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The Hashemite
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**REGIONAL TRANSPORT ACTION PLAN
FOR THE MEDITERRANEAN REGION**

RTAP 2007-2013

EVALUATION REPORT

This document aims at assessing the outcome of all the actions (1 to 34) proposed in the 2007-2013 RTAP in the different relevant sectors transport (maritime, road, railway and civil aviation) as well as at highlighting the main problematic issues related to this process.

The report reflects the responses of the ten Partner Countries¹ to the consultations conducted in 2012 and 2013.

It also provides suggestions aimed at better implementing the future RTAP (2014-2020).

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¹ 10 Mediterranean Countries participated in the RTAP (2007-2013): Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Palestine, Syria (EuroMed cooperation with Syria is currently suspended), Tunisia and Turkey.

I. STRATEGY AND COORDINATION OF TRANSPORT POLICIES (*ACTION I*)

Action 1

It is essential that transport planning and policy are better coordinated at different levels, more specifically between national master plans or transport strategies, the ENP action plans and the Euro-Mediterranean partnership. Actions proposed in the RTAP should therefore be tailored to the national needs and reflected in national transport strategies and/or, if relevant, the ENP action plans.

• *Outcome*

- *Coordination between national policies and the RTAP*

The measures of the RTAP were formulated by the Mediterranean partners themselves in accordance to national needs and objectives. Consequently the measures of the RTAP have been largely taken into account in the development of various policy strategies and national action plans in the field of transport. The regional vision of the RTAP was dictated by the guidelines of the first Euro-Mediterranean Ministerial Conference for transport in Marrakech (December 2005). Under the RTAP the ministries of transport have strengthened their coordination with other partner countries and national entities for measures with a high regional added value (for example Action 18, see below).

- *Coordination between sectoral policies covered by the RTAP*

The structure of dialogue and cooperation of EuroMed Transport, coming out of the Barcelona process and supplemented in 2008 by the Union for the Mediterranean (UfM), has been very active through the Euro-Mediterranean Transport Forum (Forum) and thematic working groups in framing and monitoring coordinated implementation of the RATP in the various transport sectors.. The following thematic working groups were set up:

- (i) Infrastructure and regulatory issues (inland transport)
- (ii) Maritime policy (*sub-groups 'motorways of the sea' and 'maritime safety and security'*)
- (iii) Aviation
- (iv) Satellite navigation “GNSS”

The EuroMed projects of technical assistance (TA) in support to the Mediterranean Partner Countries and structure of dialogue and cooperation of EuroMed transport:

- *EuroMed Transport I and II* (the main project on the transport sector reform process of the Mediterranean partners on the basis of studies, training seminars, workshops, and networking);
- *SAFEMED I, II and III* (safety, maritime security and prevention of pollution);
- *MEDAMOS I and II* (intermodal project on motorways of the sea in the Mediterranean);
- *EuroMed Aviation I and II* (safety, security and air traffic management);
- *RRU* (Projects road, rail, urban transport — inland transport);
- *Project on road safety*;
- *EuroMed GNSS I and II* (satellite navigation programmes EGNOS/Galileo).

- *Coordination between Regional (EuroMed) and bilateral (ENP Action Plan) Cooperation*

During the period 2007-2013 the structure of cooperation and dialogue, supported by the regional EuroMed transport project of the European Neighbourhood and Partnership Instrument (ENPI), has fostered co-ordination between the regional and national transport policy.

In the framework of the ENP and its component transport policy, the programming exercise, the strategic framework and implementation (Action Plan) and the dialogue mechanisms such as the bilateral transport sub-committees and working groups EuroMed have enabled both

Mediterranean partner countries and the EU to better ensure the consistency of policies and action plans and better coordinate existing instruments (e.g. TA projects, TAIEX, twinning).

- Coordination with other involved partners

The recruitment of other institutional partners in the implementation of the actions of the RTAP should be mentioned as a success of the coordination approach at operational level and on the common regional strategy.

Indeed, in the context of the cooperation structure and EuroMed dialogue, involvement and regular participation of the UfM Secretariat, GTMO 5 + 5/CETMO, Arab Maghreb Union (AMU) and the ESCWA (United Nations Economic and Social Commission for Western Asia) allowed for exchanges of expertise and experience between these various frameworks.

- Achievements by the Mediterranean Partner Countries

- Algeria has made significant progress at national level in all modes of transport. Several sectoral blueprints in transport (rail, port, airport and logistic platforms) fall within the scope of the national plan of spatial planning (SNAT). Thus, its national strategy is to develop and modernise the transport system in terms of infrastructure and institutional reforms. The planning of transport networks is in line with the measures of the RATP. On the regional level the developed transport infrastructure networks are consistent with the actions of the RTAP. Algeria has carried out this coordination exercise in the framework of the Algeria/EU action plan. The EU's support programmes for the transport sector are consistent with its sectoral development plan.
- Egypt developed an institutional framework, an organisational structure and human resources planning, including a redefined role for the Transport Planning Authority. A national transport strategy was laid down in conformity with the RTAP 2007-2013. The Ministry of Transport prepared the integrated national plans of development projects for all transport sectors. These plans focused on the regional value added and trade facilitation. They included the development of new railway lines, dry ports, inland transport, ports and logistic activities. For example, the national and regional strategy included the establishment of a new maritime connection with Turkey (shipping line between Egyptian and Turkish ports and logistic services). The possibility of establishing the same service between Egypt and Lebanon is currently under consideration. Within the framework of MEDAMOS project, it received TA in the field of maritime transport and logistics aiming at establishing reliable, efficient, integrated, and environmentally sustainable maritime and intermodal door-to-door connections within the broader logistics and supply chain systems.²
- At national level, Israel has made substantial progress in all areas of transport. At a regional perspective, the planning of networks of land transport should be based on greater cooperation and coordination with neighbouring countries. The dialogue structure EuroMed, TA projects and the role of facilitator of the European Commission in the bilateral meetings between Palestine and Israel contribute to fostering regional technical operational cooperation in the field of transport.
- Jordan's National Transport Strategy 2012-2014 is also consistent with the ENP action plan and the RTAP as regards structural reforms, legislation, customs procedures, development of ports and airports, best implementation of the priority projects, studies concerning logistical platforms, the programme of trade and transport facilitation, the separation of

² Integrated Port Community System (PCS) with EU Ports Study on port management system, and development of PCS linked with EU counterpart in accordance with Directive 2010/65/EU; e-Phytosanitary Certification System Alignment of e-phytosanitary certificates between Egypt and Slovenia; training programs for Egyptian phytosanitary inspectors; Intermodal Transport Corridor Study Pre-feasibility study for linkage with the planned Intermodal Transport Corridor.

management and regulatory activities through the establishment of independent regulatory bodies in various transport sectors (LTRC, CARC and JMA).³

- In conformity with the RTAP, Lebanon's Ministry of Public Works and Transport has promoted the multiple social, economic and environmental objectives, including safety and security; transport efficiency and cost effectiveness; environmental protection; private sector participation and healthy market competition; balanced geographical development; integration with regional and international transport infrastructure; and economic development. The implementation plans and programs were formulated accordingly, and the investment program of the transport sector was customised to reflect the implementation of the priority projects that would meet these objectives.
- Morocco has several master-plans in the different modes of transport (motorways, highways, roads, railways, ports, airports, logistics). The Ministry for Infrastructure and Transport aims at creating a modern basic transport infrastructure, facilitating local, regional and international trade and ensuring the fluid, comfortable and safe movement of goods and persons in full synergy with the trans-European transport network (TEN-T) and the trans-Mediterranean transport network (RTM-T) and in line with the measures in the RTAP and the ENP Action Plan. The national strategy for the transport sector during the period 2008 - 2012 has given priority to structural reforms of the various transport modes (road/goods, rail, civil aviation, maritime and port) aiming mostly for a progressive liberalisation focused on transport services. Regarding infrastructure, Morocco has already carried out significant infrastructure projects aimed at regional integration.
- The Palestine national strategy for the transport sector 2010-2012, prepared by the Ministry of Transport, takes into account the transport networks and activities of the RTAP in order to integrate Palestine's transport system in the region and between the region and the EU.
- Tunisian transport policies are coordinated between the various levels. The proposed actions under the RTAP are adapted to national needs.

- ***Suggestions aimed at better implementing the future RTAP 2014-2020***

- ⇒ The Ministerial Conference on transport in Marrakech (2005) launched the current strategy for Euro-Mediterranean cooperation in the field of transport. In this context and integrating existing initiatives (national, sub-regional, regional and international), the Ministerial Conference on transport in 2013 should establish the priorities for Euro-Mediterranean cooperation up to 2020.
- ⇒ Continue to consider and address issues of common concern within a regional approach. These will be the main guidelines for the future RTAP. On this basis, mobilise in a more focused and coordinated way the involved partners as well as the technical and financial instruments available.
- ⇒ One of the main objectives of the partnership is to promote tangible transport investments and close cooperation between the Mediterranean Partner Countries on transport policy, strategy and programmes. It also requires increasing harmonisation between the Mediterranean Partners on customs procedures and practices to facilitate transit of people, goods and vehicles. The development of a regional “One Stop Shop” approach should be an essential and concrete action to ensure rapid transit between the concerned Mediterranean Partners.
- ⇒ As first action of the future RTAP, confirm the basic principle of conformity and complementarity between national and regional strategies.

³ LTRC (Land Transport Regulatory Commission); CARC (Civil Aviation Regulatory Commission); JMA (Jordan Maritime Authority).

II. MARITIME TRANSPORT AND PORTS (ACTIONS 2 À 9)

2.1 Improving the efficiency of ports

Action 2

Mediterranean Countries are encouraged to work towards the assignment of the tasks of port and terminal management, on the one hand, and regulation, on the other hand, to different autonomous agencies. Port and terminal management should be decentralized, for instance, through private sector concessions. The concept of port community could be installed within each port. The European Commission is called upon to support the transfer of know-how, inter alia, through twinning activities and the dissemination of best practices.

• **Outcome**

Whilst Mediterranean countries have generally progressed in the separation of ports' regulatory and operational functions, in some cases the actual status of the port authorities needs to be clarified in more detail.

- Actions already undertaken in Algeria aimed at improving regulation and management of ports. The port development policy should improve the efficiency of port operations with a view to boost Algeria's foreign trade through efficient logistics (Algeria recently joined the LOGISMED project). The ports single window system is currently being implemented.
- Egypt is carrying out reforms of maritime industry and ports legislation. Maritime transport activities regulations have been amended and more improvements are underway. In particular, it is developing a Port Community System (PCS) for the Damietta Port focusing on the intermodal exchange of cargo operations between Damietta's Sea and River ports. The project is developing general specifications of the initial version of the Electronic Data Interchange (EDI) and a roadmap of a Barge Traffic Management System (BTMS) implementation. The scope of the BTMS in terms of cargo will be mainly containers.
- In Israel autonomous agencies operate in the respective field of regulation and terminal management. A government decision privatizing port companies is now being implemented.
- Jordan is developing and implementing a master plan aimed at improving port and terminal management, regulation, and enabling business development. Port and terminal management has been decentralized via private sector concessions. The concept of port community is introduced. Port development policies will continue increasing capacity and efficiency of handling and introduce Key Performance Indicators (KPIs) in port management and operation. National measures were taken to reduce dwell times in container terminals with the support of the MEDAMOS project. Each port management authority should use these measures as bases for annual business plans.⁴ The separation of management and regulatory activities through the establishment of independent regulatory bodies as JMA/ACT has been achieved.
- Lebanon has greatly invested in order to upgrade infrastructure, modernise equipment and optimise operations of the various commercial Lebanese ports, namely on: *i*) extension of the container terminal at Beirut port; *ii*) procurement of additional new gantry cranes; *iii*) construction of a new container terminal at Tripoli port; and *iv*) construction of a new port in Saida superseding the old port. The operation of container terminals both at Beirut and Tripoli ports is awarded to the private sector through concession agreements. Technical

⁴ Jordan Ports, Transport and Logistics Development plans include the following actions: i) International Trends in Multi-Model/ Shipping port operations compliance; ii) boost capacity and efficiency in ports operation; iii) enhance ports and airport regional competitiveness; iv) safety, security and environment including ECO port system in accordance to EU Directives; v) long-term and sustainable investment; vi) state-of-the-art equipment and new technology; vii) protect stakeholders and partners investments.

assistance through the MEDAMOS II project allowed launching the development of a Port Community System (PCS), which will form the communication hub for all stakeholders dealing with reception and clearance of goods. It will collaborate with the European Port Community System Association and implement its project methodology.

- In Morocco a reform of ports has been implemented with a view to clarify roles of various port operators and fully separate between regulatory function and business and operational tasks. A single maintenance function and actions to ensure competition within the same port and between ports were also introduced in Morocco. The regulatory body ('*Agence Nationale des Ports*') set up in 2006 oversight the system. Competitive conditions were established in Casablanca, where the maintenance is ensured by a private operator. The reform resulted in an immediate reduction of costs of the port (-30% average), enhanced quality services to vessels and goods, improved security through better coordination within the ports and a reduction of transit time for containers. The introduction of the private sector in ports through concessions has also allowed for significantly improving the productivity and quality of services. Within its port policy, Morocco progressed on efficiency of ports, for instance on the Tangiers-Med port complex, which could be considered an example for the region. The strategic location of this port, its current and future capacities, its use of public-private partnership and its management are in line with the RTAP in this field.

For the longer term, Morocco has recently defined a port strategy for 2030. It consists of the definition of 6 'Pole ports' along the 3 500 km of coastline. The core in this strategy comprises the construction of five new major ports (including that of the Nador West Med port complex on the Mediterranean), capacity increases in current ports (including Casablanca and Agadir) and inserting ports in urban planning and qualification (Casablanca, Tangiers).

- In Palestine the seaport authority is a part of the Ministry of Transport, which could be seen as a difficulty for the separation of regulatory and operational functions in practice. This situation raises the need for technical assistance aimed at capacity building.
- In Tunisia, the port authority manages trading seaports pursuant to the "*code des ports maritimes*" (Law n.48-2009). The Code aims to reinforce the role and the tasks of the port authorities, notably port police, protection and conservation of the public domain of these ports, construction and operation of port projects under the concessions or PPPs, as well as creating the structures for monitoring and coordination with all actors in ports (National Council of Ports, the port community, Committee for safety and security, of each port). Private operators manage facilities and port activities by means of concessions.
- In Turkey seaport authority is a part of the Ministry of Transport, Maritime Affairs and Communication with regulatory functions. The management of the business and operational tasks of the port activities are carried out by private operators through concessions.

- ***Main outstanding issues***

- The involvement of the private sector in the management of terminal or full-port activities results in more autonomy and decentralization. Some port authorities, however, are part of partnerships. In such structures, it appears to be more difficult separating in practice regulatory and operational tasks.
- In some cases, port authorities' weak capacity to carry out effectively port management concessions may result in poor performance from the concessionaires.
- It should be noted, however, that port management reforms are designed on a medium term perspective. A full assessment at this stage is not always feasible. Implementation can

encounter significant resistance by stakeholders (e.g. trade unions). Some governments progress slowly in the implementation of the projects included in the reform plan.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Reinforce capacity building and know-how Continuous technical assistance should cover: efficient regulatory framework (modernization and transformation); increased know how on private sector participation, PPP and concession structures; improved efficiency of port operations (customs, control, etc.); and increased consideration of environmental impact.
- ⇒ Ensure increased private sector participation and a more transparent governance structure with a clear distinction between governance (role of the public sector) and operations (role of the private sector). A more country-specific approach and increased assistance via twinning and other programs could increase the knowledge and assist in establishing the appropriate regulatory framework.
- ⇒ Define criteria to improve port management concessions performance (e.g. proper master planning and contract management, financial modelling, and KPIs for operation).

Action 3

Continue work on the simplification of customs procedures in line with the recommendations of the Euro-Mediterranean Trade Ministerial Conference (Palermo recommendations), taking into account the commitments made in the context of the WCO SAFE Framework of Standards to Secure and Facilitate Global Trade and, whenever applicable, those in the framework of the ENP Action Plans. Technical support in this regard will be provided by the EuroMed MoS project motorways of the sea.

- ***Outcome***

RTAP-actions 3 to 5 address international maritime freight, one of the priorities of the EuroMed cooperation in the area of trade. The three actions have received support from the MEDAMOS I project (2007-2010), and, since November 2010, MEDAMOS II.

Concerning Action 3 (simplification of customs procedures), it appears that most countries are implementing the 2003 Palermo recommendations for trade facilitation, notably through:

Efforts made by some Mediterranean countries to facilitate customs procedures.

- For example, Algeria, Morocco and Tunisia have established specialised services within the customs administration focused on facilitation and risk analysis.⁵ In particular, progress in the use of the Single Administrative Document (SAD), and electronic handling, is mentioned by Morocco and Tunisia. In the latter country, operators carry out the '*Liasse Transport*' project under the supervision of the Ministry of Transport, enabling stakeholders involved in the electronic processing of the port formalities transport through the 'electronic one-stop-shop for external trade and transport' to reduce the time the goods stay in port. The standardisation process of customs procedures does not require necessarily the adoption of SAD. Some countries (Israel, Turkey) report that other can be envisaged to this purpose.
- Egypt is reactivating its "*National Transport and Trade Facilitation Committee*" (NTTFC) based on the recommendation of the ESCWA. The NTTFC includes high-level representatives from the government and the private sectors (Ministries of Finance Customs Authority; Trade and Industry; Interior; Civil Aviation; Communication and Information Technology; and Agriculture as well as Chambers of Commerce, Insurance Companies,

⁵ Algeria: "*Sous-direction chargée des facilitations*"; Morocco: "*Direction de la facilitation et de l'informatique*"; Tunisia: "*Direction de l'analyse du risque*".

Industry and Business associations, and Union of Shipping Agents). Egypt is implementing the NTTFC mandate (Ministerial decree of 2004) with a view mainly to diagnose problems, identify obstacles and bottlenecks facing the regional movement of goods (land, sea and air).

- Lebanon has established the "*National Committee for Transport and Trade Facilitation*", which includes all stakeholders both from the private and public sectors. Its main objectives are to establish an effective climate for dialogue, cooperation and coordination between the various stakeholders as well as develop simplified administrative and operational procedures of trade activities. The Port Community System benefited from technical assistance of MEDAMOS II and is now considered a priority activity in the plans for trade facilitation.

As regards cooperation between public authorities and operators, each country has initiated activities aimed at finding practical solutions.

- The Jordanian Customs is continuously making efforts to simplify customs procedures in line with the recommendations of the Euro-Mediterranean Trade Ministerial Conference (dwell times in Jordan's Aqaba container terminals was reduced from 10.5 days to 8.45 days in 2010, while a new target is to reduce further time by introducing X-ray scanners in operation at Aqaba Container Terminal by 3rd quarter of 2013).
- Commitment by Palestine to decentralize ports through private concessions for the management of container terminals or for operations is the difficult task pursued by Palestine. The customs authority is currently engaged in reforms towards simplification and greater efficiency in container inspections.

- ***Main outstanding issues***

To be effective, efforts aimed at facilitating reforms should be coordinated at governmental level, as they affect different Ministries/administrative services (transport, trade, customs). Moreover, insufficient telecom infrastructure could prevent the use of electronic systems for exchanging data.

Customs procedures should be simplified, notably as regards the use of customs transit systems and the application of selective control. Unequal and inefficient exchange of safety and security information among customs in the region makes control procedures more and more complicated. Lack of resources for increased application of modern technologies causes inconsistent control of all cargoes.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Reinforce internal coordination at governmental level in the Partner Countries in order to ensure a consistent implementation of all the actions of the future RTAP 2014-2020.
- ⇒ Enhance Euro-Mediterranean cooperation by requiring support to all relevant actors in all sectors (transports, trade, customs). The exchange of information among administrations should be improved along the experience of the "Single Administrative Document".
- ⇒ Disseminate TA projects and address connections with southern EU member States addressed. Using "Authorised economic operator" in the region could provide a useful instrument to improve customs transit periods.
- ⇒ Maintain action 3, which could receive TA through the upgrading of customs services as targets of the pilot projects in each Partner Country. Dedicated workshops and training programs should be organized to disseminate best practices and increase knowledge on efficient customs services, applications and techniques.

Action 4

Elaborate national measures for the reduction of dwell times in container terminals with the support of the EuroMed Motorways of the Sea (MoS) project. These measures should be used by each port management authority as a basis for their annual business plans.

• **Outcome**

Some Partner Countries reported the preparation of action plans or the achievement of positive results, in particular in the context of the reduction of containers' dwell times at port terminals:

- Israel introduced a tariff system reform which achieved a reduction of dwell time of containers.
- Each port management authority in Jordan should refer to the national measures for the reduction of dwell times in container terminals with the support of the MEDAMOS project as the basis for their annual business plans. Average dwelling time is cited as a key indicator of port performance in the port management manual produced by the MEDAMOS project.
- Lebanon took concrete actions, through the "*National Committee for Transport and Trade Facilitation*", in order to simplify customs formalities and enhance work procedures of the Beirut Port Authority with a view to reduce dwell time of containers. Yet, more actions are to be taken before. The development of the PCS and the construction of the planned dry port would also provide effective tools to achieve the objective of simplifying and expediting the clearance of goods and reducing the dwell time.
- Dwell times in container terminals have been improved since the implementation of the port reform in Morocco as well as the management of the Tangiers Med port complex and its connection with railway, motorway and road networks. Further improvements of waiting times of containers are expected through the programming of several dry ports (Dry port of 200 hectares a in Casablanca at 20 km from the current port with a high volume road and rail connection) and connecting infrastructure.
- In Tunisia: MoS actions aim at setting out a 'terminal operating system' (TOS) in Radès, using an electronic-gate and electronic data exchanges on international transport of goods via the TTN platform, linked to Marseille and Genoa.
- In Palestine, the lengthy dwell times are closely linked with customs, control procedures and other administrative barriers.

• **Main outstanding issues**

Modernised human resources is a necessary precondition to concrete improvements in this policy area. Enhanced coordination among stakeholders is required to ensure greater efficiency in the logistic chain.

• **Suggestions aimed at better implementing the future 2014-2020 RTAP**

- ⇒ Ensure private and public partners' involvement in the implementation of the actions of the future RTAP 2014-2020.
- ⇒ Reinforce the actions aimed at raising quality of human resources.
- ⇒ Focus on other possible reasons causing long dwell times of cargoes in ports or long waiting times of vessels before being (un)loaded. For instance, it would be useful to conduct a study at the regional level and analyses sources of non-efficiency and cases of bottlenecks.

Action 5

Introduce in the short-term the recommendations of the IMO-FAL Convention for standardizing basic reporting formalities of ships when arriving and/or departing from ports so that documentation can be accepted equivalently in all regional ports. Technical support in this respect shall be provided by the EuroMed MoS project.

• **Outcome**

This action refers to the implementation of the recommendations made by the 2005 amendments to the UN 1965 Convention on Facilitation of International Maritime Traffic (IMO-FAL) that are intended to modernise the convention in order to enhance the facilitation of international maritime traffic.

All Mediterranean countries, with the exception of Morocco and Turkey ratified the IMO-FAL Convention.⁶

- Due to security reasons, a partial implementation is envisaged at the Israeli ports of Haifa, Ashdod and Eilat. A paperless online system is in force in the maritime community.
- Turkey adopted a regulation (2010) on the acceptance of IMO-FAL forms. The ratification process of this Convention is underway in the Parliament's general assembly.
- Jordan started to implement partially the recommendations of this Convention for standardizing basic reporting formalities of ships when arriving and/or departing from ports so that documentation can be accepted equivalently in all regional ports. Technical support in this respect shall be provided by the MEDAMOS project.
- One of the main topics currently studied and under preparation by the Lebanese "*National Committee for Transport and Trade Facilitation*" is the harmonisation and standardization of document based on the IMO-FAL Convention.
- In Tunisia, documents required in conformity with international conventions are successfully transmitted through the TTN platform.

• **Main outstanding issues**

The key issue in terms of implementation of the IMO-FAL Convention is technology. As is the case of cargo documentation rules, considering that Mediterranean ports already collect the information required by the IMO-FAL Convention, but not in a standardised electronic format. Standardisation of electronic forms raises some concerns. Turkey has initiated studies on the electronic custom implementations at its ports.

• **Suggestions aimed at better implementing the future 2014-2020 RTAP**

- ⇒ Provide technical support to the Mediterranean Partner Countries that have not ratified the IMO-FAL Convention, including by supporting the development of human resources.
- ⇒ Encourage the use of IT systems and standardised electronic formats should be encouraged to ensure the establishment of consistent systems across countries.
- ⇒ Enhance efficiency in administrative procedures need to be taken into consideration. These include a single administrative counter, VTMIS, advanced warning systems and integrated port information communication and management.

⁶ In Morocco IMO-FAL convention is reportedly applied in the port of Tangier Med.

2.2 Reform in the shipping sector

Action 6

Mediterranean Countries are encouraged to assess the performance of competition related reforms in their national shipping sectors and to produce recommendations for the removal of factors distorting competition. The working group on 'maritime transport' of the Euro-Mediterranean Transport Forum is called to monitor this activity in the short-term. The EC should provide external expertise as required.

• *Outcome*

Liberalization of international maritime transport services implies the restructuring of the shipping industry in a way that allows for parallel investment in the upgrading of the vessel fleets. Key actions are: removal of legislative constraints and administrative procedures encumbering the engagement of the private sector in the shipping industry as well as the parallel development of incentives in line with EU schemes (e.g. single tonnage tax). It is equally important to address anticompetitive behaviour (carriers' abuse of market power by setting excessive fares).

Many Mediterranean countries have a quite limited national shipping sector. Their situation varies among countries with the larger national fleets:

- In Algeria, various activities are currently implemented in the field of maritime transport efficiency, in particular with a view to strengthen the national flag.
- In 2005 Israel privatised its national company in this sector. At this stage, further actions to increase competition in the shipping sector are not considered as necessary.
- Jordan established several initiatives in this field, notably the Aqaba Port Community System and EDI partners' integration, a Single Window System, a link Genoa Port-Aqaba Container Terminal, relocation of Customs Inspection Yard, National Railway- container station at Aqaba Port/Container Terminal beyond 2014.
- Lebanon's shipping fleet is owned and operated exclusively by the private sector. The public administration's role is to set legislations and regulations applying to shipping industry in compliance with international conventions. In this respect, a "flag state implementation" team of qualified officers will assist ship-owners in the upkeep of their vessels. Incentives were given to ship-owners to encourage them to develop their fleet.
- Morocco benefited from institutional twinning project aimed at reinforcing the regulatory framework, enhancing services quality and involving the private sector in line with the EU acquis. In particular, liberalisation of goods transport was achieved in 2007 and a new regulation applied to passengers in 2007. Morocco also privatised its national company in 2007. Currently, a study is in progress to develop an ambitious strategy for the development of the maritime sector and the promotion of Moroccan national flag.
- Tunisian maritime transport has been opened up to the private sector since 1992. International maritime transport to and from Tunisia has been fully liberalised since 1998. The market of regular lines is governed by the law of supply and demand while observing competition rules and transparency.
- In Turkey competition reforms will be carried out once the privatisation process of ports is completed. Most of Turkish ports are privatized and private port operators are dominant in the market. Turkey has also a project "Renewal of Turkish Coaster Fleet" aimed to renew its fleet.

- ***Main outstanding issues***

Financing and regulatory reforms remains the most important issues for the development of this sector.

Liberalisation of goods transport introduced competition pressure from foreign operators to national fleet, e.g. in Morocco. This aspect could be linked also to lower costs for non-national vessels (fuel and insurances) as well as to the difficult access to financing.

In Palestine the key issue is transparency of rules applying to port concessions awards.

Despite efforts for the involvement of private operators in the ports activities, the Public-Private Partnership (PPP) in ports/terminals achieved remains at much lower level compared to the European countries.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

⇒ Mobilise adequate TA to define guidelines and structures aimed at facilitating the participation of the private sector in port and maritime operations. Support the transfer of know-how could be provided, inter alia, through twinning activities and the dissemination of best practices.

⇒ Pursue with determination the objectives of this action as a priority within the future RTAP. Progress might be slow and progress difficult to achieve, because the maritime and port sectors are considered in many countries as “sensitive” areas, considered of strategic importance to remain under control of the government.

⇒ Indeed, each individual country will in any case a specific reform with a view to develop the national ports system and the related national industry. All reforms will reflect the situation of national industry faced to international competition.

⇒ Follow up, within the future RTAP, the discussions on services liberalisation in maritime transport, currently being conducted within the bilateral cooperation with the EU. For instance, a synthesis report could be regularly submitted for discussion at the « Maritime » Working Group.

Action 7

With regard to international conventions and given the pressing need to improve maritime safety and security, priority should be given to the full implementation of safety and security requirements deriving from IMO/ILO regulations. The ISPS security regulation should be implemented efficiently both at the Flag State and Ports levels following the recommendations and with the technical support of the SAFEMED project. Ideally this alignment should already become effective in 2008. The medium-term goal by 2013 is to effect the removal of Mediterranean Countries from the black list and to reach the inspections’ target of the Paris MoU.

- ***Outcome***

Since the start of the SAFEMED project (2006), there have been 16 ratifications of IMO conventions by Mediterranean Partner Countries and signed by Jordan. Only two countries remain in the black list of the Paris MoU. Most recently, countries that have been removed from the list include Algeria (now in the grey list), Morocco (which has also ratified most relevant IMO-ILO conventions and was a beneficiary of all activities conducted under the SAFEMED project) and Turkey (now in the white list). Israel and Turkey have officially volunteered for the VIMSAS Audit Scheme. The ISPS code implemented is now by Israel, Jordan, Morocco and Turkey. Tunisia gave its availability to volunteer for the audit scheme related to the implementation of the obligatory IMO tools (VIMSAS).

- Algeria ratified most of the IMO conventions and benefited from the SAFEMED activities.
- All Egyptian ports are currently complying to the requirements of the ISPS Code, marine environment protection conventions as well as safety requirements provided for in IMO Conventions, guidelines and protocols.
- Jordan signed IMO conventions and effectively implemented them through national legislation as well as the relevant part of the national strategic plans for the transport sector. Moreover, Jordan aims at cooperating with countries in the region with regard safety and security by participating effectively in the port state control activities and exchanging ships inspections and detention information through the information centres (for example, the cooperation with Red Sea countries in Safety, Security and environmental protection through PESEGA and the signature of a Memorandum of Understanding). The EU technical support and assistance was an essential element for this regional cooperation.
- Lebanon established a "*National Committee for Transport and Trade Facilitation*" comprising high-level representatives of the concerned authorities to ensure the effective implementation of maritime security measures in accordance with the ISPS Code. All ships flying the Lebanese flag as well as all ports and port facilities have complied with the requirements of the ISPS Code. Port security officers and ship security officers had undergone training courses to effectively and efficiently assume their duties.
- Palestine made considerable efforts through the SafeMed Project in order to comply with international safety and security standards in maritime transport. It has also achieved relevant results in terms of adherence to IMO/ILO conventions, but the level of ratification of more recent conventions and protocols leaves room for improvement.
- Tunisia benefited from the SAFEMED project supported by the EU and aimed at improving security and safety of maritime transport. This activity also included protection of the marine environment of ports, capacity building and funding of studies. This includes the analysis of the regulatory framework, assessing the implementation of the international conventions related to the safety of ships and shipping, the security of ships and of port facilities, protection of the marine environment and maritime training.
- Turkey is a signatory State and contractor asset for all major IMO conventions and the memoranda of understanding for the Black Sea and the Mediterranean. Turkey implements the Regulation on the safety of human life, property and for the protection of the marine environment, and should also follow technical developments. Turkey's Recognized Security Organizations (RSOs) were authorized for preparation, approval and certification of the Ship Security Plan and Ship Security Assessment on behalf of Administration. In terms of Port Facilities, RSO's are authorized to prepare Port Facility Security Plan and Security Assessment. Approval and certification is carried out by Administration.

As regards the Standards of Training, Certification and Watch keeping for Seafarers Convention (STCW), the Commission has already recognised Algeria, Egypt, Israel, Jordan Morocco, Tunisia and Turkey. It is advised to provide support to Lebanon in the process of recognition.

- ***Main outstanding issues***

National administrations should fully appreciate the importance of safety and security issues and strive to reach full and effective implementation of IMO conventions and instruments.

The ageing fleets in the Mediterranean Partner Countries entail significant safety and security potential risks. Moreover, difficulty is encountered by the private sector to access ship financing, to ensure adequate maintenance and crew qualifications.

The financing of projects, which are mentioned in the national strategic plans, is a key issue for many countries.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Pursue the support by the EU to improved cooperation for the implementation of this action of the RTAP, which should focus on bilateral TA and more advanced trainings (e.g. on training of inspectors under the « *Mediterranean MoU Port State Control* »).
- ⇒ Pay more attention to issues related to the piracy and armed robbery.
- ⇒ Maintain this action in a long-term perspective (until 2020) as a matter of priority.

Action 8

The European Maritime Safety Agency (EMSA) is called upon to examine ways for cooperation with the Mediterranean Countries and, on this basis, to define concrete areas of cooperation.

- ***Outcome***

The adoption of the revised EU regulation of EMSA in January 2013 extended the geographical scope of cooperation, response and monitoring tasks to different sets of third countries including the Mediterranean Partner Countries.⁷ On this basis, concrete areas of cooperation could be defined. In this context EMSA ensured again its technical role for the SAFEMED III regional project (2013-2015).

It should be noted that some countries are already in a cooperation process with the Agency:

- In the field of maritime training and education in Jordan, procedures were initiated to sign a MoU for mutual recognition of competency certificates (for masters, marine officers and marine engineers) by all EU Member States after final approval by EMSA to recognize JMA procedures.
- Lebanon is in the process for the recognition of certification of seafarers in accordance with the IMO-STCW Convention. EMSA, on behalf of the European Commission, will conduct an inspection mission for this purpose in due course.
- Morocco requested, in the context of on-going concrete projects, to define the rules of its cooperation with and participation to EMSA works as well as the launch of the connection between Morocco's database "HAZMAT" to EMSA's SafeSeaNet programme.
- Turkey is an active CleanSeaNet user. This project is implemented by EMSA.
- Tunisian's training and certification system (STCW) is recognised by EU Member States in light of an assessment conducted by EMSA. Tunisia intends to enhance the cooperation tools with EMSA through a memorandum of understanding.

- ***Main outstanding issues***

The most significant issue in this field is the need to address the lack of access to EMSA's services by non-EU countries.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Continue to provide support to this cooperation, either on a bilateral basis or multilaterally. Giving the Agency the lead of the SAFEMED III project will enhance this support.

⁷ Regulation EU 100/2013 amending Regulation (EC) No 1406/2002 establishing a European Maritime Safety Agency (OJ L 39, 9.2.2013, p. 30-40)

Action 9

Mediterranean Countries are invited to assess, and, when possible, implement, VTS or VTMIS systems in the major Mediterranean ports and coordinate technological solutions between neighbouring ports and coastal areas. The expertise assembled by EMSA and SAFEMED on this as well as on the use of ICT (including GNSS) for improving the efficiency of sea / land interfaces should be used appropriately.

• **Outcome**

VTS/VTMIS systems are already implemented in ports in Algeria (it is currently launching the VTMIS project), Israel, Jordan, and Turkey (new projects are currently being developed). These systems are likely to be acquired by Tunisia, which proposes carrying out a feasibility study on setting up a system to monitor and control VTS coastal shipping along the northern coasts (Canal of Sicily).

- Lebanon is reinstating its past VTS system, which covered the Lebanese territorial waters and through which all maritime activities were overviewed and managed. Through the technical assistance provided by the European Commission, tender documents were prepared for the procurement of a new VTS. Actions at this stage still focus on securing the budget required for Lebanon's procurement to reinstate the VTS.

- In Morocco, the following actions were implemented by the Public Authority (*Direction de la Marine Marchande*): operating VTS system in Tangier (Gibraltar), development of the HAZMAT database (follow-up of dangerous goods) and of the AIS (Automatic Identification System for vessels).

- Important projects have been implemented in the recent years in Turkey. VTS in the Straits of Istanbul and Çanakkale and the Sea of Marmara has been established in order to enhance maritime safety, minimize the risks of the possible threats and protect marine environment in line with national legislation and international regulations, and considering that it serves to 55000 vessels yearly. Turkey is also developing new projects to extend maritime traffic monitoring systems along her entire coastline. The VTS projects are underway at Izmit and Mersin-Iskenderun Ports and bays where the maritime traffic is dense.

• **Main outstanding issues**

A detailed study is needed and should be ideally carried out under the framework of the SAFEMED on the implementation of VTS or VTMIS system.

• **Suggestions aimed at better implementing the future 2014-2020 RTAP**

⇒ Define in more detailed terms the relations between the EU and Mediterranean countries to support actions in this field. Many Partner Countries consider necessary the support by the European Commission (e.g. a study on the development of VTS on the coast-line) to the implementation of Action 9.

⇒ Focus on the following aspects:

- ✓ Connection avec SafeSeaNet;
- ✓ Bilateral technical assistance for the deployment of VTS/VTMIS (Annual monitoring assessing the progress in this field);
- ✓ Discussion and review of progress on an annual basis (Working Group).

- ⇒ Maintain a single Working Group on maritime issues including the Motorways of the Sea (MoS), ports, maritime safety and security. It should ensure all operators' and stakeholders' views are fully considered.
- ⇒ Ensure coordination with initiatives conducted by GTMO and the Secretariat of the UfM in the field of maritime transport.

III. LAND TRANSPORT, ROAD AND RAIL (*ACTIONS 10 À 13*)

3.1 *Road Transport: harmonizing international road freight*

Action 10

A Mediterranean task force comprising officials from the national road administrations should be set up by the Euro-Mediterranean Transport Forum in the short-term to assess adherence to a number of key UN ECE agreements and identify measures to implement these agreements. The task force should also prepare recommendations for the gradual liberalization and harmonization of international road haulage.

• *Outcome*

Within the 'Infrastructure and Regulatory Issues Working Group', two meetings of the sub-group on "road and rail regulatory issues" took place in 2008.

During the meeting on 21 November 2008, all present Partner Countries presented the current status of their road & rail sector as well as an overview of recent reforms in these sectors. It became clear that partner governments are working on reforms in these sectors, but are still encouraged to make more efforts to implement the actions identified in the RTAP and in need of additional assistance.

Therefore, the EU has decided to finance for the period 2010-2014 two new relevant regional projects: one focused specifically on road safety⁸ and another focused on land transport (road, rail and urban transport).⁹

Accession to the UN ECE conventions is still not uniform throughout the region.¹⁰ The bilateral contacts indicated, however, a number of specific actions taken at the national level to implement relevant international agreements. For example:

- Algeria has ratified the TIR (International Transport of Merchandises) Convention.
- Jordan is contracting party to four out of 13 main UN road transport agreements. These are: the TIR, the Harmonization Convention, the CMR and the Temporary Importation of Private Vehicles. However, Jordan has integrated in its legislation and affectively implement a good part of the provisions stipulated in some other main UN road transport agreements, notably the ADR Convention (with some parts of it being applied in Jordan),¹¹ the Road Signs and Signals of 1968 (with almost identical provisions to those contained in the agreement), the AETR (with regard to driving and rest times of professional drivers and the analogue tachograph) and the 1958 and 1997 Vehicle Regulations (with a good number of their provisions being applied in Jordan).
- Lebanon is a contracting party of the International Transport of Merchandises-TIR Convention (1975); the Convention on the Contract for the International Carriage of Goods by Road- CMR Convention (1956); the Protocol to the Contract for the International

⁸ Global Road Safety Partnership (GRSP).

⁹ Recently launched the priorities of the new project, The RRU Euromed Transport ("transport sectors in the road, rail and urban transport") should focus on road transport, the liberalisation of the road transport market and the promotion of cross-border transport by converging conditions in transport operational and professional road sector within individual partner countries. This would imply the coordination of driving licences, roadworthiness tests, and the promotion of relevant UNECE conventions in this area.

¹⁰ E.g. Algeria and Jordan ratified nine conventions. Lebanon ratified six conventions and is signatory to one other. In recent years, Turkey has become a contracting party to most international UNECE transport agreements and conventions. See UN ECE's *Status of United Nations Transport Agreements and Conventions-30.01.2013*, available at <http://www.unece.org/trans/conventn/intro.html>

¹¹ European Agreement concerning the international carriage of Dangerous Goods by Road.

Carriage of Goods by Road Convention (2006); the Convention and the Protocol on Touring Facilities (1954); the Road Traffic Convention (1949); the Protocol on Road Signs and Signals (1949). Lebanon has also initiated the internal administrative procedures to ratify both the International Carriage of Dangerous Goods by Road- ADR (1957) and the ATP International Carriage of Perishable Foodstuffs-ATP (1970) Conventions.

- Morocco is a Contracting Party to the 8 main UN/ECE agreements which relate to road transport. These are agreements/conventions on: Road Traffic (1968); Signs and Signals (1968); International carriage of dangerous goods by road (ADR) whose provisions are applicable to both international and national transport; International carriage of perishable foodstuffs and on the special equipment to be used for such Carriage (ATP, 1970); CMR (1956); TIR (1959); Harmonisation of Frontier Controls of Goods (1982); Customs on the temporary importation of private road vehicles (1954). Although Morocco is not a Contracting Party to the UN/ECE vehicles Regulation, these regulations and instructions are implemented in its national regulations on certification and roadworthiness tests of vehicles.
- Tunisia has ratified a number of international conventions (including ADR, CMR, ATP, TIR, the Harmonisation of Frontier Controls of Goods). However Tunisia found difficulties in the implementation of some conventions (ADR, ATP and TIR), due to the lack of funding and qualifications. The activity of road haulage on behalf of another person is subject to a specification and to a prior declaration, the main operating conditions are professional capacity, technical capability and good repute. The carriage of goods on own account and for hire or reward with a GVWR not exceeding 12 tonnes is free.
- Following its accession to the ADR (International Carriage of Dangerous Goods by Road) Convention in 2010, Turkey implemented a new Directorate General within the Ministry of Transport, Maritime Affairs and Communications, which is devoted to regulate, monitor and inspect the transport of dangerous goods by road and all other modes (rail, air, sea and inland waterways). Turkey has concluded 58 bilateral agreements on international road transport and liberalised the transport sector with 24 countries and the international road transport operations with three EuroMed countries.

The varying degree of accessions by Mediterranean countries to UN ECE instruments seems to reflect the different role played by road freight transport for the interchange of each individual country with both the Union and other Mediterranean countries.

Action 10 also mandated the sub-group to come up with *recommendations for the gradual liberalization and harmonization of international road haulage*. The support by the land transport project (RRU) should facilitate the implementation of this action (*see specific suggestion below*).

This element is closely connected to the reforms proposed in Action 11 for the whole of the road sector (passenger and haulage). The reform processes started long time ago (early 1990s) in all countries is proceeding at very different speeds so far. This fact could also explain the different accession pace to the international agreements followed in the various countries.

- ***Main outstanding issues***

Progress is needed overall in the area of road safety. The number of road casualties per year in the Mediterranean countries is still extremely high, with the notable exceptions of Israel and Turkey with lower numbers of road deaths per year and per million inhabitants. Road safety improvements require efforts aimed at improving vehicles, infrastructure and road user behaviours.

Despite the progress made through the accession to international conventions and agreements, the Mediterranean Partner Countries still need to improve the implementation of key conventions and particularly UNECE Agreements.¹²

However, for Mediterranean Countries it is important to identify clear mutual benefits in the international cooperation. For example, it was noted that a single model of liberalisation could raise concerns in countries where international transport is addressed by bilateral agreements based on reciprocity. Other replies pointed to the fact that the EU could be more pro-active towards possible vertical agreements on road transport reflecting the Open Sky model.

A problematic side-effect that could be linked to this process in some countries is the extremely high number of heavy load trucks compared to the market needs and the fragmentation of the market in the number of operators (i.e. high percentage of individual trucks owners).

As regards EU technical assistance, for some Partner Countries it should be significantly increased. Countries stressed that the EU approach to road safety is based on the principles of UN ECE, and constitutes the necessary benchmark.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ To streamline the EuroMed structure, within the existing 'Infrastructure and Regulatory Issues Working Group'. Strengthen the component "*regulatory issues on land transport*", avoiding the increase of sub-groups or task forces.
- ⇒ Reinforce Action 10 as a key element of the future RTAP. For Jordan, for example, it is important to looking at the experience of other countries in the measures taken to implement ADR agreement. Anyway, before any change, it is deemed necessary to assess the results of the EuroMed regional programme (RRU).
- ⇒ Prepare within the WG a strategic plan or a roadmap for the gradual liberalization, the alignment of professional and operational requirements in the road transport sector of the various Partner Countries, and the harmonization of international road haulage. It should aim also at strengthening awareness on environmental issues, road safety, urban/ cross-border transport issues and trade facilitation. The liberalisation plan will be set out on the basis of each Partner Country's national strategy.
- ⇒ Couple actions 10 and 11 (which are inherently more *means* than *goals*) to concrete and new targets in terms of road transport, road safety and urban transport (the latter are two priorities to be integrated in the future RTAP), fleet conditions and renovation and licensing. In this respect, the WG could also be used to address relevant issues concerning road transport, to promote cross-border transport, to align operational and professional requirements of road transport in all the Partner Countries, and to harmonise international road transport.
- ⇒ Explore the possibility of an approving and classifying system for road haulage operators in the future RTAP.
- ⇒ Hold a debate within the WG on the relevance of concluding vertical agreements between Mediterranean countries and the EU in the field of road transport, aimed notably at regulatory convergence with the relevant EU *acquis*.

¹² These include in particular the E-Road Network (AGR), Combined Transport Network (AGTC), Convention on road traffic, Convention on signs and signals, Weights and dimensions, Issue and validity of driving permits, Technical inspection of vehicles, Global vehicles regulation, AETR/ADR/TIT/ CMR and E-CMR agreements.

⇒ Facilitate the accession to international conventions on land transport through coordinated actions. Enhance technical assistance in this perspective.

Action 11

The task force on road transport shall also deal with necessary reforms in the road industry. In particular, it will examine ways to reform the road haulage and passenger sector, in order to increase the **professionalism of drivers** (through stringent and regular driver tests), **operators** (by introducing a licensing system) as well as the **technical state of the vehicle fleet** (by introducing road worthiness tests and complementary measures supporting the upgrading of the vehicle fleets). It is recommended that road-worthiness tests are made mandatory for operators engaged in international transport by 2009.

• *Outcome*

Most Mediterranean countries have already adopted legislative and regulatory instruments including provisions reforming the areas identified in Action 11: more stringent driver tests and implementation of licensing systems and road worthiness tests, as well as fleet renewal programs.

The road report for Mashreq and Maghreb countries¹³ proposes to move the focus from the output of "liberalisation" to the outcomes that are expected from liberalisation, mainly in terms of safety, sustainability and a focus on urban transport.

- Algeria liberalised the road transport sector for passengers (since 2008) and for goods. Private and public undertakings operate in this sector. Algeria implemented the tachograph system as well as its road transport law, introducing specific provisions aimed at improving safety, obligatory technical control, review of the rules governing the organisation of public land transport in order to ensure the management of the existing underground in Alger and Oran, and various tramways. Algeria benefits also from a twinning programme, within the EU framework, in the field of road safety.
- Egypt established a Road Transport Regulator. Its role is to develop, *inter alia*, standards, examination, and certification for drivers, operators, and vehicles. It also elaborates and regularly updates standardised industry-related procedural manuals for safety regulations during operation and service, hazard goods transportation (e.g. flammable, toxic, etc.), qualifications and conduct of inspectors, standards of vehicles used for public transport services, etc.
- The Jordanian freight transport sector was liberalized from all constraints in 2005 and many specialized transport companies started in different transport categories (containers, crude oil, general cargo, car carriers, refrigerated goods, heavy load carriers, etc.). New regulations for licensing freight carriers as well as regulating auxiliary services for freight sector have been recently adopted. These include a new by-law for licensing and classification of transport carriers and freight forwarders (16 January 2013) and the required regulations (1st April 2013), while the regulations for auxiliary services for freight sector is expected to be drafted end of 2013.

¹³ "Status Report on the Implementation of RTAP Road Transport Actions in the MEDA Maghreb Countries", Study financed by the EU (January 2010), available at: <http://euromedtransport.eu/En/image.php?id=1708>

- The Lebanese transport sector is liberalised. All operational activities for passenger and freight transport are performed by the private sector. The public administration's role is to set the regulations and to monitor their implementation. Freight Forwarders are licensed by the Directorate general of Land and Maritime Transport in accordance with the decision defining the criteria and qualifications required to performing this activity. In accordance with the Traffic Law, all vehicles whether for passengers or goods running on gasoline are obliged to undergo a technical inspection once a year (twice a year for diesel vehicles) to ensure road worthiness prior to renewing licenses.
- Morocco has already liberalised the road haulage (since 2003), while introducing a number of criteria to access to this service provision covering, *inter alia*, financially sound undertaking and professional conduct (supervisory staff, minimum training, etc). Regulations on driving hours and rests for professional drivers were established on the basis of the new Road Transport Law (*Code marocain de la route*), entered into law on 1st October 2010. The government and the private sector signed several framework contracts aimed to modernise this sector, develop its competitiveness and its openness to investments (development of the business community and renewal of its vehicles fleet).
- Tunisia has, since 2000, carried out a complete revision of the highway code and its implementing texts including on periodic roadworthiness tests for vehicles which provides for a particular frequency for heavy vehicles intended for the carriage of goods and passengers. The new text on driving and rest times, which was also set up, has undergone some difficulties of application. A review of this Directive is required in view of including the tachograph.
- EU *acquis* on "operating license for haulers", "professional competence certification systems" and "vehicle technical inspection" and "weight and dimension control stations" were introduced into Turkish legislation and rules of the road transport sector. Nearly 98% of the domestic road transport market has been licensed with the introduction of licensing system.¹⁴ In order to modernise the road transport fleet in Turkey, more than 110.000 old motor vehicles were withdrawn from the market following a programme launched in 2007.

- ***Main outstanding issues***

For the public authorities, promoting the implementation of new measures by all operators, especially when considering that safety issues and the technical state of the vehicle fleet raises at the same time a challenge and a goal.

Jordan carried out road-worthiness campaigns in advance to any action related to safety issues. Two safety campaigns were held: one in 2012 for drivers' fatigue, and another in 2013 on the importance of having a valid vehicle licence and a legal driving licence fitted to the vehicle class.

Morocco has put in place an integrated strategic plan for road safety including seven areas of which one covers controls and sanctions. Morocco has also strengthened its network of technical centres throughout the Kingdom to accompany the evolution of the vehicle fleet and ensure local services.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

⇒ As mentioned under Action 10, ensure that the WG plays its role through the RRU project in the field of reforms of the road transport by examining ways to reform the road haulage

¹⁴ As of September 2013, nearly 530.000 licenses have been issued.

and passenger sector in order to increase the professionalism of the drivers (through stringent and regular driver tests), operators (by introducing a licensing system) as well as the technical state of the vehicle fleet (by introducing road worthiness tests, and complementary measures supporting the upgrading of the vehicle fleets).

- ⇒ Through the RRU project, ensure technical assistance on tachograph and on transport of dangerous goods.
- ⇒ Identify, through the WG, specific indicators, linked to the road transport (road safety) objectives, to be achieved by 2020.

3.2 Railway transport: interoperability and structural reform

Action 12

Increasing the attractiveness of rail transport in the long-term will necessitate both infrastructure investments and structural reform. In the medium-term, i.e. by 2013, Mediterranean Countries are invited to: elaborate a time and financing plan on those infrastructure investments that concern, inter alia, interoperability, the renovation of rolling stock, electrification and signalling systems.

• **Outcome**

Partner Countries reported on various initiatives which have been elaborated at the national level and are currently being carried out to plan infrastructure investments:

- Algeria is about to implement an overall development programme to modernise rail, road (routes and motorways), road stations, undergrounds and tramways sectors.
- Israel approved two major multi-year investment programs of about €9 billion, covering *inter alia* renovation of rolling stock and signalling systems and electrification. Structural changes achieved include outsourcing of rolling stock maintenance, design and construction of new lines by other infrastructure companies and establishment of cargo haulage companies in cooperation with the private sector.
- Lebanon conducted a comprehensive study on the revitalization of public and freight transport industry. One of the major projects proposed by the study is the revitalization of the railway system. A priority project was identified to construct the coastal railway section from the Lebanese-Syrian border in the north of Beirut, passing through Tripoli Port and serving Beirut Port. Relevant economic, feasibility and engineering studies are in progress.
- Jordan's National Railway Project pursues a comprehensive set of objectives ranging from the development and increased competitiveness of Aqaba port and creation of new value-added businesses and industries through more competitive infrastructure and logistical links, to the cost-effectiveness connectivity with the regional railway network and the harmonized Jordan/Arab League and Jordan/Euro-Med regional transport policy. This national railway project was presented to potentially interested lenders.¹⁵ The mini project (Shidya Link) which is part of the north-south corridor of the whole network had received a technical support from EuroMed and the European Investment Bank. This project was secured by the

¹⁵ A "Project Redefinition Report" was presented in May 2012. It analyses the development of a rail link supporting the transport of phosphate from the mine site to the Port of Aqaba. The movement of the marine phosphate terminal will otherwise result in discontinuation of rail transport for this traffic in 2013.

Gulf grants and is now in the tendering process. The UfM has recently labeled the north-south corridor of the JNRP and prepared a road map for the project.

- The railway sector in Morocco is an important element of the transport and mobility policy. To this aim an ambitious railway strategy has been identified. It is structured around the development of 1,500 Km of high-speed networks, 2,743 Km of the classic line, a logistic platform network linked to the railway transport, the regional railway transport, quality and safety of the services. In this prospect, important efforts to develop railways were deployed in Morocco, including investments in the framework of the 2005 – 2009 Development Plan (18.8 billion dirhams) and the 2010-2015 Development Plan (€ 3billion). The latter supports actions such as the Tanger-Kenitra high speed railway lines (€ 1,819 billion) and enhancement and increased capacity of the Casablanca-Kénitra rail line (€ 409 millions) and the electrification of the Fes-Oujda line. Similarly, and with the objective of harmonisation with the European rail signalling systems, Morocco has invested in a draft implementation of the European system of rail traffic monitoring (European Rail Traffic Management System (ERTMS), on a 78,4km stretch of track between Ain Sebaa and Rabat Agdal as first phase.
- Palestine's EuroMed Transport Project on 'Road, Rail and Urban Transport' launched early 2012 focuses on railway safety, separation of operations and infrastructure and more specifically on interoperability in the context of further promotion of cross-border rail transport. These issues should be linked to concrete railway developments in the region, notably of cross-border or regional dimension.
- Tunisia's national railway company (*Société Nationale des Chemins de Fer Tunisiens, SNCFT*) has already made an institutional reform by separating infrastructure from transport operators who have been grouped together into five business units (two for the suburbs, one for the main lines, one for freight and a unit for transporting phosphate). This system is to be retained in the future given its advantages compared to the classical system (track, equipment, etc.). Furthermore, two on-going studies in 2013 are addressed at infrastructure (high-speed lines to neighbouring countries, adaptation of the phosphate network and rolling stock to run heavier high-performance trains) and equipment (needs in acquisition and rehabilitation of the existing fleet).
- Turkey's Strategic Plan covering years 2010-2014 is structured around an analysis of the present status and an outlook to future developments, including strategic goals and targets and their cost/benefit analysis.

- ***Main outstanding issues***

The significant challenges that are encountered in implementing this action include:

- availability of financing, notably due to the size of the project, and more specifically the inability of some Countries to provide sovereign guarantee to access lower cost financing;
- need for investment on planning, designing and implementing the infrastructures.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

⇒ Pursue the actions of the future RTAP according to the following indications:

- ✓ Supporting the discussions with/engagement by lenders;
- ✓ Reinforcing technical assistance on human resources. This should include support for the implementation of policies in the railway sector to increase safety and efficiency;

- ✓ Building on increased attractiveness of rail transport in the long-term to support current infrastructure investments and structural reform.
- ✓ Setting out a calendar and a financing plan for investments in infrastructures, interoperability, new rolling stocks, etc.
- ✓ Financing issues should be considered in the wider context of infrastructures and investment policies with a view to the implementation of the network (actions 29, 30, 31).

Action 13

With the view of increasing the attractiveness of rail transport, Mediterranean Countries are invited to elaborate a strategy paper on the future of their national railway sectors with a focus on freight transport. These strategy papers – to be prepared in the short-term to report on ongoing and planned reforms – should be presented and discussed at the new working group to be established by the Euro-Mediterranean Transport Forum on 'infrastructures and regulatory issues'.

Furthermore, Mediterranean Countries are advised to embark on structural railway reform, beginning with effecting an appropriate separation of infrastructure management from operations. This implies that access to rail infrastructure (including licensing railway undertakings, deciding path allocation as well as charges) will be decided independently from any railway undertaking.

• **Outcome**

A number of initiatives are emerging in the Partner Countries to implement Action 13 of the RTAP:

- In Algeria, the reform on the planning and organisation of land transport (*Land Transport Guidelines and Organisation Law, 2001*) already created the *Agence National d'Etudes et de Suivi des Investissements Ferroviaires* and enshrined the principle of licensing and separation of the infrastructure development from operations.
- The Israeli Ministry of Transport is conducting land transport master-plan in order to formulate the best policy (in terms of infrastructure, regulation and organizational reforms) for freight in general, and for the increase in freight rail use in particular.
- The Jordan Railway Strategy (2008) reached an advanced state of implementation.¹⁶ It proposed the National Railway project, whereby the railway infrastructure would be owned and managed by the Government of Jordan, and railway operations would be left to private operators. The latter would be responsible for investments in rolling stock as well as maintaining the infrastructure.
- Lebanon's Land Transport Policy and its implementation plan have set the strategy for the revitalization of the railway system. The Railway and Public Bus Transport Authority (RPTA), which is under the tutelage of the Ministry of Public Works and Transport, is considered as the regulator to the railway sector responsible for the infrastructure and for the overview of operation activities performed by the private sector.
- In Morocco, l'*Office National de Chemin de Fer (ONCF)* elaborated a "Strategic Plan towards 2035". Several actions are announced by this plan, including high speed railway lines (1.500 km of Atlantic axis from Tangier towards Agadir, as continuation of high speed

¹⁶ In particular, the Land Transport Regulatory Commission (LTRC) has been established through Law No. 4/2011 as the national regulator of the land transportation. The Jordan Railway Corporation (JRC), was established by virtue of it Temporary Law No. 40/2010 as an official public entity linked to the Minister with legal personality, financial and administrative autonomy.

connection from South-Europe, and Maghreb axis from Casablanca towards Alger, Tunis and Tripoli), development of a railway network (2.743 km), logistic platforms linked to the railway network, multimodal transport, etc. The envisaged public investments amount to € 3 billion (2010-2015), focussing on the extension of the Tangier-Casablanca high-speed railway line. The setting up of the national railway company (*Société Marocaine des Chemins de Fer - SMCF*) aimed at separating the infrastructure management from the exploitation of railway transport services. Furthermore, a programme for a regional rail transport network is being finalised to complement efforts in urban transport, notably following the opening tramways in Rabat and Casablanca.

- Palestine recalled that the Council of Transport Ministers of the 22 Arab Countries are planning to elaborate a strategy paper on the future of their national railway networks and the prospects of linking them together with a view of increasing the attractiveness of rail transport. This plan is expected to be prepared in the short-term and will be presented and discussed at the Arab League Land Transport Committee.
- In Tunisia, by law enacted in 1998, the operation and the railway infrastructure were separated. The SNCFT (*Société Nationale des Chemins de Fer Tunisiens*) is no longer the owner of the infrastructures, but operates through a concession with the State. Alongside the SNCFT, other operators can use the railway network.
- Turkey's Ministry of Transport is preparing a “Transport Master Plan Strategy” and “Transport and Communication Strategy of– Target 2023” in order to establish a transport infrastructure corresponding to the expectations of national economy and civil society and to ensure a balance between transport modes. This include an increased share of the railways in freight transport would be 15% by 2023. The legislative and institutional framework of the Turkish rail sector is being devised in accordance with the EU *acquis*. Turkey also recalled that the “*Reform of Turkish Railways*” project, financed by EU IPA-I, is being implemented aimed at establishing framework conditions for restructuring and reforming the rail sector in line with competition requirements.

- ***Main outstanding issues***

The main difficulty encountered in the development of a comprehensive strategy paper on the future of their national railway sectors is linked to the availability of funding.

Moreover, at this stage it is noted that the separation between infrastructure management and operations is not effectively implemented in all the countries. In this context, the potential of PPP remains so far untapped across the region.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Enhance technical assistance for the elaboration of strategic plans.
- ⇒ Support and establish consultation/collaboration notably in the framework of the ESCWA in order to maximize the value of investments in the sector.
- ⇒ Exploit the exchange of experiences between the Southern Mediterranean countries and the EU Member States for the development and modernisation of the railway sector, notably on licences.
- ⇒ Increase substantially the rail share in the freight haulage market by improving the infrastructure, opening bottlenecks, performing industrial reforms and increasing participation of the private sector in the rail industry.
- ⇒ Complement the land transport actions with the urban transport aspect.

IV. CIVIL AVIATION (ACTIONS 14 À 16)

4.1 Opening-up the aviation market

Action 14

Mediterranean Countries are encouraged to assess the scope of reform of national aviation legislation in order to facilitate the opening up of their air transport markets to competition, including, as the case may be, to allow competition for public flag carriers. This is especially important if considering participation in the European Common Aviation Area (ECAA). Technical support in this respect will be provided by the EuroMed Aviation Project which is currently working on producing a road map for the establishment of a Euro-Mediterranean Common Aviation Area (EMCAA). This will be finalized in 2010.

• *Outcome*

Euro-Mediterranean aviation agreements were signed with Morocco (12 December 2006), Jordan (15 December 2010) and with Israel (10 June 2013). The negotiations are on-going with Lebanon since 2009 and started with Tunisia on 27 June 2013.

In its Communication of September 2012, the European Commission set out the important objective to finalise on-going negotiations with interested neighbouring countries by 2015, with a view to achieve a Common Aviation Area.¹⁷

Such a Common Aviation Area is based on:

- 1/ negotiation of bilateral comprehensive agreements between the EU and interested Mediterranean Countries, which connects the opening up of the market access to regulatory convergence towards the aviation EU *acquis*;
- 2/ once a critical number of agreements is concluded, reaching a multilateral agreement between the EU and Mediterranean Countries.

The road map for the establishment of a Euro-Mediterranean Common Aviation Area (EMCAA) was finalised in 2009 and endorsed by the DGCAs during the 3rd Aviation Group Meeting on November 2009. It encompasses 60 high level objectives with defined steps to be taken in relation to access market, aviation safety and security, environment and air traffic management. Those high level objectives have been integrated into national work plans to be regularly updated by each Mediterranean Country.

- Algeria is well advanced in its regulatory convergence with the EU; its code of civil aviation has been updated to give a legal basis to the “right of passengers”.
- The agreement signed on 10 June 2013 between the EU and its Member States, on the one part and the government of the State of Israel, of the other part endorses the progressive opening of the air transport market between Israel and the Member States on the basis of a regulatory convergence towards the EU *acquis*.
- Jordan has equally almost completed its implementation of the EU *acquis* required by Annex III of the Air Transport Agreement. As regards consumer protection, two projects are on-going: a project on consumer protection and a project on passengers with reduced mobility. The Council of the CARC will approve these rules as soon as the civil aviation act has been amended by an Article on different levels of compensation. Jordan benefited from several specific assistance projects between 2010 and 2012. It has benefited since August 2013 of a twinning covering all areas of the aviation *acquis*.
- Lebanon has adopted the open sky strategy. A law transformed the Directorate General of Civil Aviation (DGCA), a public administration, into the Civilian Aviation Authority

¹⁷ See Conclusions of the Council of Transport Ministers of the EU on EU external aviation policy, adopted on 20th December 2012, which support the relevant Commission Communication of September 2012.

(CAA), an autonomous authority. However, the full implementation of this law requires specific execution decrees, which have not yet been finalised. Once the CAA assumes its responsibilities, it will embark on the preparation of legislations and rules allowing for more efficient and effective implementation of the open sky strategy. Technical assistance was also provided to the DGCA to support the preparation of a road map to open-up competition.

- Morocco is well advanced in its regulatory convergence with the EU, its draft civil aviation code is currently being examined with a view to its adoption. It must in particular provide the necessary legal basis for the development of a Regulation on rights of passengers. Morocco has benefited since December 2012 from a twinning scheme covering all areas of the aviation *acquis* (market access, aviation safety, aviation security, environmental protection and air traffic management).
- Tunisia has established a medium-term action plan (2010-2015) with a view to achieving the objectives identified in the Roadmap. Its scope covers market access, safety, security, the protection of the environment and air traffic management. This action plan sets out the steps to be taken, at national level, in the major fields of civil aviation mentioned above, and identifies the crucial organisations responsible as well as the main modalities of implementation. In the framework of the implementation of this action plan, technical assistance missions have been carried out in Tunisia since 2009 relating to the airport handling market, changes in the rules on the protection of passenger rights, environmental management, management of exposure to noise and noise abatement, and the Community emissions trading scheme (ETS). Tunisia has launched a comprehensive reform of the air transport sector: aiming to (i) update its regulatory framework with a view to its adaptation to international standards and practice; (ii) reorganise services related to civil aviation; (iii) promote private participation in the development of the sector.

- ***Main outstanding issues***

- The willingness to open up of the Mediterranean countries varied greatly from one country to another because of some reluctance of the public authorities to carry out the necessary reforms.
- As regards regulatory convergence, again there are many differences which are linked to the level of political commitment and also to administrative and human resources constraints.

- ***Suggestions aimed at better implementing the future RTAP 2014-2020***

- ⇒ Achieve within the Euro-Mediterranean framework a level of increased convergence sufficiently homogeneous under the bilateral air transport agreements concluded with the Mediterranean countries, so that these agreements could move towards a multilateral aviation agreement providing further benefits.
- ⇒ More specifically, ensure implementation in partner countries of a regulatory framework to promote fair competition between air carriers and independent regulatory mechanisms. Furthermore, a mechanism to protect all passengers including passengers with disabilities or reduced mobility travelling by air should be provided in all the countries in the region. It would also be desirable to achieve harmonised rules for licensing airlines regarding ownership, effective control, financial capacity and requirements for liability insurance.
- ⇒ Further TA and South-South cooperation in order to progress through the various steps towards EACEM. Raise awareness at the political level on the benefits of openness and convergence.

4.2 Making air transport safer and secure

Action 15

The sustainability of the air transport sector in the region requires that Mediterranean Countries introduce the same rules in their transport legislation as those included in the international and European regulations governing civil aviation (i.e. regulations of EC/EASA and JAA). For this purpose the European Aviation Safety Authority (EASA) is called upon to specify and elaborate concrete cooperation areas with the Mediterranean Countries by 2009.

Action 16

Mediterranean Countries are invited to introduce cross-border regional arrangements with regard to aviation accident and incident investigation and reinforce their safety oversight capacity. Regarding aviation security, Mediterranean Countries are called upon to align security regulatory functions and security oversight mechanisms with the ECAA acquis and to reinforce the security oversight capacity of the competent authorities. The working group 'air transport' of the Euro-Mediterranean Transport Forum should coordinate the exchange of information.

• **Outcome**

Cooperation projects in term of safety have been implemented through EuroMed Aviation projects I (2007- 2011) and II (2012-2014).

A specific project called the Mediterranean Aviation safety cell (MASC) has been put in place since September 2011 within EASA for three years. It aims at assisting the Mediterranean Partner Countries, which signed an aviation agreement with the EU or are in negotiation with the EU in harmonising their national legal and regulatory systems with the EU aviation safety rules. The involved countries are Israel, Jordan, Lebanon, Morocco and Tunisia.

- Algeria benefits from a twinning project of two years specifically dedicated to elaborate and implement National Plan on Safety and Security Management System (April 2013-April 2015).
- Lebanon is a member of the MASC project. Experts are working closely with the safety department of the DGCA, supported by the technical assistance to the DGCA, in order to revisit the safety plan pertaining to safety rules (air worthiness, flight operation and licensing) and enhance it, where required, to be in full compliance with the European standards. A national security plan was also prepared and submitted to the concerned authorities for endorsement.
- Morocco also signed on 21 March 2011 a working arrangement with EASA which establishes the roadmap towards the full participation of Morocco in the *Safety Assessment of Foreign Aircraft* programme (SAFA). Shortly Morocco should be fully integrated in the SAFA Programme. An assessment mission was conducted by EASA in 2012. Morocco will therefore become the first non-European state to participate to such a programme.
- The initial EASA evaluation mission in Jordan under the MASC project took place in 2012. The mission concluded that Jordan has implemented most of the acquis in safety with the exception of the conversion of its aircraft maintenance licences to European standards. Specific assistance in this area has been defined.
- In addition to participation in the MASC project Tunisia has developed a Roadmap (2012-2015) to define the measures to be taken at national and regional levels in order to create a Euro-Mediterranean Common Aviation Area (EACEM), including in the field of security, and for a progressive implementation of the measures and actions to be undertaken (2012-2015).

As for the aviation accident and incident investigation (action 16), most Mediterranean Countries asked for bilateral actions.

All Mediterranean countries benefits from the EuroMed aviation project, which deals with aviation security.

- ***Main outstanding issues***

The implementation of regulatory convergence in safety requires significant financial and technical resources. However the sustainability of aviation in the region demands that the Mediterranean partners adapt their legislation on air transport with regard to international and European rules governing civil aviation.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ The MASC managed by EASA could be enlarged to encompass other Mediterranean countries within the extension of the Euro-Mediterranean Common Aviation Area.
- ⇒ Analyse, on a case-by-case basis, the participation of Mediterranean countries to certain European aviation projects such as the SOFIA, the SAFA programme or SESAR.¹⁸
- ⇒ Provide for a specific action on air traffic management, which has not been the subject of a specific measure within the RTAP 2007-2013.
- ⇒ Provide for specific actions also in the framework of existing regional initiatives (AEFMP, BlueMed), providing further support to convergence incorporated into projects EuroMed Aviation I and II.¹⁹

¹⁸ MASC: Mediterranean cell aviation safety. Sofia: Safe automatic flight back and landing of aircraft; SAFA: Safety assessment of foreign aircraft; SESAR: Single European Sky air traffic management research.

¹⁹ Common plan AEFMP with Algeria, Spain, France, Morocco and Portugal shall aim at harmonisation of five air navigation systems of their Member States. "BlueMed" project: <http://www.bluedmed.aero/nodo.php?id=203>.

V. INFRASTRUCTURE POLICY: NETWORK, PRIORITY PROJECTS, CONNECTION WITH THE TEN-T (ACTIONS 17 À 31)

5.1 Integrated multimodal services

Action 17

The development of logistic platforms in the Mediterranean Countries is a high priority. European Commission support will be provided through facilitation activities like TAIEX workshops or twinning projects. The EIB study on the subject (to be completed in mid-2007) is a very important exercise which will provide a good basis for the development of logistic platforms in the future.

• *Outcome*

Following its 2009 study, the EIB has prepared the LOGISMED, project aimed at defining a network of logistic platforms in the Mediterranean, based on international standards for both infrastructure and quality in logistics services with qualified personnel. This project is divided into two sub-projects: One to promote the creation of logistic platforms in the Mediterranean partner countries ('LOGISMED hard'); The other, to raise skill levels as well as the training of a network between them ('LOGISMED soft'). The training element of this latter project, known as LOGISMED TA was approved by the UfM in 2011.

Logistic platforms are a key element for the modernisation and improvement of the competitiveness of and the logistics of goods transport between ports on both shores of the Mediterranean with a view to establishing the trans-Mediterranean network, but also its connection with the TEN-T (trans-European transport network).

- In the exercise of an infrastructure policy developed by the EuroMed cooperation structure and dialogue, logistic platforms have been identified by Syria (Homs), Jordan (either Amman or Mafraq),²⁰ Egypt, Tunisia (Djebel west) and Morocco (Casablanca) as priority projects which could feature the future Trans-Mediterranean Transport Network).
- For the effective implementation of a multimodal transport policy, Egypt intends to facilitate the use of various other transport modes through improving and upgrading land, river and railways transport systems. A study on Egypt needs in terms of logistic platforms and on the potential for creation of a network of platforms in the region (Medlog) was conducted through the European Investment Bank (concluded in 2012). The creation of a Medlog network aims to tighten the links between the Mediterranean countries and Europe, thus promoting Egypt as a trading area. Currently the concession agreement is being drafted as regards the Design/Build/Finance/Operate (DBFO) for the 6th of October City proposed logistic centre. Moreover, infrastructure had been developed in the majority of ports and the rest of the ports are currently undergoing improvements and developments.
- Under the MEDAMOS II project, comprehensive studies for the establishment of a dry port in Lebanon were launched. This dry port will be also acting as a logistic platform for facilitating multi-modal transport between Lebanon and the region.
- An on-going study on the creation of a logistics platform in Jebel West was carried out in Tunisia. Other studies outside the RTAP were also carried out. The strategic study carried out on the development of services and logistical infrastructure (2007); The study carried out on the establishment of a network of logistic platforms (Ministry of Infrastructure); And the study on transport logistics chains (Ministry of Commerce).

²⁰ Awaiting for the final recommendation of the prefeasibility study of Dry Ports / Logistic Centres aiming to identify the best location.

- In this connection, it should be pointed out that Morocco has developed a new strategy for the development of its logistics competitiveness that is built around five axes (National Plan of logistic platforms, optimisation of the flow of goods, upgrading and raising the level of professionalism and operators, training, and governance of the sector). Development of a network of logistic platforms is a major component, it provides for the construction of 3 300 ha of logistics areas in 2030, and 2080 in the mid-term.
- The Turkish Ministry of Transport attaches utmost importance to promote combined and multimodal transport in Turkey. The “Transport Master Plan” includes the development of Intermodal transport services in Turkey and thus provides a balance for the utilization of different transport modes. Moreover, as combined and multimodal transport sectors have been growing in Turkey quickly, a legal and an administrative basis to regulate the interfaces between modes are needed to share responsibilities among different stakeholders and authorities.²¹ These initiatives are beneficial not only to Turkey, but also to the inter-modal of the region.
The new '*Directorate-General for Hazardous Materials Transport and Combined Transport*' will regulate that combined transport operations performed in Turkey be feasible, economic, environmental friendly and efficient, in the framework of fair competitiveness, sustainability and open market rules. It will also regulate and manage the civil liabilities of operators and transporters in the combined transport sector.
- Work under the MEDAMOS project to define the Mediterranean Motorways of the Sea, as a maritime component, of TMN-T also cover the connection of their hinterlands for ports and intermodal connections, for which the logistic platforms and specially the dry ports play a very important role.

• ***Main outstanding issues***

As clearly stated by action 17, it would make sense to implement twinning covenants between logistic platforms in partner countries and those in some EU countries and exchange experience, tools and assistance, towards a regulatory convergence towards the Community *acquis* in the field of logistics and the development of logistical competitiveness observatory. This proposal would certainly contribute to improving the implementation of this action.

• ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Coordinate and refocus all the implementation of actions on the platforms, including the LOGISMED project on the same infrastructure strategy, aiming at the establishment of Euro-Mediterranean TMN-T in line with national policies for the development of transport networks.
- ⇒ Provide support for defining the priorities for the development of logistics, notably the regulatory framework, training, the organisation of trade and the improvement of infrastructures (logistics areas, rails, roads and ports).

²¹ A study conducted by the OECD/ECMT provides a very useful regulatory framework roadmap for necessary actions with a view to developing and building intermodal facilities and interfaces. The 2009 EU Twinning Project also pursued the overall objective of “strengthening intermodal transport in Turkey”.

5.2 *Role of infrastructure investment and development*

Action 18

In the framework of the EuroMed Forum, Euro-Mediterranean countries will set up a network of transport experts to collaborate on regularly assembling and analysing transport data, maintaining a common database of demand, GIS network data and common forecasting scenarios for the Mediterranean. Such a network already exists in the framework of CETMO for the western Mediterranean. This should be expanded in the course of 2007 and 2008 to include representatives from eastern Mediterranean Countries. *Assuming the successful and timely implementation of a permanent secretariat to support the activities of the Euro-Mediterranean transport forum (see action 34), the two actions should be linked.*

• *Outcome*

This network has taken the form of a group of experts known as “Action 18 of the RTAP” under the auspices of the working group on infrastructure and regulatory issues”. This group covers the Eastern and Western Mediterranean. With the technical support and experience of CETMO for the Western Mediterranean, this group composed of national experts appointed by the partner countries through the EuroMed coordinators, and experts of TRACECA ESCWA, SAFEMED and MEDSTAT, met six times in November 2009 to June 2012.

This group has enabled the directing of technical work to develop a database and methodologies such as geographical information system, forecasting models and definition of scenarios for the future. All these tools must be able to analyse the functioning of the Mediterranean transport system and its evolution. Thus, a database concerning the Mediterranean transport system has been developed and modelling tools for forecasting transport flows to different horizons (2020 and 2030)” was created.

- Linked to this process, Turkey's Ministry of Transport, Maritime Affairs and Communications is carrying out an EU-funded project named *“Technical Assistance to the Introduction of a Transport Information Management System in Turkey”*, which would mainly focus on TEN-T network in Turkey. This project will contribute to the establishment of a Transport Coordination Unit in the Ministry and a Transport Information Management System. The project will increase the capacity of the Ministry in collecting, processing and analysing data regarding all transport modes in Turkey and also for providing the most proper data for the TEN-T related studies in the future.

• *Main outstanding issues*

Data collection is an important part of the database that is planned to be improved in the next years. As the quality of the data directly affects the information system which is planned to be established, improvement of the databases of each country is necessary.

The group of experts “Action 18” has carried out technical work to identify and prepare the tools and instruments which will help to describe how the transport system works of in the Mediterranean region. However, technical assistance is being sought in order to improve the quantity and quality of existing data relating to the model developed under action 18 for its validation.

• *Suggestions aimed at better implementing the future 2014-2020 RTAP*

⇒ Promote a project of development by satellite in the transport sector (e.g. GNSS) in the countries of the Southern Mediterranean in order to contribute to the homogenous collection and processing of data on the sector.

- ⇒ Decide, within the "infrastructure and regulatory issues" working-group, how to proceed with Action 18.
- ⇒ Enhance the linkage of all integrated port community systems within all beneficiary countries (pilot project), as follow-up to the implementation of Action 18.

5.3 *Assessment and prioritization*

Action 19

Mediterranean Countries are invited to take the necessary steps for developing the projects provisionally identified by the High-Level Group (HLG) as short-term priorities (see Annex A) as well as any other projects on the HLG axes singled out by the Euro-Mediterranean Transport Forum. All approved projects should be subsequently systematically appraised through full feasibility studies. The European Commission encourages and supports the development of border crossing projects in order to complete the physical integration of the Euro-Mediterranean countries.

Action 20

Further to the above, Mediterranean Countries are encouraged to submit the projects identified by the HLG as priorities in the long-term (to start after 2010) to pre-feasibility studies in anticipation of the review of the HLG priorities in 2010. Alternative proposals should be considered for projects displaying low suitability according to the completed pre-feasibility studies. The pre-feasibility studies on all the long-term priorities should be completed by 2010 and be followed by full feasibility studies by 2013.

• *Outcome*

The high-level conference on “extension of the major trans-European transport axes to the Mediterranean region” (Lisbon, 3 December 2007) established the strategic link between institutional reforms identified by the regional transport action plan for the Mediterranean for 2007-2013, requested by the Marrakech Conference, and the infrastructure policy of major transnational axes and priority projects initiated by the work of the high-level group of Ms de Palacio (HLG).

Actions 19 and 20 restate a key element of infrastructure policy initiated by the work of the high-level group of Ms de Palacio i.e. identifying major trans-national axes and priority projects located on these axes.

The EuroMed working group “infrastructure and regulatory issues” launched on the basis of a common methodology agreed within the group exercise, a prioritisation of the projects of Annex A to the RTAP in order to arrive at a shortlist of a maximum 2 projects per Mediterranean partner country.

It is foreseen that the shortlist of priority projects as well as evaluations on them through analysis, pre-design general or detailed pre-feasibility studies and feasibility studies, is presented to the Ministerial Conference on transport of November 2013.

Infrastructure policy on which the group “infrastructure and regulatory issues” has worked since 2009 goes beyond the definition of trans-national axes and is part of a network approach in accordance with the mandate of the Marrakesh Conference of 2005. Indeed, the Euro-Mediterranean Transport Ministers had stated their commitment “to set up a Euro-Mediterranean integrated and multi-modal transport network contributing to increase trade between the EU and its Mediterranean partners, and among the Mediterranean partners themselves”.

The work already done by the group “infrastructure and regulatory issues” were concentrated to prepare this strategic vision through successive phases and complementary:

- First approach a “South-South” connection through large regional projects: Prioritisation of priority projects/corridors according to a common method granted and applied by the countries. These regional projects are scheduled for inclusion in the future network;
- Networked approach to regional integration ‘South-South’: Establishment of a trans-Mediterranean network of transport (core and comprehensive) based on the existing methodology exercises sub-regional (GTMO5 + 5, ESCWA) and regional (TEN-T);
- Networked approach to ‘South-North connection’: Schedule of a core trans-Mediterranean transport network to be connected to the TEN-T core network based on the TEN-T methodology and the specificities of the region.

All this should constitute the “Euro-Mediterranean integrated and multi-modal transport network”.

The Ministerial Conference on transport in November 2013 in Brussels should endorse the routing and launch its implementation towards 2030/2050.

- ***Main outstanding issues***

The mobilisation of the necessary investments is one of the main obstacles to speeding up the achievement of the priority projects to submit to the Ministerial Conference of November 2013. One of the main recommendations along these lines would be for further reflection on the problem of financing transport infrastructure projects especially regional ones.

- ***Suggestions aimed at better implementing the future RTAP 2014-2020***

- ⇒ Reformulate actions 19-20 to record the evolution of infrastructure policy (following the outcome of the Ministerial Conference in November 2013) covering the future TMN-T and its connection with the TEN-T.
- ⇒ Take into account the global dimension of TMN-T both towards Africa and the Arabian Peninsula as well as Asia.
- ⇒ Regroup actions 18-22-23-24-25-26-27-28, as a support to the implementation of the central action of the infrastructure policy of the future TMN-T, its priority projects and its connection with the TEN-T (actions 19-20-21).

<p><u>Action 21</u></p> <p>Mediterranean Countries are invited to facilitate, to the extent possible and where relevant, the successful implementation of the first two MoS pilot projects in 2008 and 2009; and to take into account their approach and replicate their best practices in future MoS projects to be installed in 2010-2013.</p>

- ***Outcome***

Follow-up of Action 21 was done by the EuroMed working subgroup “motorways of the sea”, with the technical support of the project MEDAMOS.

- This Working Group conducted two additional exercises similar to the “infrastructure and regulatory issues” group’s approach for actions 19-20:
 - Priority projects approach through the identification of pilot projects for motorways of the sea.

➤ Network approach by the identification of Mediterranean Motorways of the Sea as maritime component modal TMN-T and links of connections to the TEN-T.

On this last point, a methodology based on the TEN-T is under preparation and validation. This methodology should be commonly agreed and applied by the Mediterranean partner countries in order to identify the points/links between the two networks.

- Jordan established several initiatives in this field, notably: the Aqaba Port Community System and EDI partners' integration; the Single Window System; the link Genoa Port-Aqaba Container Terminal; the relocation of Customs Inspection Yard; the National Railway container station at Aqaba Port/Container Terminal beyond 2014.
- Under the MEDAMOS II project, Lebanon identified two main projects: Port Community System (PCS) and Dry Port. Technical assistance is currently provided for these projects. The Ministry of Public Works will then launch the consultancy services for the development of the PCS as well as for carrying out the detailed studies for the establishment of the dry port.
- The pilot project motorway of the Sea Agadir — Port Vendres offer was based on an offer of a “door-to-door” service from the consortium led by the ITMC-group for the transport of potatoes and citrus fruits, between the Souss/Massa (Morocco) and France. This offer was achieved through the contractual relationship between the consortium and exporters to provide an integrated pre and post road haulage road service up to the reception platform at Perpignan/St Charles or on the wholesale market of Châteaurenard. This service started in November 2007.
- Tunisia has launched two projects: Port of Radés (TN)/Port of Marseille (FR) and Port of Radés (TN)/ Port of Genoa (IT). The first phase of the project (MEDAMOS I) led to the identification of obstacles, setting objectives and performance indicators, a consortium bringing together key players on the entire transport chain on the two axes. TA was provided by the European Commission. The following stages of projects are to establish a structure for monitoring and evaluation of the current two axes following established performance indicators and the application of good practices on other shipping lines (Radés/Barcelona, Radés/Livorno, La Spezia) and project support MEDAMOS South/South.
- Mersin-Trieste and İskenderun-Port Said are the best practices mentioned by Turkey for the successful "Motorways of the Sea" concept based on bilateral relations and MoU's.

- ***Main outstanding issues***

A development potential of services related to the motorways of the sea and a modal shift still exists, but it requires funding to achieve the appropriate infrastructure and equip those administrations which are not yet able to accompany the project.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Redraft the action on motorways of the sea, logistic platforms and the ports, which form the core policy pillars connecting the TMN-T and the TEN-T, so as to develop the network approach and the connections with policy actions 19 and 20. It must also provide a greater role for the partner countries on the northern shore to ensure a practical and effective implementation.
- ⇒ Provide for the widespread use of memoranda of understanding between the partners of the southern and northern Mediterranean, with the examples provided by Jordan and Tunisia, and strengthening their follow-up.
- ⇒ Develop an important logistic hub on the motorways of the sea to attract logistics and transport professionals. Accelerate the contribution from the Marco Polo programme for

giving the project the financial support needed for its development.

5.4 *Environmental considerations*

Action 22

Strategic environmental assessments and environmental impact assessments have to be carried out for all relevant plans, programmes and projects concerning transport, especially with regard to port infrastructure, management and operations.

• *Outcome*

For regulatory issues, consideration of environmental issues has been strengthened through the mandate of EuroMed projects in the field of aviation, land transport and maritime. Certain achievements can be reported, in particular the projects MEDAMOS, aviation and RRU.

- Egypt established a “*Strategic Environmental Assessment division*” that is tasked with drafting, monitoring, and enforcing Environmental Impact principles and guidelines to be undertaken for all transport projects. These guidelines shall be in line with local level legislation and compatible with global specifications and directives.
- In this regard Jordan is implementing the safety regulations and the International Ship and Port Facility Security Code (ISPS codes) for all ports requirements and EU ECO port standards in 2012. Moreover, the law is becoming more and more safe, secure and environmental friendly, while less accidents means the terminal operates smoothly without interruptions or pauses, hence enhancing a fast and reliable service.
- In accordance with the Lebanese legislation, all projects shall undergo an environmental impact assessment (EIA) study in the design stage. The EIA is reviewed by the Ministry of Environment prior to the authorisation of the implementation of the project. The Ministry of Environment together with the relevant authority are in charge of supervising the respect of mitigation measures proposed by the EIA during the implementation of the project. This approach applies to all projects, including those related to the transport sector.
- The Moroccan legislation requires the achievement of environmental impact assessments for plans, programmes and projects relating to the various types of transport. To this end, the carrying out of these studies was widespread.
- In Tunisia, the environmental studies for all infrastructure projects are a regulatory requirement.

For infrastructure, some evaluations were made, as for example in the context of the identification of measures carried out for the priority projects (e.g., Jordan).

• *Suggestions aimed at better implementing the future RTAP 2014-2020*

- ⇒ Reword this issue which by its cross-cutting nature covers all sectors of the RTAP to reflect a more strategic vision in line with the TEN approach.
- ⇒ Organise seminars or projects covering maritime, land, air, on good practices and new technologies in the area of environmental conservation and the development and operation of transport infrastructure.

Action 23

In order to expand the pool of environmental expertise available to Mediterranean Countries regarding transport, it is recommended to enhance the environmental expertise within national transport ministries, for example by establishing dedicated environmental units.

- **Outcome**

- Egypt established the already mentioned “*Strategic Environmental Assessment division*” (action 22), and set out job descriptions, qualifications and expertise needed for hire, and training plans needed to enhance local expertise.
- In Jordan, the vision of the Ministry of Transport (MoT), which is reflected in its new National Strategy 2012-2014, entails a developed and sustainable transport sector, characterised by its competency, safety and environmental stability. A new division “Transport and Environment” has been established within the restructured MoT (July 2012).
- The Directorate General for Roads and Buildings of Lebanon's Ministry of Public Works and Transport includes an Environmental Unit, which is responsible for screening all projects and defining the type of environmental study that has to be carried out prior to implementation. This approach applies for maintenance and road rehabilitation projects as well as for new construction projects. This Environmental Unit coordinates with the Ministry of Environment. A similar Unit is proposed to be included also in the Directorate General of Land and Maritime Transport, currently under re-organisation.
- Morocco's Transport Minister established bodies working on issues related to sustainable development and environmental issues (transport coordination, risk and disaster management, energy efficiency, etc.). These bodies closely cooperate with the Ministry responsible for the environment and with the Agency for Renewable Energy Development Agency and Energy Efficiency
- At present, the Tunisian Ministry responsible for the environment is working with all relevant departments depending on the theme. However, the possibility of creating a structure at the level of the Ministry of Transport in charge of the environment is needed and is the subject of a study in progress.
- In Turkey, the Ministry of Transport, Maritime Affairs and Communications established in 2011 the Department of Environment and Climate Change, within the Directorate General for Foreign Relations and European Union. This Department is responsible for following and evaluating studies on environment, energy, greenhouse gases and climate change, carried-out by national and international organizations, institutions, platforms, foundations and other relevant organizations.

- **Suggestions aimed at better implementing the future 2014-2020 RTAP**

- ⇒ Reformulation of this action should reflect the objective already mentioned, to regroup actions in support of the implementation of the main objective of the RTAP, based on infrastructure policy of the future trans-Mediterranean transport its priority projects and its connection with the TEN-T (as described in actions 19-20-21).
- ⇒ This action is to be reformulated given the fact that its main objective is to strengthen and modernise the institutional and administrative capacity in the Mediterranean countries. At present, almost all Mediterranean countries have a department of the environment. Also, it would be useful to strengthen coordination and cooperation between this department and department of transport in the Mediterranean partner countries.
- ⇒ There should also be greater coherence between the different to Euro-Mediterranean activities at regional or multilateral level in the field of environmental protection.

5.5 Socioeconomic considerations

Action 24

Future infrastructure needs assessment or feasibility studies should entail a risk assessment and management strategy through the incorporation of scenarios on socioeconomic development.

• *Outcome*

Risk assessment is an integrated element in any feasibility study relating to transport infrastructure project, including an analysis of socioeconomic and financial scenarios.

- This assessment is conducted in Egypt as part of the scope of the “*Strategic Environmental Assessment division*” (action 22).
- In this regard, Jordan carried out an Economic Impact Analysis as well as a Social and Environmental Analysis in relation to the Jordan National Railway Project, which is one of Jordan’s main priority projects.
- Major projects in Lebanon are subject to an economic feasibility study, an environmental impact assessment as well as socio-economic studies in the design stage. These studies are considered essential prior to the authorisation to implement the project.
- In Morocco, feasibility studies and socio-economic impacts are regularly carried out in the field of transport infrastructures and services (programme and project). The budgetary reform implemented in Morocco imposes performance indicators in the planning and presentation of programmes and projects. International donors equally require socio-economic impact studies to be conducted prior to the funding of projects.
- Socioeconomic elements are taken into consideration in studies to be conducted in Tunisia (irrespective of the implementation of the RTAP). A particular attention should be paid to the regional dimension aspects.

• *Suggestions aimed at better implementing the future RTAP 2014-2020*

- ⇒ Reword this action to reflect the objective already mentioned, to regroup actions in support of the implementation of the main objective of the RTAP, based on the infrastructure policy of the future TMT-N, its priority projects, and its connection with the TEN-T, (as described in the actions 19-20-21).
- ⇒ The importance of pursuing actions which highlight the regional dimension of the intervention was also pointed out.

Action 25

It is equally important to recall the goals of accessibility and public service obligation in transport planning. With respect to infrastructure investment, it is important to ensure the organic linkage of all new infrastructures on the trans-national axes with the national networks.

• *Outcome*

The EU is in the process of concluding the adoption of the Regulation on the new Union guidelines regarding the development of the TEN-T. The preparation of the new TEN-T Guidelines has been based on studies conducted by the European Commission.

- Lebanon is a partner country in both the "International Road Transport Agreement" and the "Railways in the Arab Mashreq Agreement", which were concluded under the UN-ESCWA for the Arab Mashreq countries. These agreements set the guidelines and the standards to

ensure harmony and integration during the design and the implementation of the transport system in the Arab Mashreq.

- This approach has always been adopted by Morocco in planning and carrying out its transport infrastructure. For example, the framework of national motorway construction or the high-speed lines include regional priorities ('North-South and East-West) as an extension of trans-European transport axes and in the Maghreb. These axes are connected to the different provinces and areas of the country.
- Tunisia is connected to its neighbours (Libya and Algeria) by roads and a railway line in the case of Algeria. Transnational infrastructure projects are under way (including the projected motorway of the Maghreb countries, the LGV of the Maghreb). In effect the integration of multi-modality in Euro-Mediterranean regional planning in transport is now essential.
- Due to the accession negotiations, Turkey is also responsible to fulfil the new guidelines for the development of the Trans-European Transport Network, which is part of the EU 'acquis', to its current network. In this context, the Ministry is carrying out studies, in cooperation with the European Commission, regarding the implementation of new TEN-T Guidelines to the Turkish network. To this end, an EU-funded Transportation Infrastructure Needs Assessment (TINA) project, initiated in 2005, was carried out with the participation of all stakeholders. Completed in 2007, and approved by the Commission in 2008, the objective of the TINA project was to define a multi-modal transport network (Core Network) which will serve to extend the European Union's TEN-T into Turkey to: enable sustainable mobility of persons and goods; ensure freedom of movement of goods, services and people; offer high-quality infrastructure on acceptable economic terms to users; include all modes of transport, taking into account their comparative advantages; allow the optimal use of existing capacities; be interoperable within modes of transport and encourage intermodality.²²

- ***Main outstanding issues***

Main difficulties encountered by the countries for the implementation of this RTAP Action include data collection problems, for example in the case of the TINA-Turkey and TEN-T Document studies.²³

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Reword this action to reflect the objective already mentioned, to regroup actions in support of the implementation of the main objective of the RTAP, based on the infrastructure policy of the future TMT-N, its priority projects, and its connection with the TEN-T, (as described in the actions 19-20-21).
- ⇒ The integration of multi-modality regional planning in the Euro-Mediterranean transport is considered decisive.

²² In order to meet the technical benchmarks, preparation of "TEN-T Document" was started in 2008, building on the TINA-Turkey study. After the meeting held in Brussels in 13 December 2010, Turkey and the European Commission agreed on the future TEN-T network according to the decision 1692/96 as amended and on a priority project of the European interest in the framework of this TEN-T network. On this basis, technical benchmarks of the accession negotiations are considered to be met.

²³ Transportation Infrastructure Needs Assessment (TINA) for Turkey.

5.6 *Safety and security considerations*

Action 26

Without prejudice to actions taken in other transport modes, safety aspects should be integrated in the design, construction and operation of any future road links and nodes and in the upgrading of existing links. This should follow the standards prescribed by international best practice.

• *Outcome*

- Algeria's implementation of this action, which is considered as necessary, did not raise any specific difficulty. Technical assistance was provided in the railway and aviation sectors.
- Israel implements the state of the art safety and security standards in plan, design, construction and operation of transport infrastructure.
- Safety considerations in Jordan are taken into account through mapping of black spots, new road or intersection design and through safety auditing for new road projects. In operational terms, this has included change of damage signs or turn off signals on intersections in case of oil being poured from trucks. Accidents have been analysed to define black spots in Jordan, and these black spots have subsequently been prioritized for treatment actions.
- In Lebanon, safety and security measures are duly respected in the preparation, design and implementation of projects. Through the Road Safety Project, funded by the EU, a road section was identified as pilot project through which the standards of road safety measures will be explored. This pilot project will be considered as the model that has to be adopted on all similar projects.
- In Morocco road safety issues are incorporated into the design, construction and operation of any route or road. Indeed, Morocco has a integrated strategic plan with seven areas of which one is related to road infrastructure. In this context, a significant number of black spots are treated annually via a physical rehabilitation and a programme of infrastructure planning. The new projects are designed and built according to the standards and international best practice.
- Palestine stressed that a key prerequisite in this respect is the accession to international conventions and, accordingly, the remodelling of institutional authorities and procedures to pay greater attention to safety and security considerations. This is especially the case for the maritime and civil aviation sectors (action 7, 8 and 16). In the road sector the problem is more complex. It has to do with the sub-optimal follow-through of safety controls by traffic authorities and the sub-standard technical condition of the fleets of most small road operators (see action 11). However, it also has to do with the design of road infrastructure and its poor maintenance. This concerns the backbone network in particular. In Palestine, the number of fatalities, which are due to the road accident, is still with very high rate compared to the EU Members States and the traffic accidents represent an economic loss.
- Tunisia benefit from the support provided by the EuroMed project on road safety. In this context, Tunisia elaborated and implemented a road safety management system within a public transport (passenger) company. The long-term aim is to extend this system to the other public transport companies (passenger and freight). The major challenges relate to the funding needed to acquire the necessary equipment for the successful implementation of the project as well as the improvement of human resources in the area of road safety management through training programmes (to be provided by highly qualified experts and possibly twinning initiatives).

• *Main outstanding issues*

A problematic aspect is indicated in the lack of adequate fund.

Moreover, database for accidents to be used in traffic analysis to determine real problems are not available and there is no system of how to deal with traffic safety problems.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Traffic safety becomes a fundamental part of government policy. It is also important to ensure setting and applying rules that support traffic safety issues.
- ⇒ Integrate in an explicit manner in the framework of the future TMN-T 2014-2020 the goal of road safety. In this respect, establishing quantitative objectives (percentage) in the field of safety throughout the region.
- ⇒ Financing needs for the extension of existing programmes. Twinning relating to road safety.
- ⇒ The EU technical assistance should be provided to enable the implementation of a mandatory and permanent training mechanism for road drivers (mainly targeting public transportation and the transport of goods) and transport industry with a view to promote a road safety culture.
- ⇒ These activities could be integrated into a broader operation as regards road safety and to effectively reduce the large number of victims on the road network in the region. Information, awareness and traffic education through communication campaigns in neighbouring countries are considered key elements to reduce road accidents.

Action 27

Mediterranean Countries should continue to collaborate with the EuroMed GNSS projects and liaise with the GALILEO Euro-Mediterranean Cooperation Office (GEMCO). The Mediterranean Countries should also liaise with the European Commission regarding the progress and opportunities related to the gradual introduction of European GNSS services in the region as of 2011.

- Algeria is more involved in the EuroMed Global Navigation Satellite System (GNSS) II project and obtained significant achievements through the direct involvement of the Air Navigation Service Provider. Recently, it hosted a workshop gathering strong interest from stakeholders in the civil aviation field. A ground station of the European Geostationary Navigation Overlay Service (EGNOS), funded by the EuroMed GNSS project, was due to be installed in Tamanrasset. However, the site has been found not suitable from technical point of view. At the above-mentioned workshop, Algerian authorities expressed their intention to identify an alternative location. They have also remarked that this Ranging and Integrity Monitoring Stations (RIMS) is a first step towards the set-up of EGNOS service coverage allowing civil aviation operations in the whole country (especially in the south).
- Egypt had already decided in 2004 to establish the Galileo EuroMed Cooperation Office (GEMCO) office in Cairo. It has also participated to the EuroMed GNSS I and II projects. Two EGNOS ground stations have been successfully installed in this country in Abu Simbel and Alexandria. One is funded by the EuroMed GNSS programme.
- Israel is participating to the EuroMed GNSS II, hosting workshops, participating with delegates and proposing way forward to promote EGNOS adoption in the region, primarily in the civil aviation domain. Interest in this field is expressed also in other sectors (mainly road). An EGNOS ground station funded by the EuroMed GNSS programme is being installed in Haifa and should become operational in the next 12 months.

- The Jordan Civil Aviation Regulatory Commission (CARC) is now developing a GNSS strategy, including GNSS, implementation for the next 20 years. Two projects related to GNSS usage in aviation (ADS-B and RNAV) are now under implementation.
- Lebanon has always showed a keen interest towards GNSS and EGNOS. A workshop is planned in Beirut by the end of 2013.
- Morocco has showed strong and constant interest in GNSS and EGNOS. In this sense, contacts between the country and the European Commission are active since early 2004. A cooperation agreement was initialled in 2005 in Brussels and signed in 2006. A GNSS Group of Economic Interest has been created in Morocco, with the following objectives: *i)* start and encourage different projects aiming to create new jobs with a strong added value component; *ii)* stipulate partnership agreements with the different Moroccan and foreign partners; *iii)* favour exchange experiences, particularly those concerning training; *iv)* improve the role of Morocco among the countries which produce new technologies and applications with a strong added value; *v)* export services and application in neighbouring countries. An EGNOS ground station, funded by EuroMed GNSS programme, has been successfully installed in Agadir and should become shortly operational.
- Palestine was actively involved in GNSS and EGNOS. It followed the initiatives launched in the frame of EuroMed GNSS, by hosting technical meetings, regularly participating to events through delegates and promoting GNSS and EGNOS towards the countries' stakeholders (especially universities and research centres) in various domains.
- Tunisia has participated very proactively to both EuroMed GNSS projects, by hosting workshops, participating to events through delegates and proposing way forward to promote EGNOS adoption in the region, notably for civil aviation. The Tunisian Air Navigation Service Provider is committed to endorse the use of EGNOS in civil aviation operations, and underlined the need for the coverage in the whole country especially in the south. Tunisia is about to host the newly revamped GEMCO lauched by EuroMed GNSS II.
- Turkey has been involved in a number of EuroMed GNSS projects. All projects in which Turksat participated were completed successfully and GNSS/EGNOS practices have been learned.

5.7 Institutional and organisational capacity

Action 28

Training, twinning and exchange programmes aiming at improving institutional capacity must be continued over the next five-year period and expanded through management seminars to assist in the organizational reform of transport administrations, maintaining institutional capacity and upgrading knowledge. Mediterranean Countries are invited to propose related activities to the TAIEX instrument.

• *Outcome*

This action plays a decisive role in the overall implementation of the RTAP. Fore institutional and organisational capacity, the partnership should aim at the “strengthening and training of human resources”.

This action is thus of paramount importance for strengthening the bilateral and regional partnership.

- Algeria and Jordan benefited from two twinning programmes in the field of civil aviation and road safety.

- For example, Morocco has benefited from several twinning projects and technical assistance under the TAIEX instrument in particular in the areas of maritime safety and security and air transport, and road safety.
- The Ministry of Transport of Tunisia currently benefits from a Twinning project on the steering and monitoring of the transport sector. Another twinning is programmed for the Civil Aviation Administration. Other twinning proposals are on-going, namely a twinning on meteorology and a twinning for the merchant navy. The Ministry has also applied for several actions for TAIEX assistance covering different aspects of transport.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Strengthen coordination between the instruments of bilateral and regional cooperation.
- ⇒ Examine in the framework of bilateral cooperation the arrangements for strengthening the cooperation instruments and simplification of relevant procedures in order to ensure better implementation of this action, to the benefit of the Mediterranean partner countries.

5.8 *Financing prospects*

Action 29

Assisted by the Working Group on infrastructure and regulatory issues, Mediterranean Countries are encouraged to start technical work on the priorities identified by the HLG or approved alternatives (see actions 19-21). These priorities should also provide the reference basis for the funding of feasibility and other studies by the NIF.

- ***Outcome***

At this stage, no study on the priority projects has been submitted to the Neighbourhood Investment Fund (NIF).

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Strengthen the role of the NIF as a mechanism for trans-Mediterranean connections by supporting large-scale infrastructure projects, by developing an approach similar to the one used for the trans-European transport network and the Connecting Europe Facility (CEF), currently under adoption in the European Union.²⁴
- ⇒ Establish a prioritisation of intervention in this framework to identify in advance the actions that will be supported by the NIF (regional actions, for example, being targeted in the first place).
- ⇒ Support at the national level an update of the legal and financial system, create a regional system of guarantees and establish a regional fund guarantee for private sector investments in new transport infrastructure projects. In this context it would be important to explore the possible role of the UfM Secretariat.

²⁴ European Commission proposal for a Regulation of the European Parliament and of the Council establishing the Connecting Europe Facility, COM (2011) 665

Action 30

The European Commission is called upon to complete a micro-study evaluating the opportunities, chances and risks for PPPs in the Mediterranean region. The study will describe the current situation, thereby highlighting the legal possibilities and obstacles, and list the transport PPPs already implemented in the region. It will also publicize those projects with a potential to be implemented as PPPs and liaise with International Financial Institutions (IFIs) and private investors active in the Mediterranean region to gauge their potential interest in financing these projects.

• **Outcome**

- In 2008, the EuroMed project conducted a mini study on the "Public Private Partnership in the transport sector – promoting private sector involvement in transport infrastructure development in the Mediterranean countries".²⁵
- In 2011, the EIB conducted a study on the legal and financial frameworks of the Public-Private Partnership (PPP) in the Mediterranean Partner Countries.²⁶
- A new policy regarding the involvement of the private sector is being implemented in Egypt at present. There is a major transformation where BOT and PPP are widely adopted in new maritime and port related projects.
- In Jordan, the PPPs Transport and Logistics Development Prospective pursue the following objectives: International trends in multi-model/ shipping port operations compliance; Boost capacity and efficiency; Enhance ports and airport regional competitiveness; Safety, security and environment; Long-term and sustainable investment; State-of-the-art equipment and new technology; Protect stakeholders and partners investments; Bringing up transport activities to an international level; Providing an efficient and reliable service to customers (cost effective and efficient); Offering a safe and inspiring place to work; Delivering shareholders sustainable, profitable growth. There are several successful stories on PPP projects (Queen Alia International Airport / Aqaba Container Terminal).
- Morocco is already involved in public-private partnership (several projects were launched in the following areas: port management, urban transport, airport services, road safety, etc). To this aim, Morocco is in the process of adopting a draft law on PPP. The Transport Minister set up a specific unit responsible for accompanying and promoting of investments, notably in the area of the PPP.
- In Turkey, various projects in the different transport sectors were registered in the period 2007-2013 in terms of PPPs, as defined in the Turkish legislation (BOT: Build-Operate-Transfer): Projects relating transport were conducted in six international airports and terminal buildings (BOT); four airports; the Göcek Tunnel (Motorways Service Stations, BOT); three Port facilities, nine Marinas (BOT); the Marmaray Bosphorus Tunnel (BOT); Motorways with a total length of 2.000 km (BOT); Restructuring of Kapıkule railways border station (BOT); the Antalya-Alanya Railways project (BOT).

• **Main outstanding issues**

Among the main challenges encountered for the implementation of this RTAP Action, it emerged the need to provide an adequate definition of the Public-Private Partnership.

At this stage only a limited Number of PPP Models is covered by the current legislation (BOT, and other models). The scope of the existing PPP legislation does not include, for example, the sectors of justice, education, culture and there is a lack of harmonization among PPP laws.

²⁵ Available at: <http://www.euromedtransport.eu/Fr/image.php?id=144>

²⁶ Available at: http://www.eib.org/attachments/country/femip_study_on_ppp_voll_fr.pdf

Moreover, there is a lack of Central Administrative Structure for the PPP projects, in relation to their implementation and coordination.

Finally, a consistent EU reference regarding the implementation of PPP projects which will benefit from EU financial Assistance would facilitate the use of PPPs.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

⇒ EIB support to PPPs (MED 5P initiatives), at first the priority infrastructure projects of the Mediterranean partner countries.

⇒ Implement the mini study recommendations on ‘public-private partnership in the transport sector’ and, where appropriate, update the study to allow all the Mediterranean countries to benefit from it.

Action 31

The European Commission is called upon to hold a coordination meeting or set of meetings with the various International Financial Institutions (IFIs) active in the Mediterranean region, notably in the context of the MoU on cooperation in the MEDA region signed between the EC, the EIB and the World Bank in May 2004. The aim of these meetings – to take place in 2007-2008 and be chaired by the EC – should be to establish an Infrastructure Steering Group for facilitating coordination on regional transport priorities in line with strategies defined by the national authorities. In addition, the option for a Project Preparation Facility should be explored. Such a facility would be in charge of financing technical assistance for project preparation in order to make potential investments bankable.

- ***Outcome***

The UfM was launched in 2008 and in 2010 received a Secretariat of the Union for the Mediterranean (SUfM). The SUfM is mandated to focus on projects, in particular their promotion and the mobilisation of funds for their implementation.

The Working Group "Infrastructure and Regulatory Issues" (action 33), in its conclusions of 13-14 January 2010, reaffirmed "the willingness to consider in conjunction with the work of the UfM, on the content and location of a conference covering transport financing, which should preferably have taken place in 2010. These further discussions, including the search for new sources of financing for the transport projects, will be investigated by a specific Task force which will report to the group of infrastructure and regulatory issues for its consideration. This Task force was set up in 2010 under the auspices of the Union for the Mediterranean. In December 2010 the working group on infrastructure and regulatory issues endorsed the key recommendations presented by the Task force on the financing of priority projects for transport infrastructure and the future trans Mediterranean transport network, TMT-N.

- Mobilising resources in order to establish a Fund for Euro-Mediterranean Transport taking into account the experience of the mechanisms, principles of the mechanisms of TEN-T funding.
- Carry out an in-depth analyses such mechanisms and principles for financing the TMT-N and evaluate the financial needs of the transport infrastructure sector in the Mediterranean region and the mechanisms required.
- Ask the SUfM to take full account in its mission of identification, promotion and labelling of concrete transport projects, of existing results of on-going work and contribute to the search for innovative financing arrangements for future TMT-N infrastructure.
- Ensure that the “EuroMed Transport Project II” maximises benefits from existing EU financial instruments where the Mediterranean countries could be involved, including, inter

alia, the programmes of the ENPI and multi-country programmes; Also exploring ways to strengthen synergies with other donors, mechanisms and financing activities.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

⇒ The Forum meeting of January 2013 took on the recommendations made by the working group mentioned above, in its conclusions to mark their importance in the policy formulation for the future RTAP 2014-2020, which will be discussed at the forthcoming ministerial conference of November 2013.

VI. MONITORING THE IMPLEMENTATION OF THE RTAP (ACTIONS 32 TO 34)

Action 32

The Euro-Mediterranean Transport Forum as the main platform for the discussion, monitoring and regular update of the RTAP shall deliver a mid-term review of the RTAP by the end of 2009 and a final review report by mid-2013. Given that the executive capacity of the Euro-Mediterranean Transport Forum is limited, the European Commission – as secretariat of the Forum – should continue to provide the support required to prepare reports and updates.

• *Outcome*

A first mid-term activities project was prepared in 2010 on the basis, in particular, of the IT tool for monitoring. A study has also been carried out in 2011 by the main project EuroMed Transport.

Following this first round evaluation, a new approach has been followed. This favoured the evaluation directly by the Mediterranean partners themselves.

This approach was decided by the working group on infrastructure and regulatory issues at its session of 26 March 2012. On that occasion, the conclusions of the group stressed the importance of the evaluation of the RTAP to be carried out in the first place by Mediterranean partner countries on the basis of a common methodology through a questionnaire developed by the European Commission.

The evaluation by the Mediterranean partners was carried out in accordance with the approved procedure. This is reflected in this summary report. This report is based on the replies and the contributions received from the Mediterranean partner countries as a whole to the questionnaires prepared by the Commission. The text was the subject of discussion and validation within the various EuroMed working groups concerned.

• *Suggestions aimed at better implementing the future 2014-2020 RTAP*

- ⇒ Ensure a continuous and regular monitoring of actions for the new RTAP. It is also essential that the partner countries continue to play a direct role in the supervision and continuous updating of measures as a whole through the work of the thematic groups concerned.
- ⇒ Drafting a succinct Activity Report of the tangible achievements of the RTAP two years after the start of the new RTAP and thereafter every two years. The European Commission, as well as the SUfM on the actions and the projects relevant to it, should be asked to provide the necessary support to the preparation of the reports.
- ⇒ Mention in the new structure and evaluation reports of the RTAP the possible indicators used in some actions in order to ensure the effective implementation of the RTAP.

Action 33

In order to fulfil its monitoring task with respect to the implementation of the trans-national axes in the Mediterranean, the Euro-Mediterranean Transport Forum is invited to establish an additional thematic WG in 2007 to deal with infrastructures for all modes of transport, and with regulatory issues for land transport. The working group should consider multimodality, focusing on the main Mediterranean transport axes but taking the wider transport network into account. Furthermore, it should coordinate its work with other Forum working groups. The European Commission should provide organizational and financial support for the running of these working groups.

- **Outcome**

This working group on infrastructure and regulatory issues (inland transport) was created in November 2007. It is composed of the national EuroMed, coordinators who are senior representatives from the Ministries of Transport of the Mediterranean partners. This group has followed the central actions (actions 19-20-21) by developing infrastructure policy of the future trans-Mediterranean transport network, its priority projects and its connection with the TEN-T.

This group unifies the framework dialogue and technical work of the RTAP for the whole EuroMed structure implementing in a coordinated manner the two interdependent pillars of EuroMed transport cooperation, namely reforms and regulatory convergence as well as infrastructure policy.

- **Suggestions aimed at better implementing the future 2014-2020 RTAP**

⇒ Focus on delivering transport infrastructure projects and reform and modernisation of the sector.

Action 34

The Commission is invited to consider the establishment and maintenance of a permanent secretariat on Mediterranean transport to support the operation of the Euro-Mediterranean Transport Forum through the systematic collection and analysis of relevant data and the supply of expertise (see also action 18). Such a secretariat should ideally comprise two programme areas dealing with Western and Eastern Mediterranean respectively, given the different opportunities and challenges and the variable development of institutional structures of regional cooperation in the two sub-regions. A feasibility plan on the establishment of such a permanent secretariat should be completed by the end of 2007 and take into account the experiences made by CETMO for the Western Mediterranean.

- **Outcome**

Compared to the moment of the adoption of the RTAP 2007-2013, the institutional context has changed and must be taken into account in the implementation rules in the future. Indeed, the Union for the Mediterranean (UfM) was launched on 13 July 2008 at the Paris Summit as a continuation of the Euro-Mediterranean Partnership (EuroMed), derived from the Barcelona process as established at the Barcelona Conference in 1995.

As regards operational cooperation between the EuroMed Transport structure and the UfM, the following two main aspects are noteworthy:

- Since the 9th EuroMed Transport Forum of 12 December 2008, all technical meetings of the EuroMed Transport structure are “under the auspices of the UfM through its co-chairmanship”.
- The UfM has a Secretariat of the Union for the Mediterranean (SUfM) whose statutes have been adopted on 3 March 2010.²⁷ This Secretariat, established in March 2010, is based in Barcelona

- **Main outstanding issues**

An issue that should be the subject of a specific action concerns the permanent technical support to be provided to the overall Mediterranean Region. Indeed, the Eastern sub-region

²⁷ The Statutes of the SUfM is available at www.ufmsecretariat.org.

benefited from subsequent technical supports, thanks to regional EuroMed programmes. This discontinued support has not prevented a collective commitment by the partners which has resulted in concrete achievements. However, a suitable and sustainable solution to this issue needs to be found in order to provide this sub-region with a permanent technical support, which should have the same technical nature as the support provided by CETMO to the Western sub-region.

- ***Suggestions aimed at better implementing the future 2014-2020 RTAP***

- ⇒ Clarify the relationship between the various operational technical working frameworks (EuroMed, SUfM, CETMO/GTMO) in order to ensure a better coordinated support to Mediterranean partners in the implementation of the future RTAP. In the overall context of the future RTAP, European transport agencies of should also be considered as stakeholders. The same applies to the EIB in particular through specific technical assistance programmes.
- ⇒ More specifically, establish a permanent technical support, to be headed by the National Coordinators, to carry out the execution of the new RTAP 2014-2020 in light of a precise mandate.

Annexe C : List of acronyms and abbreviations

AEFMP:	Algeria, Spain, France, Morocco, Portugal
AFS Convention:	Convention on Anti-Fouling Systems for ships nuisibles sur les bateaux
AMU:	Arab Maghreb Union
ATM	Air Traffic Management
CETMO	<i>Centre d'Études des Transports pour la Méditerranée Occidentale</i>
EASA	European Aviation Security Agency
ECAA	European Common Aviation Area
EMCAA	Euro-Mediterranean Common Aviation Area
EC	European Commission
EDI	Electronic Data Interchange
EIB	European Investment Bank
EGNOS	European Geostationary Navigation Overlay Service
EMSA	European Maritime Safety Agency
ENP	European Neighbourhood Policy
ENPI	European Neighbourhood and Partnership Instrument
ESCWA	United Nations Economic and Social Commission for Western Asia
EU	European Union
FEMIP	Facility for Euro-Mediterranean Investment and Partnership
GNSS	Global Navigation Satellite System
GTMO	Transport Ministers Group for Western Mediterranean
HLG	High Level Group
IFC	International Financial Cooperation
ILO	International Labour Organisation
IFI	International Financial Institutions
IMDG	International Maritime Dangerous Goods Code
IMO	International Organisation Maritime
IMO-FAL	Convention on Facilitation of International Maritime Traffic
ISPS	International Ship and Port Facility Security Code
JAA	Joint Aviation Authorities
Marpol	International Convention for the Prevention of pollution from Ships
TMN-T	Trans-Mediterranean Transport Network
TEN-T	Trans-European Transport Network
Mediterranean Partners	Algeria, Egypt, Israel, Jordan, Lebanon, Morocco, Palestine, Syria, Tunisia, Turkey
MoS	Motorways of the Sea
NIF	Neighbourhood Investment Fund
PPP	Public-Privat Partnership
RTAP	Regional Transport Action Plan
TAIEX	Technical Assistance Information Exchange Unit
TINA	Transport Infrastructure Needs Assessment
TIRS	Transport Infrastructure Regional Study in the Balkans
UNECE	United Nations Economic Commission for Europe
UNECE TEM et TER	United Nations Economic Commission for Europe Trans-European Motorway and Trans-European Railway
VTMIS	Vessel Traffic Management and Information System
VTS	Vessel Traffic System
WCO	World Custom Organisation
WCO SAFE	World Custom Organisation – Framework of Standards to Secure and facilitate Global Trade