

THE ROLE OF MULTILATERAL COORDINATION IN TRANSPORT POLICY REFORM: THE CASE OF THE MAGHREB COUNTRIES

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ABSTRACT

This paper aims at describing how multilateral cooperation policies are influencing national transport policies in developing countries. It considers the evolution of national transport policies and institutional frameworks in Algeria, Morocco and Tunisia in the last 10 years, and analyses the influence that EU cooperation programmes (particularly those within the Euromed programme initiative) and international coordination activities have played in the evolution towards efficient, sustainable transport systems in those countries.

Notwithstanding the significant socioeconomic, political and institutional differences among the three countries, three major traits are common to the transport policy framework in all cases: a focus on megaprojects; substitution of traditional ministerial services by ad hoc public agencies to develop those megaprojects, and progressive involvement of international private players for the operation (and eventually the design and construction) of new projects, focusing on know-how transfer rather than investment needs.

The hypothesis is that these similarities are largely due to the influence of the international cooperation promoted by the European Union since the mid- 1990s. The new decision-making situation is characterized by the involvement of two new relevant stakeholders, the EU and a limited number of global transport operators. The hierarchical governance model evolves towards more complex structures, which explain the three common traits mentioned above. International coordination has been crucial for developing national transport visions, which are coherent with a regional, transnational system.

Keywords: national transport policy, Mediterranean, Maghreb, transport governance, planning

CONTEXT AND METHODOLOGICAL APPROACH

Since the mid-1990s, European Union (EU) cooperation activities with Mediterranean countries have largely contributed to shape national policies, influencing the direction of scope of the reforms of the transport sector that those countries were undertaking since the

1980s. In the case of the 3 Maghreb countries (Algeria, Morocco and Tunisia), the existence of a permanent forum for transport cooperation established in 1995 with European countries in Western Mediterranean has contributed to consolidate a more stable and influential cooperation process.

In spite of the socioeconomic and political differences among the three countries, transport policies in all of them have been increasingly dominated by three major characteristics: an increasing focus on megaprojects, the creation and consolidation of public agencies in charge of these projects, with large autonomy, and the association of major global operators to them. Although none of these trends was directly or indirectly encouraged by EU cooperation, the analysis made in this paper shows that EU cooperation created the necessary conditions to favour this policy approach. In other words, the EU cooperation has been pivotal in moving national transport policies in the Maghreb in this direction, and in creating a particular structure of metagovernance (Meuleman, 2010) that makes this evolution possible. Whether this is the intention of the EU cooperation policy, and whether these priorities are serving the priorities of these developing countries are two major questions that are however not addressed in this research.

The methodological approach is based on the identification and analysis of the governance regimes under the current national policies in the three countries. Basic traits of the three classical governance regimes models (hierarchical, market, and network, Meuleman, 2010) are found within the revision of the national transport policies in the three countries. Common traits in the otherwise quite diverse national transport policies approaches are also identified. The role of the EU, as a major stakeholder in the region is described, with a revision of its multilateral and bilateral cooperation programmes.

As a result, a three-tiered governance model is identified, which would be largely shared by the three countries: the traditional hierarchical model remains largely preserved but its obvious limitations to address a challenging socioeconomic environment are partially covered by a market model (providing the framework for developing large scale projects and facilitate the involvement of global operators) and an international, cooperative network model, providing technical capacity building and a long-term vision.

THE CONCEPTUAL FRAMEWORK: TRANSPORT GOVERNANCE MODELS

This section provides for a conceptual framework for the analysis and characterization of governance regimes in the countries of the Maghreb.

In a wide sense, governance regimes can be considered to refer to "the totality of interactions of governments, other public bodies, the provider sector and civil society aiming to solve societal problems or creating societal opportunities". This broad definition (Meuleman, 2010, p.49-50) would include institutions, instruments, processes and the various actors' roles. However, in the context of this paper, it seems more practical to reserve the term "governance regime" to refer to the particular distribution of roles among actors and the complex grid of relationships among them within that public policy, without considering

the also influential area of norms, rules and practices within a particular public policy (transport). Governance regimes would thus mainly refer to the particular relationships of hierarchy, collaboration and mutual adaptation among those actors involved in one particular public policy.

Governance regimes can be characterized (Di Maggio, 1983; Scharpf, 1997; Zurbruggen, 2006) by the review of policies, projects, internal norms and external regulations, professional cultures, formalisation of deliberational and decision-making practices, etc. The identification of the particular actors within the public sector, and of the external actors having or seeking to have an influence in the process, and the relationships among those actors serve to identify the prevailing paradigms. Furthermore, international cooperation is a powerful instrument to encourage convergence among models in different countries, following the "institutional isomorphism" processes already identified by DiMaggio in 1983.

Following Meuleman (2010), three governance paradigms (hierarchical; network and market) may serve to create a typology, which should facilitate the description of the potential conflicts and synergies within and between governance approaches. The typology refers to the particular structures put in place for the conception and implementation of the transport research policy. In this particular context, the following categories of governance regimes/styles will be used:

- Hierarchical regimes: traditional bureaucratic structures. Reluctance to uncertainty: detailed definition of the transport policy, including objectives, topics, and instruments. Limited stakeholder participation in policy design.
- Market regimes: the transport policy is handed over to the market forces of providers, reserving to the government a role of "regulator" to guarantee fair competition among players and the achievement of broader societal goals (accessibility and mobility to regions, people and companies, sustainable development, economic growth...).
- Network regimes: focus on network building and expansion, so that a growing number of stakeholders actively interact and lobby for decision-making from different perspectives, whereas the government looks for consensus-building and the attainment of clearly stated goals (vision): Generally based on long-term strategies, with a focus on global problems.

In some policy sectors, particular national cultures prevail and impose particular governance styles. In other sectors, with highly differentiated traits (for example, high exposure to international interaction), governance styles may present similar characteristics in countries with otherwise wide differences in their national cultures (Meuleman, 2010, p.53). Concrete policies may present a mix of governance styles, particular for solving critical challenges. A predominantly hierarchical organisation may adopt a network governance style to conduct a strategic reflection, or a market style to address one emerging regulatory concern.

In this research, the characterization of governance regimes is largely based on the results of previous studies reviewing the national transport policies in the Algeria, Morocco and Tunisia and the experience of the EU sponsored Euromediterranean Transport Project, an initiative providing multilateral cooperation in the field of transport to all Mediterranean countries.

REVIEW OF RECENT EU COOPERATION INITIATIVES

The European Neighbourhood Policy and the Euro-Mediterranean Transport Forum

The so-called Barcelona process was started in November 1995, with the ambition of establishing a common area of peace, stability, and shared prosperity in the Euro-Mediterranean region. The Mediterranean countries participating in the Barcelona Process were, in 2004, included within the new European Neighbourhood Policy (ENP), which was conceived to avoid the emergence of new dividing lines in Europe, following the enlargement of the EU. With the ENP, the EU works with country partners to reduce poverty and create an area of shared prosperity and values, based on deeper economic integration, intensified political and cultural relations, enhanced cross-border cooperation and shared responsibility for conflict prevention between the EU and its neighbours.

The first Euromed transport forum was organised by the European Commission in Malta in 1999. Since then, the forum has become the reference arena for the development of regional cooperation in the transport sector. The forum is regularly convened and chaired by the European Commission (EC), and it is made up of senior transport officials of the EU and Mediterranean partner countries. International financial institutions and a number of international organisations and initiatives active in the region (Union for the Mediterranean, World Bank, EIB, GTMO5+5, UMA, UN-ESCWA) are present as observers.

Transport cooperation with the Mediterranean neighbours was structured at three levels: the Ministerial conference, which adopts political decisions and strategic orientations, the Euromed transport forum, which prepares the Ministerial conference, and a number of working groups dealing with technical infrastructure and regulatory issues (aviation, maritime, GNSS, road and rail).

The ENP has reinforced bilateral relations with the EU's neighbours, notably through joint commitments which are spelled out in so-called bilateral actions plans taking into account each country's specific needs and characteristics. In order to put in practice these objectives, agreed upon between the EU and its neighbourhood partners, the EU has allocated around € 1 billion each year for cooperation programmes in the entire ENP southern region for the period 2007-2013, through the ENP instrument (ENPI).

EU policies have considered transport as a major tool supporting economic and territorial development and cohesion, and this principle has been translated with the Euromediterranean cooperation. Transport may play a role in both directions: on the one hand, by facilitating flows of passengers and goods at fair costs, opening up opportunities for economic development and social interaction; on the other hand, by increasing accessibility in peripheral or isolated regions, and providing the base conditions for development. Transport cannot fulfil any of these objectives on its own: it merely complements and supports other policies aiming at socioeconomic development, but it can certainly accelerate the growth process. The development and cooperation strategy, as envisioned already in the 1995 Barcelona Declaration, is based on the concept of a Mediterranean free-trade area offering to neighbouring countries the prospect of a stake in the EU's internal market. The Barcelona Declaration stressed the need to have a proper transport system facilitating the

vision of free movement of persons, goods, services and capital (four freedoms) and enhanced integration and cohesion among the southern partner countries themselves.

The Eu Transport Policy as a reference for the Mediterranean

Transport cooperation in the Mediterranean has been linked tightly to the evolution of the European transport policy. The EU transport policy has always included an "external dimension" paying careful attention to convergence with neighbouring countries in the areas of both, infrastructure/network development and regulatory reform. This approach is maintained and even strengthened in the new white paper on transport policy, which asserts, at the very beginning of the document, the fact that "transport is global, so effective action requires strong international cooperation" (EC, 2011). Transport cooperation in the Mediterranean has indeed followed the two main pillars of the European transport policy:

- Network development. The TMN-T has been developed in parallel with the TEN-T and its extension to neighbouring countries (from the Pan European Transport Area of the Mediterranean in the mid-1990s to the 2007 Commission's communication).
- Regulatory framework: Although carefully tailored to the particular conditions of the Mediterranean region, cooperation has broadly followed the same priorities and strategies of the common transport policy: rail reform, Motorways of the Sea, Open Skies, de-regulation and competition in road transport, intermodality/co-modality, environmental integration, or clean urban transport.

The EU 2011 White Paper keeps working on its predecessors' vision to attain a competitive and sustainable transport system, in a context that is becoming increasingly global and challenging. This vision can be largely shared by the Mediterranean region: in fact, competitiveness in the transport sector is a prerequisite for socioeconomic development, as inefficient, high-cost transport systems keep putting a significant burden on the governments' budgets and on the economy as a whole.

The three pillars at the heart of the white paper's strategy are the completion of the internal transport market (the so-called single European transport area), innovation (with a focus on technology and users' behaviour) and infrastructure (including funding). These pillars lay at the basis of any efficient transport system and therefore equally apply to the Euro-Mediterranean transport system, and particularly of the Regional Transport Action Plan (RTAP). The third pillar (infrastructure) is probably the one which has experienced a more sustained effort in the cooperation of the EU with the Mediterranean. Mediterranean partner countries have identified their own common transport networks (Trans-Mediterranean Transport Network, TMN-T) using a methodological approach similar to the one used for the identification and revision of TEN-T.

In line with the Europe 2020 Strategy objectives, the White Paper explores how the external dimension of transport policy can be deployed for fostering growth. It recognizes the importance of the EU's role in pursuing transport policy cooperation in ENP countries to the mutual benefit of citizens and business both in the EU and its neighbouring countries. It is of course important that the EU's internal transport policy and its external dimension in the neighbourhood are consistent.

REVIEW OF TRANSPORT PLANNING PRACTICES IN THE MAGHREB

Transport planning practices in Algeria

In Algeria, transport planning has been integrated within the wider vision of the national scheme on spatial planning (*schéma national d'aménagement du territoire*, SNAT), a comprehensive territorial vision for 2025. Based on this vision, developed between 2005 and 2009, infrastructure plans have been developed for every transport mode. These modal plans lack an integrated vision of the transport system and are focused on infrastructure, without addressing the regulatory framework and the characteristics of transport services: these questions should have been addressed by an integrated national transport plan (plan national des transports, PNT) for which different studies were conducted between 2009 and 2011, although the plan has not been formally adopted by the government yet.

Geography plays a decisive role in the design of transport networks within the SNAT: the existing economic hubs are complemented by a significant number of additional economic centres, to be developed in the next years with the support of intensive investments of the public administrations.

The technical standards of the road and rail segments connecting the economic centres are defined on the basis of the continuity and homogeneity of the networks: high standards (motorways and electrified double-track rail) are generally proposed in most of the networks, without much concern about actual and potential transport demand volumes and needs. Notwithstanding the modal character of the networks identified within the SNAT, some intermodal connections are also identified, mainly for freight.

The dominance of the objectives linked to regional development and territorial cohesion within the SNAT results in little, if any, influence of the tools and reasoning of the classical rational planning model, and particularly to cost-benefit analysis of the projects. As a consequence, innovative, non-infrastructure concepts, such as traffic management, or the application of information and communication technologies to transport receive little consideration in the transport model proposed. The deployment of a comprehensive, inclusive development vision for the national territory is probably the main contribution of the SNAT, but the consequence is the identification of extremely costly transport infrastructure networks, without exploring alternative approaches to provide reasonable accessibility conditions at lower costs.

The planners' focus on regional development and territorial cohesion results in a purely national perspective, paying little attention neither to the otherwise still modest international transport flows nor to their potential growth: the particular needs of international traffic flows (particular for inland transport) do not seem to play any significant role within the SNAT vision. Ports are indeed seen as a major leverage for the development of international trade, and the improvement of the competitive position of Algerian ports within the western Mediterranean is mentioned within the SNAT, but without defining a concrete port strategy, which is postponed to a future sectoral plan for ports.

In the absence of a renewed vision of the integration of Algeria within the web of international transport flows, the existing intergovernmental transport concepts in the region are respected, and are largely compatible with the transport system designed in the SNAT. This

is particularly the case for road and rail, where the Trans-Maghrebin networks agreed upon in the 1980s and 1990s in the framework of the Arab Maghreb Union (Union du Maghreb arabe, UMA) keep providing the basic east-west backbone of the proposed networks. Nevertheless, this protagonism is justified by the fact that the east-west axis links all the major cities and economic centres in the country, and not by the ambition to improve inland communications with Morocco and Tunisia. In fact, the completion of the international sections of these axes has not received the same priority. Furthermore, the inclusion within the SNAT of new axes within the country (linking the central and southern regions with the coast) has enormously increased the financial needs, making it more uncertain the completion of the transborder segments.

Whereas environmental considerations are included within the SNAT, they refer exclusively to the protection of natural sites, without establishing criteria for specifically addressing global challenges, such as climate change mitigation and adaptation strategies. Although this may be understandable in the particular socio-economic context of Algeria, it results in a difficulty to cooperate with transport strategies in developed countries, and particularly in the European Union.

In summary, although there are no major contradictions between the national transport strategy designed within the SNAT and the international priorities identified within the Euro-Mediterranean multilateral dialog, there is no evidence of an explicit will of addressing global challenges (such as climate change) or a priority to integrate national networks within the region.

Transport planning practices in Morocco

Current transport planning practices in Morocco has been deeply influenced, since the beginning of the Century (and particularly since 2003) by an ambitious program for the development of major infrastructures in all transport modes. This program was articulated since 2008 within a national strategy (stratégie d'action du secteur de l'équipement et des transports, 2008-2011), which progressively included a wider variety of actions, beyond the construction of state-of-the-art infrastructures. This was the case of the implementation of the express-road (voies express) concept for the improvement of strategic road axes, whether traffic and difficult topographic conditions did not justified the development of motorways. More recently, in 2010, a logistics strategy (stratégie logistique 2010-2015) (MET, 2010) was approved in order to expand the modernization effort to the development of different tiers of road freight platforms within the country, coupled with the modernization of existing operators with capacity building programmes and access to ITC solutions. An incremental approach is also being followed for the development of the future high speed rail Tanger-Casablanca-Marrakech.

In a context of completion of many of the ambitious project undertaken in the last decade, and with more limited access to financial sources, transport planning in Morocco could evolve towards a new focus on local access conditions (rural roads, particularly) and improvement of the quality of transport services, following the experience of the logistics strategy in other transport sectors. During this period, transport infrastructure development largely focused on the modernisation of the road and rail trans-Maghreb in axes, largely following the priorities agreed upon at the international level. The completion of these axes,

including their connection with Algeria, and their expansion towards the North of the country, remain a major priority in this regard.

In fact, the development of the trans-Maghrebin axes and other road and rail links has been largely associated to a regional development policy focused on the North of the country, with the new port Tanger-Med (and its motorway and rail access) and the express road "rocade méditerranéenne" as their most prominent and costly projects. The actual socioeconomic impact of these mega-projects in the Northern region should largely influence the drivers of transport policy making in Morocco in the future.

The lack of relevant inland transport flows with other Maghreb countries and the uncertainties related to their development in the future help to explain why the original international networks planned in the 1980s have not been substantially expanded since then. Furthermore, closure of the land border Morocco-Algeria since the 1990s and limited complementarity among the economies of the three countries would suggest that transport is unlikely to represent a bottleneck for intra-Maghreb trade flows. Any substantial effort to expand international links in the region seems to find little justification in the absence of sound prospects for substantial socio-economic integration within the region and with the EU. In spite of the strong national focus of the transport policy, and its primary connection with a regional development policy, the international connectivity of the Moroccan transport system has received substantial attention and funding during these years, particularly with the new port of Tanger-Med and other projects in the north (the future new port of Nador) and west (expansion of the port of Casablanca) coasts.

Although efficiency (cost-benefit analysis) and environmental (sustainable mobility concept) considerations are included in the government's strategic documents for the transport sector, these do not seem to play in practice a role comparable to that of the considerations based on regional cohesion and economic development. The inclusion of the former criteria in project analysis seems to be quite modest compared to the latter, in accordance with the official documents of the government.

Transport planning practices in Tunisia

Transport is included in Tunisia within the comprehensive economic development plans approved every 5 years. Within those plans, individual projects are identified and assessed, without making an explicit identification of the long-term vision for the transport system. These planning practices may be justified by the small size of the country (compared to its neighbours) and the weak integration among its modal transport networks. Furthermore, there seem to be little advantage in the adoption of more comprehensive planning practices, taking into account the absence of significant transit and international flows: the identification of potential transport infrastructure projects, its evaluation and prioritisation remain the dominant planning approach.

The need of more sophisticated transport planning tools should increase as economic integration with other countries in the Maghreb and in the Mediterranean region makes further progress, looking for an efficient connection between the national transport system and international networks. In fact, this situation has not materialized yet, as international transport flows, particularly with its two major neighbours, Algeria and Libya remain quite limited for both, freight and passengers. Further progress in the regional integration

processes would probably require a more complex transport planning approach, less dominated by macroeconomic planning and more influenced by geographical and environmental considerations as well as by functional efficiency. The development of explicit scenarios of regional (Mediterranean) and subregional (Maghreb) integration seems thus to be a pre-requisite for the adoption of more sophisticated planning practices.

The current framework of five-year economic development plans does not facilitate the consideration of the environmental perspective within the planning and decision-making process, which is further complicated by the limitations in the availability of environmental data.

This is not to say that the current planning practices do not take into consideration the challenges and opportunities raised by the growth of international, global transport flows. On the contrary, some of the projects identified within the five-year plans are justified on the basis of giving a more relevant role to Tunisia within the logic of these global flows. This is particularly the case for the megaproject of a new port in Efindha. The point is that this approach is not clearly placed in the framework of an integrated development of the transport system in Tunisia, in close coordination with its neighbouring countries: in the absence of a dynamic regional integration process, there are no incentives to undertake such an approach. Effective regional integration could dramatically change the role of the Tunisian transport networks, which could become a key transit link between the two major countries in the Maghreb. Under this scenario, the development of inland (rail and road) international connections would become a first priority for a country, which could become a key hub within the Southern Mediterranean coast.

Therefore, regional integration, within the Maghreb and within the whole Mediterranean region seems to be a key incentive for the adoption of more sophisticated and integrated planning practices in Tunisia, including the geographic and environmental perspectives and giving more consideration to the modernizations of transport management and transport service tools such as those based on ITCs.

DECISION-MAKING AND FINANCING OF NEW PROJECTS

The emergence of new public agencies and the identification of new mega-projects

In spite of the modest progress achieved in the process of subregional and regional integration, the three countries analysed have actively participated in the multilateral initiatives of the EU for the identification and development of a Trans-Mediterranean transport system since the mid-1990s, and have dedicated significant financial resources to the development of major transport infrastructure projects, supported by new project management practices and financing schemes.

The three countries developed in the last decade a new, remarkable capacity for managing and implementing large transport projects, learning from the failure of some public private partnership schemes since the 1990s, and developing original approaches, better fitted to their particular national economic and financial context. Major projects completed in this decade include the Tanger-Med port in Morocco, the Enfidha airport in Tunisia and the East-West motorway in Algeria. In the last years, a renewed interest has emerged in the three

governments to modernise the freight transport sector, with the involvement of major global logistics players, the modernization of ports and other freight hubs and the development of intermodal terminals.

In part, the success of governments and their agencies in the implementation of these and other projects, including the completion of some schemes that had been designed already in the 1970s and 1980s, was favoured by the stability of the planning framework, which has kept focussing on a limited number of priority projects. This situation started to change in the last years, as new projects started to be announced by policy makers without prior in-depth assessment and discussion. This renewed optimism may be understandable in a context in which technical services and agencies, as well as other stakeholders have successfully completed complex projects and are looking for new ones for continuing their activity. However, it jeopardizes the desired evolution of technical assessment towards better integrated planning models, including territorial, environmental and intermodal aspects. Furthermore, formalized decision-making, based on approved plans are replaced by an incremental process for the inclusion of individual projects within the governments' plans, often with poor technical justification and requiring substantial financial resources. There are recent examples in all the countries: The recent revision of some of the Algerian Modal Master Plans developed within the SNAT, and particularly the ambitious expansion of the rail network, including a coastal high speed rail line; the expansion of the motorway network and the new port of Enfidha in Tunisia, with uncertain traffic prospects, and the high speed line Tanger- Marrakech or the new port in Nador in Morocco show how the decision-making processes are simplified, the cost tag of the project increases and the assessment of the expected benefits are poorly justified and largely rely on uncertain indirect impacts on the regional economy.

The successful completion of many of the more complex projects in the region is associated to *ad hoc* public agencies created for their management, implementation and operation. The particular profile of these agencies is not uniform, even within the same country or sector, but they converge in the purpose of creating new centres of technical expertise, more flexible bureaucratic conditions and, eventually, access to new financial resources. A solution sometimes developed after the failure of conventional technical services to implement them or after unsuccessful bids to develop them under PPP schemes.

Actually, the three countries developed new regulatory frameworks during the 1980s and 1990s to engage international private investors in the development of transport infrastructure. However, the results of the bids and negotiations launched following these legislative reforms were disappointing, mainly due to the risks perceived by the investors, the high uncertainties linked to traffic forecasts, and the high ambition and investment needs of many of those projects. In the last years, the involvement of private investors has been channelled towards medium-size developments for which risks can be better identified and managed such as the construction and operation of new port terminals (Alger, terminals 1 and 2 in Tanger-Med...) or medium-size airports (Enfidha): A promising experience, which could be expanded afterwards to other projects and transport modes.

The new public stakeholders

The new public agencies responsible for the construction and operation of many major transport infrastructures are becoming more relevant in the decision-making process, based on their know-how and access to financial sources, whereas traditional technical services within the governments have difficulties to keep the needed technical expertise and to react in a highly constrained and bureaucratic environment. Similar situations are present in all transport modes, although with some specific traits, which are common to the three countries.

In the road sector, the development of the motorway network has been trusted to public agencies. In the case of Morocco and Tunisia, these agencies are responsible for the construction and operation of the network, and collect tolls from the users. In the case of Algeria, the responsibility for design and construction has been split from the operation, with two different public agencies. As tolls cover only a part of the total infrastructure costs, those public companies receive additional funding from the governments. The expansion of the network has resulted in a significant increase of the credits received by these agencies from international financial institutions, so that their capacity to further expand the network has progressively been reduced in Morocco and Tunisia. In the case of Algeria, the government's financial situation allows a full subsidizing of the two public agencies for further expansion of the network after the successful completion of the 1,200 km long East-West motorway.

The poor financial and technical conditions of the national rail companies in the 1980s and 1990s were a major barrier to the improvement of the railway system in the three countries. Initially, reforms of the legal framework were approved in order to allow the operation of private rail companies, but these reforms did not result in the involvement of new operators. Consequently, national rail companies are being restructured. In the case of Morocco, the national company ONCF has been able, after restructuring, to undertake the management of the new rail projects, including the high speed line Tanger-Morocco. In Algeria, restructuring of the national company, SNTF, is in progress, and the construction of new rail lines has been trusted to a new public agency, ANESRIF. In Tunisia, the reform of the national company, SNCFT, has also started, and the construction of the main rail project in the agenda, a commuter rail line in the metropolitan area of Tunis (Réseau Ferré Rapide, RFR), is being developed by an *ad hoc* public agency, following the Algerian model.

Ports have been more successful than other transport modes in attracting private investments. The institutional and regulatory frameworks have been substantially changed in the three countries, in order to facilitate the involvement of major global players in the operation and eventually construction of new port terminals, with a focus on container traffic. Nevertheless, the public sector keeps having a major role in port activities. For example, in Morocco, the public company Marsa Maroc is the sole operator in most ports, and is associated in some of the new terminals with those global operators. The limitations found by the government in the conventional port model, currently managed through the public agency ANP (Autorité nationale des ports) explain why a new public agency was created for the development of the new port Tanger-Med. This model has been successful in the completion of the new port and its operation through contracts with various global operators, and could be replicated for other projects (like Nador) in the future. In Algeria, some partnerships have also been established between public port managers and global operators, with the

constitution of *ad hoc* societies (like Djazair Port World and Djen-Djen Port World) since 2008. In spite of several efforts, including the reform of the legal framework and some international biddings, this approach has not materialised in Tunisia, yet: only a minor concession, for the improvement and operation of the cruiser terminal in Goulette port (Tunis) was successful in involving private investors, although purely of a national character. The situation in the 3 countries is more diverse in the airport sector. In Morocco, the public agency ONDA enjoys a high degree of autonomy and a solid financial situation, based on the collection of air navigation and airport fees. In Algeria, the financial situation is more fragile, due to the high number of airports in the country, justified by regional cohesion objectives; the attempts in the early 2000s to develop a PPP scheme for the development and exploitation of the international terminal of the Alger airport was unsuccessful. In Tunisia, the government was successful in attracting a global player, TAV, for the construction and operation of the Enfidha airport.

Exploring new governance models: development of the logistics sector

The sector of logistics infrastructure and services is emerging as a privileged field for cooperation among public agencies, governments and national and international partners. Governments in the three countries play a decisive facilitator role, particularly to provide adequate sites for the location of new infrastructure and to encourage dialog among public and private operators and other actors, in order to move beyond their respective modal expertise and cultures.

The 3 countries have developed specific strategies on logistics, with a different level of detail. Although they include investment proposals in logistics platforms, the main focus of these strategies include modernisation of the national logistics operators, capacity building and the development of an attractive framework for the involvement of experienced international operators. The governments' strategies aim at mobilising the major public actors (including ports and railways) in the promotion of intermodality and to strengthen cooperation among formerly competing players. The identification of promising clusters of enterprises, which could play a leadership role in the development of advanced logistics in the region, is a necessary precondition for the implementation of these strategies (CETMO, 2010). This approach is being explicitly followed in the Moroccan strategy (MET, 2010) and could be strengthened by further cooperation in this field among the three countries.

Transport infrastructure development and governance regimes

The review made above shows how the Maghrebian countries have given a high priority to their transport infrastructure systems in the last decade, focusing mainly on ambitious projects with a capacity to have an impact on regional development and the integration in global transport flows. This strategy has been made operational thanks to the activity of *ad hoc* public agencies, which have gained substantial technical and management capacities. This experience has deeply influenced the transport planning practices and governance regimes, improving technical capacities (although concentrating them in the new public agencies), involving major global partners (with substantial negotiation capacities) and giving

new relevance to the international dimension of the national transport systems. These changes should be influential in the consolidation of new governance regimes in the transport sector, once most of the priority projects, which had been sleeping for many years in the governments' offices, have been finally implemented, and the political need of a discussion on "what to do next" will gain momentum.

The emergence and consolidation of these new stakeholders and their accumulation of technical know-how could support the adoption of more collaborative approaches to transport planning, and the transition towards less hierarchical, network-based governance regimes. There is however a significant risk, as suggested by the recent emergence of new project proposals, that these new emerging stakeholders will primarily look for the consolidation of their respective areas of influence, and the adoption of particular projects, supporting a piece-meal, incremental transport policy rather than the consolidation of better integrated, strategic planning visions.

International cooperation has been influential in providing a stable planning vision during the last decade, including a consistent international perspective in a political context of national priorities, and an effective dissemination of emerging transport concepts, including multimodality, intermodality and sustainable mobility. However, lacking effective socio-economic integration in the region, it is uncertain whether international cooperation will remain effective or will be rather replaced by more domestic approaches and by competition among the 3 countries for gaining some minor advantages in global networks.

DESCRIBING TRANSPORT GOVERNANCE REGIMES

The former changes in transport planning and governance can be illustrated as the transition of national hierarchical regimes towards a particular networking governance system. In this transition, the EU has been influential, providing formal and informal spaces for networking (particularly the ETF and its working groups, but also the many activities within the Euromed transport project), increasing technical capacities (which has probably facilitated the activities of the new agencies set up by the Maghrebian governments), and providing a strategic and stable long-term vision of the transport system in the region, as a key reference for national planning activities.

Ironically, changes in the governance regimes do not seem to follow the paradigms supported by key Euro-Mediterranean documents, such as the RTAP. In fact, the role of the private sector has increased marginally, confined to relevant projects, but not to the core of the transport system. Furthermore, convergence with the EU regulatory system (*acquis communautaire*) has not made substantial progress, and access to the transport market remains in many sectors largely regulated and with significant barriers to newcomers, particularly in the case of foreign operators. Furthermore, lacking substantial political or economic progress in the process of Euro-Mediterranean integration in these years, Mediterranean countries have remained sceptical about the practical interest of the integrated Trans-Mediterranean transport concept fostered by the RTAP.

The analysis of the transition in the governance regimes in the three countries can be better approached by considering three different, although related, processes and governance structures: the traditional, hierarchical government structures, based on highly centralized, traditional technical services within strong regulatory powers over a myriad of all-size,

national transport operators; the collaborative planning process undertaken within the Euro-Mediterranean Transport Forum (ETF) and the deployment and empowerment of an additional, parallel public administration, with new public agencies with a high degree of autonomy, significant technical capacities and access to the highest political decision-making levels.

Therefore, three different governance regimens coexist in the three countries. The traditional hierarchical model prevails within the ministries in charge of transport and infrastructure (the competencies are often split between the ministry of transport and the ministry of public works). A market based regime dominates the management of key mega-projects, and articulated through public *ad hoc* agencies, which enter negotiations with global stakeholders for the implementation and operation of large projects. And a consensual, network regime provides a shared vision through an international dialog largely sponsored and led by the European Commission.

The governance structure within the ministries in charge of the transport policy in the 3 countries remains largely hierarchical, with a legalistic orientation, with little room for political action, and with a centralized approach, without significant intermediate layers. This structure has have increasing difficulties to cope with the rapidly changing socio-economic environment since the 1980s, and since then, various proposals for reform have been studied, with the support of international financial institutions and the EU. These reforms generally aimed at moving the ministries' services away from the direct provision of transport infrastructure and services, and focusing on regulatory (access to markets and fair competition) issues, and giving a larger role to the private sector. The results of these reforms have been diverse, sometimes raising new problems (like the proliferation of small road transport operators, difficult to be effectively controlled by the government in Algeria), adopting regulations that could not be implemented and enforced afterwards (like the new port organization in Algeria or the new structure of the public rail operator, ONCF in Morocco) or with poor or no answer from the private sector (like the concession opportunities opened in various transport sectors in the 3 countries), but also providing the public administrations with a renewed capacity to face a quickly changing situation with impressive growth in transport demand needs. The hierarchical model has proven to be resilient to these challenges circumstances, being able to survive with minimum practical changes, preserving most of its influence in transport policy making and remaining the main, if not only, reference for most of the other stakeholders in the transport sector, particularly for national players.

The market governance model was intended to have progressively replaced the original hierarchical model since the 1980s, but the difficulties mentioned above made it impossible its deployment. As a pragmatic strategy, the market model was implemented in particular niches where a number of circumstances converged: technical complexity of the project, generally demanding expertise not readily available within the country; relatively autonomy of the project within the national transport system, so that its boundaries could be easily identified; lack of capacity (or even previous failure) and means of the traditional technical services to move the project forward, and high political priority of support for a particular project or scheme, including a tight schedule and priority in access to public funding.

The market governance model is developed through a piecemeal approach, taking opportunities of particular megaprojects with strong political backing. It must be said, however, these ambitious and costly projects are not generally newcomers: their origin is

often rooted in ambitious, comprehensive planning schemes prepared in the 1970s and 1980s and that could not be implemented under the difficult socioeconomic conditions of the following years. These projects get *ad hoc* regulations, public agencies bypassing the traditional hierarchical structures within the government, and in some cases (like the Tanger-Med project) earmarked funding sources. Following a market governance model, these agencies adopt a project-focused, short-term approach, with scarce interest about the rest of the transport system, limited cooperation and links with other public institutions, and a keen interest in the performance prospects and merits of their projects compared to other competitors (other ports, nationally or internationally, other networks, other transport operators). This individualistic and competitive attitude is encouraged by the need to seek for international private partners, which are necessary to provide technical expertise, equity and, in some cases, also to facilitate the integration of the new facility within global networks (particularly in the case of port terminals).

The international multilateral dialog on transport in the Mediterranean has actively been facilitated by the European Union since the mid-1990s. After the implementation of the EU's neighbourhood policy in the mid-2000s, this policy largely replaced the projects for reforming the transport sector that had been implemented with the support of the World Bank and other international financial institutions. As the European Union governance style, as a "proto-state", is largely based on a consensual approach to policy –making and decision-taking, the Euro-Mediterranean cooperation on transport has been dominated by the collectivistic, long-term and relationship-oriented traits, which are characteristic of network governance. The Regional Transport Action Plan (RTAP) is an excellent example of this governance style, with a long-term vision and strong technical contents. Precisely, these have been the main practical contributions of the process, from the perspective of the Mediterranean countries, and particularly of the 3 Maghrebian countries: the consolidation of a long-term vision and the technical dissemination and capacity building linked to an extensive exchange within working groups and assistance programmes.

Nevertheless, the consensual dialogue within the Euromed Transport Forum and other related activities has not consolidated a levelled playing field, yet. The usual difficulties for defining the terms and the contents of a multilateral discussion have impelled the European Commission to play a leadership role, which has resulted in the prevalence of the EU transport model traits within the dialogue, and the simplification of the process as an attempt to merely expand the European model to Mediterranean countries. This perception drove the dialogue to a standstill, and forced the European Commission to look for some dialogue facilitators (such as the Centre for transport studies in western Mediterranean, CETMO).

These three governance styles have co-existed in parallel, and national governments in the 3 countries have used and combined them in an opportunistic and pragmatic way, depending on the contingent conditions they have been facing. In general, the maintenance of a hierarchical governance style at the national level has largely preserved the core of the transport system operating on a business as usual basis; the reforms undertaken have been integrated within this general framework without challenging the governance style: on the one hand, this may explain why pro-market reforms have largely been unsuccessful (as they could hardly be undertaken without fundamental changes in governance styles). Market governance styles have been confined to those megaprojects, which had high political priority and backing, which could justify by-passing the dominant hierarchical institutions.

Network styles have mainly provided a strategic, long-term vision and have significantly updated technical competences within the public administrations, but have failed to influence short-term decision and policy making. Taken together, they help to characterize planning practices in the Maghreb countries.

Ironically, within this complex framework, the European Union has been pivotal in creating a transport planning and policy narrative in those countries, but has certainly fallen short of moving the whole of the transport system towards a pro-market, open model. In fact, the emerging system is arguably more resilient to change than the old one. This "emergent" parallel governance structured aims at avoiding the lack of flexibility of the traditional structures for politically (or economically) critical projects, without challenging the basic interests at the core of the traditional transport system.

In spite of its limits, the EU policy has resulted in a more stable, planning-friendly environment in the 3 countries, after difficult years of intensive and sometimes failing reforms. This new framework includes the consolidation of permanent networking platforms (ETF and its working groups, bilateral committees), a politically backed strategic vision for transport in the region, potentially with huge implications for national policies (explicit within the RTAP, and the on-going Trans Mediterranean Transport Network concept), and the emergence and empowerment of new, active stakeholders, mainly some new public national agencies and some global operators.

CONCLUSIONS

This paper explores how governance regimes in three developing countries (Algeria, Morocco and Tunisia) have been influenced by multilateral cooperation policies, and which practical effects these changes have had on national transport policies. It has reviewed national transport policies and institutional frameworks in Algeria, Morocco and Tunisia in the last 10 years, and EU's cooperation programmes, within the framework of its Euromediterranean policy, including the Regional Transport Action Plan (2007-2013) launched by the EU to the Mediterranean region, its monitoring tool and its mid-term report. Data review focuses on the actors involved at the international level, and the mechanisms for the translation of the major guidelines of the Euro-Mediterranean transport paradigm at the national level.

Notwithstanding the significant socioeconomic, political and institutional differences among the three countries, three major traits are common to the transport policy framework in all cases: a focus on megaprojects, aiming at facilitating the consolidation of integrated multimodal networks, with the by-side effect of replacing traditional cost-benefit analysis by regional and economic development considerations; substitution of traditional ministerial services by ad hoc public agencies to develop strategic megaprojects; and progressive involvement of international private players for the operation (and eventually the design and construction) of new projects, focusing on know-how transfer rather than investment needs.

The conclusion is that these similarities are largely due to the influence of the international cooperation promoted by the European Union since the mid- 1990s. This influence operates through the modification of the traditional hierarchical governance model. Without compromising its central role, this model is replaced by a specific, market governance model for addressing politically critical, large size megaprojects, and by a network, consensual

model to provide a long-term vision under the leadership of the EU and the participation of all the countries in the region. While the traditional hierarchical model seemed unable to cope with the challenges of poor efficiency, lack of financial resources and increasing transport demand needs in the 1980s-1990s, the new paradigm preserves the basic interest of those involved in it, while providing more satisfactory answers to the most critical challenges.

The new decision-making situation is characterized by the involvement of two new relevant stakeholders, the EU and a limited number of global transport operators. Since the end of 1990s, the EU emerges as new stakeholder providing an alternative conceptual model (integrated multimodal networks), which needs the involvement of more technically savvy operators. The capacity of influence of this policy is significant, taking into consideration the modest financial contributions during this period.

As a result, transport planning has evolved towards an original version of the collaborative planning paradigm described by Innes (2010). Lacking strong socio-economic and institutional networks at the national level, transport policies are largely influenced by the concepts developed within the multilateral dialog at the technical and political level. As a consequence, international coordination is serving as a major influence to develop more efficient planning practices at the national level, but it is unable, in itself, to provide the resources and know-how needed for developing and operating the new infrastructures. This is provided by global operators. Contrary to the 1990s paradigms, PPP have not become a regular channel for the provision of advanced transport infrastructures and services (CETMO, 2011, Euromed Transport Project, 2008). On the contrary, the realm of action of these global players is usually limited to key strategic nodes (particularly new port terminals). For the rest of the system, governments have created (after repeated failures of PPP schemes) ad hoc public agencies. Another major consequence of international coordination is the convergence of national transport network visions in a coherent, transnational system: the influence of transnational schemes on planned national networks results in more coherent infrastructure development priorities.

Within this framework, the usual criticism to the proliferation of megaprojects in transport policies in developing (and developed) countries can be seen from a different perspective. Megaprojects have been considered as a consequence of the prevalence of some political and economic elites within the decision making process in transport policies, with little concern for the assessment of costs, benefits and environmental impacts (Flyvberg, 2003), or as the result of political games favouring local rather than national interests (Robinson, 2005). The evidence reviewed in Maghreb countries may highlight a new contributing causal factor: pressure from global actors (and particularly in this case from the European Union) to expand global transport networks (and their associated technologies) to additional countries, so that similar high design and operational standards are applied with little attention to local priorities and needs.

The uniqueness of the context, and the instability of this model raises questions on how it may evolve in the future, and how the likely increasing competition among the three governance styles to expand their respective realm of influence will be solved. The availability of financial resources, the increasing domestic transport local access needs and the political reforms in the region should have a major influence. At any rate, the EU cooperation, and the prospects of the Euro-Mediterranean integration project will probably keep playing an influential role on this evolution.

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