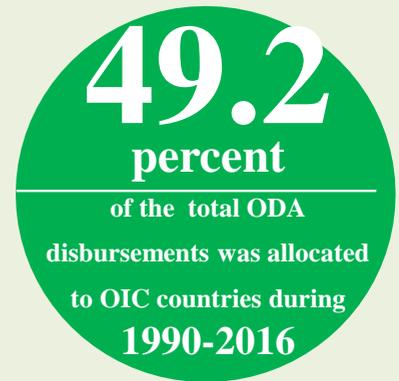


### CO<sub>2</sub> per Capita, Metric Tonnes

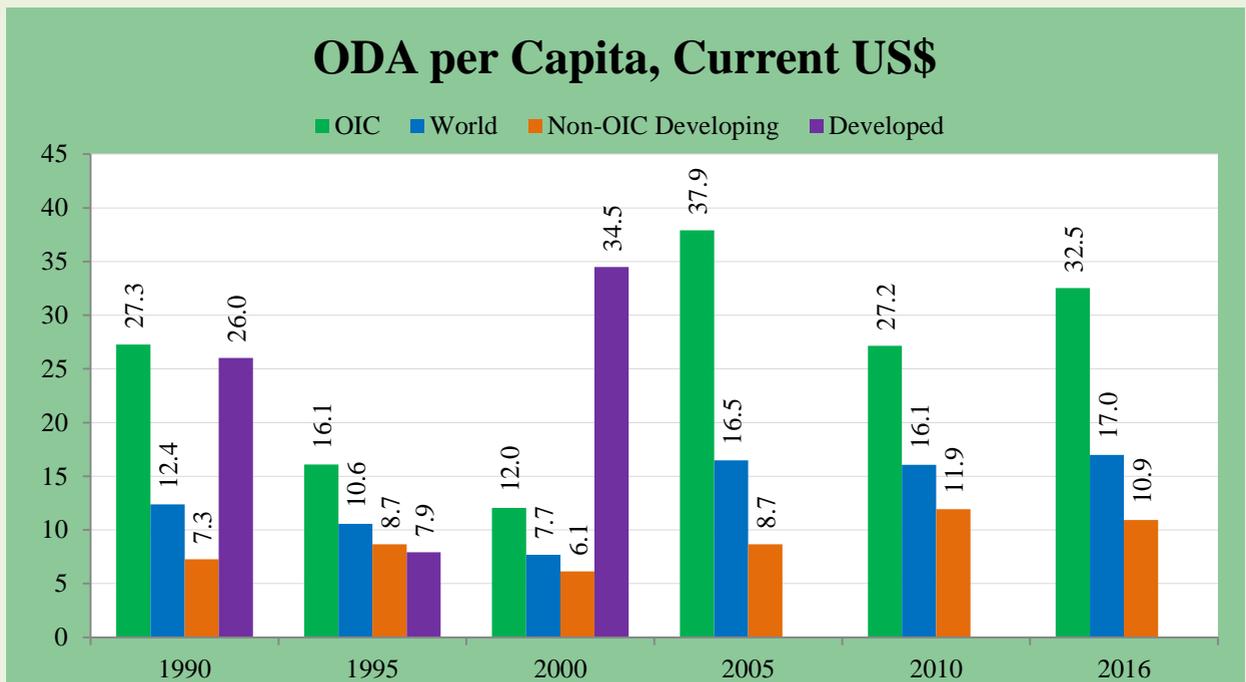


*Lower contribution to deterioration of global commons puts the OIC countries in a stronger position in negotiations on global commons and directing new investments according to the requirements of the international conventions*

Official Development Assistance (ODA) with the grant element of at least 25% is the source of aid with the main goal of promoting wellbeing of the people and economic development of the recipient countries. Group of individual OIC countries benefited from around US\$ 55.8 billion influx of ODA in 2016. Between 1990 and 2016, OIC countries received approximately 49.3% of the total bilateral ODA.



In per capita terms, ODA disbursements to OIC countries was US\$ 32.5, which was higher compared to the non-OIC developing countries US\$ 10.9, and the world US\$ 17.0.

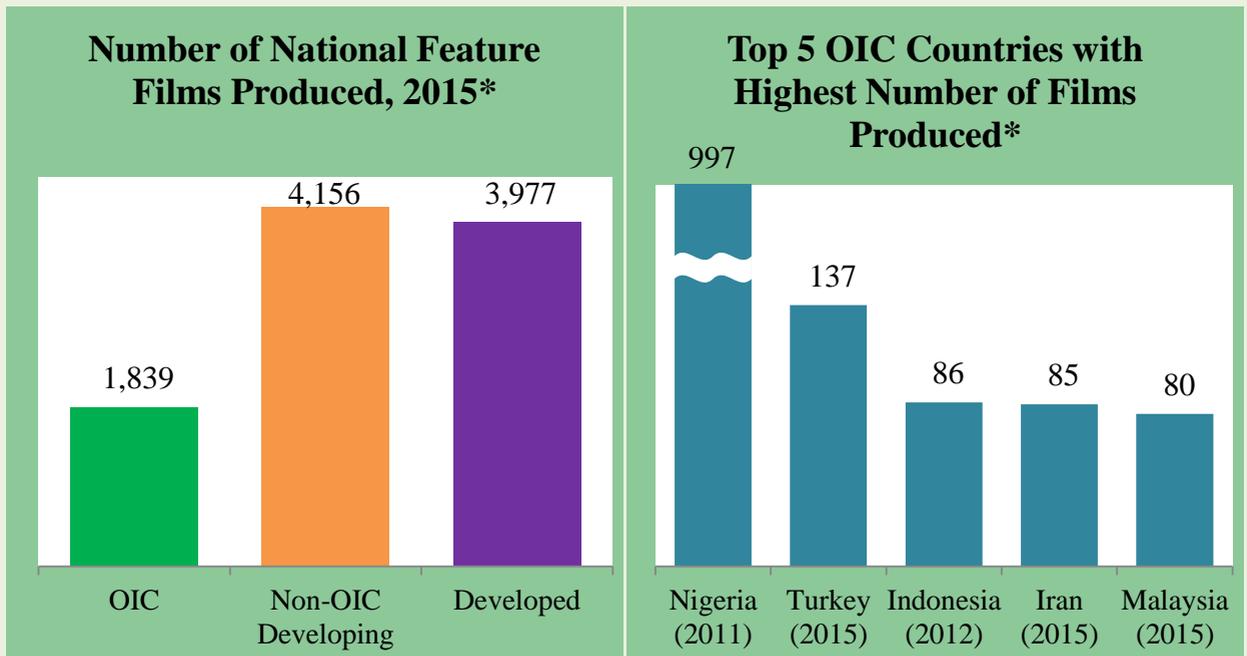


*ODA is significant source of finance and instrument for development in OIC countries. Many studies proved ODA as an effective tool in poverty alleviation as well as for assisting developing countries to achieve higher results in public education and health sectors.*

National cinema is part of an international marketplace, characterised by a cross-border flow of talent and a global circuit of festivals and awards. Promisingly, the national film industries in OIC countries are getting stronger compared to one decade ago. Producing nearly 1,000 feature films, *Nollywood of Nigeria* was not only the leading film producer within OIC region but also **ranked second** in the world following Bollywood of India.



Based on the last year available data from the period 1997 and 2015, a total of **1,839 feature films were produced in 33 OIC countries**. This constituted **18.4% of the global film production** while the shares of developed and non-OIC developing countries in the world were 41.6% and 39.8%, respectively.



\* Last year available data from 1997 and 2015

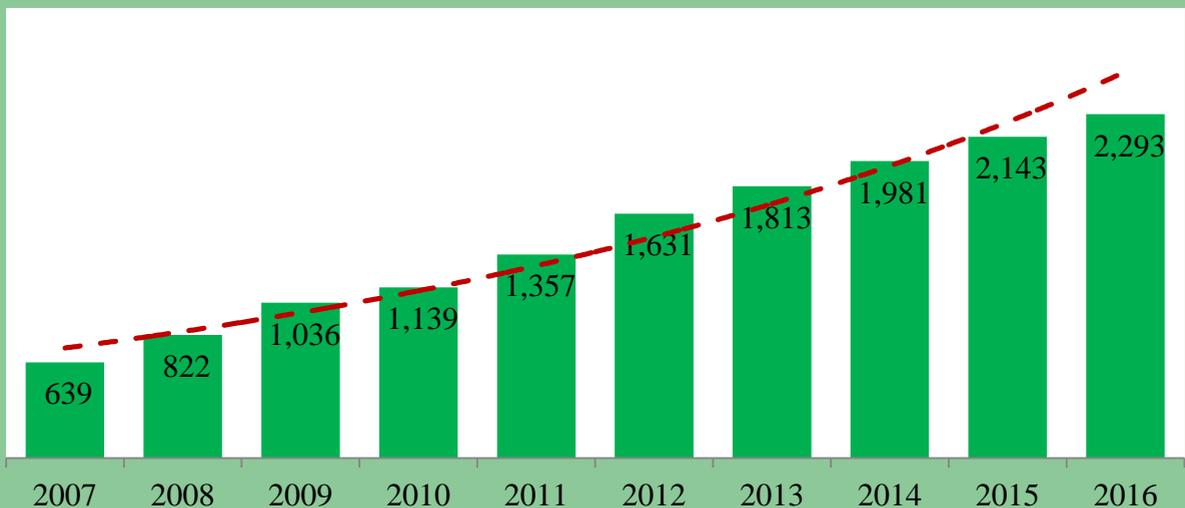
*The support given to national and regional film industries will enrich the cultural diversity of cinema production. This will also help to overcome the geographical divide between big players and small domestic markets.*

Participation finance, mostly referred to as Islamic or interest-free finance, is a system whereby the financial institutions offer financial services based on the principle of shared risk and reward. The value of global assets of participatory finance industry more than tripled from US\$ 639 billion in 2007 to US\$ 2,293 billion in 2016.



Despite the recent adverse developments in the global financial system, the growth of the industry remains uninterrupted and strong. OIC countries with their predominant share in global participation finance industry assets, continue to be major epicentres of growth.

**Size of Global Islamic Financial Assets  
(in Billion US\$, 2007-2016)**

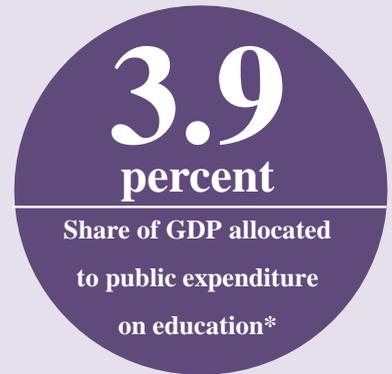


*Participation finance is emerging as an alternative source of finance in addressing major development challenges faced by many OIC countries. Yet, greater convergence as well as harmonisation of regulatory standards among OIC countries is needed to improve long-term growth prospects of the industry.*

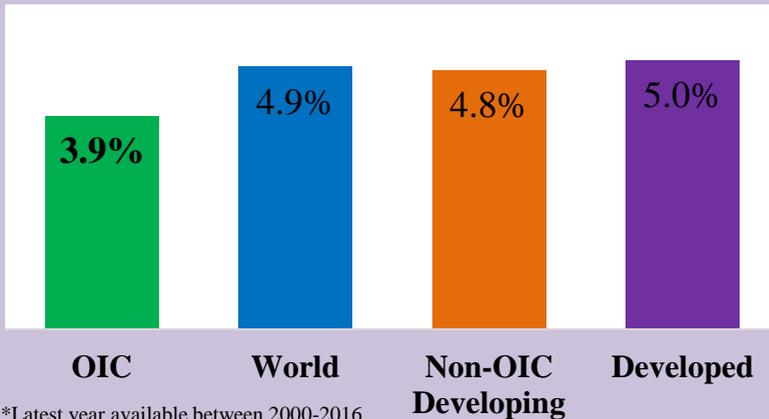


# THREATS

On average, government spending on education accounted for 3.9% of GDP in OIC countries while the averages of the world and non-OIC developing countries were 4.9% and 4.8%, respectively.



**Public Expenditure on Education 2016\*, % of GDP**



At the individual country level, only 13 OIC countries allocated higher spending to public education than the world average.

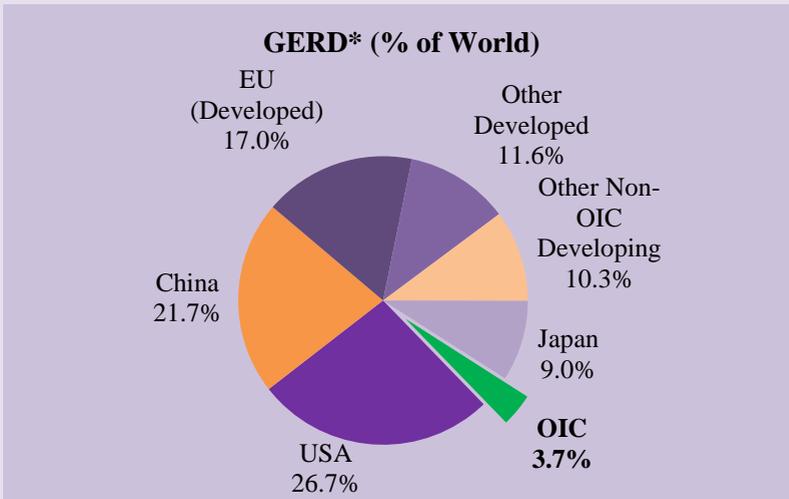
**Public Expenditure on Education\* in OIC Countries, % of GDP**



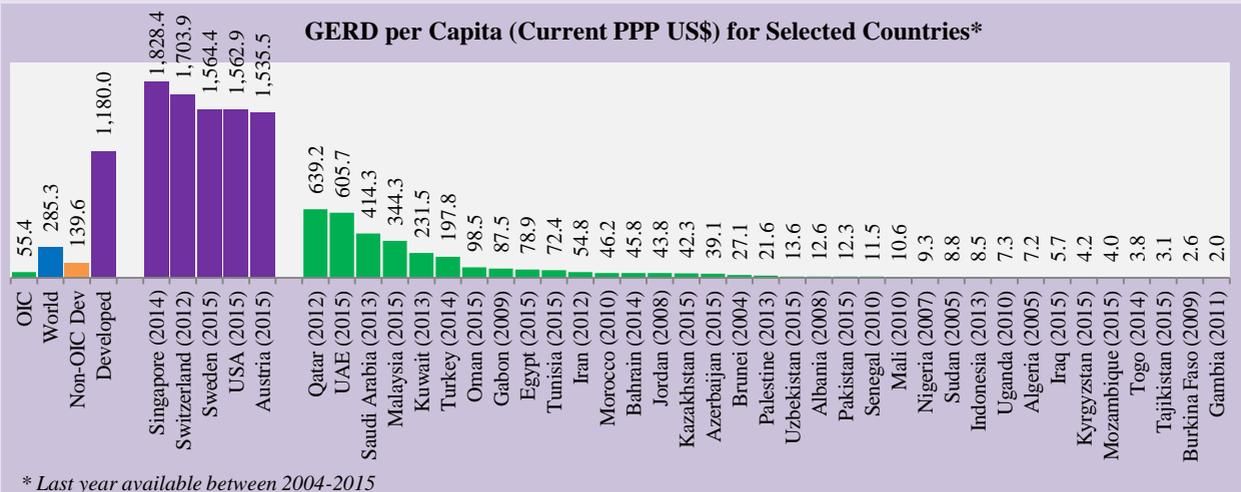
*Setting sound priorities while allocating public resources is highly critical for promoting equitable economic growth and welfare. Governments need to focus more on policies that will promote human capital formation for achieving knowledge-based economies.*

Today, 64.3% of the global R&D expenditures was spent by developed countries, of which 26.7% by the USA, 17% by the EU, and 9% by Japan.

OIC countries accounted for only 3.7% of the world total Gross Domestic Expenditures on R&D (GERD), or 10.4% of the total GERD of developing countries.

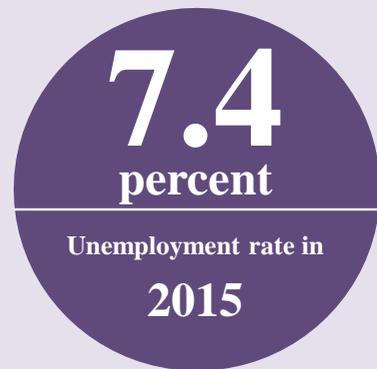


For OIC countries with available data, the average R&D expenditures per capita are calculated as around US\$ 55.4, which is well below the average of the world, US\$ 285, and of the developing countries, US\$ 140.

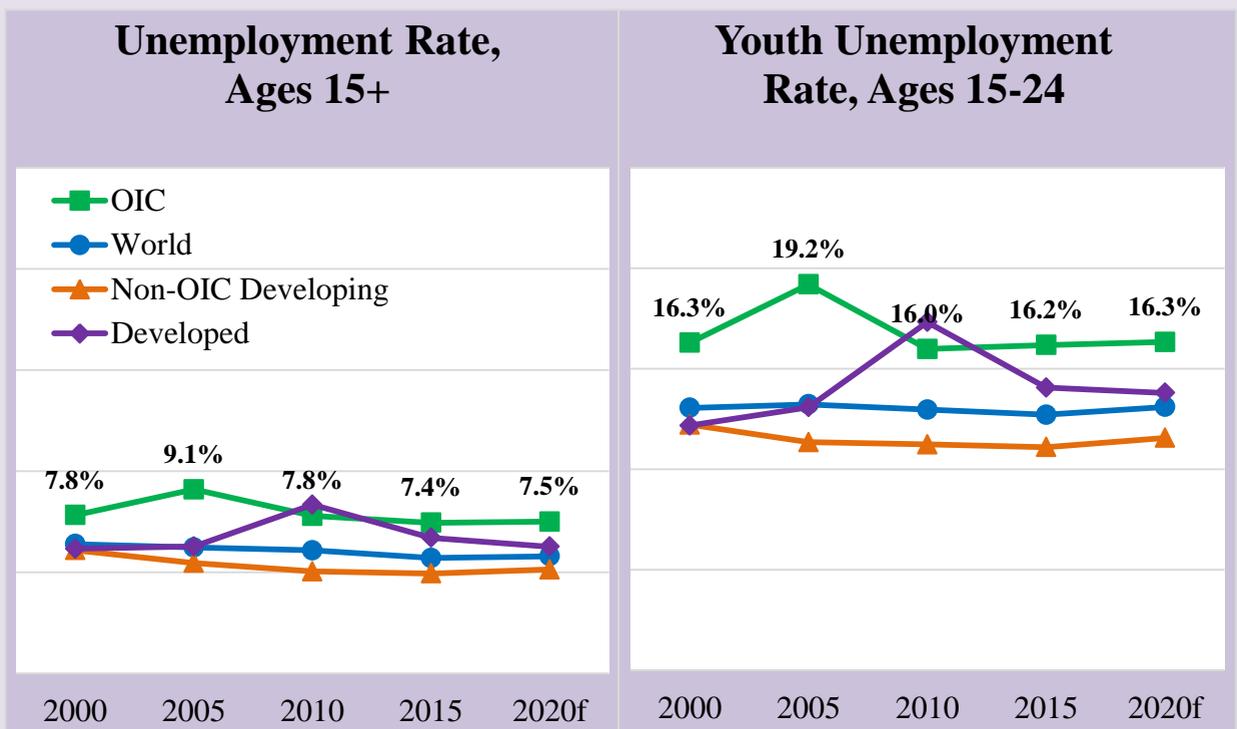


***Low GERD indicates inadequate levels of scientific research and academic activity in OIC countries, which necessitates more investment and cooperation in R&D and higher education.***

A higher unemployment rate indicates the existence of systematic problems in the labour market. Over the period observed, both total and youth unemployment rate in OIC countries as a group was above the world and non-OIC countries averages. As of 2015, total unemployment rate of OIC countries was measured at 7.4%, which was higher compared to the averages of non-OIC developing countries (4.9%), the world (5.7%) and developed countries (6.7%).



The OIC average youth unemployment rate decreased from 16.3% in 2000 to 16.2% in 2015, which was above the averages of developed countries (14.1%), the world (12.7%) and significantly higher than non-OIC developing countries (11.1%).



*Increasing unemployment rates, especially among the youth, is a threat that should be dealt through adoption and implementation of effective labour policies towards job creation.*

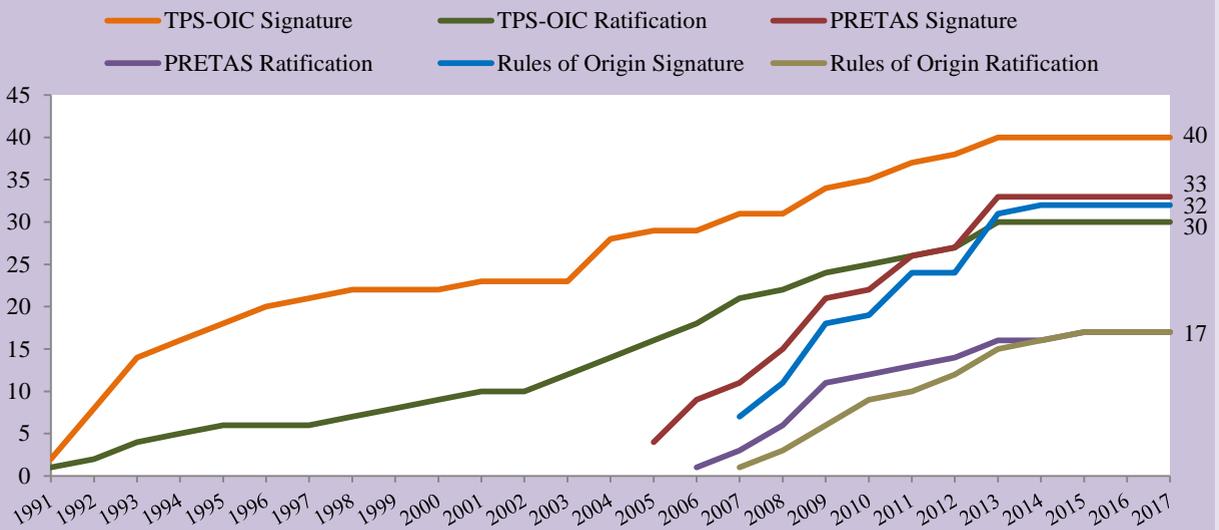
Though it has been adopted in 1990, the Framework Agreement on Trade Preference System (TPS-OIC) entered into force in 2002. As of November 2017, it has been signed by 40 members and ratified by only 30 members.

Adopted in 2005, the Protocol on the Preferential Tariff Scheme (PRETAS) entered into force in 2010. So far, it has been signed by 33 members and ratified by only 17 members.

Adopted in 2007, the TPS-OIC Rules of Origin entered into force in 2011. So far, it has been signed by 32 member and ratified by only 17 members.



**TPS-OIC Agreements, Number of Countries with Signatures and Ratifications**



*The slow pace of ratification of the Trade Preferential System (TPS-OIC) and the associated trade agreements by the member countries during the last two decades is a clear indication of the lack of political will, which is necessary for any economic cooperation and integration scheme.*

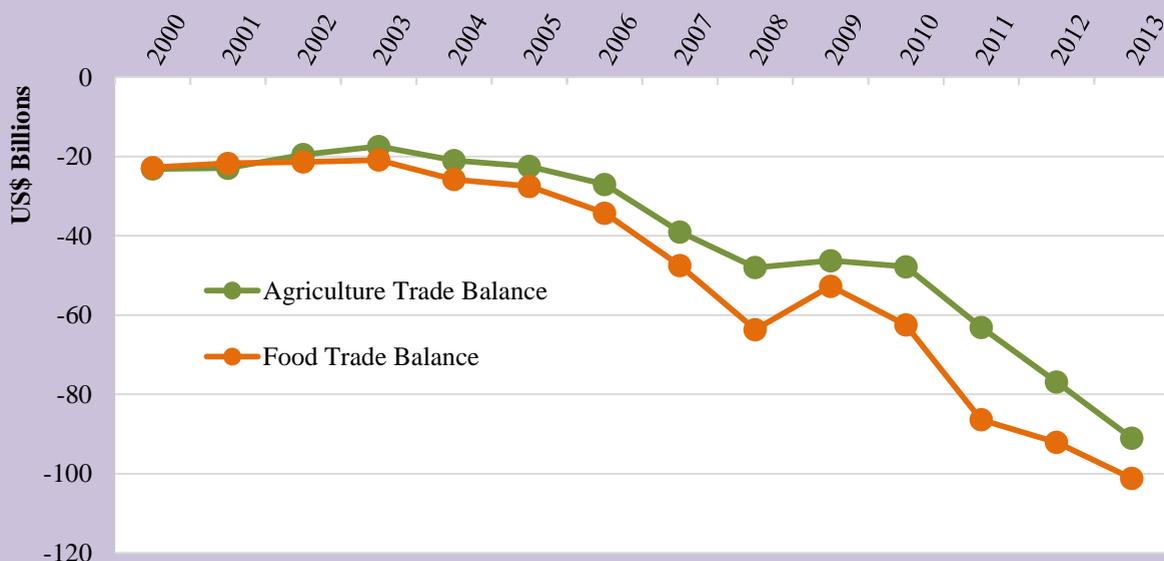
The trade deficit in agricultural products in general and food products in particular has increased rapidly over the past decade and, despite a short-lived improvement during the global financial and economic crisis, it is still growing.

Trade deficit in both agricultural and food products has more than quadrupled from their levels around US\$ 23 billion in 2000 to more than US\$ 91 billion and US\$ 101 billion respectively in 2013.

Trade deficit  
in agricultural and  
food products

**QUADRUPLED**  
since  
**2000**

### Trade Balance of OIC Countries in Agricultural and Food Products



*Increasing trade deficit in agricultural and food products implies more dependence on imports and aid for feeding the increasing population. Well-devised strategies for increasing productivity in the agricultural sector are urgently needed.*

**194**  
million

Undernourished people in  
**2015**

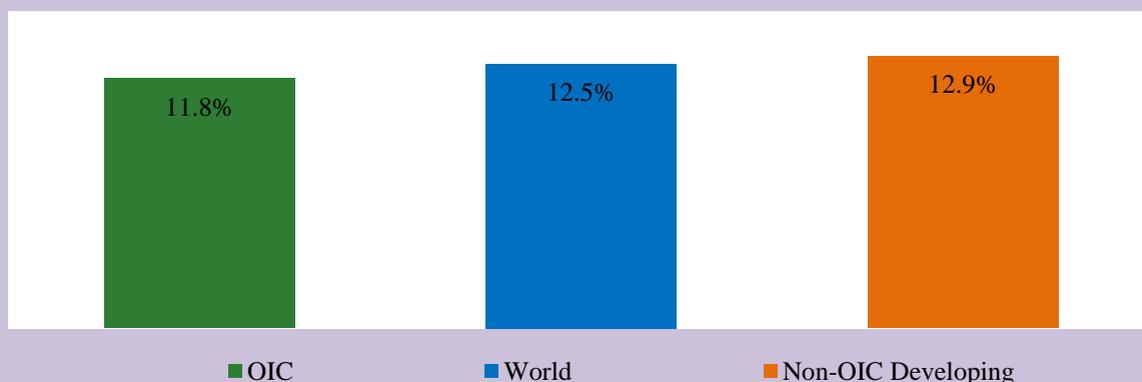
In 2015, there were around 194 million undernourished people in the OIC countries, corresponding to 11.8% of their total population. OIC countries accounted for over 26.5% of the total undernourished people in the world.

**28**

Low income food deficit  
countries in  
**2015**

The situation remained critical in 28 OIC countries which are ranked among 56 low income food deficit countries (LIFDCs) in the world.

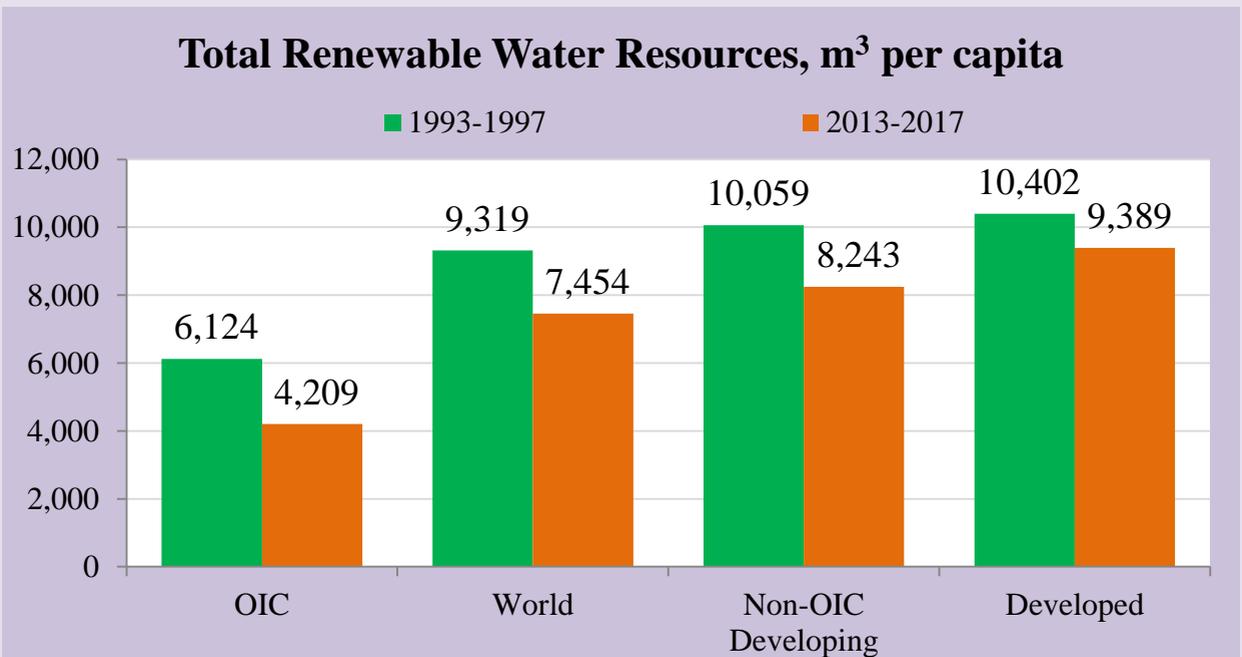
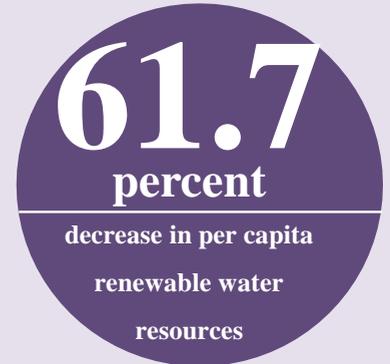
## Prevalence of Undernourishment (% of Population), 2015



*A significant portion of OIC population is suffering from undernourishment whereas nearly half of OIC countries are unable to produce sufficient food to meet their domestic demands. This necessitates long-term programmes to address major constraints and challenges facing agricultural development and, thus, food security in these countries.*

The shortage of water resources and inefficient irrigation systems constitutes a serious challenge and threat for OIC countries, particularly to those which are located in the driest regions of the world.

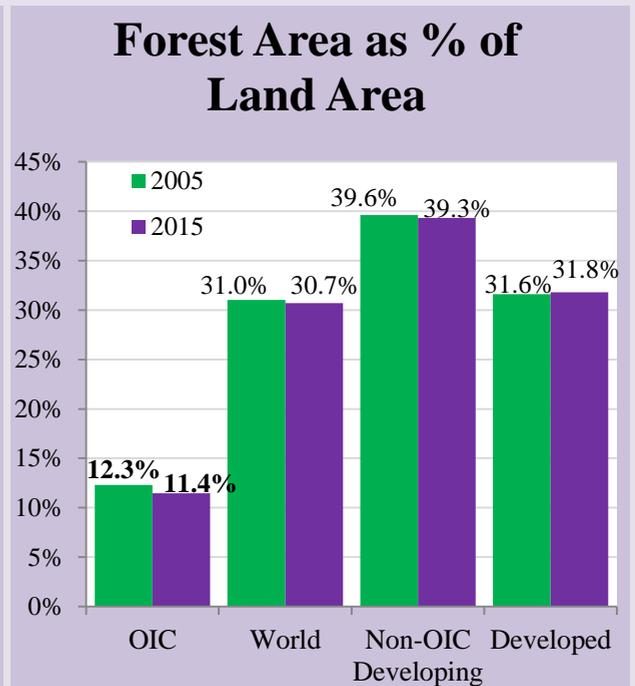
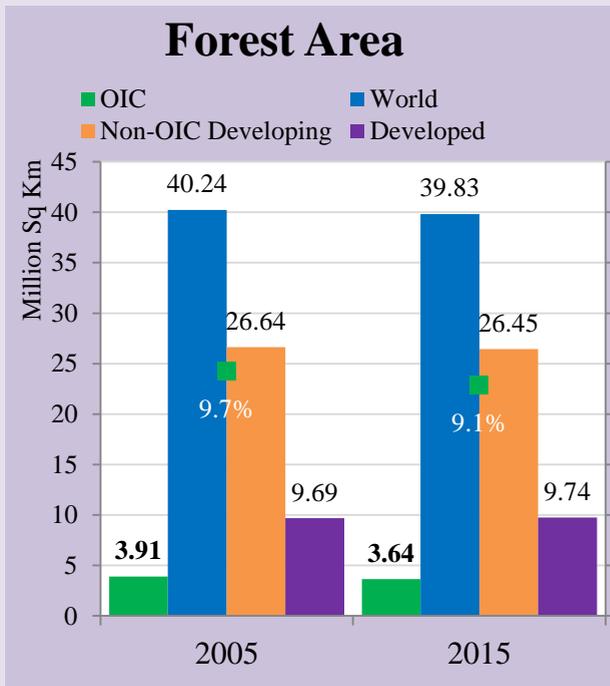
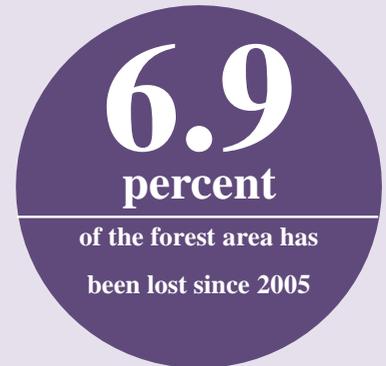
Over the last two decades, the average per capita total renewable water resources in OIC countries decreased to 4,209 m<sup>3</sup> which was significantly lower than the world average of 7,453 m<sup>3</sup>.



*Adoption of long-term programmes to cope with water scarcity as well as prudent water management policies to promote investment in water-saving irrigation systems are urgently needed.*

The total forest area of OIC countries was estimated 3.91 and 3.64 million kilometer square for the years 2005 and 2015, respectively. The share of forest area owned by OIC countries corresponds to 9.7% and 9.1% of the world total for respective years.

On the other hand, the share of forest resources in in total land area was estimated at 12.3% and 11.4% for the years 2005 and 2015, respectively, which are remarkably lower than the world averages.



*Forest resources have significant importance from both ecological and economic point of view. Already limited available forest resources of the OIC countries call for action and necessary precautions should be taken to prevent deforestation.*

# THREAT

# DRINKING WATER RESOURCES AND SANITATION FACILITIES

286

million

people with no access to improved water resources in 2015

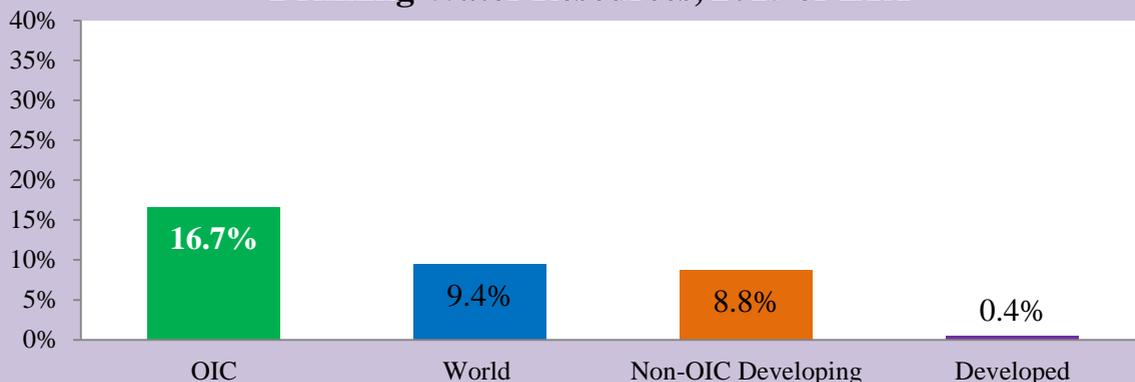
In 2015, the average percentages of population without access to improved drinking water resources and sanitation facilities in OIC countries were 16.7% and 38.7%, respectively, which are both above the world averages.

666

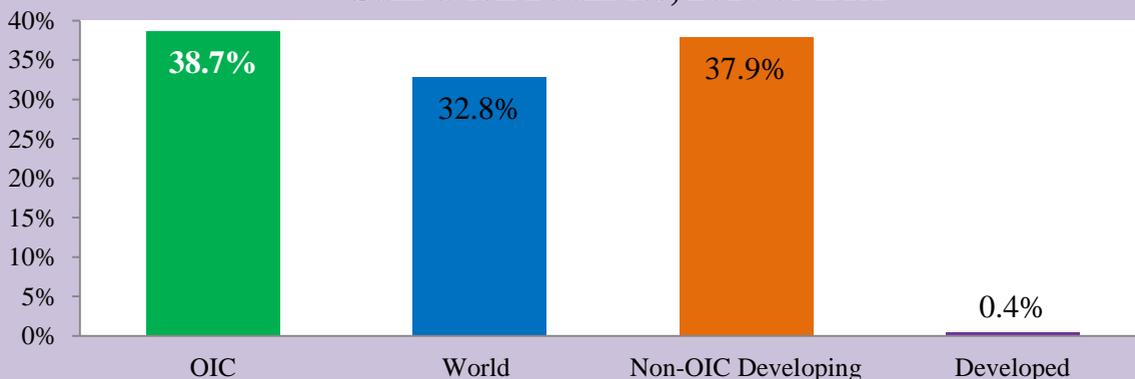
million

people with no access to improved sanitation facilities in 2015

### Percentage of Population without Access to Improved Drinking Water Resources, 2015 or LYA

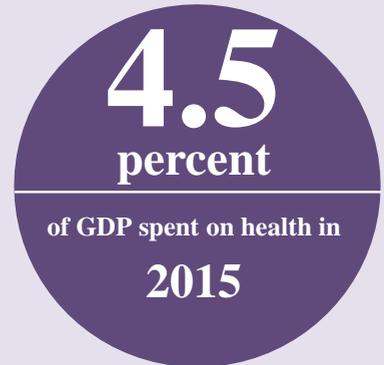


### Percentage of Population without Access to Improved Sanitation Facilities, 2015 or LYA



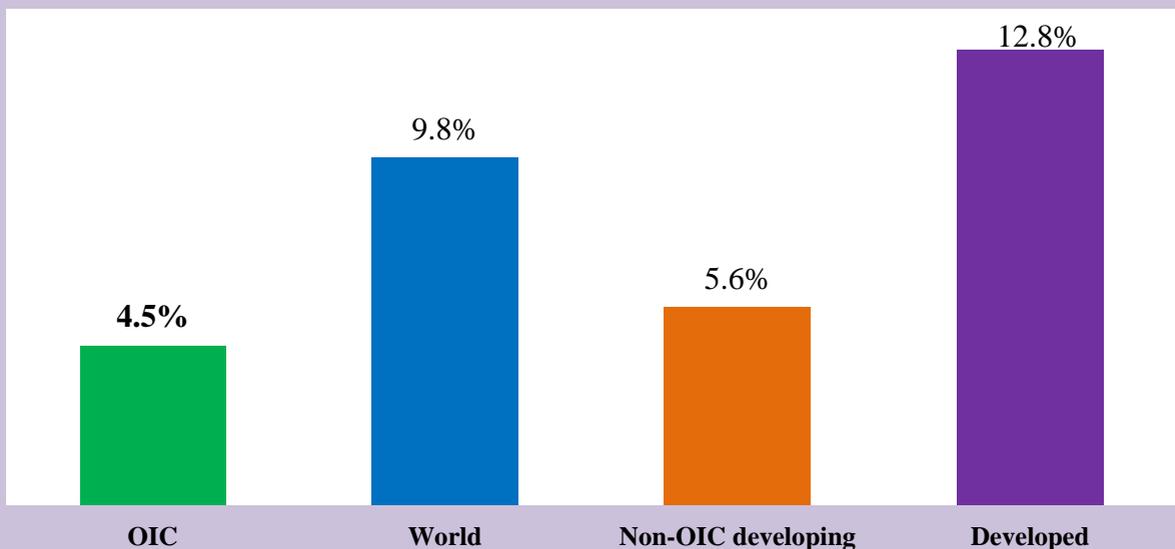
*A significant portion of the OIC population lacks access to improved water resources and sanitation facilities, which are essential for dignified lives and healthy resources.*

Health financing is a critical component of health care systems and share of resources for health shows not only the importance of health in the national development agenda but also explains the status of health equity, transparency and accountability.



In 2015, total expenditures of OIC countries on health accounted for only 4.5% of their GDP compared to 9.8% in the world and 5.6% in non-OIC developing countries. Due to low coverage of social security and public/private health insurance schemes, out of pocket health spending remained the major source of health financing in OIC countries with a share of 38.8% of total health expenditures. For 20 OIC countries, out-of-pocket health spending accounted for more than 50% of the total health expenditures in 2015.

**Expenditure on Health, % of GDP, 2015**

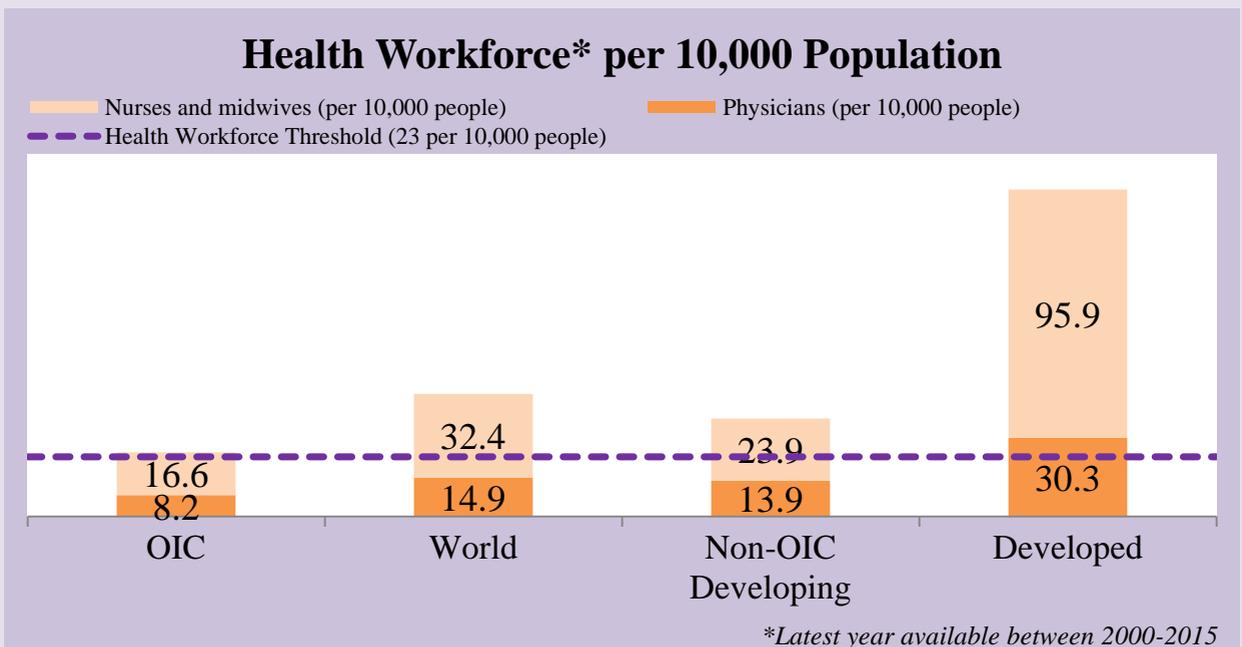


*Heavy reliance on out of pocket health spending has serious social and economic implications, especially for the low income and poor people.*

The number of physicians and nurses/midwives per 10,000 population in the OIC Countries were only 8.2 and 16.6, respectively, compared to the world averages of 14.9 physicians and 32.4 nurses/midwives.

Among the regions of OIC, situation remained more critical in South Asia and Sub-Saharan Africa where number of health workers per 10,000 population was recorded at 10.1 and 14.7, respectively.

Based on the WHO's threshold of 23 health workforce (total of physicians and nurses/midwives) per 10,000 population, 29 OIC countries are currently facing a health workforce crisis.



***Insufficient health workforce in OIC countries indicates low levels of healthcare capacity and services, a threat which necessitates encouraging development of more skilled human capital in the fields of medicine and healthcare.***

# ACRONYMS/ ABBREVIATIONS

<b>Abbreviation</b>	<b>Long Title</b>
EAP	East Asia and Pacific
ECA	Europe and Central Asia
DTP	Diphtheria, Tetanus and Pertussis
EDS	External Debt Stock
EU	European Union
FCTC	Framework Convention on Tobacco Control
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GERD	Gross Domestic Expenditures on R&D
LAC	Latin America and Caribbean
LFPR	Labour Force Participation Rate
LIFDC	Low Income Food Deficit Countries
MENA	Middle East and North Africa
OIC	Organisation of Islamic Cooperation
PPP	Purchasing Power Parity
R&D	Research and Development
SA	South Asia
SSA	Sub-Saharan Africa
TRWR	Total Renewable Water Resources
UNESCO	United Nations Educational, Scientific and Cultural Organization
US\$	United States Dollar
WHO	World Health Organisation

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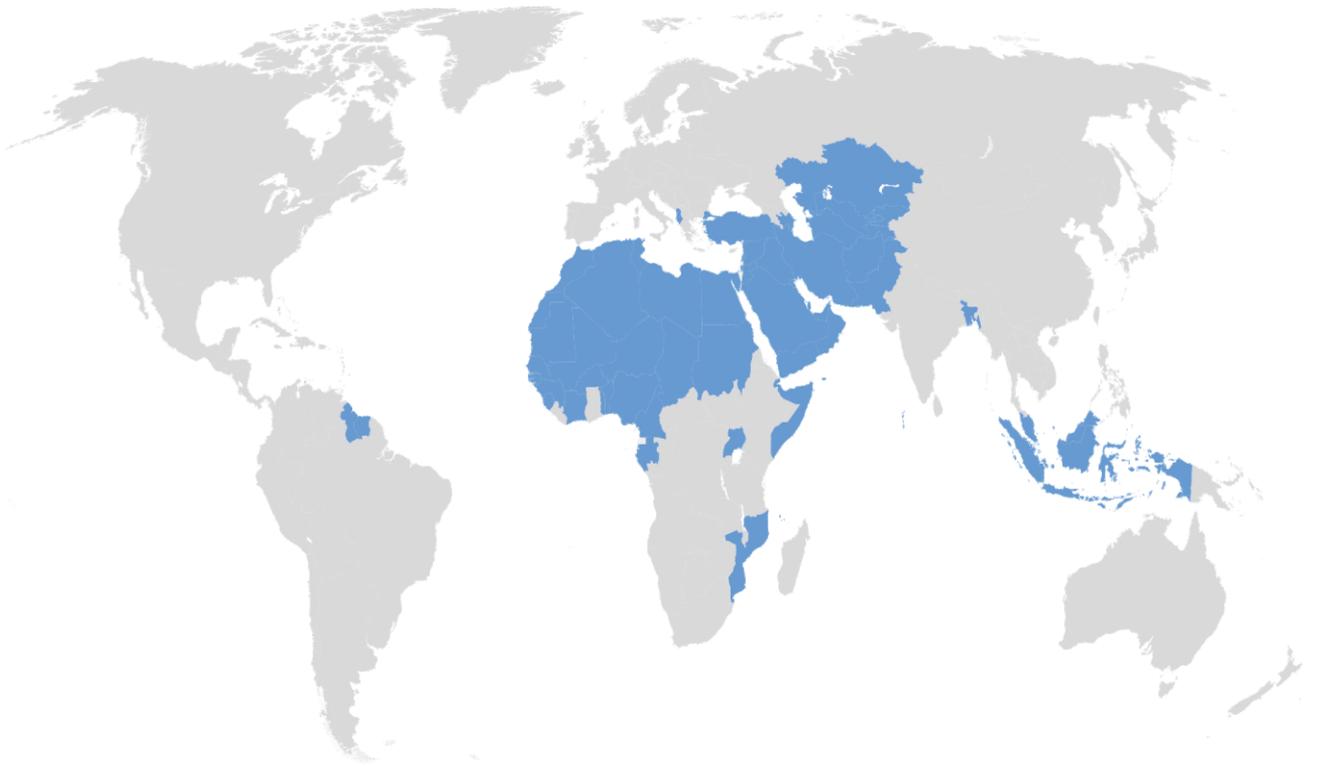
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