

CIGS・IMF Conference “Economic Outlook for Middle East,
North Africa, Afghanistan, and Pakistan” October 10, 2012

CIGS・IMF共催カンファレンス『アラブ世界の経済見通し』
2012年10月10日

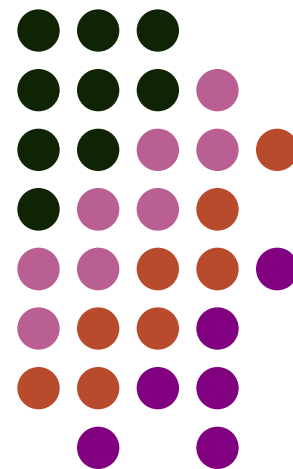


Implications of “Arab Spring” Socio-political Developments for Sustainable Growth

“アラブの春”後の社会・政治情勢は
持続的成長をもたらすか

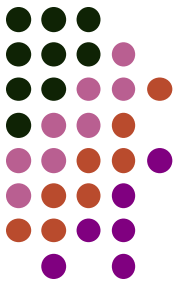
Toshiro Nishizawa, Director General, Country Credit Department
Japan Bank for International Cooperation

外国審査部長 西沢利郎
株式会社 国際協力銀行





- Economic and Socio-political Diversities
経済的、社会・政治的な多様性
- Economic and Socio-political Imbalances
経済的、社会・政治的な不均衡
- Capitalizing on Under-utilized Resources
リソースの利用拡大が鍵をにぎる



Economic and Socio-political Diversities

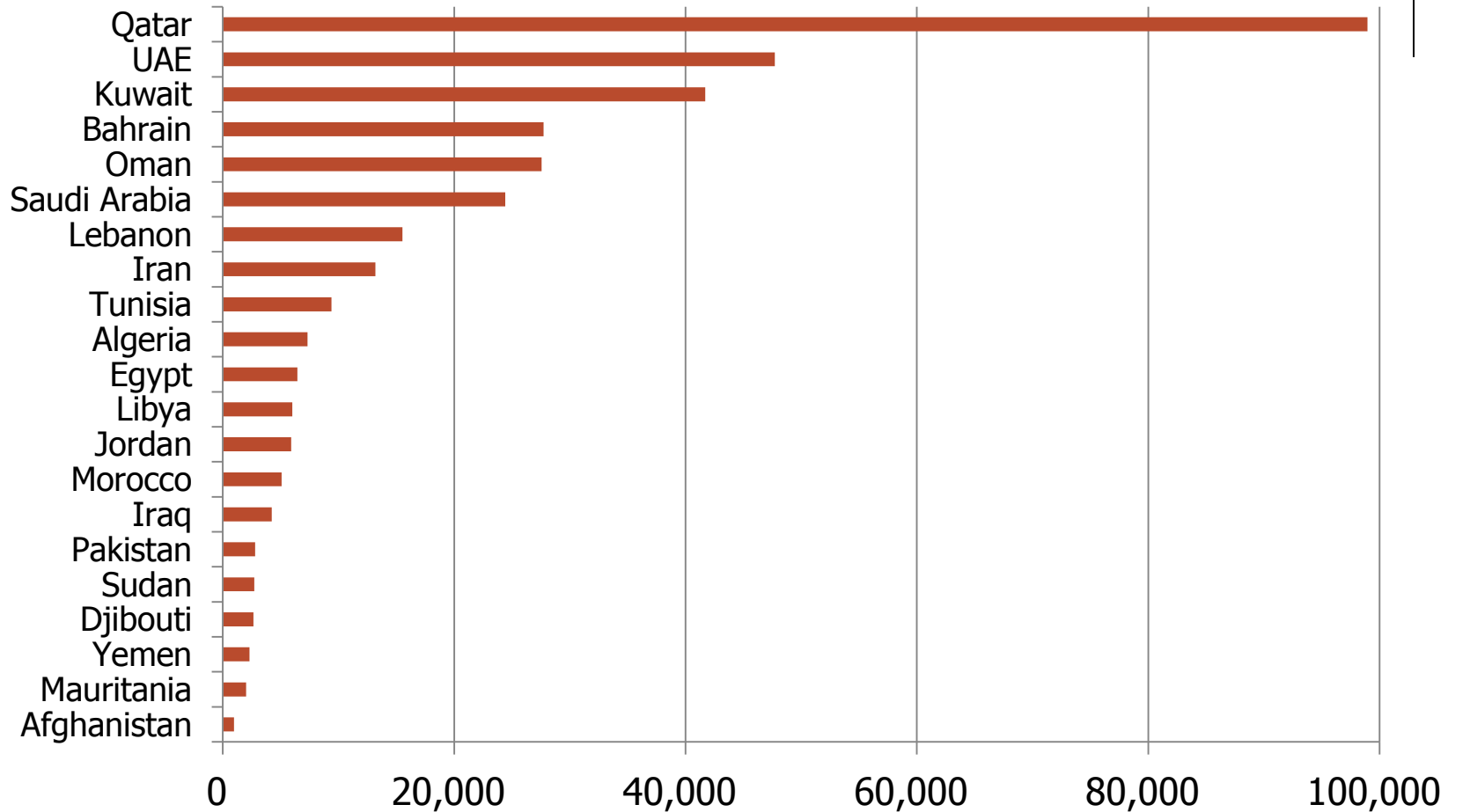
経済的、社会・政治的な多様性

October 10, 2012

Income Disparity among Countries

最貧国から高所得国まで

PPP-based Per Capita GDP, 2011



Source: IMF, World Economic Outlook Database

Current international dollar



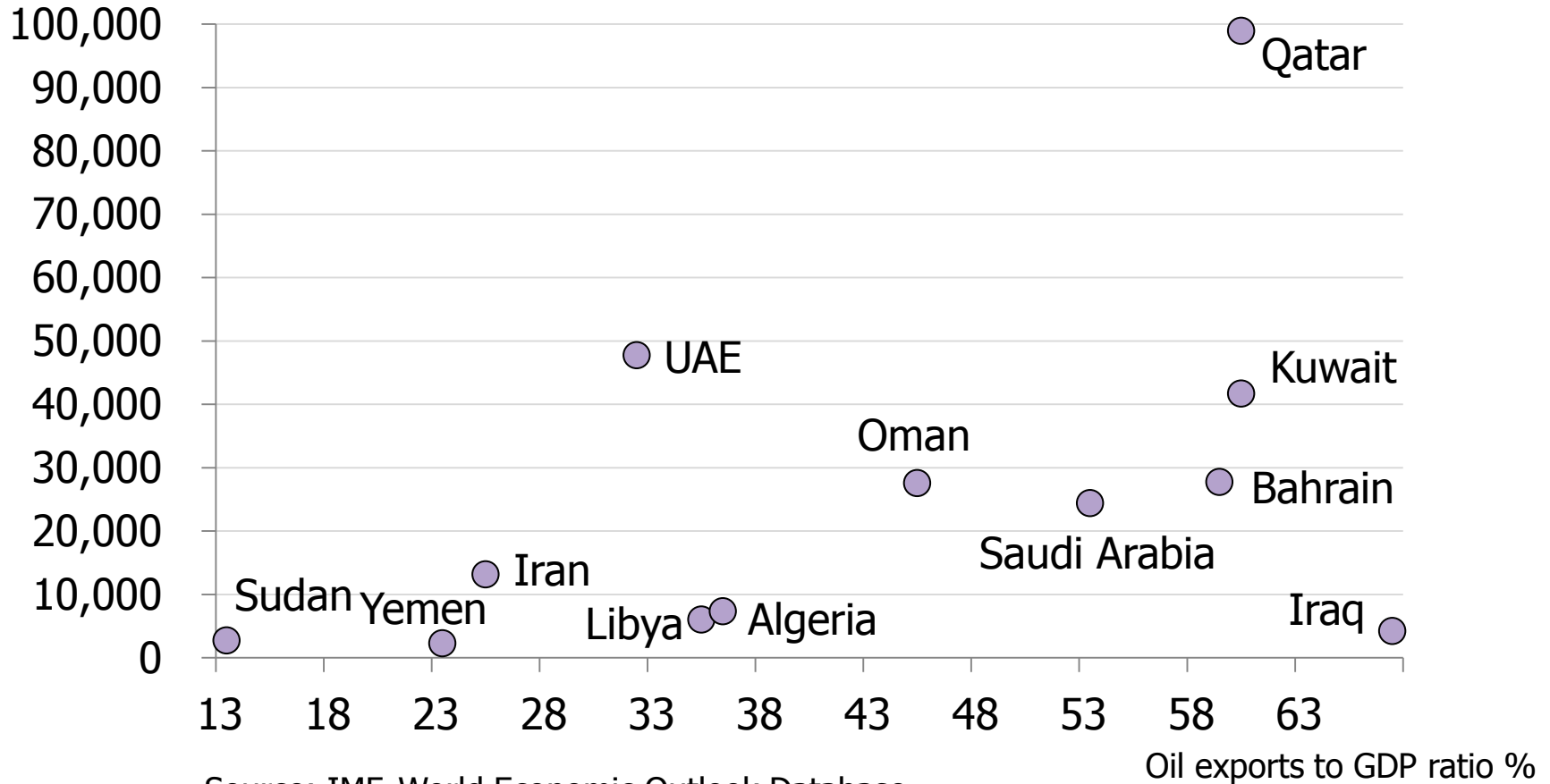
Income Levels of Oil-Exporters

石油輸出国の所得水準



PPP-based Per Capita GDP and Oil Exports to GDP Ratio, 2011

Current international dollar



Source: IMF, World Economic Outlook Database

Income Levels of Oil Importers

非石油輸出国の所得水準

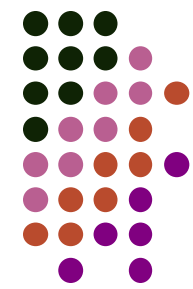


PPP-based Per Capita GDP and Oil Exports to GDP Ratio, 2011

Current international dollar



Source: IMF, World Economic Outlook Database



	Oil Importers 石油輸入国	Oil Exporters 石油輸出国
High Income 高所得		Qatar UAE Kuwait Bahrain Oman Saudi Arabia
Middle Income 中所得	Lebanon Tunisia Egypt Jordan Morocco Pakistan Djibouti	Iran Algeria Libya Iraq Sudan Yemen
Low Income 低所得	Mauritania Afghanistan	

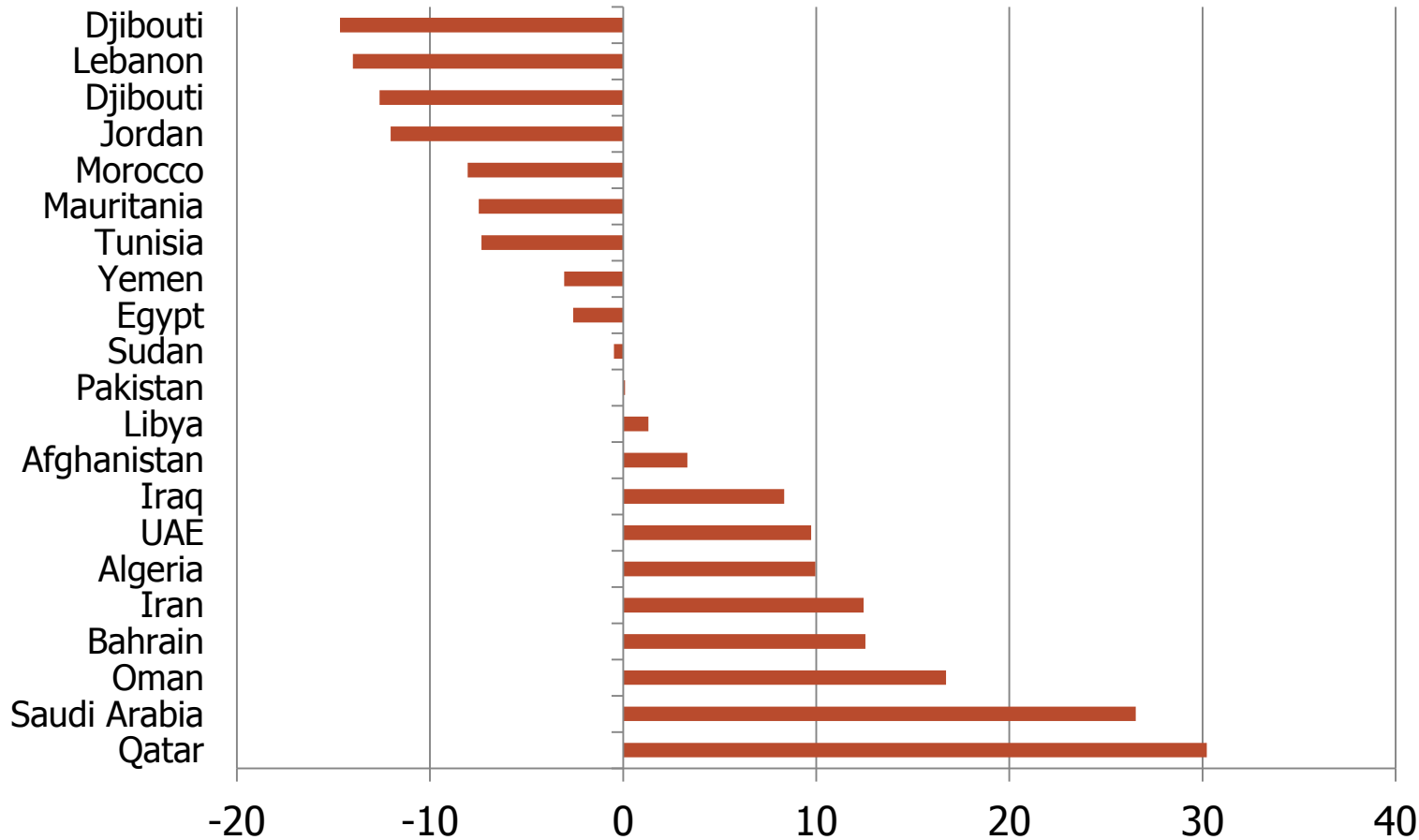
Source: World Bank Country Classification

Ranging from Large Deficit to Large Surplus

大幅な経常赤字から大幅な経常黒字まで



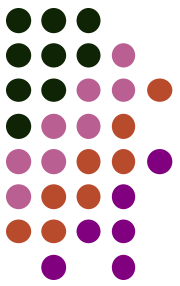
Current Account Balance to GDP Ratio, 2011



Source: IMF, World Economic Outlook Database

Form of Government

政体



Republic 共和制		Monarchy 君主制	Emirate 首長制
Afghanistan	Mauritania	Bahrain	Kuwait
Algeria	Pakistan	Jordan	Qatar
Djibouti	Sudan	Morocco	UAE
Egypt	Syria	Oman	
Iran	Tunisia	Saudi Arabia	
Iraq	Yemen		
Lebanon			

Source: Ministry of Foreign Affairs Homepage

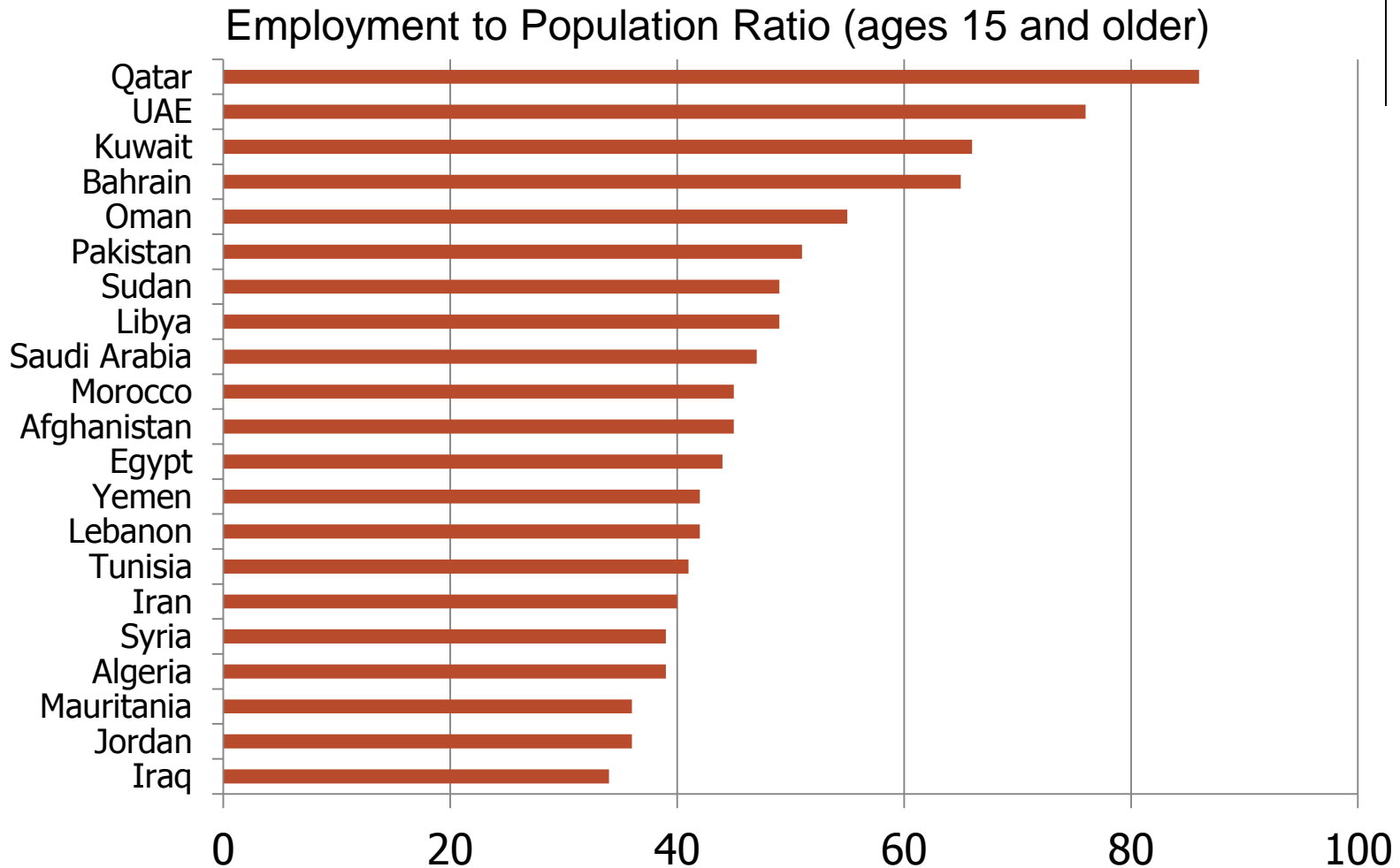


Economic and Socio-political Imbalances

経済的、社会・政治的な不均衡

Labor Market Conditions

労働市場の状況



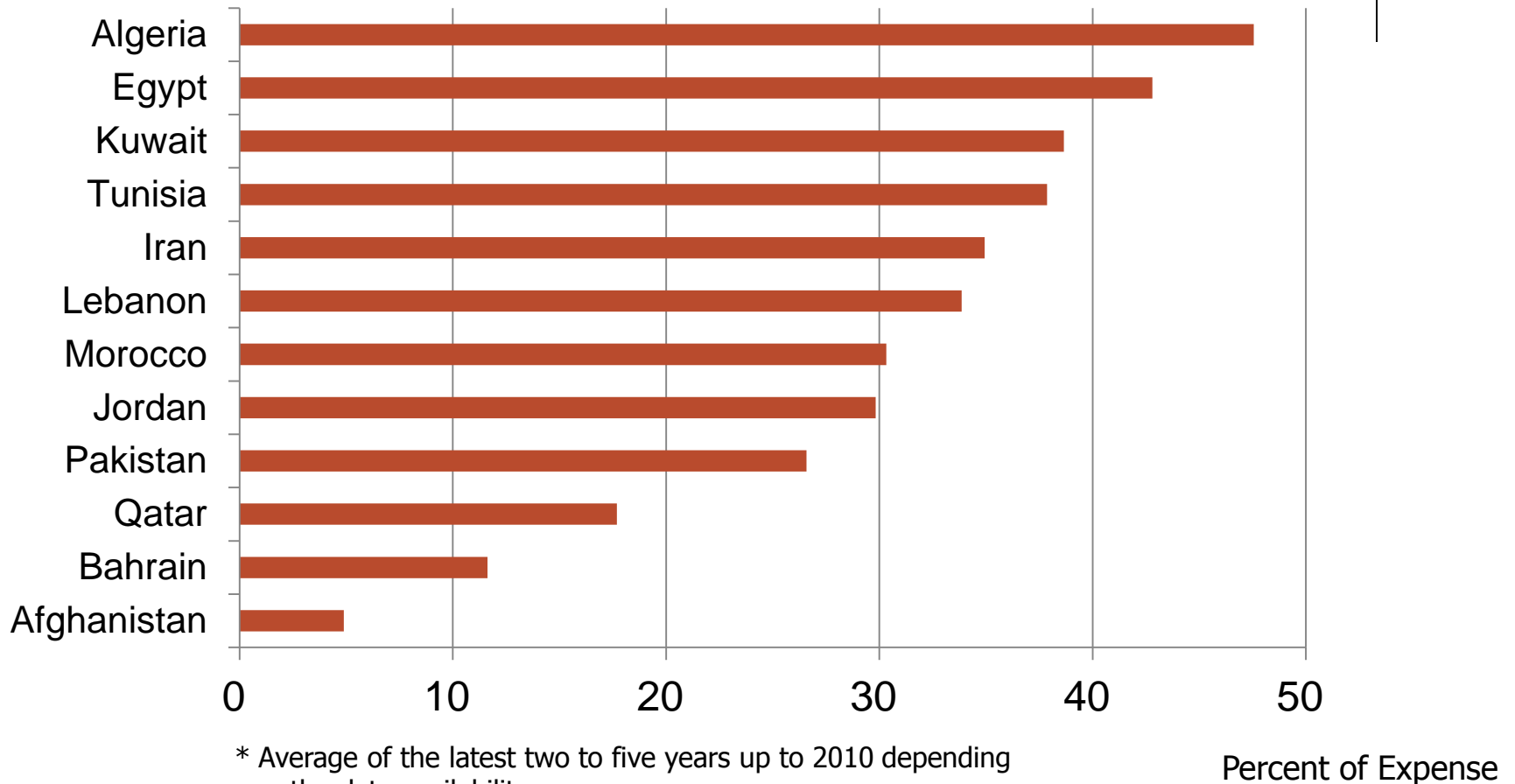
Source: World Bank Database

Need for Fiscal Transformation

財政変革のニーズ



Subsidies and Other Fiscal Transfers*



Source: World Bank Database



Capitalizing on Under-utilized Resources

リソースの利用拡大が鍵をにぎる

Strategic Implications

戦略的な示唆

How could we promote a long-term sustainable growth under the new socio-political environments?



Host country's needs

- Developing energy resources
- Diversifying industries for job creation
- Meeting water and power demands

Japan's strategic interests

- Securing energy resources
- Participating in water and power sector projects
- Diversifying production locations
- Promoting high value-added exports
- Contributing to environmental conservation

Opportunities to enhance mutual benefits



新たな社会・政治環境のもとで、どのようにしたら長期的に持続可能な経済成長を促進できるか？

ホスト国のニーズ

- エネルギー資源開発
- 産業多角化(雇用創出)
- 水・電力需要への対応

日本の戦略的関心

- エネルギー資源確保
- 水・電力インフラ事業への参画
- 生産拠点の拡充・展開
- 高付加価値輸出の促進
- 環境保全事業への貢献

互恵的な関係を拡大する好機

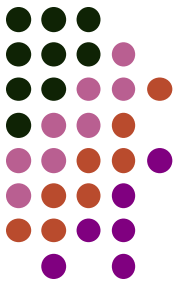
CIGS・IMF Conference “Economic Outlook for Middle East, North Africa,
Afghanistan, and Pakistan” October 10, 2012

CIGS・IMF共催カンファレンス『アラブ世界の経済見通し』

2012年10月10日

Implications of “Arab Spring” Socio-political Developments for
Sustainable Growth

“アラブの春”後の社会・政治情勢は持続的成長をもたらすか



Thanks for your attention.
ありがとうございました。

Toshiro Nishizawa, Director General, Country Credit Department
Japan Bank for International Cooperation

外国審査部長 西沢利郎
株式会社 国際協力銀行
t-nishizawa@jbic.go.jp