Major policy, infrastructure and management developments in the Western Mediterranean region related to ports

The Mediterranean Harbours
4th-5th October 2007

CETMO
Centre d’Études des Transports pour la Méditerranée Occidentale
CETMO

Organization created in 1985 as the result of an agreement between Western Mediterranean countries (Algeria, France, Italy, Morocco, Portugal, Spain and Tunisia).

Mission

To develop regional cooperation at the institutional and technical levels with the aim of facilitating international transport conditions in the Western Med.

Specific Objectives

- To study transport flows, infrastructure and legislation, and to develop initiatives that facilitate transport.
- To study and provide information about the logistics and technological trends that influence the strategic position and competitiveness of the transport sector in Western Mediterranean countries.
CETMO and the GTMO

Since early 1997, CETMO holds the position of Secretariat of the Group of Transport Ministers of the Western Mediterranean (GTMO).

Since its creation in 1995, the GTMO aims to promote cooperation on transport in the Western Mediterranean and to contribute to the Euro-Mediterranean Partnership. Libya, Malta and Mauritania jointed GTMO in March 2007.

The GTMO has recently promoted and coordinated two important projects:

- **Reg-Med** ([www.reg-med.net](http://www.reg-med.net))
The main objective of Reg-Med was to organize analysis and discussions on the regulatory framework affecting transport in order to facilitate goods flows and improve transport efficiency in the Mediterranean area.

- **DESTIN** ([www.destinweb.net](http://www.destinweb.net))
The overall objective of DESTIN was to contribute towards research on:
  - Operational and sustainable methods and criteria for identifying and evaluating the development of transport networks in the Mediterranean that also help in decision-making processes for planning infrastructure within the context of the extension of the Trans-European Transport Network (TEN-T).
### Challenges for policy, infrastructure and management of ports

#### International trade in Western Mediterranean

<table>
<thead>
<tr>
<th>Country Combination</th>
<th>Year 2005</th>
<th>Source: Eurostat</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France – Italy – Portugal - Spain</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>16,8 MT</td>
<td>67,6 MT</td>
</tr>
<tr>
<td></td>
<td>22,095 M€</td>
<td>27,557 M€</td>
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<tr>
<td></td>
<td>1,315 €/T</td>
<td>408 €/T</td>
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<tr>
<td><strong>Algeria – Morocco - Tunisia</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DZ</td>
<td>MA</td>
<td>TN</td>
</tr>
<tr>
<td>6,1 MT</td>
<td>5,9 MT</td>
<td>4,8 MT</td>
</tr>
<tr>
<td>7,414 M€</td>
<td>8,889 M€</td>
<td>5,792 M€</td>
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<tr>
<td>1,215 €/T</td>
<td>1,507 €/T</td>
<td>1,207 €/T</td>
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<tr>
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<td>56,6 MT</td>
<td>6,7 MT</td>
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<td>15,180 M€</td>
<td>7,297 M€</td>
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<td>268 €/T</td>
<td>1,089 €/T</td>
<td>1,155 €/T</td>
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**Western Mediterranean ports**

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### International trade in Western Mediterranean

Main UE partners:
Extra UE trade

<table>
<thead>
<tr>
<th>% value</th>
<th>% Imp</th>
<th>% Exp</th>
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</thead>
<tbody>
<tr>
<td>USA</td>
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<td>23,5</td>
</tr>
<tr>
<td>Chine</td>
<td>13,4</td>
<td>4,8</td>
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<tr>
<td>AELE</td>
<td>11,6</td>
<td>11,2</td>
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<td>OPEP</td>
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<td>Japan</td>
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<td>4,1</td>
</tr>
<tr>
<td>ASEAN</td>
<td>6,0</td>
<td>4,2</td>
</tr>
<tr>
<td>ACP Africa, Caribbean, Pacific</td>
<td>4,6</td>
<td>4,7</td>
</tr>
<tr>
<td><strong>Magreb (DZ, MA, TN)</strong></td>
<td><strong>3,2</strong></td>
<td><strong>2,8</strong></td>
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</table>

Main Magreb partners:
Extra Magreb trade

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<tr>
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</thead>
<tbody>
<tr>
<td><strong>UE</strong></td>
<td><strong>65,4</strong></td>
<td><strong>66,1</strong></td>
</tr>
<tr>
<td>USA</td>
<td>3,4</td>
<td>16,7</td>
</tr>
<tr>
<td><strong>Chine, Japan, Korea</strong></td>
<td><strong>8,1</strong></td>
<td><strong>1,7</strong></td>
</tr>
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**Source:** Eurostat

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Challenges for policy, infrastructure and management of ports

International trade in Western Mediterranean

FLUJO: EUROPA DEL SUR-OESTE => MAGREB

ANIMALES VIVOS Y PRODUCTOS DEL REINO ANIMAL
PRODUCTOS DEL REINO VEGETAL
GRASAS Y ACEITES, ANIMALES O VEGETALES, CERAS.
PRODUCTOS DE ALIMENTACION, BEBIDAS Y TABACO
PRODUCTOS MINERALES
PRODUCTOS DE INDUSTRIAS QUIMICAS
PLASTICOS Y CAUCHO
PRODUCTOS TEXTILES
MADERA Y PRODUCTOS DERIVADOS
OBRAS DE PIEDRA, ETC. ; CERAMICA, Y VIDRIO
METALES COMUNES
MAQUINARIA Y MATERIAL ELECTRICO
MATERIAL DE TRANSPORTE
OTROS

Year 2003
Source: Eurostat and Magreb customs
### Challenges for policy, infrastructure and management of ports

#### International trade in Western Mediterranean

**FLUJO: MAGREB => EUROPA DEL SUR-OESTE**

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<thead>
<tr>
<th>Category</th>
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<tr>
<td>ANIMALES VIVOS Y PRODUCTOS DEL REINO ANIMAL</td>
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**Year 2003**

Source: Eurostat and Magreb customs

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Magreb harbours: door to goods export/import
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Road network

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**Railway network**

*Destin*
Réseau de Base des Infrastructures de Transport en Méditerranée Occidentale

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Airports and Gas pipelines

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Challenges for policy, infrastructure and management of ports

Obstacles to fluidity of trade flows: Passage through ports

- Different kinds of bottlenecks between ports and countries (infrastructure and/or organizational/operational bottlenecks).
- No ports have indicators to measure these conflictive areas.

The common deficits include:
- Complex port administration with excess of actors => source of conflicts.
- No competition between port services => no incentive to improve service.
- Infrastructures are not appropriately sized, or are badly used or adapted.
- Space and resources are allocated late or badly. Long delays affecting ships as well as cargo.

Nevertheless, port-transit time and costs are being reduced on the whole.
Obstacles to fluidity of trade flows: Customs and other controls

- Customs problems affect the Magreb ports, mainly imports.
- Lack of organization/coordination between the different goods control.
- Lack of control personnel and equipment.
- Need for efficient implementation of the declaration via electronic, harmonisation of information and documents to submit and simplification of declarations.
- Goods declaration and others documents are infrequently examined in advance, before goods arrival.
- Excessive goods controls and too much time taken to decide whether goods need to be checked.
- Other countries' certificates of conformity are not accepted; the acceptable risks levels within each country are not harmonized (non customs border controls).
Challenges for policy, infrastructure and management of ports

Obstacles to fluidity of trade flows:
Land Transport

Road
- Many small operators with poorly qualified personnel.
- More supply than demand => prices tend to fall => no investment potential.
- No document standardization between countries. Controls are duplicated and goods take too long to cross borders.
- Damages due to clandestine immigration and drug trafficking, expensive to cross the Strait of Gibraltar, etc.
- Bilateral rather than multilateral agreements between countries (problems of quotas, empty returns, triangular trade, etc.).

Rail
- Not competitive compared with road traffic, except for certain kinds of cargo.
- Management of railway services not very efficient.
- Deficient rail-maritime intermodality.
Needs and opportunities for improvement: Maritime transport services and Passage through ports

- Support for liberalization process of maritime transport: updating of public-national fleets and generation of privately owned fleets.
- Identification, quantification and development of port-transit bottlenecks.
- Continuing with organizational reform of port management, investments and ICT support.
- Generating partnerships within port communities to unify efforts.
- Encouraging the improvement of maritime transport flows through contacts with Southern European ports with the aim of learning from their experience.
- Evaluating customs processes to reduce delays.
- Adopting advance goods declaration and good practices as set out in the revised Kyoto Convention on customs procedures.
- Applying risk-management techniques and a posteriori controls (customs and non-customs controls).
- “One-stop office” in ports.
Challenges for policy, infrastructure and management of ports

Needs and opportunities for improvement:
ICTs to facilitate passage through ports

- To simplify customs procedures and reduce delays.
- As tools to manage port calls: simplification, synchronization, monitoring, EDI.
- As a link between port and customs systems: One-stop office.
- As a link with systems outside the port community (land-transport systems and other port communities).
- To overcome any impediments to their use:
  - Create a legal framework for validating e-documents.
  - Create a forum to inform users and hear their opinions.
  - Generate a culture on the benefits of using ICTs in the sector.
Challenges for policy, infrastructure and management of ports

Needs and opportunities for improvement: Land transport and multimodality aspects to be reinforced

- Need for measures to support the liberalisation process.
- Multilateral agreements to bring markets into line and guarantee equal opportunities for southern and northern operators.
- Cross-border movements of goods need to be facilitated.
- Rail-port interoperability needs to be improved.
- Reforms or support are needed to separate railway commercial operations from infrastructure management.
- Planning and strengthening of logistics platforms.
- Standardization of intermodal loading units.
- Support for the role of forwarding agents in Magreb and their professionalization.
Challenges for policy, infrastructure and management of ports

Euro-Mediterranean Transport Cooperation: results

- High Level Group for extension of major trans-European Transport axes to the neighbouring countries and regions and regions.
- Results of the Euromed Transport Project: Diagnosis, Blue Paper, Regional Transport Action Plan.
- The Marrakech Conference.

The result of twelve years of Euro-Mediterranean cooperation in transport is certainly modest. It has been a long and difficult road, though in recent years the Euro-Mediterranean Transport Partnership seems to have designed its own roadmap.
Challenges for policy, infrastructure and management of ports

Euro-Mediterranean Transport Cooperation: present and future activities

Present:
- Working Group Air Transport: **Aviation Project**.
- Working Group GNSS (EGNOS / Galileo): **Projects GNSS 2 and Metis**.
- Working Group Maritime Transport: **MedaMoS project** and **Safemed Project**.

Future:
- Creation of a **new Working Group** to assume responsibility for **infrastructure** and regulating land transport.
- Development of the **34 actions** addressed in the **Regional Transport Action Plan**.
- Implementation of two **Motorways of the Sea pilot projects** (September: Call for Proposals), one for the Western Mediterranean and one for the Eastern Mediterranean.
- EIB study on **logistics platforms** in the Magreb.
Challenges for policy, infrastructure and management of ports

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Western Mediterranean ports

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RTAP actions focused on ports and maritime transport
Short term implementation

- **Action 4**: Elaborate national measures for reduction of dwell times in container terminals.
- **Action 5**: Introduce 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.
- **Action 6**: Assess performance of competition-related reforms in national shipping sector and to produce recommendations for the removal of factors distorting competition.
- **Action 8**: Definition of concrete of cooperation between Med-countries and EMSA (European Maritime Safety Agency).
Challenges for policy, infrastructure and management of ports

RTAP actions focused on ports and maritime transport
Medium-term implementation

- **Action 2**: Work on the assignment of the tasks of port and terminal management to different autonomous agencies (and regulation). Decentralization of port and terminal management. Installation of port communities within each port.

- **Action 3**: Work on the simplification of customs procedures.

- **Action 9**: Assess/implementation VTS or VTMIS systems in the major Mediterranean ports and coordinate technological solutions between neighbouring ports and coastal areas.

- **Action 7**: full implementation of safety and security requirements deriving from IMO/ILO regulations and efficient implementation of ISPS security regulation both at the Flag State and Ports levels.
Thank you

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