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concerning

the Euro-Mediterranean Partnership in the Transport Sector

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Executive Summary

The Euro-Mediterranean Partnership, adopted at the Barcelona Conference in November 1995, heralds a new era and approach for the Community's relations with the countries in the Mediterranean basin, which are among the Union's oldest and closest partners. The Partnership is based on three linked pillars: that of a political and security partnership, economic and financial co-operation, and social, cultural and human exchange.

The new approach adds a multilateral and global dimension to Euro-Mediterranean relations. The new Euro-Mediterranean Partnership aims to increase the flows of goods and people within the region. This Communication is intended to define a framework for co-operation in the transport sector to achieve improved integration of networks and therefore help create a space in which people and goods can move more easily.

More specific objectives are defined for transport **infrastructure** (the inter-connection of the national networks of transport infrastructures in all the countries in question in order to create multimodal and inter-operable networks) as well as for transport **services** (to ensure that the most efficient and cost-effective transport services can operate with a high standard, in terms of social, safety and environmental domains, across a common transport space covering the whole of the Euro-Mediterranean Partnership region). These are the objectives which should guide Community policy and actions in this domain.

In defining its objectives and associated working principles, the Community has been able to base itself on some initiatives already taken within the Union (such as the Trans-European Networks or its Maritime Strategy). The Euro-Mediterranean Partnership has also provided a forum for considering the widening of these (as well as the Community's Common Transport Policy in general) to its Mediterranean Partners.

The Communication announces a comprehensive **action plan** for achieving integration and improved co-operation in the region, as well as the establishment of a **group** with the Community's partners for meetings and exchanges of information on transport projects of common interest in the Mediterranean and foresees co-operation on the implementation and co-ordination of projects.

1. INTRODUCTION

Over recent years the Community has rethought its relationship towards the Mediterranean region, culminating in the development of a Euro-Mediterranean Partnership¹, as adopted at the Barcelona Conference in November 1995. The new approach proposed by the Community is global in nature and aims to create a free trade area in the Mediterranean basin by the year 2010. This Partnership has three objectives: a **political and security partnership**; **economic and financial cooperation**; and **social, cultural and human exchange**.

Transport has a crucial role : increased exchanges of goods and people will require effective and sustainable transport services. Consequently the conclusions of the Barcelona Conference include statements that the participants:

"stress the importance of developing and improving infrastructures, including through the establishment of an efficient transport system..." and "...undertake to respect the principles of international maritime law, in particular freedom to provide services in international transport and free access to international cargoes..."

The work programme attached to the Barcelona Declaration states that cooperation in the field of transport will concentrate on :

"the creation of an efficient air-sea multimodal transport system in the Mediterranean, through the improvement and the modernisation of ports and airports, the removal of unjustified restrictions, the simplification of procedures, the improvement of maritime and air safety, the harmonisation of environmental rules at a high level, including a more effective control of pollution caused by maritime transport, and the creation of harmonised traffic management systems; as well as the development of east-west land links on the southern and eastern shores of the Mediterranean, and the connection of Mediterranean transport networks to the Trans-European Network in order to ensure their inter-operability."

The aim of this Communication is to formulate such a strategy in detail and to consolidate actions already undertaken (detailed below) and yet to begin into that context. Chapters 2 and 3 of this Communication examine the transport context of the Euro-Mediterranean Partnership, both in terms of trade and transport flows in the region and in terms of the Mediterranean dimension of Community transport initiatives. Chapter 4 records current sub-regional cooperation and Chapter 5 outlines the instruments available to support current and future actions on transport within the Euro-Mediterranean Partnership.

This Communication will serve as the basis for developing a comprehensive action plan for implementing the objectives set out in this paper. Sectoral work programmes have already been drawn up for maritime transport and for transport research and development and these could be integrated into the action plan for transport.

2. THE GENERAL CONTEXT : FRAMEWORK FOR COOPERATION IN THE MEDITERRANEAN

2.1 *The Euro-Mediterranean Partnership*

The fulfilment of the objectives of the Euro-Mediterranean Partnership will require an efficient, safe, environmentally sustainable and competitive transport network.

Attaining the objective of creating a Euro-Mediterranean free-trade zone means removing barriers to trade between the European Union and each of the Mediterranean partner countries, as well as between the partner countries themselves. This is fundamental to ensuring a long-

¹ In this Communication, the Euro-Mediterranean partners are those who participated in the Barcelona Conference, i.e. the Union and its Member States, Algeria, Cyprus, Egypt, Israel, Jordan, Lebanon, Malta, Morocco, Syria, Tunisia, Turkey and the Palestinian Authority.

term balanced development for such countries and reducing their dependence on Europe and on European markets where important decisions concerning terms of trade are taken outside of their control.

2.2 Trade and transport flows: current situation and forecasts

Current situation: freight transport

About 150 million tons of goods are transported per year between the European Union and the 12 Mediterranean partners (around 10% of the Union's external trade by weight). The principal transport modes used are maritime (75% of all transports) and pipelines (17%). 40% of this transport is between the European Union and Algeria due to the large traffic of hydrocarbons; the 3 Maghreb countries (Algeria, Morocco and Tunisia) together account for about 50%. In the Eastern Mediterranean the most important trade partners (by weight of goods) are Egypt, Syria and Turkey. Turkey alone absorbs 25% of EU exports to the Mediterranean partners and it is the only trading partner where land transport to and from the EU plays a role.

Less than half a million tons of goods (0.3%) was transported by air between the European Union and the Mediterranean partners in 1993, out of which approximately 40% to/from Israel alone. In Europe more than half of the total amount of air freight to/from the partnership countries passed through airports in Germany and the Netherlands, although it is likely that a large part of the goods transported through these countries are destined for/coming from other European countries, either by air, or (most probably) by road. No precise statistics are, however, available.

Trade between the European Union (EU 12) and 11 Mediterranean partners²

1993, mio tons	EU imports	EU exports
sea	73 (70%)	40 (87%)
pipeline	26 (25%)	0
road	3 (3%)	4 (9%)
rail	0.1	0.7
air	0.2	0.2
other	1.8	0.3
total	104	46
trade by value, bill ECU	28	43
ECU/ton	270	940

(source: Eurostat external trade statistics)

In contrast to movements between the European Union and the Mediterranean partners, inter-regional trade is very low, particularly in the Maghreb.

Morocco-Maghreb	Exports: 6%; imports: 2.3%
Tunis-Maghreb	Exports: 6.4%; imports: 4.5%

(Source: Inframed)

Intra-Maghreb air transport flows of both business travellers and freight are almost non-existent. At the same time, 90% of international traffic of Maghreb airlines takes place with Community Member States - 70-80% of Maghreb international trade taking place with these countries.

The Palestinian Authority is excluded from these figures, although trade flows to and from the geographic area now controlled by the Palestinian Authority are included with those to and from Israel.

Moreover, there is a strong imbalance in transport flows between the two regions: by **weight** the Union imports twice as much as it exports (more than 100 million tons versus less than 50 million tons). By **value**, however, the EU shows a **trade surplus**, since the value of goods exported is 3.5 times as high as that of goods imported, due to the nature of goods traded (imports: energy, minerals, agro-foodstuffs, exports: manufactured goods, finished and semi-finished products).

Current situation: passenger transport

The principle mode used for passenger movements between the Union and the Mediterranean partner countries is air transport. In 1993 the total flow of air transport passengers between the European Union and the Mediterranean partners was approximately 28 million, out of which the non-scheduled market accounted for more than half (54%). Turkey and Tunisia were the two most important Mediterranean partners, representing respectively 34% and 16% of the total traffic.

Among the European Union countries, Germany, UK and France alone generated almost 75% of all air traffic. While nearly two thirds of the traffic from Germany and the UK went by non-scheduled flights, mostly to Turkey and Tunisia (from the UK also to Malta and Cyprus), the French traffic was, however, characterised by a much bigger portion of scheduled passengers (70%), half of which was destined for the Maghreb countries.

Forecasts

Transport flows between the EU and the Mediterranean partners will continue to grow in the future, but their development is difficult to forecast accurately since it is closely linked with the development of the market for hydrocarbons, which make up 90% of imports of the EU from the Mediterranean partners. Petroleum imports from North African countries fell for example in 1993 but they increased in 1994. Fertilisers (phosphates) make up another 5% of imports.

Indirectly, the Euro-Mediterranean Partnership should also lead to an expansion of **trade flows**, and therefore of **traffic flows** as an increased awareness of market potentials between Mediterranean partners (created by the activities that the Euro-Mediterranean Partnership is promoting) results in the greater use of these markets which are so close. Furthermore, the Euro-Mediterranean Partnership will also be working on the indirect barriers to trade such as the promotion of co-operation in a number of sectors, or trade facilitation. Some of these planned measures in transport are detailed in Chapter 3 below.

This forecast increase in trade flows applies not only to links between the Community and the Mediterranean partners, but also between these partners themselves, as promoting regional integration between these is a key objective of the Partnership. Indeed, many of the planned measures detailed below will be targeting this specific objective.

All of this reinforces the importance of an adequate preparation of the Euro-Mediterranean Partnership in the transport sector - a preparation which has already begun in a number of transport fields.

2.3 Bilateral agreements

The main instrument devised by the Commission for creating the desired free trade area is the series of Euro-Mediterranean Agreements negotiated or under negotiation with the partners. These Agreements are at various stages of preparation, negotiation or ratification. In the case of Turkey, Cyprus and Malta, relations are covered by Customs Union arrangements.

The Agreements or draft Agreements provide for early negotiations leading to liberalisation of trade in services. In the transport sector, the aim for maritime transport will be to establish the principle of unrestricted access to the international maritime transport market. Other transport modes are exempted from the standard provisions on rights of establishment and operation in these Agreements. However, most of the Agreements contain a commitment to negotiating

sectoral market access agreements in road, rail, inland waterways and air transport at a later date.

Each Agreement also addresses technical co-operation in the transport field, in order to target the Community's technical assistance programmes to the restructuring and modernising of their transport networks. Furthermore, financial protocols signed in 1995 with Malta and Cyprus with a view to preparing their accession to the EU (although Malta's position has now changed) cover transport and infrastructure, and a resolution of the EU-Turkey Association Council calls for an extension of the area of co-operation to transport.

2.4 The specific case of Cyprus

Following its signature of an Association Agreement on a Customs Union with the Community in 1972, Cyprus entered into the process of Structured Dialogue with the European Union³ with a view to preparing its accession. This dialogue is intended to provide a framework for addressing topics of common interest related to the implementation of a pre-accession strategy, including (in the transport sector) inter alia:

- continued support for the process of approximation of its legislation;
- examination of means of extension to Cyprus of the transport Trans-European Networks;
- participation in the Euro-Mediterranean Partnership.

Relations with Cyprus on transport address issues in maritime, air, combined and multimodal transport, so as to avoid the imbalances resulting from an excessive concentration on individual modes. These points will be developed further in 4.4 below.

3. THE TRANSPORT CONTEXT: A EURO-MEDITERRANEAN STRATEGY FOR TRANSPORT

3.1 General objectives and principles

The Community's general objective is the integration of **transport networks** both between the Community and the Mediterranean partners, and between the partners themselves. As indicated in Chapter 1, the transport element of the Barcelona Declaration focuses on **infrastructure**, as well as mentioning specifically maritime transport as a **service**, and the need to respect the principles of international maritime law, in particular freedom to provide services in international transport and free access to international cargoes.

If we take first transport **infrastructure**, the objective is the inter-connection of the networks of transport infrastructures in all partners in the region in order to create an inter-regional, cross-area, multimodal and inter-operable network. To achieve this:

- the international community, and the Community in particular (inasmuch as it has a co-ordinating role) should concentrate its planning and financial efforts on **infrastructure projects of an international importance rather than those of a purely national importance**;
- **multimodal transport networks should be planned reflecting real and anticipated flows of goods and passengers**, in an exercise involving all the countries in a region to ensure that the realisation of transport networks takes place in a coherent and co-ordinated fashion;
- once transport networks have been defined, the participants should **identify bottlenecks and impediments to smooth traffic flows** as well as **missing links** in the networks, in order to focus on projects to tackle these;

³ Resolutions of the EU/Cyprus and EU/Malta Association Councils on 12 June 1995.

- in planning multi-modal transport networks, an emphasis should be given to **improving links between ports and their hinterland**, particularly important given the potential role of short sea shipping and the possibility of creating an integrated, multimodal door-to-door service. Often links between ports and the rest of the network are weak or sometimes even missing altogether⁴. However, in improving port links with the hinterland, attention should be given to the potentially distortive effects of port investments, and consequently principles of fair competition between ports should be respected;
- the Community should give careful consideration to the **balance between different transport modes** and therefore encourage projects which are either favourable to modes less harmful to the environment or which are neutral from the point of view of this balance. In particular, projects connected with short-sea shipping should be given a special attention, although care should be taken to promote projects which generate overall benefits from an environmental point of view⁵;
- **projects should be evaluated as far as possible according to objective and verifiable socio-economic criteria, including their promotion of regional development**; support should be given to projects which have a certain minimum economic viability and there should be promotion of public-private partnerships where possible. The potential sources of investment capital, whether private or public, state or institutional (including the European Investment Bank and the World Bank) should also be involved in such discussions from an early stage;
- **"software" measures** (such as the improvement/rationalisation of administrative procedures) **should be given priority over "hardware" measures**. Many transport bottlenecks (border crossings or intermodal points such as ports) have their principal causes in "software" rather than "hardware" and investing in measures which alleviate waiting times at transport bottlenecks may bring much greater benefits than infrastructure investments;
- given the scarcity of resources, **priority should be given to the rehabilitation/reconstruction of existing infrastructure rather than the construction of new infrastructure**. Although there are clear examples where new infrastructure is required, in many instances the same benefits can be obtained by the better use or the improvement of the existing infrastructure.

Turning now to transport **services**, the Community's objective should be to ensure that the most efficient and cost-effective transport services can operate with a uniformly high standard (from a social, safety and environmental point of view) across a common transport space covering the whole Mediterranean region. To achieve this:

- **obstacles to the free provision of transport services should be removed**. This removal should take place in discussions with all the countries (taking account of any legal obligations of the partners under WTO rules). Removing obstacles to the free flow of transport is also a means of removing obstacles to free trade. In particular, the Commission's Communication on Short Sea Shipping⁶ identified obstacles to the promotion of this form of transport and

⁴ Obstacles to short sea shipping services do not only exist in the Mediterranean partners. However, the Community is addressing this in the framework of its own internal policies and instruments such as the Common Transport Policy, TENS, the promotion of intermodal transport and of short sea shipping.

⁵ We should avoid a situation where the improvement of short sea shipping is accompanied by an increase in environmentally-unfriendly road transport services between the port and the hinterland. The Community should favour short sea shipping projects which improve the competitiveness of maritime transport vis-à-vis other transport modes more harmful to the environment (essentially road transport), and avoid promoting projects which, by heightening the competition with modes less harmful to the environment (such as rail transport) cause a switch from rail to road.

⁶ Communication of the Commission to the Council and the European Parliament on "The Development of Short Sea Shipping in Europe" (COM(95) 317 final)

- stressed the need to remove these. Also in aviation, removing existing obstacles to the free provision of air transport services is an important priority and the administrative, operational and regulatory systems of these countries will need to be assessed to identify these where they exist;
- a harmonisation of standards (based on international conventions or Community legislation), as well as their enforcement needs to be promoted. The unequal application of social, technical, environmental and safety standards currently constitutes not only a distortion of competition but also in some cases a real danger to citizens in the region. Moreover, it can often be a technical barrier to transport flows. In addition the Community should promote the adoption of the necessary standards and practices that ensure a smooth integration of transport networks. The Community is in a particularly favourable position to assist its Mediterranean partners on a multilateral basis, through technical assistance projects which help the regional development of common standards according to international practices. Such projects should therefore be given a priority. For example, the multi-annual Work Programme for Maritime Transport in the Mediterranean (see 3.2.3 below) identifies projects for funding under the financial instruments of the Euro-Mediterranean Partnership which contribute towards:
 - developing the potential of maritime transport in the Mediterranean;
 - the development of ports;
 - improvement of maritime safety and pollution prevention; and
 - the development of logistics;
 - the question of market access will have to be addressed by the Euro-Mediterranean partners. Indeed, in the negotiations on maritime transport services in the WTO, a number of market access problems in the Mediterranean partners were identified. In addition, preparatory discussions will need to open between the Community and its Mediterranean partners on the development of air transport agreements. In this context, the Commission services are preparing a request to the Council for negotiating Directives for an agreement with Cyprus and in the longer term agreements with other Mediterranean partners may follow⁷. To initiate this process the Commission will arrange air transport seminars for the relevant partnership authorities as well as the industry in these countries. The seminars will primarily focus on Community policy questions and be followed up by information on the legal and factual situation in the air transport sector in the Mediterranean partners. The readiness of these countries to join a common European aviation area should in the meantime be assessed.
 - the Community has an interest in developing a strategy which will promote environmentally friendly modes of transport in this region - especially in congested or environmentally sensitive areas - given the large distances involved. This objective could be achieved by two approaches. Firstly, consignors and consignees should be encouraged to limit the combination of "roll on-roll off" services and consecutive road transport to short road distances to and from the port. Secondly, consideration will be given to the negotiation of agreements with our Mediterranean partners with a view to developing multimodal chains, consisting of combined short sea shipping and rail transport;
 - the Community should also consider the problem of the necessary restructuring of transport industries, given that in a number of the partners air, road and maritime transport (either completely or for certain categories of services) are still in the hands of state or para-state monopolies with an absence of competition. There are indications of moves to open these sections to further competition. The Community can assist in these ventures based on

The Commission has already received a request from Turkey to this effect

the experiences of a number of Member States and could therefore consider favourably technical assistance projects (particularly bilateral ones) in the field of industry restructuring, privatisation and transfer of know-how, with a priority given to assisting transport operators to adjust and to become more competitive whilst observing the necessary norms and standards for transport operations in a wider international transport space;

- the Community should seek to promote improvements in the level of the training of people working in the transport sector, as a means to increase their productivity. Training of workers, particularly in safety and environmental issues, is also a means to ensure the application of European or international standards. Specific attention should be directed to projects funded by the Union in this field. Most technical assistance projects will, in any case, inevitably have a training component;
- the Community should promote exchanges of information to encourage regional integration and the possible establishment of meaningful institutional structures for the purpose of ensuring observance of competition rules. This is a domain where the Commission can play an important co-ordinating role within the Euro-Mediterranean Partnership. In particular, promoting regional data transmission systems, combining communications networks (including satellite navigation) and vessel traffic management systems, will help promote regional trade and traffic and improve the efficiency of transport and trade.

3.2 *The Mediterranean dimension of Community transport policy*

With these strategic objectives in mind, the Community has already undertaken a certain number of initiatives in the Mediterranean region, linked to transport infrastructure and networks, to transport services, as well as to horizontal issues such as regional integration and research and development.

3.2.1 The White Paper

In 1992 the Commission's White Paper on the future development of the Common Transport Policy⁸, called, inter alia, for the progressive transformation of existing bilateral regimes into multilateral arrangements and the development of a comprehensive approach to the transport services and networks of Europe to promote integrated, pan-European development.

The "pan-European" approach should be extended to the non-Union Mediterranean partners (see also 3.2.2 below). The fundamental thrust of this approach is to consolidate the developments towards liberalisation in the provision of transport services. This is particularly the case for maritime transport services where the EU has consistently sought multilateral trade liberalisation for the sector.

3.2.2 The Trans-European Networks and their integration with transport networks in the Mediterranean partners

The Union's transport network policy aims at ensuring the development of an efficient and modally balanced transport infrastructure and its intelligent use, as a basis for the effective provision of services, allowing the free movement of persons, goods and services in the Union's Internal Market.

This has been the rationale behind the development of Trans-European Transport Networks, both within the Union and in the connection of the Union's TENs to the networks of third countries, as outlined in the Commission's recent Communication on connecting the Union's

⁸ "The Future Development of the Common Transport Policy: A Global Approach to the Construction of a Community Framework for Sustainable Mobility" (COM(92)494 final)

transport infrastructure network to its neighbours: towards a co-operative pan-European transport network policy⁹ and a number of initiatives have already been taken in this regard.

There is a clear need for coordination in network planning, identifying projects of common interest. In this context the Union is working with its neighbours (to the east, south and south-east) to create, on a pan-European scale, a common transport space to ensure that transport networks of these countries can inter-connect to create a smooth space in which transport infrastructures and transport markets offer the same high level of performance. This exercise is undertaken by the **pan-European Transport Conferences**, the third of which, in June 1997 in Helsinki, introduced the new concept of **pan-European Transport Areas (PETrAs)** - to supplement the Corridor concept developed at the second Conference in Crete in March 1994¹⁰ - specifically to cover the regions of the Mediterranean, the Black Sea and the Adriatic/Ionian. Against the background of the Euro-Mediterranean Partnership, the non-European partner countries in the Mediterranean participated either as active observers in the Helsinki Conference or in the case of Turkey, Cyprus and Malta, as full members.

In preparation for this Conference a number of **regional conferences** were established, among them the Mediterranean Transport Conference in Lisbon in January 1997, to report on their activities for the creation of a common transport space, promoting regional transport co-operation between the partners. Work on co-ordinating infrastructure networks already began in anticipation of the Helsinki Conference establishing the **pan-European Transport Area of the Mediterranean Basin**, and as a follow up to the Lisbon Conference mentioned above. A first step was the identification of corridors within this region, an exercise known as **Corrimed**.

In addition, work on the coordination of planning of such transport networks is already fairly well advanced at the sub-regional level: Western Mediterranean, Middle East region and Cyprus (see Chapter 4). In the Middle East and in the Western Mediterranean the Commission has financed studies to identify transport infrastructure needs on a regional basis. Actions are already underway to develop an overall approach to the coordination of planning of an efficient transport infrastructure in the Maghreb, and the Middle East, including links through Turkey, and its connection with the TENs in Spain and France and to the evolving network in South-East Europe and the Black Sea. This will build on the Union's existing involvement through the multilateral Peace Process in the development of transport infrastructure in the Middle East.

It is clear then that work on Mediterranean transport networks should be supported on two levels, combining the initiatives in the various **sub-regions**, in which a political and technical consensus can be achieved, with work addressing the **Mediterranean as a whole**, ensuring coherence between the sub-regions and therefore identifying the links between sub-regional networks.

3.2.3 Maritime transport

Maritime transport is a mode of particular importance to the Community in its trade with third countries, as 90% of its such movements are by sea. In the Mediterranean, maritime transport is the most important mode.

The Commission's Communication on the Development of Short Sea Shipping in Europe¹¹ proposed the opening up of short-sea shipping lines between the Community and its

⁹ Communication from the Commission to the Council and the European Parliament "Connecting the Union's transport infrastructure network to its neighbours: towards a co-operative pan-European transport network policy" (COM(97)172 final).

¹⁰ Multi-modal transport corridors connecting the Union to the countries of Central Europe and the former Soviet Union.

¹¹ Communication of the Commission to the Council and the European Parliament on 'The Development of Short Sea Shipping in Europe' (COM(95)317 final).

Mediterranean partners. It particularly highlighted the importance of this transport mode in the Mediterranean, given the absence in many instances of viable land-based alternatives. In other instances, improved short sea shipping services provide an important component in a multi-modal (road-sea or rail-sea) transport chain. As a result, any increase in trade flows, and therefore of transport flows, within the region, is likely to make extensive use of shipping.

Two further Communications of the Commission in the maritime field concern the development of a new maritime strategy¹² and External Relations in the Field of Maritime Transport¹³. Maintaining open markets in maritime transport is vital to the Community and is therefore a key component of the proposed new strategy. The Commission's general objective is to consolidate developments towards liberalisation and to obtain a further reduction in existing restrictions. Ensuring unrestricted access to cargoes on a commercial and non-discriminatory basis has been a fundamental component in the agreements which the Community has negotiated, or is currently negotiating with the Mediterranean partner countries.

The first priority for transport in the Mediterranean has to be given to facilitating and improving maritime transport flows. This will include a careful examination of requirements for the development of infrastructure in certain ports in the countries concerned, associated with a major global effort to improve port operations and customs procedures. It will also be necessary to assess the needs for improving the land-based infrastructure linking ports with economic centres.

The Commission continues to place particular emphasis on **maritime safety**, and in its relations with the Mediterranean partners has identified a particular need to assist them to reinforce their maritime administrations and also to encourage their ratification of the main International Conventions on maritime safety and their effective implementation and enforcement. One particular approach taken by the Commission has been the running of workshops and seminars for the establishment of regional agreements, such as the one on Port State Control in the South-Eastern Mediterranean.

Achievements so far

The Regional Conference for the Development of Maritime Transport in the Mediterranean, held in Barcelona in April 1995, issued conclusions and recommendations on future cooperation and set up a specific Waterborne Transport Working Group. This met in September 1995 and adopted a multi-annual rolling Work Programme, which is now being put into action. This covered a wide range of potential activities from the necessary fact-finding to ports development, the strengthening of the commercial and legal environment, maritime safety, environmental issues and logistics, including telematics.

On this basis, and taking account of the beneficiaries' priorities and their absorption capacity, as well as the objectives of the Barcelona conclusions and the Euro-Mediterranean Work Programme, a meeting held in Cyprus in October 1996 identified a first series of actions, including regional projects that could be financed by MEDA (see 5.1 below). A number of projects were subsequently submitted to and received approval from the MED management committee in 1997 for financial support. In particular the maritime action programme has identified for financial support projects aimed at preventing or reducing pollution at sea, such as the establishment of emergency plans in case of accidents, hydrographic surveys and related cartography, actions to improve handling of dangerous goods and development of waste reception facilities. In this respect, one of the main actions relates to the development and implementation of harmonised VTS procedures as part of an integrated network of traffic

¹² *Communication of the Commission to the Council and the European Parliament: "Towards a new Maritime Strategy" (COM(96)81 final)*

¹³ *Communication of the Commission to the Council and the European Parliament: External Relations in the field of Maritime Transport (COM(96)707 final)*

management and information systems, as well as the development of electronic infrastructure and related software and telematics applications.

3.2.4 Air transport

The Barcelona Declaration integrated co-operation in the field of air transport into a broader context of sea-air multimodal transport, through the improvement of safety, environmental standards and airport infrastructure, the elimination of restrictions and the establishment of a harmonised system of traffic management. These elements are included in the Euro-Mediterranean Association Agreements.

Achievements so far

Apart from this, regular contacts have been established between the EC and Arab air carriers in the framework of the Euro-Arab dialogue. Until recently, no government organisation existed in this sector, and the Arab Air Carriers Organisation (AACO) has therefore been the only available counterpart for more regular discussions at a multilateral level. However, a regional governmental organisation was created in November 1996, and further contacts between the Community and these countries are now being held within this framework.

In addition to this, a seminar on EU air transport issues was held in Malaga in March 1996 with the participation of air carriers as well as government representatives from the Maghreb countries. This was later followed up by exploratory talks on air transport between the Commission and Moroccan and Cypriot authorities respectively, as a first preparation for future negotiations. This type of contact is also envisaged with other countries in the region and has already been proposed with Turkey and Israel.

3.2.5 Air Traffic Management (ATM)

In the field of ATM, the EU has for many years been supporting the ECAC strategies which concentrate on increasing airspace and air traffic control (ATC) capacity in Europe by harmonising, integrating and developing the operation of national facilities devoted to air navigation services. They also address the issue of consistency between European systems and those based in third countries, such as those in the Mediterranean region. While the scope of applicability refers only to Europe, this geographical framework is likely to be extended to adjacent Mediterranean states, at least as far as the operational and technical aspects are concerned. As an example, co-operation has been launched between Western Mediterranean partners to increase the capacity in south-west Europe through the harmonisation of services and installations.

The main deficiencies of ATC in the Mediterranean lie with the lack of radar coverage and of data processing capabilities. Future programmes of modernisation will need to focus mainly on these domains, requiring corresponding investment to improve human resources. The budget line for the ATM component of the TEN T is used to support these developments on the European side, while MEDA funds might be used for the corresponding elements in the partner countries.

3.2.6 Navigation and Positioning Network (GNSS)

Contacts have already been established with some Mediterranean partners, in order to optimise the navigation signals in the region - transmitted through the European contribution to a global navigation satellite system (GNSS) - and to enable satellite navigation users to benefit from improved transport safety and efficiency. GNSS will also serve to facilitate intermodality.

Numerous initiatives are underway and decisions have been taken in support of the implementation of GNSS in the Mediterranean area. In this context the Commission's Communication on the connection of the Union to its neighbours (see 3.2.2 above) recognises that GNSS is an important instrument for the creation of the pan-European Transport Network as well as for the cohesion of multimodal transport systems in the Mediterranean basin, which represents an important transport node for the three continents of Europe, Africa and Asia. The

Lisbon Conference - which provided the Mediterranean region's input into the Helsinki Conference (see 3.2.2) - underlined the importance of satellite navigation and positioning in the Mediterranean region and agreed on cooperation between the Mediterranean partners to develop a masterplan for GNSS implementation. Furthermore, GNSS has been recognised as a potential priority project for the extension of the Trans-European Navigation Network to the Mediterranean region¹⁴.

For its part, Italy has formally stressed the need for inter-operability within the Mediterranean region in GNSS and consequently a feasibility study for the creation of a homogenous satellite navigation service in the Eastern Mediterranean is under approval for financing under the TEN-T.

A workshop on space applications in the Mediterranean region was held in Cairo in May 1997 with particular emphasis on the development of satellite navigation infrastructure in the Mediterranean basin.

Discussions now need to be intensified in order to define concrete cooperation arrangements with the relevant Mediterranean authorities to ensure the implementation of a system that is fully inter-operable with those in adjacent regions. *Inter alia* this requires: defining a regional strategy to ensure the implementation of a navigation and positioning network masterplan in the Mediterranean; ensuring convergence of initiatives into coherent action satisfying the needs of users and inter-operability requirements with systems in adjacent regions; optimising navigation infrastructure; promoting a multimodal GNSS receiver; educating users; and finally, facilitating industry (including support to service provision).

3.2.7 Rail and combined transport

Although maritime and to a lesser extent air transport will remain the principal modes used for relations between the Union and its Mediterranean partners, in the longer term, a Community policy for transport in the Mediterranean should foresee an evolution towards combined transport by rail, building on the existing rail networks in some of the countries concerned (such as the Mashrek countries and Turkey) in order to anticipate the necessary infrastructure and fleet technology needs, as well as the modification of the necessary international and national legal frameworks. Such a policy could also promote the longer-distance transport of goods, for which rail transport (particularly flexible when in combination with other modes) is well suited.

3.2.8 Statistics

There is a clear need for the Community to co-operate with its Mediterranean partners on statistics. Under its transport component, MEDSTAT - a project of 20 MECU, initiated by Eurostat, the Statistical Office of the European Communities - has developed a work programme for establishing co-operation in the field of transport statistics in the Mediterranean area in order to reply to the needs for information in this field. The work programme includes an analysis of users' needs and of existing systems, assistance in convergence towards EU standards, and exchange and dissemination of information.

3.3 *Research and development*

The Union's transport research policy aims at supporting the CTP and the development of the TEN-T, including its interconnection with the networks of other countries. Current research, being carried out mainly under the specific Transport Programme of the 4th Framework Programme of Research and Technological Development (1994-1998) pays particular attention to the way the TENs might evolve and how issues related to access, inter-operability, inter-connection and inter-modality might be addressed. (By virtue of a Science and Technology

¹⁴ Decision no. 1692/96/EC of the European Parliament and the Council of 23 July 1996 on Community Guidelines for the Implementation of the Trans-European Transport Network (L 228).

Cooperation Agreement Israel is associated to the EU's 4th Research and Development Framework Programme and thus already participates on an equal footing in the Transport Programme of the Framework Programme.)

Attempts should be made to increase the capacity of the Mediterranean partners to participate in joint research activities, by setting up structures and effective institutional frameworks and by ensuring active participation from the Union in both scientific and technical staff training. Where it is feasible, a regional approach could promote the sharing of experience between Mediterranean partners.

In order to foster cooperation with the Mediterranean partner countries in the field of transport research and development the Commission services established a RETRAMED group (Research on Transport in the Mediterranean) which brought together experts from all EU Member States and twelve Mediterranean partners. The aim has been to gather information about the Mediterranean partners' transport research actions and to identify areas of common interest for future co-operation in transport research. On the basis of this work the Commission has drawn up a multi-annual Work Programme for transport research, that has been approved by the RETRAMED group. This Work Programme aims at supporting future choices in the development of transport policy in the Mediterranean region - in the light of the likely establishment of a free trade zone - taking both economic and environmental considerations into account. Elements of this work programme, together with the maritime programme mentioned above, will be incorporated into a transport-wide action plan for the Mediterranean, which will identify specific projects to be put forward for financial support under Community financial instruments, including MEDA. Under the 4th Framework Programme for Research and Development at least, funding is not available to support the RETRAMED programme.

The Work Programme covers:

- (1) research into the methods required for collecting data for transport statistics (in close co-operation with the initiatives and programmes of the Statistical Office of the European Communities (EUROSTAT));
- (2) strategic research, including: transport demand trends and management; transport network efficiency and impact; the links and inter-connections of the various transport networks of the Mediterranean area;
- (3) research into transport infrastructures, including research on the organisational and technical solutions to optimise infrastructure management (e.g. infrastructure charging, telematics for pricing);
- (4) research into urban transport, focusing on problems arising from the need to meet demand for accessibility in urban and metropolitan areas while at the same time minimising transport time for goods and people without neglecting safety and the environment;
- (5) research into traffic management, in particular in the area of air and maritime traffic control, focusing on the conditions necessary for developing integrated (inter-operable) networks at sub-regional level and throughout the Mediterranean;
- (6) research towards enhancing the inter-modality and complementarity of various modes of transport with a view to improving the Mediterranean transport networks;
- (7) research on improving transport safety and the environment - focusing particularly on road transport (road user behaviour, vehicle design) and the impact of transport systems on socio-economic activity and the environment.

In addition to these initiatives, research institutes in third countries in the Mediterranean are already able to participate in individual COST actions to exchange information on research projects. However, full participation in the exercise depends on the extent to which the countries are integrated into the COST structure, (Turkey and Malta are full members and Cyprus has applied for membership). There is a need to examine how these countries can be associated

with the overall initiative. Currently, albeit without Community financing, the Mediterranean partners are entitled to participate in the transport initiatives under the current 4th and the future 5th Framework Programmes.

4. SUB-REGIONAL CO-OPERATION IN TRANSPORT

Regional integration in the Mediterranean as a whole is being complemented by a considerable dynamism in a number of sub-regions. The main such sub-regions are as follows:

4.1 *The Western Mediterranean*

In the **Western Mediterranean**, co-operation in a number of transport fields, but in particular that of infrastructure development, had already begun before the Barcelona Conference, in the framework of meetings of the Ministers of Transport of the three Community countries (Spain, France, Italy) and the three partner countries in the Maghreb (Morocco, Algeria, Tunisia), in which the Commission participates (known as '3+3').

In Rabat in September 1995 the Ministers of Transport of the Western Mediterranean identified a number of **priority corridors** of regional importance, as continuations of Trans-European Networks. A number of important criteria were established for the evaluation of projects on these corridors, including: common interest (for both Trans-European and Trans-Maghreb networks); economic viability of the project (and the possibility of public-private partnerships); contribution to economic development and regional integration; environmental impact (and emphasising transport systems which promote sustainable development); maturity of projects; and coherence with national and Community planning. Work is continuing on transport demands, on the identification and evaluation of projects of a regional importance on these corridors (INFRAMED study commissioned by the EC), and it is hoped that this can evolve into pre-investment work, facilitating the promotion of these projects to interested financial institutions. In this respect, Community financial instruments (MEDA) could perhaps finance some of the technical assistance pre-investment work linked to the preparation of investment projects.

The last meeting of Ministers of Transport of the Western Mediterranean (including Portugal) established a "Groupe transport de la Méditerranée Occidentale" (GTMO). The group uses as a secretariat the Centre d'études des transports pour la Méditerranée occidentale (CETMO) and has already adopted a number of planned actions, including definition of a multimodal transport network, establishment of improved databases and initiatives in maritime and air transport.

The GTMO framework has been active on other transport-related activities, including regional trade facilitation, liberalisation and commercialisation of air transport (seminar in Malaga in March 1996), and reconciliation of transport infrastructure planning with the imperatives of the environment and of spatial planning. Two studies in these fields are in preparation.

In the transport research field, the GTMO has begun co-operation (seminar in Rabat in January 1997) with the aim of integrating the Maghreb countries, where possible, into Community R&D activities, and promoting, within these activities, research projects which are of specific interest to the region.

4.2 *Regional co-operation on transport in the Middle East*

In the Middle East the European Union, through the Regional Economic Development Working Group (REDWG)¹⁵, has assumed a leading role in the promotion of regional co-operation between the core parties. Within this structure the regional parties agreed to establish four Sectoral Committees, one of which covers infrastructure, and within this Committee a Transport

¹⁵ Members of the REDWG Monitoring Committee are EU (gavel-holder), Egypt, Israel, Jordan, the Palestinian Authority, US, Russia, Japan, Canada, Norway, Saudi Arabia and Tunisia.

Strategy Group has been formed. Under the chair of the European Commission on behalf of the Union, this Group will oversee the development of transport in the Middle East.

The Transport Strategy Group agreed in April 1996 on the concept of transport corridors. Each of the partners in the Middle East is heavily dependent on its neighbours for long-distance transport. As a nucleus for future development, discussion has already taken place on four land transport corridors in this region. The European Commission is currently funding a Middle East Regional Transport Study which will provide transport scenarios up to the year 2020.

Once a wider regional co-operation has become feasible, the concept of corridors should be extended geographically (to the North, through Lebanon and Syria to Turkey, and to the East and South East to the Arabian Peninsula). Transport corridors as a means for long-term planning are of specific importance for land-based transport from the Middle East to Europe into Saudi Arabia and the Gulf countries and towards Iraq and beyond.

4.3 Eastern Mediterranean and the link to the Black Sea

The absence of a political framework for the countries of the Eastern Mediterranean has hindered progress on developing a regional approach to transport networks in the region. However, private organisations have been active in promoting regional co-operation. The International Transport Conferences on the development of Transport Connections between Western Mediterranean and the Black Sea in Piraeus in April 1996, and Sochi in May 1998, organised by the Hellenic Chambers Transport Association, with the support of the European Commission and Eurochambres, have provided a useful forum for discussion. The conferences have highlighted the need for co-operation within a competitive environment between the ports and between ports and other transport modes to improve the quality of multimodal transport services in the region, of which maritime transport is the central mode.

The absence of activities in the Eastern Mediterranean contrasts with the dynamism manifested by the regional body for the Black Sea, the Black Sea Economic Cooperation (BSEC). The two regions are linked by transport flows. BSEC is promoting the creation of regional transport networks and now plays a co-ordinating role in drawing up a programme of infrastructure development for the pan-European Transport Area of the Black Sea basin, as endorsed by Helsinki. This dynamism might perhaps spread to its neighbouring region.

4.4 Cyprus

Substantive talks on transport issues, on the basis of the Commission's Opinion on its application for membership¹⁶, had already taken place with Cyprus before the Structured Dialogue process began in December 1995. A second meeting, at Ministerial level, took place in Nicosia in October 1996.

Maritime transport dominates transport relations between the Community and Cyprus, given that the latter has built up major ship registers and is now among the world's largest holder of registers. A large proportion of the tonnage in Cyprus is owned by Community interests: ship-owners are attracted to open registers such as those of Cyprus, due to the more relaxed conditions of **vessel registration and operation** as compared to those in the EU Member States. Records of detention of Cyprus flagged ships under Port State Control inspection show substantially higher figures than the Community average. This raises concerns for the Community about, inter alia, distortions of competition, and maritime safety and pollution.

In the **air transport** sector, Cyprus has made important progress in adapting to EC legislation on aviation, is open for competition and wishes to begin negotiations on an aviation agreement with the Community. The Commission has recently entered into detailed technical discussions with Cyprus to prepare for this.

Discussions have also touched briefly on the need for Cyprus to adapt its legislation and practices on **state aids and competition** in the transport sector to be compatible with those in the Community. Discussions are taking place at technical level to address Cyprus' connections with the **Trans-European Networks**. In this context, Cyprus will be integrated into the Union's TINA process (Transport Infrastructure Needs Assessment). The most important aspect for Cyprus will be that of integrating its ports and airports into the Trans-European Networks process.

5. INSTRUMENTS FOR IMPLEMENTING THE COMMUNITY'S STRATEGY

The Barcelona Declaration states that the creation of a free-trade area and the general success of the Euro-Mediterranean Partnership require a substantial increase in the financial assistance that the Community grants to the Mediterranean. This assistance must, above all, encourage sustainable indigenous development and the mobilisation of local economic operators.

The Euro-Mediterranean Partnership is policy-driven. For the financial partnership, the three priorities set out for the financing of the EU's co-operation are:

- **economic transition**: support for structural adjustment programmes, company restructuring and modernisation and technical assistance;
- **support for socio-economic balance**: social infrastructure, vocational training, rural development, population and health and the environment;
- **support for regional integration projects**.

5.1 *Financial Instruments*

5.1.1 MEDA

MEDA is the Community's main financial instrument for the implementation of the Euro-Mediterranean Partnership. The programme has the purpose of encouraging and supporting the reform of the economic and social structures of the Mediterranean partners, notably in preparation for free trade with the European Union.

In the course of programming MEDA funds, about 90% of the budget is allocated to **bilateral (national) projects** and about 10% to **regional projects**, involving a number of Mediterranean partner countries, although bilateral and regional projects are intended to be complementary.

Believing that the future prosperity and stability of its partners rests on increased co-operation, the Community will be using its influence to promote **regional co-operation** (both between the Mediterranean partners and the Community as well as between the Mediterranean partners themselves). The Community will finance regional co-operation projects including those on transport (there is no formal division of MEDA funds between the different sectors).

The Community has set aside 4.685 billion ECU for financial cooperation with the Mediterranean partners for the period 1995-99, of which 3.4245 billion ECU, is devoted to MEDA. **Technical assistance projects** (particularly preparatory work and feasibility studies) in sectors such as transport¹⁷ may be financed from MEDA in the framework of national and regional indicative programming.

A particular emphasis will be placed on projects benefiting a number of countries. So far, this involvement has concentrated on the Middle East as part of the Peace Process, and there is a desire to extend this beyond the core players (Israel, Jordan, Egypt, the Palestinian Authority) if the political framework allows such an extension. This is the case with the regional projects to

be financed by MEDA under the multi-annual Work Programme for Maritime Transport (see section 3.2.4 above).

MEDA will serve to assist the Mediterranean partner countries in preparing for free trade with the European Union and to raise their standard of living. The wider objective of European Community interventions will be to increase the competitiveness of the partners' economies, with a view to achieving sustainable economic growth, in particular through improved export performance. The transport sector has therefore been identified as one area for targeting MEDA funds, (as regards both bilateral and multilateral projects), for accompanying the upgrading of transport infrastructure and the improvement of quality and reduction of the cost of service provision.

For projects relating to transport infrastructure, MEDA financing is likely to be used to focus on pre-investment work. A particular emphasis should therefore be placed on the optimal definition of viable projects.

5.1.2 The European Investment Bank

The EIB plays a key role in implementing the Union's co-operation policy. In addition to the more than 4 billion ECU of aid provided between 1992 and mid 1996, a further 1.8 BECU was made available by way of EIB capital loans for horizontal financial co-operation projects with the non-member Mediterranean partners (designed to finance projects of a regional nature of mutual benefit to both sides). In the transport sector, this will finance the improvement of links between non-Member Mediterranean partners and the Union (such as the construction of sections of the Rabat-Fez and Rabat-Tangier motorways in Morocco; expansion of the port of Beirut in Lebanon; enlargement of main commercial ports in Turkey and Tunisia or improvement of ATM in Cyprus).

The EIB looks to the private sector to play a greater role in the Mediterranean region, which will facilitate the financing of projects and have a beneficial effect on project identification. The EIB's experience in infrastructure financing by the private sector within the Union is now being transferred to countries outside (including the Euro-Mediterranean partner countries) where the Bank can complement local and other international sources of finance, as well as act as a catalyst. In the infrastructure sector (including transport), the EIB has provided the Mediterranean partners with some 1.6 billion ECU since 1991. In 1995, infrastructure projects worth 617 MECU were financed in the Mediterranean, 210 MECU of which were in the transport sector.

The EIB attaches particular importance to the development of trans-national projects between North and South essential for trade, communications and a fair and balanced distribution of common resources. It has already contributed to extending trans-European Networks from the Union to the Mediterranean basin.

5.2 Conclusions and recommendations

Defining a Community policy for implementing the Euro-Mediterranean Partnership in the transport sector is an important step towards the improvement of transport networks and the implementation of this Partnership. Against this background, the Commission will:

- draw up a comprehensive **action plan** based on the elements outlined in annex. Such an action plan will integrate the separate elements of the maritime and transport research programmes developed for the Mediterranean, as well as new initiatives being taken (or to be taken) in the other modes and sectors, in order to help transform objectives into projects and actions; and
- establish a **group** on Mediterranean transport, composed of all Mediterranean partners as a framework for meetings and exchanges of information between the partners concerning transport co-operation. This group, which should also provide a more global picture of the ongoing activities at sub-regional level, will operate within the framework of the Euro-Mediterranean Partnership, having in mind the objectives of the Partnership as a whole. The

Commission will co-operate with the countries concerned on the implementation of projects of common interest and facilitate co-ordination on future projects, in accordance, where appropriate, with the objectives and the Community decision-making procedure as regards MEDA.

Summary table of actions to be taken

Domain	Actions undertaken ¹⁸	Actions planned
Development of a transport action plan	Strategic objectives defined in this Communication	Transformation of the elements of this Communication into a transport action plan; establishment of a working group
Extension of Trans-European Networks	Planning of transport networks (by identifying corridors of international interest and the projects to implement these corridors) is taking place for the Med. as a whole (Corrimed for Med. Basin PETRA) and with a number of sub-regions (Western Med., Middle East)	Work to be initiated in Eastern Mediterranean and on the links between the sub-regions, based on CORRIMED. Integration of Cyprus into TINA
Maritime	Creation of a Multi-Annual Rolling Work Programme for Maritime Transport in the Mediterranean	Implementation of the Work Programme with concrete projects
Maritime safety	Dealt with in the framework of the Maritime Work Programme	Work Programme to be transformed into a list of actions, some to be financed by MEDA
Air transport	Regular contacts between the EC and air carriers from Mediterranean third countries. Exchanges of information on aviation matters	Prepare for air transport negotiations with some key countries. Launching seminars on air transport questions as a first step to reinforcing contacts with air carriers and aviation authorities in all partnership countries.
Air Traffic Management (ATM)	Co-operation launched in the Western Mediterranean between Directors General of Air Navigation Services on harmonising air traffic control across national borders and on defining modernisation programmes	Extension of ECAC strategies which concentrates on increasing airspace and control capacity in Europe and which addresses the issue of consistency between European systems and those based in third countries such as the Mediterranean area
Navigation and positioning network(GNSS)	Bilateral contacts begun with some of the groups of countries to ensure inter-operability of ground infrastructure	Defining co-operation arrangements with the relevant Mediterranean region authorities to implement a fully inter-operable technical solution
Rail and combined transport services	Facilitation of CT transport axes between northern/western Europe and its eastern, southern and south-eastern neighbours. Policy reorientation towards multimodal transport technologies for long-distance freight transport	Anticipation of the necessary infrastructure and fleet technology needs, as well as the modification of the necessary international and national legal frameworks
Transport R&D	RETRAMED Committee has established R&D co-operation priorities, and elaborated multi-annual work programme on transport R & D	Work Programme to be transformed into a list of actions, consideration of sources of Community funding (including MEDA) for some actions
Regional integration in the Western Mediterranean	Identification of a number of priority multimodal corridors, work on the evaluation of priority projects on these corridors, using INFRAMED study; work on transport and spatial planning and the environment and on R&D	Further evaluation of priority projects
Regional integration in the Eastern-Med.	Conference organised by private sector	Begin work on infrastructure networks
Regional integration in the Middle East	Work taking place in the 'Peace Process' framework. Multimodal corridors identified; work beginning on the identification of projects on these corridors suitable for fast track financing	Further identification / evaluation of priority projects

¹⁸ Unless otherwise stated, these actions will be pursued and, where appropriate, intensified.

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