

Introduction to the Thematic Issue: What Is the Future Scenario for Transport in the Mediterranean Region?

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KEY ISSUES CONCERNING THE FUTURE OF TRANSPORT
IN THE MEDITERRANEAN REGION: FROM
AN OVERVIEW TO DETAILED ANALYSIS

In a year like 2011, characterized by important events that concern the southern and eastern part of the Mediterranean region, it is not easy to imagine what the future has in store for this area even in terms of commercial relations and consequently transport.

Yet, this is precisely what has urged us to investigate this topic in this thematic issue of the *International Journal of Euro-Mediterranean Studies*, which endeavours to answer the question ‘What does the future have in store for freight transport and logistics in the Mediterranean region?’

The current global geoeconomic situation is bringing about new perspectives for the Mediterranean region in terms of trade flows and transport and logistics networks, especially with reference to maritime transport – but not exclusively.

From an evolutionary perspective, it is worth investigating the trends that are most likely to influence transport and logistics in the Mediterranean area in many different ways over the next few years.

We asked ourselves a few questions, which were to be tackled not only from a strictly technical perspective focused on transport, but rather keeping the wider picture in mind, which meant considering the future of transport in the Mediterranean region as an opportunity to analyse and anticipate a wider scenario. To be specific, these are the questions behind this edition: Which role will logistics and trans-Mediterranean transport play in supporting trade and sustain-

[8] able development in emerging countries (and in particular in Northern Africa and the Middle East)? How will economic geography and the related traffic routes change? Which will be the new drivers in the logistics competition between Mediterranean regions and what will the regional specialisations be? What will ports, cargoes, transport technologies, costs, human resources, logistics networks and supply chains be like? What prospects will there be for investors? What finance and governance frameworks will there be for infrastructures and services? What regulation and governance frameworks will there be for transport security, safety and sustainability in this area? What chances will there be for the development of trans-Mediterranean land-bridges (e. g. the Adriatic–Baltic corridor)?

THE REFERENCE FRAMEWORK: FROM BARCELONA
(1995) TO THE PARLIAMENTARY CONFERENCE
OF THE UNION FOR THE MEDITERRANEAN (UfM)
ON TRANSPORT (ROME 2011)

Before presenting the contents of this thematic issue, it is important to define a reference framework to which the papers' research contents have to be ascribed.

Mediterranean transport is obviously an extremely wide topic and it is directly linked to the issue – that we do not wish to discuss here – of the Euro-Mediterranean policy concerning the Barcelona process, of the cooperation policies among the Mediterranean countries of the Maghreb and the eastern Mediterranean area, and of the idea of creating a free trade area, not to mention the future geopolitical scenarios, which are uncertain at present.

It is clear that much of what will happen in transport depends on the evolution of the originating process, which seems to have slowed down in the last few years.

Yet, it must be pointed out that the 1995 Barcelona Declaration stresses 'the importance of developing and improving infrastructures by establishing an efficient transport system' and that 'efficient interoperable transport links between the EU and its Mediterranean Partners and among the Partners themselves, as well as free access to the market for services in international maritime transport, are essential



to the development of trade patterns and the smooth operation of the Euro-Mediterranean Partnership.’

In order to understand the scenario created by the challenges posed by a ‘Mediterranean transport policy’ it is worth looking at the recommendations made by the latest Parliamentary Assembly of the Union for the Mediterranean (UfM), which took place in Rome on 4 March 2011, that is at a time of geopolitical turmoil for that area (Parliamentary Assembly of the Union for the Mediterranean 2011).

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The starting point of the recommendations is ‘the risk of a deterioration in the economic and financial situation in the entire Mediterranean region, given the impact of the social and political events in various countries of the region on prices of raw materials and food’ and the disapproval of the ‘lack of progress in establishing the Euro-Mediterranean Transport Networks, despite the commitment expressed by the Euro-Mediterranean Partners in this respect.’

In general, the recommendations made by the parliamentary assembly concern the need to ‘put at the centre of the future transport policy of the region the correlation between the Trans-European network policy and the envisaged Trans-Mediterranean Transport Network.’ In particular, ‘a Euro-Mediterranean integrated and multimodal transport helping to strengthen trade between the EU and Mediterranean partners and between partners themselves’ is envisaged, as well as the ‘enhancement of the integration and cohesion of infrastructure networks by providing a transportation network well connected and interoperable between Southern Mediterranean countries and between those countries and the EU.’

From a political point of view, it is recommended that a transport policy in the Euro-Mediterranean region should be supported through ‘not only financial criteria, but also economic, social and territorial cohesion and in particular the needs of territorial planning and sustainable development criteria,’ while paying ‘special attention to cross-border connections, and the need for better connections between inland regions and coastal areas.’

A closer connection between the European Union policies and those of other Mediterranean countries is encouraged and this goal can be achieved also through ‘the connection of the Trans-European

[10] Transport Networks (TEN-T) with the Trans-Mediterranean (MRT-T) and for the development of innovative and flexible financing instruments.’ Making reference to the EU policy based on financing corridors, the conclusions of the assembly state ‘the need for a higher allocation of funds, including through public-private partnerships, for priority infrastructure projects and the development of maritime, land and rail corridors in the Euro-Mediterranean region.’

The role of human resources is considered fundamental and thus ‘particular attention to ensure equitable training of human resources for transportation and for harmonizing technical and operations rules between countries’ is required.

The articles published in this thematic issue are to be ascribed to this general framework. If placed within a wider picture, the answers that emerge from the submitted research papers provide a scenario that, although somewhat fragmented, is evenly distributed in geographical terms and capable of bringing to the fore some key issues.

IMPORTANCE OF ISSUES CONCERNING MARITIME
TRANSPORT

Special Attention to Maritime Transport

Maritime transport clearly is the most important topic, also because of the number of papers covering this sector. We cannot forget that the Mediterranean basin is a strategic world transport area, and in particular the Suez Canal, which represents the shortest route between East and West; it accounted for 8% of the world seaborne trade in 2009. The maritime theme, besides being linked to the economic aspects concerning the development of commercial opportunities, is also closely linked to environmental issues. By way of example, consider what the conclusions of the assembly held in Rome state: ‘the objective is to avoid the transport by sea of hydrocarbons in the Mediterranean resulting in a new “Erika” or “Prestige” in a closed and ecologically fragile sea and, in this context, a new regional project should bring together the main prevention measures.’ The issue of greenhouse gas emissions is also considered relevant.

A research topic discussed by various authors is the role played by the legal and institutional systems in the development of maritime



transport. Consider how many articles focus on the need to reform the port systems of the Mediterranean countries of Northern Africa and on the opportunities provided by importing port policies models (for example from the Far East countries) – see the article on port-devolution in Libya. The topic of port reform appears to be a core issue also for countries located in the northern part of the Mediterranean Sea: for example, according to the paper on the Spanish port reform, Spain has only recently adopted a port reform framework that is in line with a full exploitation of the logistics potential of the country. A specific focus on port management models is put forward also for the cruising sector, which is very dynamic in the Mediterranean Sea. This article points out the fact that legal frameworks that allow private management of cruise terminals favour efficiency increase. However, legal frameworks cannot work at national levels only. Some issues, like the regulation of greenhouse gas emissions made by ships must be considered from a wider, trans-Mediterranean perspective, as is clearly explained in the paper on this topic.

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Other articles deal with the transport evolution scenario in the Mediterranean region in more general terms and bring to the fore some geographical and organizational aspects of the international logistics business, while pointing out – through a model applied to a case study – the fundamental issue of choosing between Mediterranean ports and northern European ports.

*An Overview of Maritime Transport in the Mediterranean Region:
Recent Trends*

It goes without saying that the maritime transport framework of the Mediterranean region is certainly undergoing a deep transition phase (Laroche 2010). It is worth taking a look at some events that took place in 2010 to understand which phenomena are taking place, regardless of what will happen in the southern Mediterranean countries in the next few years.

There seem to be three main aspects:

- ‘Motorways of the Sea’ (MOS) development;
- the ‘battle’ for transshipment in the container sector and in par-

ticular the role that the southern side of the Mediterranean Sea is acquiring;

- the issue of gates to Europe and the reduction of environmental costs after the crisis, with new prospects for some areas (i. e. upper Adriatic Sea).

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Motorways of the Sea

The growth of maritime integration between eastern and southern Mediterranean countries and the northern side depends basically on the development of the 'Motorways of the Sea' (MOS), as is well known.

An IPEMED report issued last year stated that between 2005 and 2020 there is likely to be a growth that could amount from twice to four times the present flow levels, depending on future scenarios, but in order to support such a potential the integrated policy of Euro-Mediterranean maritime transport should be strengthened, whereas at present it is left up to regional projects (Abeille and Weiger 2010).

In 2010 some results were achieved in this sector through the pilot projects launched within the framework of the Euro-Mediterranean transport program MedaMos of the EU, which aims at creating a basic network of north-south relations (connected by a combined rail transport network) through an international partnership of various stakeholders (operators, ports, customs, ministries) involved in the logistics chain.

The Development of Hub Ports

As for international container traffic and the role of the Mediterranean region as world hub, the situation is evolving and the role played by the African side in transshipment is becoming greater. According to a study carried out by Eurispes (Eurispes 2010), container transshipment traffic in the Mediterranean region is estimated to increase by about 5 million TEU (+25.2%).

Speaking of transshipment, this was the situation in 2009 in terms of relations between the Mediterranean Sea and northern Africa: Port Said ranked first with 3 million and 258,000 TEU (+1.7% compared to 2008), Algeciras (Spain) ranked second with 3 million and 42,000 TEU



(−8.4% compared to 2008), Gioia Tauro ranked third with 2 million and 857,000 TEU (−17.6% compared to 2008), Malta ranked fourth with 2 million and 330,000 TEU (−0.1% compared to 2008), and then there was Tangier with 1 million and 240,000 TEU, but with an outstanding increase of 35.6% in comparison with 2008, which is likely to grow further in view of the huge volume of investments planned for this port of call.

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The competition of African ports, for example for Spanish ports specialized in transshipment, became a fact in 2010, when the Tangier-Med terminal (Sastre Sebastián 2010, 7) began to take some ship services away from the port of Valencia that had previously carried out transshipment (with an estimated yearly loss of 50,000 TEU). This situation is a major challenge for ports located on the northern side of the Mediterranean Sea that carry out transshipment – and for unions too – in terms of productivity and terminal operation costs, which in Spain are estimated to be 65% of the overall costs of the navigation line for a port of call, whereas in Tangier-Med such costs are estimated to be 40% lower than in Valencia.

In order to understand the full competitive potential of the southern side of the Mediterranean Sea, it is worth mentioning some comparative data on costs that concern Italy and other southern Mediterranean ports with reference to 2010. Data have been supplied by terminal operators that work in both markets. The new southern ports offer much more competitive performances in many respects: in terms of productivity per hour (Gioia Tauro moves 21–23 containers per hour, Port Said 30), of average labour cost per hour (workers: € 22.1 in Gioia Tauro, € 1.9 in Port Said and € 3.1 in Tangier; employees: € 22.9 in Italy, € 10.1 in Egypt and € 7.1 in Morocco) and of the total cost for moving a ship of 7,000/7,900 TEU (piloting, towing, mooring and taxes), which in Gioia Tauro would be 25% higher than in Port Said and 500% higher than in Malta (Eurispes 2010).

Finally, the ‘development areas’ policy and the ‘added value’ creation policy in ports have continued to be pursued in Africa, for example in Morocco and Tunisia; by way of example, in 2010 in the port of Rades a procedure was started for the concession of a plot where a logistics area of about 35 hectares could be created and managed.

Interest in New Port Gates on the Mediterranean Northern Coast

[14] The Mediterranean Sea is obviously not only a transshipment sea. Among the phenomena that emerged in 2010 in the port container sector there was a growing interest in the opportunity to use southern European gates to serve central and eastern Europe – to replace part of the northern European gates – and in particular gates closer to the eastern part of the Mediterranean Sea and therefore to Suez.

The reason for this is the growing sensitivity that carriers operating in the container sector are showing towards reducing route lengths, navigation time and fuel use.

This explains the interest in the southern gates, which are more convenient than northern European gates: navigation time is 5–6 days shorter (in all directions) and this would make up for speed reduction. Lastly, in terms of environmental sustainability, a container that starts off in Suez and reaches Munich through the upper Adriatic Sea rather than through Rotterdam reduces CO₂ emissions between Suez and Munich by 135 kg/TEU if transported through ship/rail (Venice Port Authority 2010).

Because of this, the region where the northernmost part of the Mediterranean Sea wedges into the European hinterland, that is the upper Adriatic Sea, is a maritime traffic gate with a huge potential not only for the whole of central Europe, but also for northern Europe. In Monfalcone, which is located close to Trieste, the northernmost port of the Mediterranean Sea, an important banking group (UniCredit) along with a world class container terminal operator (APM), has put forward the idea of creating a new big container terminal with a 2.5 million TEU capacity to host large dimension ships and serve eastern and central Europe (including Bavaria) mainly by rail (Drewry Shipping Consultant 2010). Such a proposal is extremely innovative also because it is made by private operators and with investments that would include only a partial State contribution.

With reference to the ‘upper Adriatic gate,’ in 2010 the works that should enable a series of infrastructures of the TEN priority project, known as the ‘Baltic–Adriatic axis,’ to be acknowledged as part of the core network of the ‘Extended Trans-European Network’ have reached



an advanced level. This would also be a recognition of the role of the Adriatic port gate as a fundamental system for relations between southern and northern Europe.

THE FUTURE OF OTHER TRANSPORT SYSTEMS:

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AIR, ROAD AND RAIL

Although the articles of this thematic issue concentrate on maritime transport, which is perceived as the Mediterranean transport mode *par excellence*, the other transport modes cannot be neglected because of the extremely important role they are playing and could play in this region.

In order to make up for this, the following paragraph will shortly outline some topics concerning air, road and rail transport systems within the transport policy of the Mediterranean region.

Air Transport

The assembly of the UfM that met in Rome in 2011 stressed once again the aim of developing ‘air travel potential’ in Mediterranean relations. However, air transport poses some problems in terms of integration in view of the ‘Euro-Mediterranean Aviation Area.’ According to the recommendations of the parliamentary assembly that met in Rome, ‘air transport plays a very important role, owing in particular to the development of tourism and the mobility of immigrant populations; the objective is to improve airport capacity and integrate air traffic management systems with a view to creating of the Single European Sky. These measures will be supplemented by the possible conclusion of “Open Sky” agreements between the EU and the Mediterranean partners concerned and by participation in the European Aviation Safety Agency.’

In general, as various authors have been pointing out for some time, a decisive drive for the development of aviation must come from the national policies of the non-EU Mediterranean countries too. These are the mentioned goals: restructuring and privatising flag carriers, liberalization of air traffic rights and market access, modernization and privatization of major airports, introducing competition in airport ground-handling and modernization of air traffic control and safety/security.

Domestic reforms are essential to prepare for regional integration, while regional integration is to be used as an ‘anchor’ for domestic reforms.

[16] As for the creation and implementation of new scenarios for ‘air transport relations’ between the EU and the non-EU Mediterranean countries, there are models that have worked, starting from the EU–Morocco Agreement. As is well known, this comprehensive aviation agreement, that became effective in December 2005, set down the application of the 3rd and 4th ‘freedom’ with unlimited frequency in both directions in phase 1 and the application of the basic *acquis* package, extended to the 5th freedom, on the part of Morocco in phase 2. The package included safety, passenger rights, ground-handling, competition policy, ATM/Single European Sky and the environment (noise) (Müller-Jentsch 2006).

Anyway, in spite of the progress made especially in regional integration and in bilateral agreements between the EU and non-EU countries (i. e. the agreement with Jordan in 2010), there is still a long way to go to create a Euro-Mediterranean ‘open sky framework.’

Road and Rail Transport

In general, the topic of road and rail transport is far-reaching and it concerns various operational levels (infrastructures, administration, safety, etc.) and various geographical levels (from the macro-regional to the urban level).

As far as the main priorities in infrastructures are concerned – an aspect we would like to bring to the fore – it is self-evident that they are basically found in areas located on the southern side of the Mediterranean Sea.

As for road transport, we would like to draw attention to the project concerning the motorway interchange of the southern side (which will have to be integrated with the interchange for the production of photovoltaic electricity); it has been slowed down because of financial and political reasons, but it remains an ideal background for numerous partial works meant to connect the motorway along the coast. A case in point is the 1,700-km-long motorway that should connect Egypt to Tunisia across Libya along the *via Balbo*. According to the press, the estimated cost (certainly rounded down) is 3 billion



Euro. However, there is some pressure (and it is becoming all the more relevant in political terms) for the development of trans-saharan connections that should make it possible to connect the coast and its ports with the resource basins in the sub-Saharan belt.

It is worth remembering some complex infrastructural projects that aim at creating a land (rail and road) connection between Europe and Africa. [17]

The first is the tunnel between Spain and Morocco, which has recently been seriously brought to the attention of politicians again (after the first project proposals made in the 1980s) also thanks to the progress made in tunnel technologies. The second, which is still wishful thinking, is the project for a tunnel between Sicily and Africa (about 150 km).

Railway is considered as a real option for internal connections on the southern side: for example, the parliamentary conference held in Rome hopes that there will be the opportunity to 'relieve the congested waterway of the Mediterranean through the rapid implementation of a powerful railroad from Rabat to Cairo for environmentally friendly transport of goods and passengers, as well as to review the ENP to the effect of eradicating any barriers here while improving the investment security and rule of law.'

If you analyse the priority investment programme 2009–2013 put forward for the Mediterranean region (UfM), you will see that besides funding for various ports, there are various rail projects that are relevant for the Mediterranean region: for example, the fast speed train link Casablanca – Tangier (Morocco) and the doubling and electrification of the Tunis Ghardimaou railway line (Tunisia), besides a railway link between the Syrian border and the borders with Iraq and Saudi Arabia (Jordan).

Within a modern action plan for the creation of an advanced and open transport system in the Mediterranean area, trains should not be disregarded, not even in the countries on the southern side.

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