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V Mediterranean Week of Economic Leaders - UFM OPEN DAYS

LOGISMED
Euro-Mediterranean network of logistics platforms

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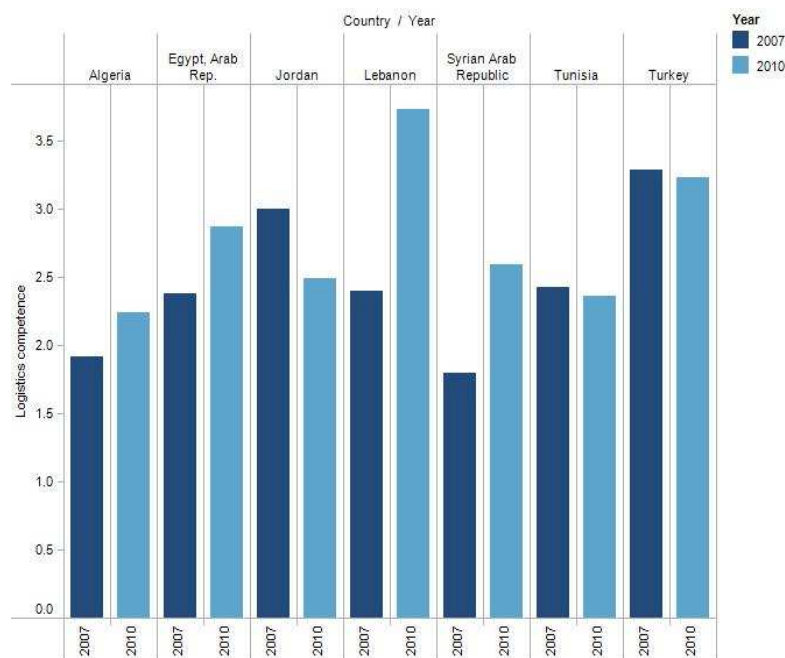
1. Background
2. LOGISMED: The Network of Logistic Platforms
3. Action plan for the development of the LOGISMED Training Activities Programme

1. Background



A strong logistic and transport sector has been identified as a pre-condition to develop a national logistic economy that is competitive at a global stage.

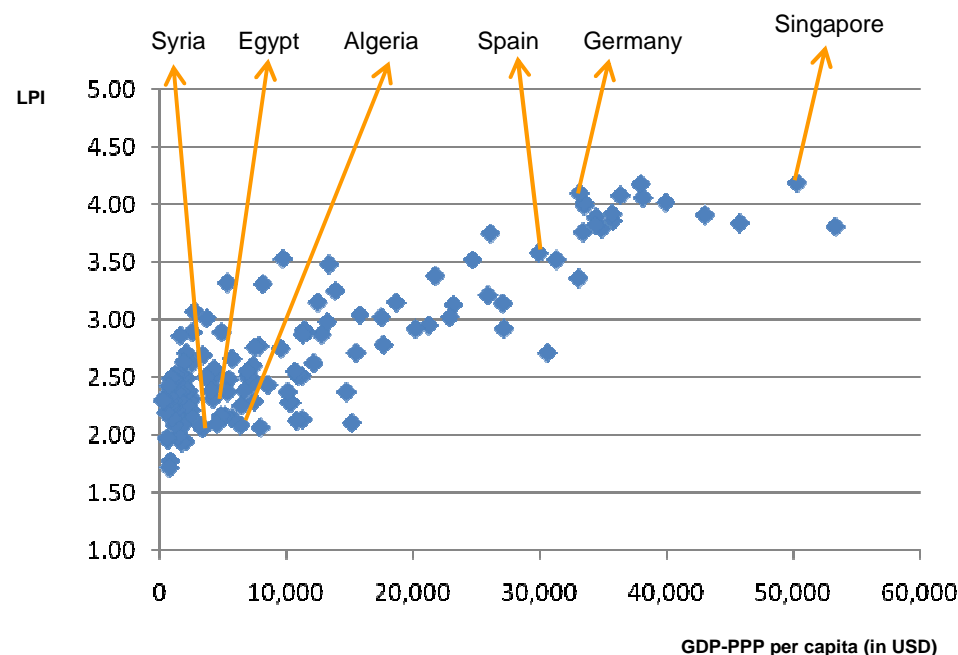
Within the MEDA region, there has been a slight improvement over the past five years, however, discrepancies still exist between the countries in the different indicators.



Sum of Logistics competence for each Year broken down by Country. Color shows details about Year.

Selected MEDA countries Average Logistics Performance Index 2007-2010 (LPI)

Source: World Bank



LPI vs. GDP-PPP per capita

Source: IDOM using World Bank data

1. Background



- ▣ The logistic sector in the Euro-Med region:

EUROPE

- Mature Sector
- Operators: International presence and investment capacity
- Diversity of services: -Industrial;-Retail;-Reverse logistics;-etc.
- Specialised and large scale plants
- Advanced automation and data interchange systems

MEDA COUNTRIES

- Sector still in development
- Local Operators: Small size and part of international logistic chains. Controlled by European companies.
- European operators are usually more focused on transport rather than logistic services.
- Bottlenecks in logistic chains are also due the congestion of ports.

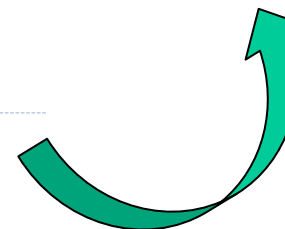
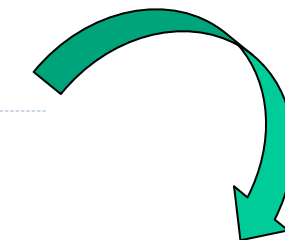
1. Background



Specific characteristics of the MEDA transport and logistic services sector vary between countries, however there are certain aspects that can be generalised amongst to all.

These aspects lead to the conclusion that there is a general lack of effective logistic services in the region.

Sector	Characteristics
Road Services	<ul style="list-style-type: none"> ▸ Atomised ▸ Few large private companies ▸ Informal sector ▸ Average fleet age high
Rail Services	<ul style="list-style-type: none"> ▸ Public railway firms with not much container transport ▸ Non - existence of the intermodal operators.
Air Services	<ul style="list-style-type: none"> ▸ Few cargo services provided for the domestic market. ▸ State subsidies limit competition.
Maritime Services	<ul style="list-style-type: none"> ▸ Usually Port Authorities under the Maritime Transport Authority management. ▸ Presence of international Maritime companies ▸ Some container terminals are run by private co. (national or international)
Logistic Services	<ul style="list-style-type: none"> ▸ Very few operators with 3PL benefits ▸ Not enough presence of foreign firms.



Lack of effective internal logistics.
Lack of effective external transport, lack of logistic platforms, need for organisation of procedures....

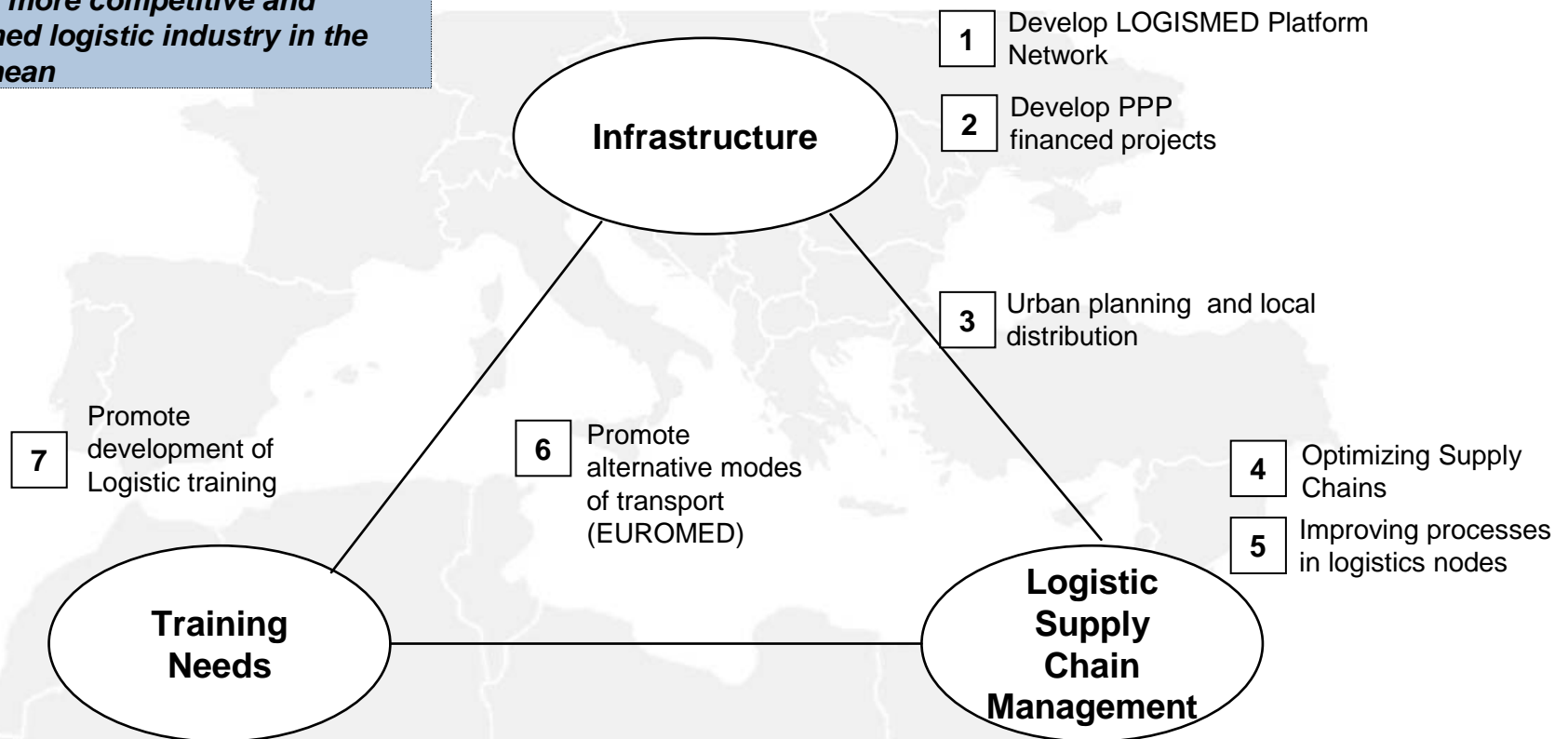
Source: IDOM

1. Background



What are the main areas of improvement within the Logistics and Transport industry in the Mediterranean?

Towards a more competitive and strengthened logistic industry in the Mediterranean



Source: IDOM

1. Background



- ❖ THE PROJECT “A Euro-Mediterranean network of logistics platforms”
 - ❖ Intended to sustain cooperation and trade between Europe and Meda partner countries and among Meda partner countries.
 - ❖ Intended to sustain the development of local operators in the field of logistics and transport and lead them up to an international size.
 - ❖ The identified sites should adopt international standards and be a benchmark for the existing and future platforms in each country.

1. Background



- ▣ “A Euro-Mediterranean network of logistics platforms”
 - ▣ Published in March 2009
 - ▣ Financed by the FEMIP Trust Fund
 - ▣ Developed by



- ▣ Provides a diagnosis on the logistics sector in the MPCs.
- ▣ Demonstrates the interest and feasibility of a network of Euro-Mediterranean logistics platforms:
“the **LOGISMED** network”

The report is available in:

www.eib.org/attachments/country/logismed_fr.pdf

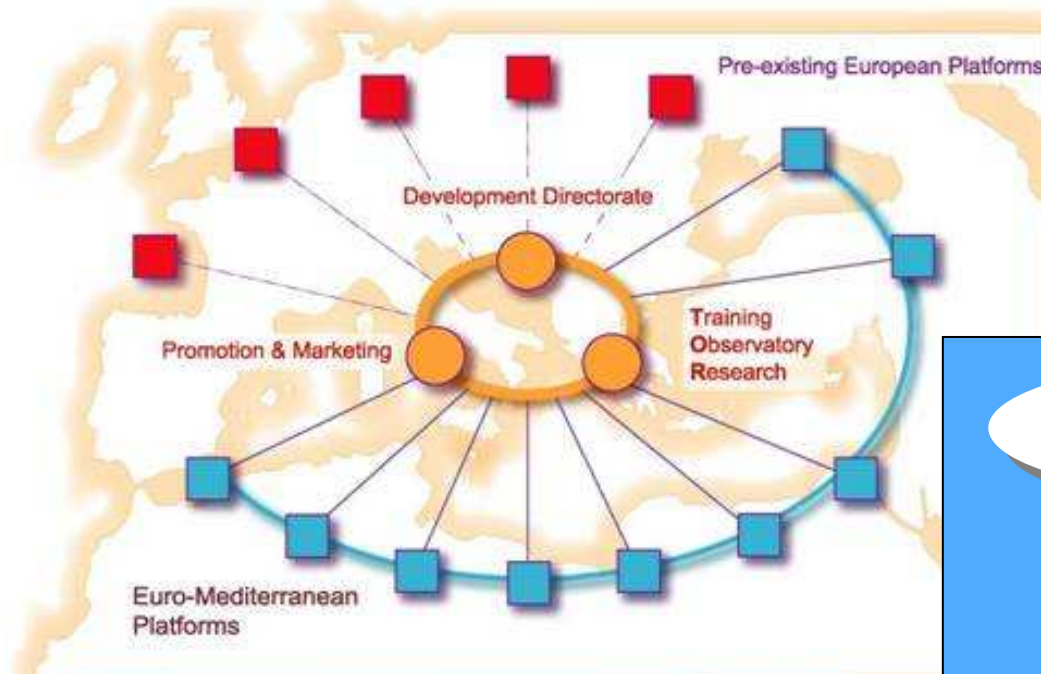
2. The LOGISMED network



- ❖ Based on four pillars:
 - ❖ A **certification** strategy providing:
 - ❖ a common model for the implementation of EMLP;
 - ❖ global marketing;
 - ❖ efficient relationships between the EMLP and the platforms of the EU.
 - ❖ **Private management** of the EMLPF: contractual and flexible PPP system.
 - ❖ **Shared training** activity.
 - ❖ **Common monitoring** (observatory, communication, research).

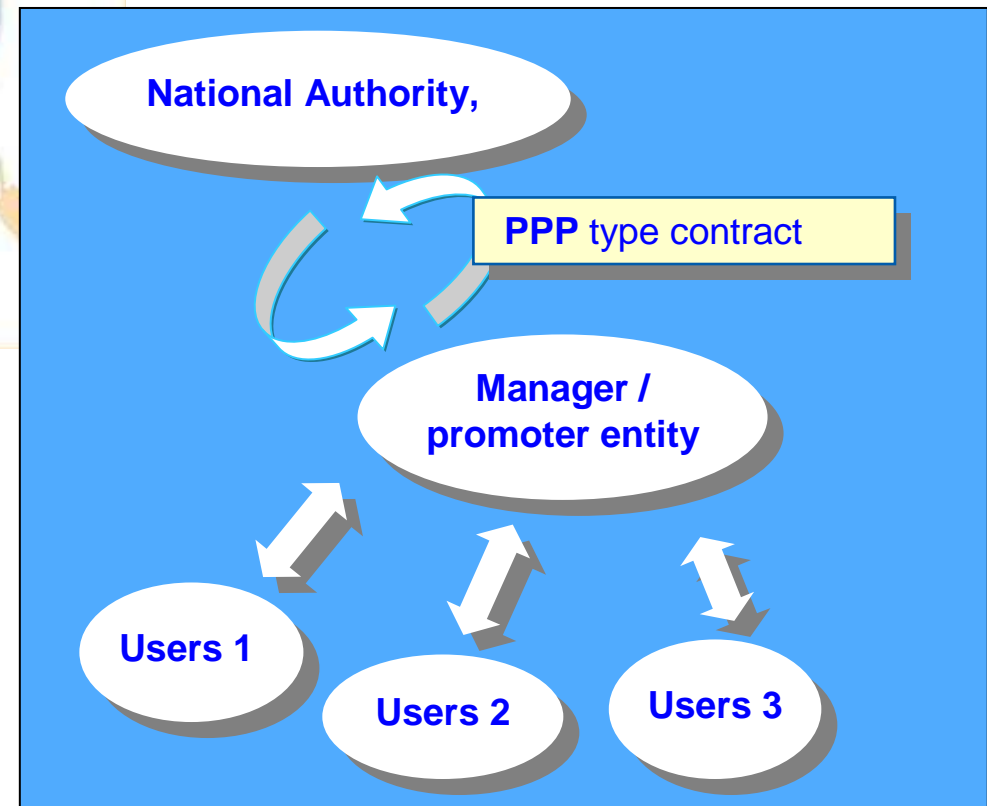


2. Structure of LOGISMED network



Coordination from a national perspective

General organization



2. Feasibility Studies (i)



- ❖ Objectives:
 - ❖ **Validation of the project locations** proposed by the relevant National Authorities. Assessment of alternative sites.
 - ❖ Evaluation of **potential traffic and users**: traffic forecasts for the logistic platform, including estimates by the types of goods.
 - ❖ **Definition of the facilities and services** to be provided by the logistic platform: warehousing; buildings for other services (bank, post office, training centre); maintenance and mechanical repairs facilities; internal roadways and footpaths; railway and intermodal services; green spaces; parking or open-air storage areas; wastewater and storm water treatment facilities; waste collection premises; etc.
 - ❖ Identification of the **institutional conditions** for implementing and funding the project.
 - ❖ Analysis of **financial impact**.

2. Feasibility Studies (ii)



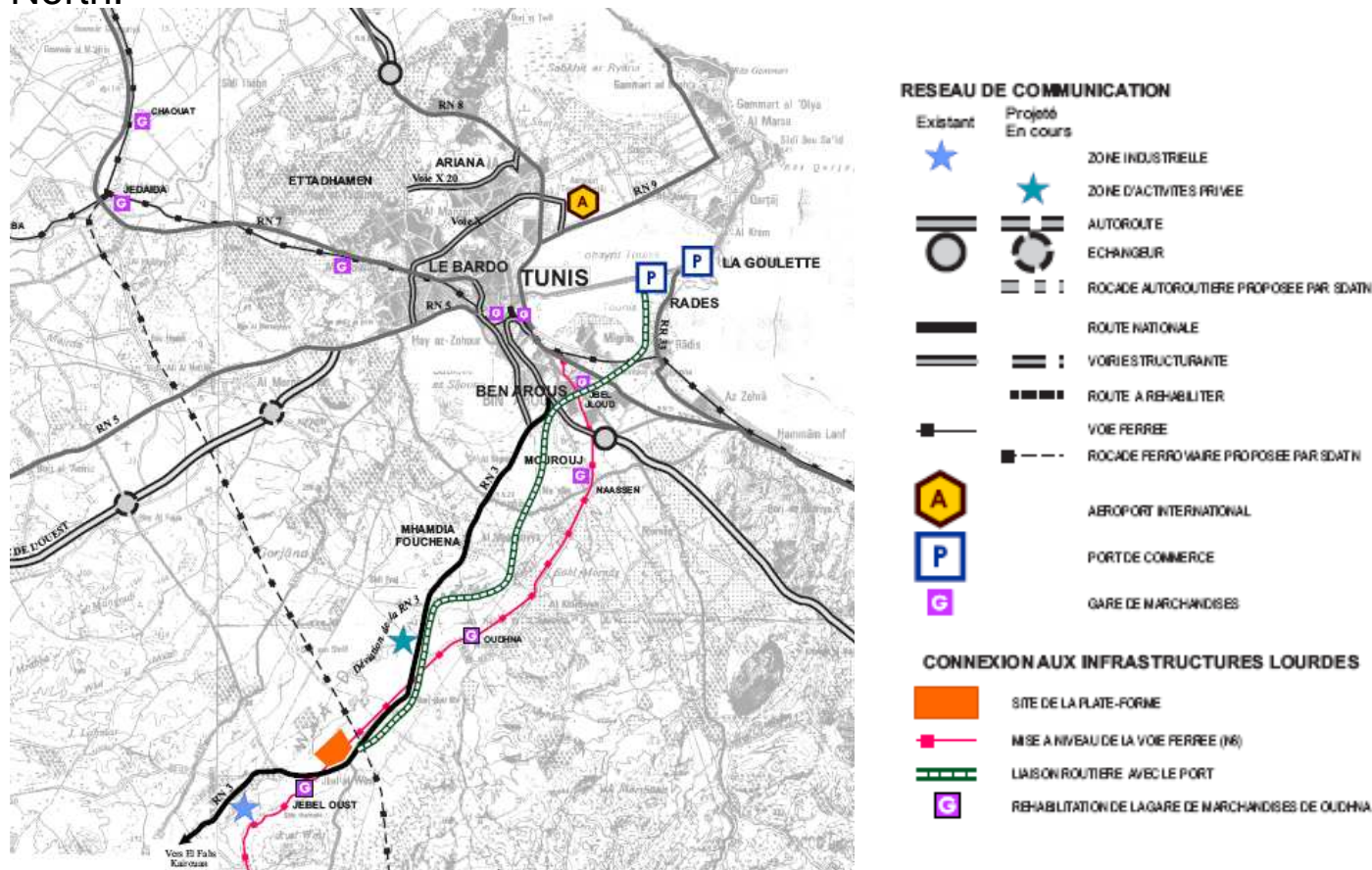
- ❖ Expected results:
 - ❖ The **Preliminary Design and a Master Plan** for the development of the logistic platform.
 - ❖ The **Baseline Environmental Impact Assessment**.
 - ❖ The **Economic and Financial Assessment** of the proposed solution.
 - ❖ The definition of the **Institutional Framework** for the implementation of the logistic platform.

2. Feasibility Studies (ii)

Tunis Platform in Jbel el Oust

Located north of Jbel Oust, 25 km of the Tunis city centre and 25 km west of port Goulette-Tunis.

Close to the RN3, the area of the site has 214 ha with a possibility of being extended to the North.



2. Feasibility Studies (ii)

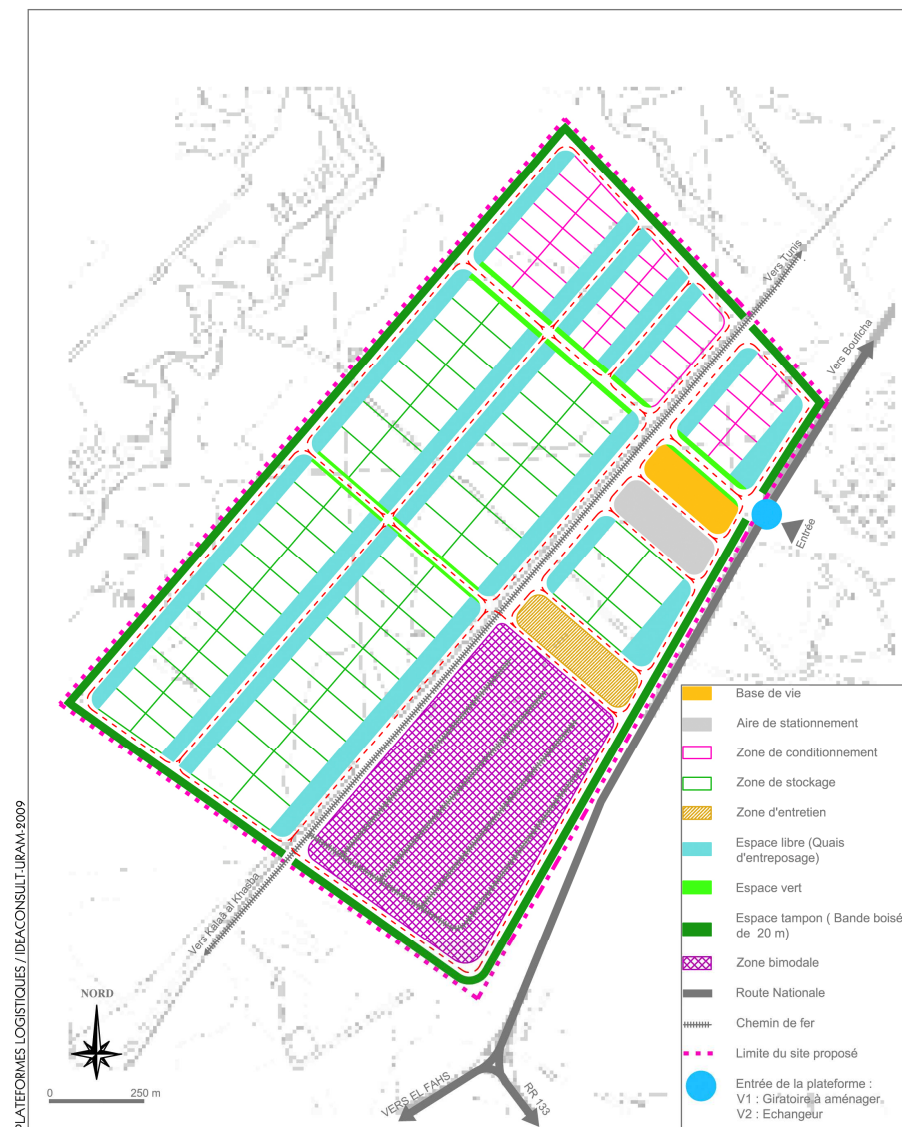
Tunis Platform in Jbel el Oust

Désignation	Surface (ha)
Base vie	2,33
Aire de stationnement	2,80
Zone de conditionnement	17,00
Zone de stockage	63,00
Zone d'entretien	2,80
Espace libre (quais d'entreposage)	31,84
Zone bimodale	34,88
Espace vert	15,00

168 ha

(Extra 50 ha for the creation of a dry port to extend the activities of the Port of Rades)

PROPOSITION D'AMENAGEMENT DE LA PLATE-FORME DE JBEL EL OUST





3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



- Initiative channelled through the CMI under the Transport and Logistic Cluster.
- The EIB acts as a lead organisation and CETMO and UNIMED are involved as technical partners.
- The objectives of LOGISMEDTA are focused on:
 - identifying training needs in the logistic sector and;
 - providing solutions to meet those needs, eventually creating
 - a training programme in the logistics field
 - regional pool of experts that can be tapped by the EMLPs.



3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



Main goals to be achieved:

- ❖ Develop a **network for logistics training** in the Mediterranean basin with similar curricula, with the aim of creating a regional pool of professionals to serve the needs not only of the EMLPF, but also of other logistical platforms and companies in the sector.
- ❖ Create **pools of teachers** and professionals with an interest in further training in transport and logistics.
- ❖ Provide **support** for the creation of **the LOGISMED network**.



3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



Initiatives:

- ❖ A study on the feasibility of creating such a LOGISMED training network, focusing on the creation of joint programs and mechanisms for integration into national training systems;
- ❖ Dissemination activities with experts with a view to preparing and discussing the objectives and approach of the feasibility study;
- ❖ Proposal for the establishment of a network of training professionals in the Mediterranean framework.



3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



Objectives of the study:

- ❖ Identify the training needs for the three target groups identified in the study (operative professions, supervisory professions and players outside the logistics field).
- ❖ Identify and evaluate existing training schemes.
- ❖ Propose solutions: creation of a training activities programme or the adaptation of existing training courses and their integration into a network.
- ❖ Propose an Action Plan (content, organisation, schedule, investments, etc.).
- ❖ Identify the participants in this programme.
- ❖ Estimate the financing requirements.
- ❖ Propose, where applicable, support measures for the implementation of this programme.



3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



Results achieved up to now:

- General framework defining tasks and skills per Job position based on the Novalog Project and the previous Logismed study.
- The optimal location for the training activities has a direct relation to the level of the job position.
- Benchmark of the reference models that can be used to set the 'to-be' situation for the MPCs. UK and USA the best-in-class models and Spain the achievable objective.
- Initial diagnosis of the state of the art in Morocco, Tunisia and Egypt.
- Definition and proposal of the main lines of action.



3. LOGISMED Training Activities

(The Program on Transport and Logistics of the CMI)



High-Level Seminar (23rd Nov 2010)

