

The European Union's TRACECA programme
for Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine

Motorways of the Sea for the Black Sea and the Caspian Sea

Project Inception Report - Final Version

March 2009



This project is funded by
the European Union



A project implemented by
Egis Bceom International in
association with Copetrans,
Italferr and Euro-Ukraina
Consulting

Project Title	: Motorways of the Sea for the Black Sea and Caspian Sea	
Project Number	: EuropeAid/126588/C/SER/MULTI	
Beneficiary Countries	: Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	
	Project Partner	EC Contractor
Name	: European Commission DG AidCo A3	Egis Bceom International.
Address	: Rue Joseph II straat 54 B- 1000- Brussels	Place des frères Montgolfier F- 78286- Guyancourt cedex
Tel. number	: +32.2.299 11 11	+33 1.30.12.48.34
Fax number	: +32.2.295.56.65	+33.130.60.04.89
Contact person :	Léonidas Kioussis	Marc Abeille, Project Team Leader Blackcaspmos.egis-bceom@egis.fr
Signatures :		

Date of report : 30 March 2009

Reporting period : 2 Decembre 2008 – 30 March 2009

Author of report : Marc Abeille, Project Team Leader

EC M & E team:	_____	_____	_____
	[name]	[signature]	[date]
Project Manager :	_____	_____	_____
	[name]	[signature]	[date]

PROJECT SYNOPSIS

Project Title	: Motorways of the Sea for the Black Sea and the Caspian Sea
Project Number	: EuropeAid/126588/C/SER/MULTI
Countries	: Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine

Project objectives:

The overall objective of the project is to facilitate trade and transport along the corridor Europe-Black Sea region- Caucasus- Central Asia through improved interoperability and multi-modal transport on the Black Sea and the Caspian Sea.

The specific objective is to promote the concept of “Motorways of the Sea” in TRACECA countries in order to support efficient intermodal freight transport connecting the Black and Caspian Seas’ neighbouring countries with the enlarged EU territory.

Definition: a Motorway of the Sea (MoS) is a maritime intermodal freight transport chain.

The selection of MoS pilot projects and segments will develop specifically sea-land links (rail, road and possibly inland waterways).

Outputs:

Four main outputs will have to be achieved within the project duration:

1. Extensive review and analysis of transport systems in beneficiary countries (“pre-MoS” conditions in beneficiary countries and in other Black Sea/ Regional countries)
2. Awareness rising to promote economic potential of intermodal logistics chain (case demonstrations, exchange of best practices, training) and related recommendations.
3. Short and Medium term Road Map: Pilot projects to be identified and selected with beneficiary countries :
 - according to MoS standards and conditions
 - based on transport policies and market requirements
4. Pre-feasibility or feasibility studies for selected projects:
 - impact assessment (socio-economic, environmental, market benefits, obstacles, solutions, national and regional dimension)
 - coordination with international financing institutions
 - promotion/ communication

Project activities:

The project activities are consisting in short term and long term expertises in all MoS fields: Traffic forecasts, Financial evaluation, Transport and Port legal environment and management procedures, Port operations, Environment, Design of facilities.

Project starting date: December 2008

Project duration: 24 months

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1 Introduction and summary of project progress since its start

The project contractually commenced in December 2008 but due to Christmas holidays in Western and Eastern Europe and as discussed during the Kick-off meeting (23/01/09), it could not really start before mid-January 2009.

The main objectives of the project concern the promotion of effective and efficient intermodal freight transport solutions between the EU and the Black Sea Caucasus and Central Asia countries within the MoS framework, which implies:

- To facilitate trade and transport on the corridor
- To improve interoperability and multimodal transport on Black Sea and Caspian Sea
- To develop concept of “Motorways of the Sea” (MoS)

A Motorway of the Sea is a maritime based intermodal freight transport chain focusing on sea-land connections (rail, road and inland waterway).

According to the ToRs, this project will have to achieve four main outputs within its two-year duration:

1. Review and analysis of transport systems “pre-MoS” conditions in the beneficiary countries and the other partner countries around the Black Sea: Bulgaria, Romania, Turkey
2. Awareness raising on economic and value potentials of intermodal logistics transport and related recommendations
3. Short and Medium term Road Map: Pilot projects selected with beneficiary countries
4. Pre-feasibility/ feasibility studies for selected projects

It should also focus on impact assessments (market trade developments, resolution of obstacles, socio-economic and environmental impacts), coordination with International Financing Institutions as well as promotion and communication.

The Inception phase covers the first three months of the project. This report presents the status of work and the main findings at the end of this phase.

The Inception report is a working document prepared for the use of the Client and the Steering Group; its forms and contents are not prepared for wider publication. The report shows a more advanced method for project development as a result of the preliminary findings of early investigations. Although some of the information produced is still preliminary, it is expected that this report will provide helpful feed-back.

1.1 Project context

1.1.1 Background

The TRACECA programme was launched in 1993 under a programme of a European Union (EU) funded technical assistance (TA) to develop a transport corridor on the West- East axis from

Europe to Central Asia through Caucasus that would complement other existing routes. This programme was further extended to Ukraine and the five Black sea countries.

In 1998, a “Basic Multilateral Agreement (MLA) on International Transport for the Development of the Transport Corridor Europe- Caucasus-Asia”, including technical annexes on rail and road transport, commercial maritime navigation, customs procedures and documentation was signed by 12 countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Romania, Tajikistan, Turkey, Uzbekistan and Ukraine.

In March 2000, the first TRACECA Intergovernmental Commission meeting took place in Tbilisi. Two supporting structures were set up in order to facilitate the implementation of the MLA:

- An Intergovernmental Commission (IGC), ministerial committee to decide by consensus on new actions and discuss the possibilities of TRACECA-funding by the EC and,
- The Permanent Secretariat established in Baku to prepare the yearly meetings of the IGC and coordinate the activities with designated officials in the signatory states.

Countries have acknowledged the achievements reached by TRACECA and intend to fully take advantage of the programme. The number of countries expressing strong interest in TRACECA is increasing (Iran, Pakistan and Afghanistan applied to become members and Russia and Egypt applied to become observers).

Furthermore, in the context to the EU enlargement, the Ministerial Conference on Transport Cooperation between EU Black Sea- Caspian littoral states and their neighbours held in November 2004 in Baku (the “Baku initiative on Transport”) was launched as a process for enhanced relations through the greater integration of transport markets

The representatives of Azerbaijan, Armenia, Belarus, Bulgaria, Georgia, Kyrgyzstan, Kazakhstan, Moldova, Romania, Tajikistan, Turkey, Ukraine and Uzbekistan agreed on the progressive integration of their respective transport networks and markets in accordance with EU and international legal and regulatory frameworks.

For this purpose, it was agreed to further develop the cooperation in the domain of transport and four Expert Working Groups identified priority orientations for transport cooperation, gradual integration of markets and sector reforms in year 2005.

In May 2006, the 5th Annual Meeting of the IGC TRACECA and the 2nd “Baku Initiative” Ministerial Conference on Transport Cooperation between EU Black Sea- Caspian littoral states and their neighbours was convened in Sofia. During the IGC TRACECA meeting, member states officially approved a long-term strategy for the TRACECA corridor up to 2015.

They confirmed their previous commitment to finance the operational cost of the TRACECA secretariat. During the 2nd “Baku Initiative” Ministerial Conference, participants endorsed the conclusions of the four Expert Working Groups (as for the development of the ports along the TRACECA corridor).

The Motorways of the Sea (MoS), defined as frequent door-to-door intermodal services relying on maritime transport for the long haul, came within this framework, with MoS pilot projects that might determine future intermodal maritime links between regional and sub-regional markets, and. Black and Caspian Seas MoS among the five transitional axes in a EC Communication dated on 2007.

The transport of freight, passengers and energy in the Black and Caspian Sea and the Caucasus areas are serviced by sea going river vessels, Ro-Ro ferries for trucks, rail ferries for railways wagons with some ports/intermodal hubs are connected to inland waterways.

These are already “sea-based transport logistical routes” in the Black and Caspian seas, but the intermodal services are mostly segmented. Each part of the supply chain is using different transport modes and different procedures, which does not meet the MoS definition. This particular

project should focus on improving existing or new viable maritime routes and their linking intermodal services with a “door-to-door” supply chain approach.

1.1.2 Summary of Inception Period and Outcome

The project is implemented by Egis Bceom International (EBI) in association with Copetrans, Italferr and Euro-Ukraine Consulting (EUC). The main project office is located in Kiev at EUC, a subsidiary of EBI.

All the beneficiary countries have been visited (four NS and three EU Delegations), with the exception of Turkmenistan (No (National Secretary).

Meetings held during the period (January-March 2009)

The contract for the study was signed in December 2008. A first preliminary meeting with the Commission was attended by the Team Leader and the Project Coordinator in Brussels on 12 December 2008. A more formal Kick-off meeting was held with the representatives of the Steering group in Brussels the 23rd January 2009. The meeting was also attended by the Team Leader and the Project Coordinator.

Workshop for the preparation of the TRACECA website in Vienna, 12-13 January 2009

This was the first opportunity for the invited Team Leader to meet some countries representatives in one spot at the beginning of the project. After the MoS presentation and clarification, Ukraine stressed some difficulties that could be faced, and Romania (associated country expressed the wish to have the consultants visiting all directly linked countries. It was explained that, according to the ToRs, the direct beneficiary Countries were to be considered by the EC as a priority at this stage of the project.

“GIS Experts Meeting” Brussels, 28 January 2009

A meeting was organised in Brussels at the EU initiative about transport data collected through the EU-funded projects. The MoS Team (transport planner) was invited to meet the GIS experts working on “Traffic flows” project (WSP / Louis Berger) together with the Transport Dialogue and Logistics Centres project. It was agreed that the "Traffic flows" data will be transmitted in order to avoid any duplicated work, and all projects were invited by the EC to proceed similarly for common relevant information in the future.

First field mission Baku and Kiev – 5-10 February 2009

Field work started on February, 2009. The project’s base of operations was settled in Kiev in the premises of Euro-Ukraine Consulting. A local legal transport expert was recruited on the project. The Team Leader and the expert visited Secretary General and TRACECA experts where they met also the National Secretary of Azerbaijan.

Infrastructure Meeting Bucharest, 18 February 2009

The Team Leader was invited to make a presentation of the project at the Infrastructure meeting in Bucharest, Romania on February 18th. This opportunity allowed to meet National Secretaries present at the meeting and make a presentation of the objectives and expected results of MoS pilot projects. The purpose was to present other ongoing and starting TRACECA projects in order to provide an up-dated overview and screening of the EU actions.

Following the introduction, there were more detailed questions and discussions with National representatives. A special reference document with the synopsis organisation, and overview of MoSs was distributed to all participants.

Second field mission Kiev, Tbilisi and Almaty- March 13-20, 2009

The Team Leader, the shipping and logistics expert and the port specialist went to visit the National Secretaries in Georgia and Kazakhstan, thus completing introductions before all National Secretaries of direct beneficiary Countries (with the exception of Turkmenistan). They had also constructive meetings with the EU Delegations in both countries, and started contacts and discussions with NSs, their experts, stakeholders and other consultants.

Meetings were also held with the Team Leaders of the two “logistical centres” projects in Almaty and Kiev in view of sharing information, contacts and views. The local legal transport expert also met the team on “Accession and Implementation by Ukraine of International Agreements and Conventions in transport” in Kiev.

Field mission into the Ukrainian ports, Odessa and Ilyichevsk, 24-25 March, 2009

Thanks to the National Secretary in Ukraine who facilitated contacts and meetings in Odessa and Ilyichevsk, the ports and legal experts met stakeholders in the two ports and received updated and useful information. They met responsible of the commercial port and significant players in Ilyichevsk, who showed a great interest in the MoS pilot projects. In Odessa, the team was provided with an updated database and discussed thoroughly existing legal and technical bottlenecks, including the impacts of the economic crisis.

Completion Seminar “Maritime Links” TRACECA-TEN, Sofia, 26 March 2009

The project was invited to attend this meeting which was not an official TRACECA coordination meeting, but where the final results about the concluding activity of this two-year project were presented. This was also an opportunity to meet official representatives of the Ministries of Transport from other Black Sea countries.

First General Outputs

- The mobilization during the Inception phase included the deployment of members of the core team and the employment of local assistants.
This mobilization was also to establish the first contacts with the National Secretaries and other counterparts in the Administrations, in order to fix meeting dates, this activity being a pre-requisite of the ToRs for the official introductions in each country.
- Following the EU instructions, the project is limited to contacts with the direct beneficiary countries at this preliminary stage.
All beneficiary countries were visited except Turkmenistan (no NS), and other opportunities were seized for introducing the MoS initiative to all Countries including all TRACECA Countries.
- Based on these contracts, it was useful to share the further and more widely the MoS Pilot Project approach, as it appears that the situation and perception are difference between Countries been established also with a number of projects in the TRACECA region. In particular, the project’s team was invited to meetings with Louis Berger/ WSP (“traffic flows” EU project) about data and TRACECA website. The MoS team met several times Dornier Consulting and Safege (the two starting “logistical centres” EU projects). All teams of these EU-funded parallel projects agreed for a regular communication about the follow-up of their action (contacts and up-dated information).

- The most important and relevant background studies for the MoS project were listed and analysed as presented further in this report, and more particularly the Final Report on “Transport maritime links” (dated July 2008) and provisional data collection from the “Analysis of Traffic flows” project (February 2009). The list of documents of interest is presented in Annex 3.
- Finally, during the Inception phase, a more detailed project implementation plan and schedule have been prepared as presented in Chapter 3. After reviewing the documentation and according to the preliminary findings, the Consortium will follow the development of its detailed methodology to select and design the MoS pilot projects.

Status of work

The following table presents a general overview of the status of work at the end of the Inception Phase: Progress (%) against actual planned.

	Progress (%)	
	Planned	Actual
Task 1 Review of studies	50	35
Activity 1.0 Mobilisation	100	100
Activity 1.1. Review and analysis of studies	80	65
Activity 1.2. Information update	0	25
Activity 1.3. Market research	0	20
Task 2. Awareness raising	20	10
Activity 2.0. Training, support for the MoS concept	20	5
Activity 2.1. Identification and contact of main stakeholders	15	5
Activity 2.2. Partnership structuring support	0	0
Activity 2.3. Support for promotion of pilot projects	0	0
Task 3. Elaboration of a Road Map	0	0
Activity 3.0 Assistance in the design of pilot projects	0	0
Activity 3.1 Analysis of business plan	0	0
Activity 3.2 Elaboration of a road map	0	0
Task 4. Impact assessment	0	0
Activity 4.0 Pre-feasibility or feasibility studies	0	0
Activity 4.1 Impact assessment	0	0

1.1.3 Expectations of the beneficiaries

The differences of perception about Motorways of the Sea and the specific regional projects are making it most necessary to develop the introductory papers and communication beyond the meetings already held in each Country.

- The first exchange of letters between National Secretaries and the E.C. took place in early 2008, long before the start of the contract;
- National stakeholders may see in the MoS project different opportunities for their respective Country, and those views must be harmonised in a regional perspective;
- Stakeholders within each Country have different ideas also, depending on their roles and position, - institution, users, operators.

The main common understanding is about the general concept and objectives of MoS, but significant awareness raising activities are indispensable to precise the specific design and achievements of Pilot projects.

This will be made step by step, in parallel to the other activities, starting from the level of National Secretaries' and their experts', progressing among National shareholders (including non-direct by MoS linked Countries), then enlarging to all countries.

The following steps to develop the approach have already been discussed with National Secretaries and should comprise in the short term:

- A National strategic synthesis (SWOT analysis) explaining the added value of MoS for each Country;
- A series of answers to the most frequently asked questions about Motorways of the Sea and their implementation in the region;
- A working day between all National Secretaries and the Team with the objective to share a regional approach of MoS.

1.2 Constraints, risks and assumptions

During the Inception period, the consultants got confirmation about the risks or difficulties that might occur in the course of the project.

Those were anticipated in the consultants' proposal.

In order to achieve successful developments of the MoS pilot projects, strong commitments from the partners and beneficiary countries are expected. On the contrary, a weak cooperation might reduce the effectiveness of the project.

Another main assumption is the stability and continuity of the project environment.

The following presents the main difficulties and risks as identified during the preparatory phase and précised during the Inception phase:

General economic context

The economic crisis comes as a major concern in most if not all meetings. The following table summarizes the questions arising and proposed solution on its impact.

	First finding (Black Sea)	Questions arising and solutions
<ul style="list-style-type: none"> Traffic flows professional media and press review 	<ul style="list-style-type: none"> General views on downturn of trade and transports and negative growth of most core markets in 2009-10 Statistics on the reduction of containers (possibly amplified when counted in movements) 	<ul style="list-style-type: none"> Necessity to change the approach of forecasts base methodology on a series of hypotheses and to prepare scenarios Such scenarios to retain MoS potentialities of existing and non-existing markets
<ul style="list-style-type: none"> Specifics: port data 	<ul style="list-style-type: none"> Limited information re-other cargo flows 	<ul style="list-style-type: none"> Field enquiries with operators all modes and segments
<ul style="list-style-type: none"> Operations: maritime operators 	<ul style="list-style-type: none"> Cancellation of liner services New joint services / vessel sharing with reduction of capacities 	<ul style="list-style-type: none"> Follow up of regular maritime services links (priority) (Suggestion: quarterly)
	<ul style="list-style-type: none"> Change of schedule patterns e.g. shifts between transshipment hubs 	
<ul style="list-style-type: none"> Forecasts / potential markets 	<ul style="list-style-type: none"> Dominant views: uncertainties on volumes, horizons, etc. 	
<p>Conclusion: Pilot-Project developments to be considered in an "opportunity" perspective:</p> <ul style="list-style-type: none"> focus on intra/inter-regional market trades, MoS solutions and good practices as drivers for alleviating obstacles containerisation potentials: some positive signs under pre-identification 		

Strategic approach

As expressed above (1.1.3. Expectation of beneficiaries), difficulties might arise if the understanding of the MoS concept and of counterparts' involvement were not shared, as it appeared at the start of the project there was different awareness or views of the MoS, and shareholders needing or not more introduction and preliminary information about the MoS project to open the way for contacts and exchange of views.

The integration of potential MoS projects in National Transport Strategies must be enlightened

Examples and case descriptions of MoSs in other regions and Mediterranean Pilot projects were discussed, and the need to further exchange with stakeholders in order to establish common understanding and approaches of the objectives and ways to prepare the Pilot projects.

Market scope

The following table summarises the questions arising and proposed approach on the scope of relevant market.

See table on the next page

Table 1: Proposed approach on the scope of relevant market

Scope	Comment / Questions	Proposed approach
<ul style="list-style-type: none"> • Non beneficiary TRACECA Countries: <ul style="list-style-type: none"> - East of Caspian Sea and West of Black Sea - Black Sea specific : Moldova - Central Caucasus specific: Armenia 	<ul style="list-style-type: none"> Enlarging regional dimension Request from Moldova delegation in Bucharest 30 March Neighbouring Countries along central request of axis 	<ul style="list-style-type: none"> When and as using MoS, including potentially Not a beneficiary Country in ToRs Consider future container Terminal developments (2009 – 2010) When and as using MoS potentially MoS axes connected
<ul style="list-style-type: none"> • Land transport of external trade, in transit only 	<ul style="list-style-type: none"> West, North and Central Europe Asia and other continents 	<ul style="list-style-type: none"> MoS Axes designed for all land / sea cargoes Contributing to increase volumes and services Condition: not detrimental to regional and inter-regional trades
<ul style="list-style-type: none"> • Maritime transhipped / feeder trade = Non regional / overseas 	<ul style="list-style-type: none"> Example: Asia – Black Sea via Mediterranean T/S Hub port 	<ul style="list-style-type: none"> Contributing to increase volumes and services Condition: not detrimental to regional and inter-regional trades

Additionally, the market research (2.2.4) will comprise an approach of market player all sides (in the regions and from the EU).

Mobilisation

Due to the Christmas periods in Western and Eastern Europe, the project could not really start before January 2009 (as stated in the minutes of the Kick-off meeting), when it became possible to plan the first meetings with the TRACECA General Secretary and National Secretaries, as a prerequisite before further contacts. Discussions with the GS and NSs came after a first part collection of information and data, including other TRACECA project and from the Consultants' own sources. These two preliminary steps had to be launched before any field visit or contact with stakeholders other than the above.

It should be noted that the costs issues are up-dated or relevant in those various studies

Traffic data and forecasts

The team had also some difficulties to be provided with recent traffic forecasts which need to be completed and further up-date in all cases as a consequence of the traffic downturn in order to reflect more realistic recent trends and future growth.

The Completion report on “Maritime links” dated on July 2008 contains some pages on port assessment and forecasts: some characteristics about Ukrainian and Georgian ports and for three other Black Sea countries but there is no equivalent, homogenous information for the Caspian Sea.

The team's transport planner met the "traffic flows" consultants who supplied a provisional data base (February), which are being analysed, as develop below in this report.

Other related projects (availability studies)

Several National projects have been, are or will be developed within the TRACECA programme as well as some other IFIs projects (EBRD, ADB...). A list of projects which could be relevant for this MoS project has been prepared in Annex 3, but all have not been made available so far. This is being checked with the NS, the EC, IFIs and other Consultants.

1.3 Relations with main local stakeholders

1.3.1 Institutional level

In most countries, the TRACECA programme is handed over at the governmental level (Ministries of Transport).

The team's project has to work in close cooperation with the Permanent Secretariat (TRACECA Intergovernmental Commission) based in Baku. The TRACECA Secretariat/ TRACECA National Secretaries play an important coordination role and should cooperate with the project beneficiaries and all the stakeholders at national level, more particularly with mobilization of national authorities and facilitating contacts.

The team should also liaise with the EU Delegations in each beneficiary country.

1.3.2 Target Groups

The direct target groups are defined in the ToRs: Ministries of Transport, Port and Maritime Administrations and Associations of Transport and Communication of the beneficiary countries.

Railway entities, shipping companies (rail ferries, Ro-Ro and container lines delivering services on TRACECA network), Customs and Border police authorities, port and terminal managements, relevant local associations and institutions should also be closely associated to the project, depending on their role and of national transport organizations.

The geographical area to be covered comprises the Black Sea and the Caspian Sea countries: Azerbaijan, Georgia, Kazakhstan, Ukraine and Turkmenistan as main beneficiary countries and Romania, Bulgaria and Turkey as associated countries.

Some stakeholders of the latter countries have enquired about the consequences of their status, and more particularly for the information, awareness rising, and contributions to the pilot project.

1.3.3 Commitments

The project partners in the beneficiary countries are expected to assist and facilitate the implementation of the project by providing required counterpart staff, necessary contacts and liaison with local authorities, free access to all information and documentation required and timely decision-making procedures.

Furthermore, project partners in the respective countries are to provide assistance, c.f. with letters of invitation for visa requirements and any other assistance for the good implementation of the project.

Project partners in each country have confirmed so far that the National Secretary will be acting as the senior member of their staff to with the Consultant and ensure that local staff of an appropriate level is made available to work alongside the consultants.

1.4 Related projects and other donors activities

The Consultant prepared the complete list of all TRACECA projects (available upon request) and selected the most relevant ones for the preliminary findings below.

Many previous or current TRACECA projects and studies are relevant to this assignment including other transport projects from International or bilateral funded programmes.

A list (as most exhaustive as possible) has been established with the most relevant TA transport projects in relation with this one (c.f. Annex 3):

- Transport Dialogue and interoperability EU/Neighbouring and Central Asia countries
- Improvement of Maritime Links TRACECA/ TENs corridors
- Analysis and forecasts of traffic flows and interregional transport integration
- Logistic centres for Western NIS and Caucasus
- Logistic centres for East Caspian Sea
- MoS project on Mediterranean Sea
- Development of Aktau port, navigational channel for Turkmenbashi port and other ports projects
- Accession and implementation by Ukraine of International Agreements and Conventions in Transport

The project has to take into consideration activities carried out in those projects.

The findings and outputs of a number of past projects should be thoroughly reviewed by the Consultant. Contacts have been established with the on-going TRACECA projects (“Maritime links”, “logistical centres”, “traffic flows”, “Ukraine conventions”, “MEDAMoS”) but many reports are still missing.

This project wishes to support and develop potential synergies with activities developed by these other parallel projects. Strong coordination between EU projects and IFIs strategies is considered as an essential part of the proposed activities.

2 First findings and analysis

2.1 Policy, institutional and regulatory framework

The analysis of the existing regulatory framework for the transport sector doesn't show major differences between f.i. in the adoption of international conventions, but the implementation levels of standards is not similar when transferred into national legislations.

Ukraine has recently signed and accessed to almost all international agreements and conventions regulating the maritime, road and rail transport modes.

Azerbaijan, Georgia and Kazakhstan are fulfilling most TRACECA's recommendations when adapting their national legislations to the international regulatory instruments. Turkmenistan is at an earlier stage of this process.

All countries have concluded cooperative agreements in the scope and on the basis of the *Multilateral Agreement on International Transport for Development of the Transport Corridor Europe-Caucasus-Asia (MLA)*, for example:

- The intergovernmental agreement between Azerbaijan and Ukraine on international combined freight transport (2007) which covers rail, maritime transport and the delivery of goods by road from/to terminals.
- An agreement is in force since 2000 between the Governments of Bulgaria, Georgia and Ukraine for the common operations of railway ferries between Varna, Ilyichevsk and Poti/Batumi ports.
- On a commercial field, an agreement between the Ministries of Transport of Georgia and Ukraine concerns the organisation and operations of Ro-Ro ferries between the ports of Ilyichevsk and Poti.
The same type of bilateral agreement between Azerbaijan and Kazakhstan applies to the Ro-Ro Ferry route between Baku and Aktau.

More generally, the bilateral relations are mode oriented; hence the application frameworks must be assessed separately for each transport modes.

Road Transport

Bilateral transport agreements have been signed between almost all countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Romania, Turkey, Turkmenistan and Ukraine.

With the exception of Turkmenistan, who has a general agreement on transport cooperation with Ukraine, the most common bilateral frameworks are on road transport with the system of permits, whereby annual quotas of permits are granted through annual bilateral consultations on the basis of trade and transit requirements.

Member countries of the International Transport Forum ITF (formally European Conference of Ministers of Transport) are Azerbaijan, Bulgaria, Georgia, Romania, Turkey and Ukraine. They are using the multilateral permit scheme negotiated within this institution.

At national level, the main regulations for road transport are:

- In general:
 - The laws and regulations on trade and transport
 - The Custom cost and regulations of border crossing and transit
- More specifically
 - Regulations and conditions under which foreign transport are authorised to use national roads,
 - Regulations vehicle dimensions, gross weight and axle loads,
 - Visa regulations for foreign truck drivers.

Railways

The status of railway infrastructures in beneficiary countries does not meet the performance standards as set in the European Agreement on international combined transport services and related installations (AGTC) with:

- Bulgaria, Romania, Turkey and Ukraine being contracting parties of the European Agreement on Main International Railway Lines (AGC)
- Azerbaijan and Turkmenistan are hesitant to accede to the AGTC.
- The Agreement on International Rail Freight Communications (SMGS) managed by OSJD is applicable in Azerbaijan, Bulgaria, Georgia, Kazakhstan, Turkmenistan, Ukraine)
- The Uniform rules of the Convention for International Carriage of goods by Rail (CIM) and of the convention of International Carriage by Rail (COTIF) are implemented by Bulgaria, Romania, Turkey, and Ukraine and coordinated by the International Organization for International Carriage by Rail (OTIF).
- All TRACECA countries agreed at the IGC Conference of Tashkent in 2002 to use the SMGS consignment note as the common transit document for rail transport under the TRACECA MLA, the implementation process is not completed yet.

The Custom Convention on Containers of 1972 is implemented in all countries, except Turkmenistan.

Under a most recent review:

- Romania and Turkey are using the CIM consignment note only
- Azerbaijan, Georgia, Kazakhstan, Turkmenistan are using SMGS consignment note only
- Ukraine and Bulgaria are using both documents CIM and SMGS, Ukraine having formally accepted the notes as a transit declaration in 2008.

The main impact of all these regulations is a lack of harmonization of international transport rules and the different liability regimes.

Maritime Transport

The maritime legislations are the oldest legal instrument. All relevant maritime countries are members of International Maritime Organization (IMO) and signatories of its regulations, though with through degrees and levels of implementation in their national legislations.

The impact of the differences is concerning mainly safety and environmental issues, not the commercial conditions of transports, except when those may be affected by the costs of the former regulations.

Tariff rules and regulations, all modes

Those issues will be analysed in relation to the market approaches, and the following are some provisional synthetic observations only:

- The general views among stakeholders as observed in the first diagnoses, contacts and field visits are referring to high levels, volatility and uncertainties of transport costs and prices. These difficulties said to be major obstacles for the development of trade and transport.
- Beyond these points that will be examined in detail for market studies, the positions are unclear at this stage when the debate comes to regulation, with diverging views on the role of the public sector (institutions, public bodies and state-owned operators) and the activities of private operators
- The regulatory framework for tariffs are diverse also:
 - In each Country, between modes and sometimes trades, e.g. partnering countries, export / import and transit
 - Between Countries, modes and trades

Multimodal Transport

This will be a key issue for the MoS projects design and developments.

The current / reference situation may be characterized by uncertainty as to the laws and regulations applicable to multimodal transport operations in TRACECA regions:

- The lack of a uniform liability regime , the diversity of national legal corpuses, including the different approaches on issues such as the liability, limits, or time-bar, make it difficult for the parties to assess in advance the risks involved.
- Problems may arise also when losses are not localized and the stage of transport where the loss or damage occurred is not identified. In practice, standard terms documents with liability provisions are normally used, but these are mostly contractual, hence subject to mandatory conditions and divergent national laws and regulations. The situation is even more complicated when the damage has occurred gradually and during the entire process of transportation.

The lack of a single definition of multimodal transport seems to be more critical in the region than in others, with national policies and texts that may lead to unclear understandings of:

- Carriage by two or more modes of transport and door-to-door carriage
- Single contract and single documents

The international liability framework for multimodal transportations is based on:

- The UN Convention on Multimodal Transport 1980 (, not in force)
- The 1992 UNCTAD/ICC Rules for Multimodal Transport Documents, which requires to be incorporated in contracts and should normally supersede the regional mandatory laws also in relation to UNECE and ICC rules and conditions that are currently under review
- The National/regional/sub-regional laws and regulations on multimodal transport

The uni-modal conventions on carriage by sea, road and rail when the place of losses are identified

- The standard professional contracts terms (e.g. BIMCO MULTIDOC 95 or FIATA B/L standard forms)

The relations between transport organizations, multimodal transport operators, freight forwarders, consignors, consignees, and other natural and legal persons could be ruled in the future by the two important documents developed for and by TRACECA for the rights, obligations and responsibilities of each operator:

- The Draft Agreement on Multimodal Transport, 2008
- The Draft Model Law on Freight Forwarding Activity, 2008

Cross-Border Procedures

A key legal instrument for the harmonization of cross-border procedures is the International Convention on the Simplification and Harmonization of Customs Procedures (Kyoto, 1974, as revised by the World Custom Organization in 1999 and adopted as the blueprint or modern and efficient customs procedures.

The border crossing facilitation instruments of UNECE are:

- The Custom Convention on the International Transport of Goods under the Cover of TIR Carnets (TIR Convention), of 14 November 1975, – implemented by all project countries;
- The Customs Convention on Containers, 1972, – implemented by Azerbaijan, Bulgaria, Georgia, Kazakhstan, Romania, Ukraine, Turkey;
- The International Convention on the Harmonization of Frontier Controls, 1982 – implemented by all Countries, except Turkmenistan;
- The Customs Convention on the Temporary Importation of Commercial Road Vehicles, 1956, – implemented only by Azerbaijan, Bulgaria, Romania, Turkey.

In summary, the general contradictions of the legal framework of project countries to be taken into account are as follows:

- A number of TRACECA countries have signed different agreements on international transport which contain potential conflicting regulations; to avoid legal conflicts, it would be necessary to clearly map the commitments of each contracting party as required by different agreements.
- Bilateral and multilateral agreements are as many commitments for the governments' vis-à-vis third countries, but their implementation at national level depends on the effectiveness of the translation into national legislation.
- Some agreements are recent and applied without the necessary adjustments of the former rules. Countries would need to take actions to establish a sound coordinated management of transport laws and regulations between the national authorities.

2.2 Traffic data and forecast

2.2.1 Review and analysis of relevant studies

The outputs of ongoing projects or studies completed recently on matters close to the MoS project are important for:

- Determining the most relevant data

- Analysing those and comprising with the "MoS"
- Proposing to fill the gap
In the absence of specific study on this field, benchmarking the TRACECA corridor with the other competing corridors will be done by using a specific method mainly based on interviews of operators and users.

2.2.2 Definition and comparison of scopes

The evaluation of the present and potential markets for the Motorway of the Sea implies that the extent of the market concerned (countries, modes of transport, ports...) is identified, as well as the type of commodity and transport units. With a view to cooperate further and share more relevant information, it is useful to recoup the MoS scope with the scope of these project studies.

Market scope and stakeholders

The general objective of the MoS project is to facilitate trade on transport axes, hence the scope of the market approach is mainly focusing on exports and imports of each direct beneficiary country (prioritised) and indirect beneficiary country (Black Sea partners):

- Between themselves, i.e. using actually or potentially the transport corridors and axes Black Sea / land legs / Caspian Sea
- Between them and other markets, either in transit or in transshipments, beyond their own external markets.

The target groups of the projects are the Ministries of Transport in each beneficiary countries, custom authorities, business community, all maritime actors (port and maritime administrations and managements, operators, professional associations), but also hinterland connection mode actors (rail, road and inland waterways).

Concerned Mode

The maritime mode and sea-land connections and interfaces (rail, road, and inland waterways) as the MoS are logistic transport chain are and will remain competing with other transport schemes in terms of modes and routes. For this reason, it is also necessary to collect information about the current and expected use of other modes in alternative corridors.

Cargo and technical scopes

Motorway of the Sea concept focuses on commodities which are liable to be loaded in transport units (mostly containers) as actually or potentially accepted on board of vessels deployed by Black Sea and Caspian Sea services, i.e.:

- Containers, all types and sizes, including for specific cargoes (reefers, out of gauge...)
- Rolling units: freight trailers, trucks and other vehicles and rolling stocks, including specifics
- Rail cars including loading above units, including for specific cargoes
- Any other cargoes, as accepted by operators

It does not concern:

- Liquid, gas or dry bulk cargoes, such as petroleum products, shipped in full vessels or transported by complete train f/a of single charterers or operators
- Air transport cargo
- Cargo using road transport only for logistic or technical reasons

Note: Passengers accompanying their vehicles may be concerned by Ro/Ro and ferry services, within the regulatory limits of the vessels.

Other relevant projects

The MoS project takes place in coordination with other technical assistance (TA) projects aiming at contributing to the knowledge of transport flows in the TRACECA region. To avoid redundancy and make the best use of existing output, it was agreed to use existing data and to liaise with the ongoing TA projects, depending on their stages of achievement.

Annex 3 is a list of the most recent TRACECA projects which are of particular relevance for the MoS.

From table in the annex 3, the opportunities of cooperation are shown in particular for:

- The two "logistic centres" projects, as beneficiary countries, stakeholders and transport modes are close, with "MoS" focusing more on maritime inter-modalities and transport solutions whereas "logistic centres" are covering the complete logistic scheme.
- The "Analysis and forecasting of traffic flows" project is also particularly relevant as it covers most of data needs for the MoS project.
- The Projects on particular ports within the region are adding to the above, with further possibilities to combine and recoup data.

2.2.3 Inventory of available and ongoing information collection

The complete assessment of the relevant available and ongoing information is being implemented. A first synthesis has been prepared on available and relevant data, gaps of information, and needs to complement those by additional surveys and cooperation.

Data and information are analysed:

- From the supply side, for each mode, available data (bottleneck, cost factors) is inventoried for the different layers of the transport network (infrastructure, service, information system) and transport policy, all having an impact in term of condition of competition.
- From the demand side, available information on socio-economic factors, general traffic flow, traffic on ports, traffic on hinterland connections, traffic on alternative routes and forecasts.

Annex 3 is a provisional assessment of compared data needs and actual or possible findings for the most relevant projects directly or indirectly related to the "MoS".

The table shows separately the available or required data for the supply side and for the demand side, and the synergies between projects.

This exercise has allowed identifying, and it will further precise gaps and assist in the research of missing data.

Other sources of information

General statistics on imports and exports by country and type of commodity can also be used (see table below)

Table 2 – Source of information on trade and maritime transportation

Acronym	Organisation	Specific databank	Type of information
ITC	International Trade Centre. (ITC) / joint agency of World Trade Organization - United Nations (UNCTAD)	International Trade Statistics from the COMTRADE database of the United Nations Statistics Division (UNSD)	Importation and exportation by type of commodity (STIC), by country in value
WTO	World Trade Organisation	World Trade Statistics Database by Country (Same sources above)	Main trade figures by country : among others trade by 5 main origin and destination countries in value
MDS	MDS Trans-modal: advice in the freight market including ports, ferries, short and deep-sea container shipping, airfreight, intermodal movements, rail and logistics	Containership Databank and Liner Databank (quoted in Maritime Link report)	Using several sources
EU	European Union	Eurostat Comext Database	Historical value of trade between EU and country partners

Review and analysis of relevant studies should be pursued:

- Data by main commodity, by origin and destination and by mode is not yet available. Only partial views of the situation are provided in the "Maritime Links" and in the "Traffic Flow" studies. As a consequence, the complete review might take more time than initially expected; and it will imply a specific approach of the reference situation for the forecasts, in consideration also of the impacts of the economic crisis (see below).
- The various recent studies should be analysed more precisely to extract and match information. Given the existing studies and forecasts, no additional and specific macro-economic study will be made, previous studies will be synthesised and refined if and as necessary. It will be necessary for the consultant to access to all relevant data and reports, including those which are not yet accessible on the TRACECA site.
- The coordination with ongoing projects in particular with "Logistic Centres" projects should be pursued and developed

2.2.4 Market research

Considering the available data, a complementary survey is necessary to evaluate current and potential markets in order to be more specific on the traffic and volumes that could be adapted to the future MoS Pilot Project services.

It is proposed to complement the present knowledge of transport flows with a field approach based on the main producer and consumer flows, with the following steps:

1. Identification of the main products exported / imported by each direct beneficiary Countries (prioritised) and indirect beneficiary Countries likely to use MoS, including non-specifically designated general cargoes measurable in transport units (containers, trailers...)
2. Selection among these categories of the major and most representative products.
3. Use of the most recent data of studies to build a first image of the existing market in the supply and demand points of view.
4. Identification, selection and interviews of operators and users (shippers in the broad sense, transport operators and transport service providers), as found in Trade Directories of each Country and with their professional Unions, with a priority for multi-market and major trading Companies who may have a driving impact on the transport services supply. Ultimately, knowledge about the O/D, quantity and unit (truck, train, containers).
5. Aggregation, matching and cross-checking with information from producers, importers, exporters, ports and other transport operators to refine the database of traffic flows and forecasts.
6. Specific quantification of international transit flows potentially using the transport axes and solutions, and serving as additional cargo bases for consolidation of MoS projects.

Coordination between ongoing projects

For the implementation of the market research, in particular to carry out interviews and to match data and reconstitute the main flows, the agreed coordination with ongoing projects should allow to avoid redundancies and ensure the consistency of data , more precisely:

- "Analysis and forecasting of traffic flows" project for present and future general frame of traffic : zone to zone flow per commodity and transport mode
- "Transport dialogue" project for sharing relevant information between projects and eliminate overlapping risks, including possibly through the network of TRACECA database correspondents.
- "Logistical centres" projects on land connections and interfaces
- Specific port studies if and as relevant.

First steps of analysis: MoS relevant main products

The detailed list of unitised / containerised (including potentially) products as based on the Standard International Trade Classification (SITC) and used by the International Trade Centre is attached in Annex 7. The following condensed version shows the general method retained for the identification of the relevant cargoes for MoS transport schemes.

Table 3 – List of commodity and relevance for the MoS

SITC Code	Product Name	"MoS" Relevance
0	FOOD & LIVE ANIMALS	No / Yes
1	BEVERAGES AND TOBACCO	Yes
2	CRUDE MATER.EX FOOD/FUEL	part No / Yes
3	MINERAL FUEL/LUBRICANTS	No / Yes
4	ANIMAL/VEG OIL/FAT/WAX	No / Yes
5	CHEMICALS/PRODUCTS N.E.S	No / Yes
6	MANUFACTURED GOODS	Yes
7	MACHINERY/TRANSP EQUIPMT	Yes / No
8	MISCELLANEOUS MANUF ARTS	Yes
9	COMMODITIES NES	No / Yes

Source: Consultant, based on SITC

Products imported and exported in the TRACECA region have been extracted from the COMTRADE database of the United Nations Statistics Division (UNSD).

Note: This did not permit to collect data for Turkmenistan which is not referenced. This value-based overview is less relevant than volume or weight to measure transport load, but it is sufficient to surround the main flows of products traded, with the objective to select and focus on the main cargoes.

For a synthetic general overview, the figures of Annex 9 are weighing the main imports and exports of all TRACECA countries and neighbours.

The analysis by data on traffic flow by origin and destination and by type of commodity should be one of the outputs of the "Traffic flow" study.

In continuation of this, the most relevant commodity groups will be considered which will help to focus on the most important commodities and potentials, to be further recouped with operators and users.

2.2.5 Difficulties faced and proposed solutions

During the study of existing data and the first interviews, some problems were observed. To carry on with the project, some solutions are proposed (see table below).

Table 4 – Problems and solutions proposed concerning relevant study review

First problems observed	Answers / solutions
<ul style="list-style-type: none"> • Avoid new studies and overlaps with other data collection on close subjects 	<ul style="list-style-type: none"> • Make good use of existing data • Recouping data sources also with operators (e.g. ports)
<ul style="list-style-type: none"> • Not all relevant TRACECA reports or data accessible on TRACECA internet site. 	<ul style="list-style-type: none"> • Ongoing process • The consultant should be helped to access to all relevant data and reports
<ul style="list-style-type: none"> • No comprehensive views of the transport flow and forecasts 	<ul style="list-style-type: none"> • Start in parallel market study through interview of operators (supply side) and users (demand side)
<ul style="list-style-type: none"> • Reluctance of some stakeholders to contribute to new study without concrete results 	<ul style="list-style-type: none"> • Combine data collection and awareness raising • Give examples and benefits of other MoS project (Mediterranean, EU) • Associate stakeholders
<ul style="list-style-type: none"> • Resistance to change in existing transport organizations • Confidentiality of data 	<ul style="list-style-type: none"> • Demonstrate potentials for trade development • Explicit advantages for direct trade (exports / imports and transits)
<ul style="list-style-type: none"> • The global and impacts on crisis, traffic, and forecasts 	<ul style="list-style-type: none"> • Retain hypotheses and develop scenarios

In conclusion:

- The information from the "Traffic flow and forecast study" to be complemented is essential to provide a suitable frame for the market study
- As reported in other parts of this report, it is possible to assess market conditions including some potential (e.g. non unitised / containerizable cargoes) as it appeared during preliminary interviews. At the same time, the collection of information is hampered by several factors
- To overtake these difficulties, data collection and market survey should be tightly connected to the awareness campaign, through which stakeholders should be more eager to deliver relevant and precise information
- As a consequence, it is proposed to cut up the market research in two phases
 - Phase 1, based on the relevant recent studies, to be exposed at the end of phase 1 and serve progressively as a base of discussion with stakeholders.
 - Phase 2: to comply and correct the market research, in order improvements to be more specific about the potential demand and closest to stakeholders needs.

2.3 Intermodal transport services

Following an analysis of the relevant literature available and meetings with several stakeholders, including key transport and logistics service providers, the first following relevant points may be highlighted:

- All countries
 - Three major cargo routes for the existing and potential trades have been identified for further comparison:
 - The TRACECA multimodal route, including short sea shipping links across the Black Sea and the Caspian Sea as well as rail and road transit across Georgia and Azerbaijan as the central land axis along the corridor.
 - A northern route, connecting Ukraine with Kazakhstan via Russia by road or rail.
 - A southern route connecting Turkey to Turkmenistan and Kazakhstan by road via Iran.
 - The most recent maritime services linking the ports of beneficiary Countries with Black Sea and overseas ports are listed (Annex 10). This list and technical / commercial contents shall be completed as more information becomes available, with a view to having a comprehensive and updated overview of the ports and maritime services networks for potential MoS pilot projects.
 - A number of maritime services are available in the Black Sea, offering many intermodal possibilities.
 - This is not the case in the Caspian Sea, where regular but limited connections are offered between Baku and Turkmenbashi and Aktau.
 - There are no regular sea-river services between the two seas.
- Georgia
 - Infrastructure: The Georgian Government has undertaken renovation works on several sections of the road connecting the country with Azerbaijan. 60 km of new highways were opened in 2005, and another 50 km trunk is to be opened by the end of 2009. Railway rehabilitation in project, comprises a new railway line by-passing Tbilisi. A border-crossing point with Turkey has been opened south of Batumi, offering improved road options.
 - Facilities and equipments: Bonded warehouses are available in Tbilisi, allowing shipping lines a faster turnaround time of their containers carrying Tbilisi-bound cargo.
 - Railcars on the Poti-Baku route are reportedly in frequent short supply, in spite of recognised investment efforts. Diesel-generators are available for sizeable amounts of imported reefer cargo into Georgia are reported but these get frequently stolen. As a result, reefer containers are carried unplugged to final destination.
 - Maritime services: The Georgian Government intends to diversify the maritime links of the country, and it is working on several railway ferry and Ro/Ro projects with Bulgaria, Ukraine and Romania.

- Pricing (specific): Railways transport rates are changing every month due to the constant fluctuations of a currency exchange rates against the Swiss Franc, being the official currency used for railway carriage of cargoes in transit.
- Information and communication: The communication process between the various actors is slow and this lead to response times of at least 10 days to put together a quotation from Poti to Almaty. A customs IT system is in place, connecting the border-crossing check points between Georgia and Azerbaijan.
- Intermodal: Whereas one of the main benefits of containerisation is supposed to ensure in principle smooth and fast transit procedures, it is reported that, whereas it takes about 9 days to rail cargo from Poti to Almaty in conventional ("open") railcars, but this may reached up to 16 days for containerised cargo. The reason seems to be that cross-border customs checks of containers are more time-consuming, as containers seals cannot be broken until their arrival to final destination, thereby preventing visual customs cargo inspections.

➤ **Kazakhstan**

- The large import flows from China are consuming a large part of Kazakhstan's current rail capacity.
- Infrastructure: Kazakhstan has a very ambitious programme for the development of road and port infrastructure in order to cope with the country's fast-growing trade.
- Information system: Kazakhstan has developed an electronic seal system for cargo tracking across the country, which is currently used for road transport. It is planned to extend to rail transport the use of the system, of which Kazakhstan is he sole user. This might help smooth transit procedures if adopted by other countries along the whole transport logistics chain.
- Competition: Some Kazakh bound cargo flows usually moving via Poti are reportedly redirected via Russia by rail or via Iran by road.
- A new code of transport is currently under review by the Kazakh Government.

2.4 Ports development

The potential ports in the 5 direct beneficiary countries are:

Ukraine	Ilyichevsk Odessa
Georgia	Poti Batumi
Azerbaijan	Baku
Kazakhstan	Aktau
Turkmenistan	Turkmenbashi

The consultants' team was advised that if other Port/Terminal solutions appeared in the course of their mission for future MoS developments, those should be taken into account.

The preliminary investigations and visits concern only the Black Sea ports, for which the following data have been collected:

- General maps (source: Fairplay)
- Container and Ro/Ro facilities
- Traffic, capacity use, performances
- Intermodal/rail

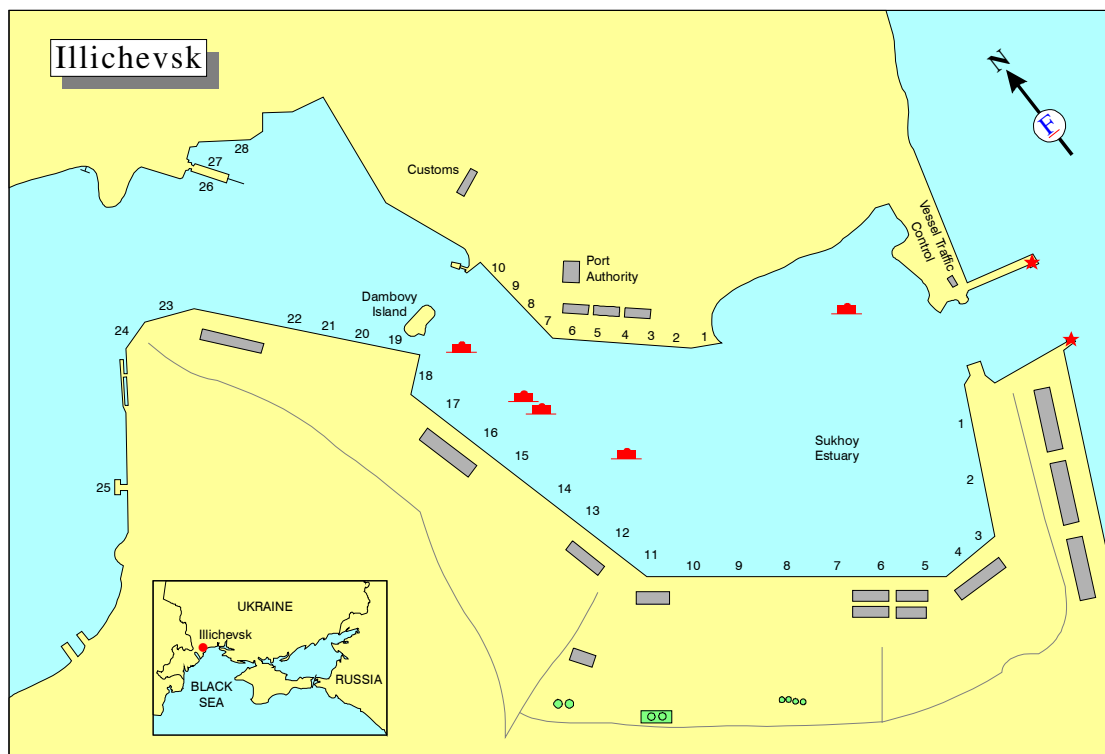
Note: See also Annexes 2, Port contacts directory, and Annex10, Maritimes services

Ukraine

In 2007 the ports of Ilyichevsk, Odessa and Yuzhny accounted for 56% of the total volume handled by the 18 seaports of Ukraine, with:

- Container flows steadily growing from (8%) thru 2007 (22%) of total port tonnage: 51% import laden, 8% export laden, 40% export empty
- Ro/Ro tonnage amounting to 10 to 11%
- Yuzhny market share growing and possibly included in the list of potential ports in view of the planned developments
- Trans-shipment: Regulatory issue hampering the competitive position vis-à-vis Constanza
- Rail has the preferred mode of inland transportation with several rail ferry connections in the Black Sea

Port of Ilyichevsk



Source: Fairplay

- A Black Sea terminus of the TEN-T Corridor IX and a Europe-Caucasus hub for the TRACECA corridor
- Combined rail ferry and Ro/Ro yearly capacity: 4.5 million tons and 150,000 trucks
- Large area available for port activities and development
- Operational limitations for feeder vessel operations (cranes/height)
- UKRtranscontainer working with the commercial port on expanding capacity
- New Container berths in the planning stage for 850,000 TEU

Berth data

Terminal 1		Berth Length	Max Draft
Berth	Vessel types		
1	Containers (up to 5,000TEU)	306	13.0
3	Containers (up to 5,000TEU)	200	13.5
4	Containers (up to 5,000TEU)	120	13.5
5	Containers (Feeder vessels)	155	13.0
6	Containers (Feeder vessels)	181	13.0
Terminal 3			
Berth			
26	Rail Combi ferry (Russian gauge)	210	9.6
27	Rail Combi ferry (Russian gauge)	210	9.6
28	Ro-Ro	270	9.6

Throughput

Throughput	2006	2007	2008	Jan-Feb 2009	2015* (Port est.)
TEU	291,127	532,766	670,556	19,000	2.5- 4.5 mio

Current capacity 1.1 million TEU

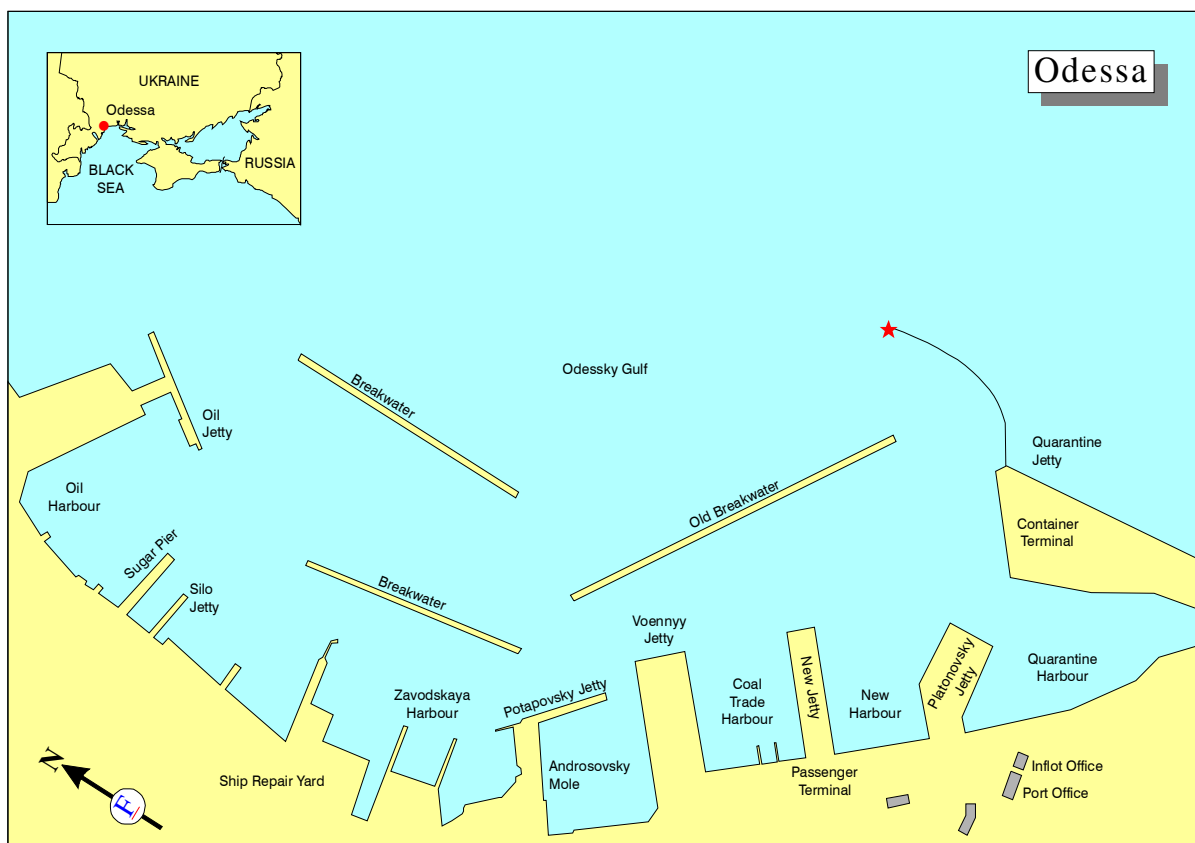
Ro/Ro

- UKRferry services with Combi ferries (Ro/Ro and Rail) - 2007: 118,000 ; 2008: 230,000 (est.)
- Passenger/cars
- Automotive sector terminal

Rail Ferry

- UKRferry services with Combi ferries (Rail and Ro/Ro accepting Containers)
- New rail ferry services in Kerch

Port of Odessa



Source: Fairplay

Containers

- Progressive extension in order to remedy to the lack of capacity: 850,000 TEU below theoretical maximum, with 38.5 hours waiting time
- Several recent and future plans:
 - HPC terminal increased up to 1 million TEU
 - CMAC/CGM terminal: 250,000 TEU
 - Next development: 2 million TEU (on hold)
 - Other indicators:
 - storage 13,500 TEU, 10-13 days
 - 60% physical inspection by Customs

Berth data

Container Terminal		Berth Length	Max Draft
Berth			
2	Containers Storage 74,150m ² (open)	310	12.0
3	Containers Storage 8,100m ²	220	11.5
29	Containers Brooklyn Kiev		

Throughput

Throughput	2006	2007	2008	Jan-Feb 2009	2015* (Port est.)
Containers TEU	395,562	523,881	572,140	41,354	

Current capacity: 850,000 (2008-2009)

Ro/Ro

- Small ferry terminal and Ro-Pax line wit Istanbul
- Passenger terminal for 5 berths: year throughput approx. 4 million Pax
- No rail ferry facilities

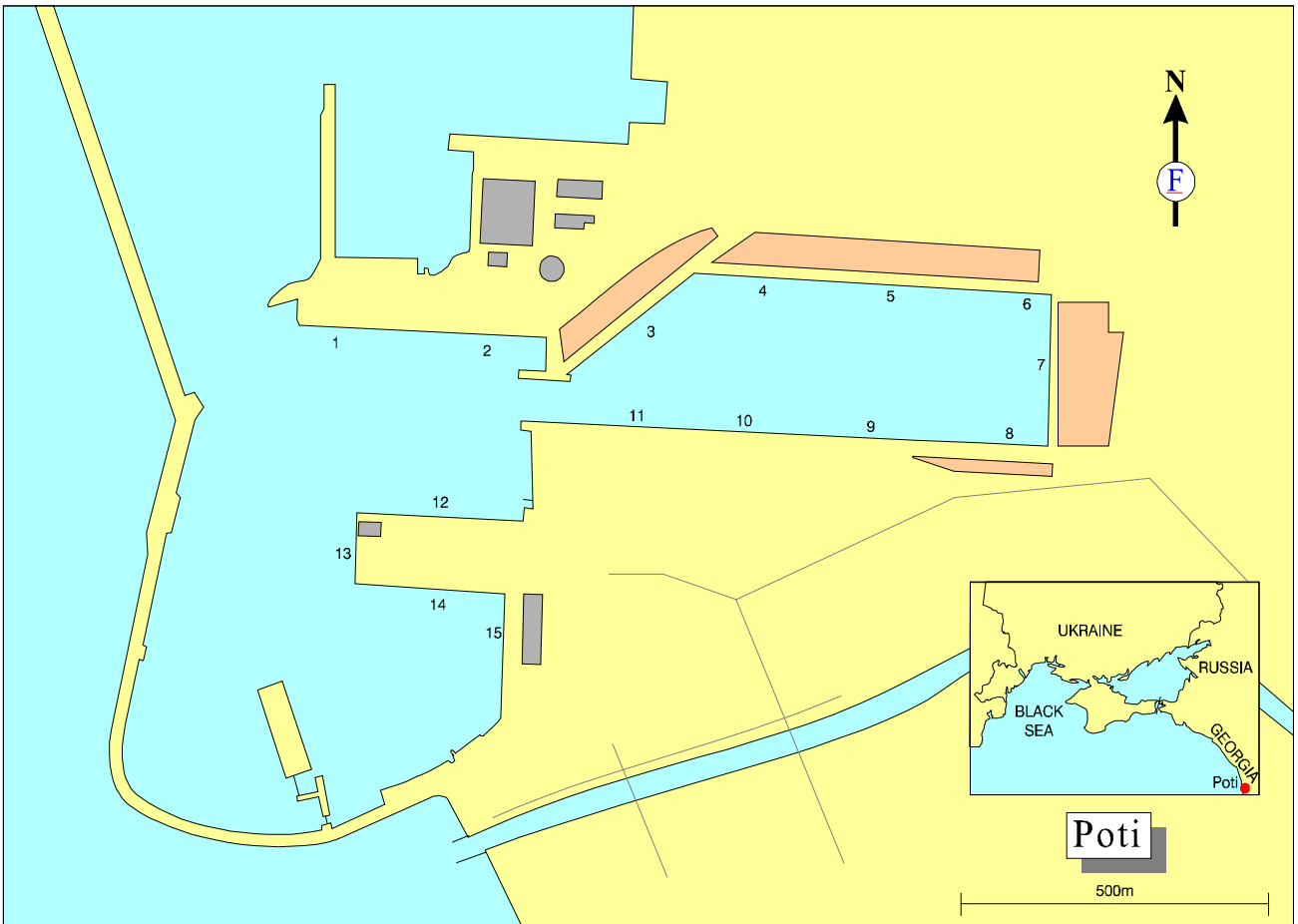
Georgia

Ports of Poti and Batumi

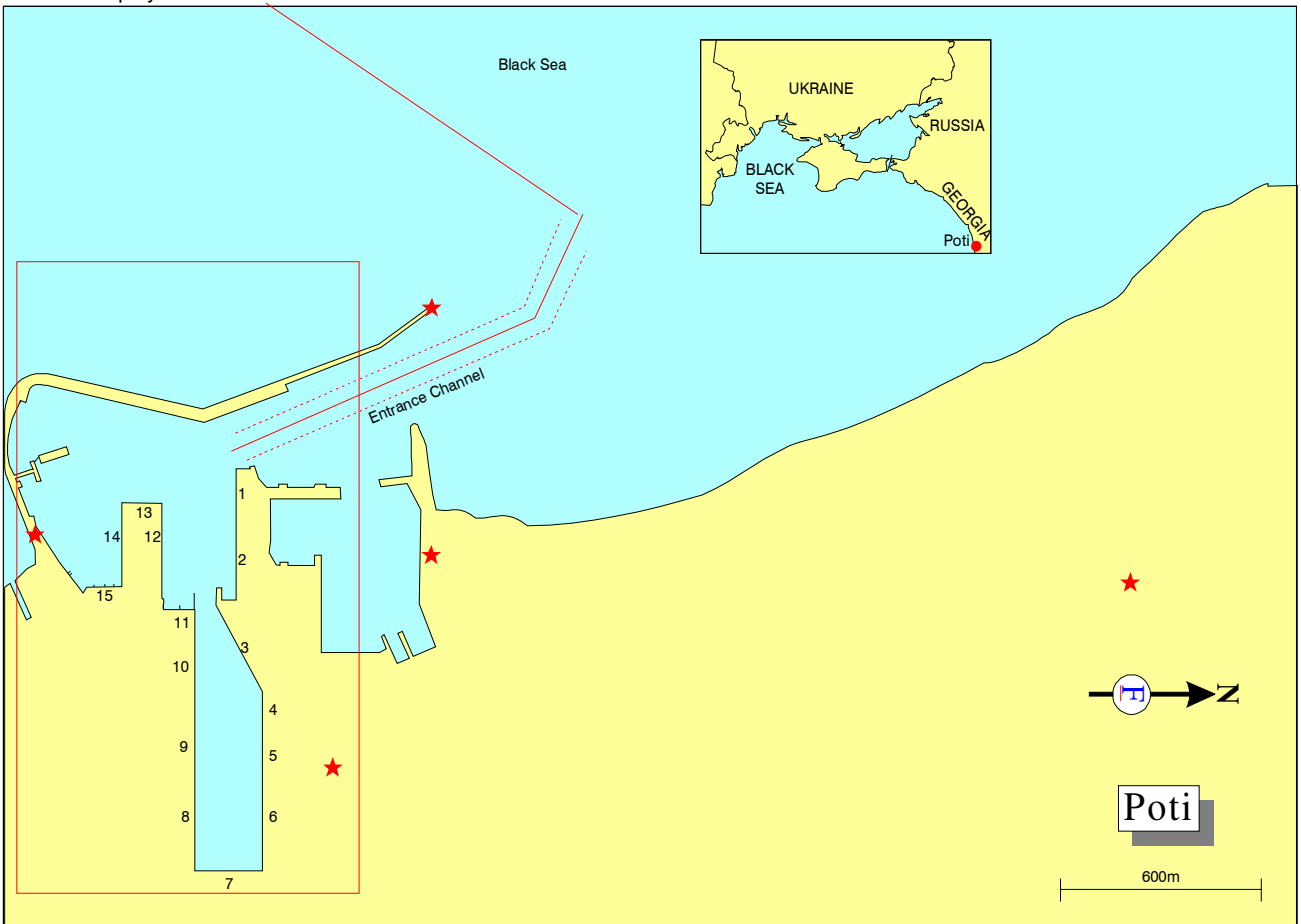
- The Georgian ports of Poti and Batumi are the eastern Black Sea intermodal Terminals / hubs / westbound to Black Sea, Turkey and Europe and eastbound to the Caucasus and Asia.
- Both ports are served by rail ferries and Ro/Ro lines linking them with most Black Sea ports.
- The two ports are geographically close and used by competing maritime operators, making them “port system” of Georgia.
- Poti has the advantage of having shorter rail route through Tbilisi to Baku, whereas the rail link between Batumi via Poti has restricted train lengths.

Port of Poti

See maps below.



Source: Fairplay



Source: Fairplay

- RAKIA (Ras Al Khaimah Investment Authority) signed a 49 year concession in 2008 to upgrade and operate the port. A new container terminal will be built in instalments over the next 5 years on a 100ha site adjacent to the existing port. The project will comprise also:
 - The “Free Industrial Zone” (FIZ) project covering at least 10ha, with tax exemptions from profit and property tax as well as VAT
 - Exemption of customs duties for exports or national sales
- Railways connections:
 - In 1998 a new rail ferry in CIS gauge (1520mm) was built in the port of Poti (a TRACECA project), rail ferry connections were reorganized with several Black Sea ports.
 - A German /Polish JV Container Terminal and railways are reported to have started a Container Train service between Poti and Baku in March 2009.
 - It is planned to build a new rail ferry terminal.

Berth data

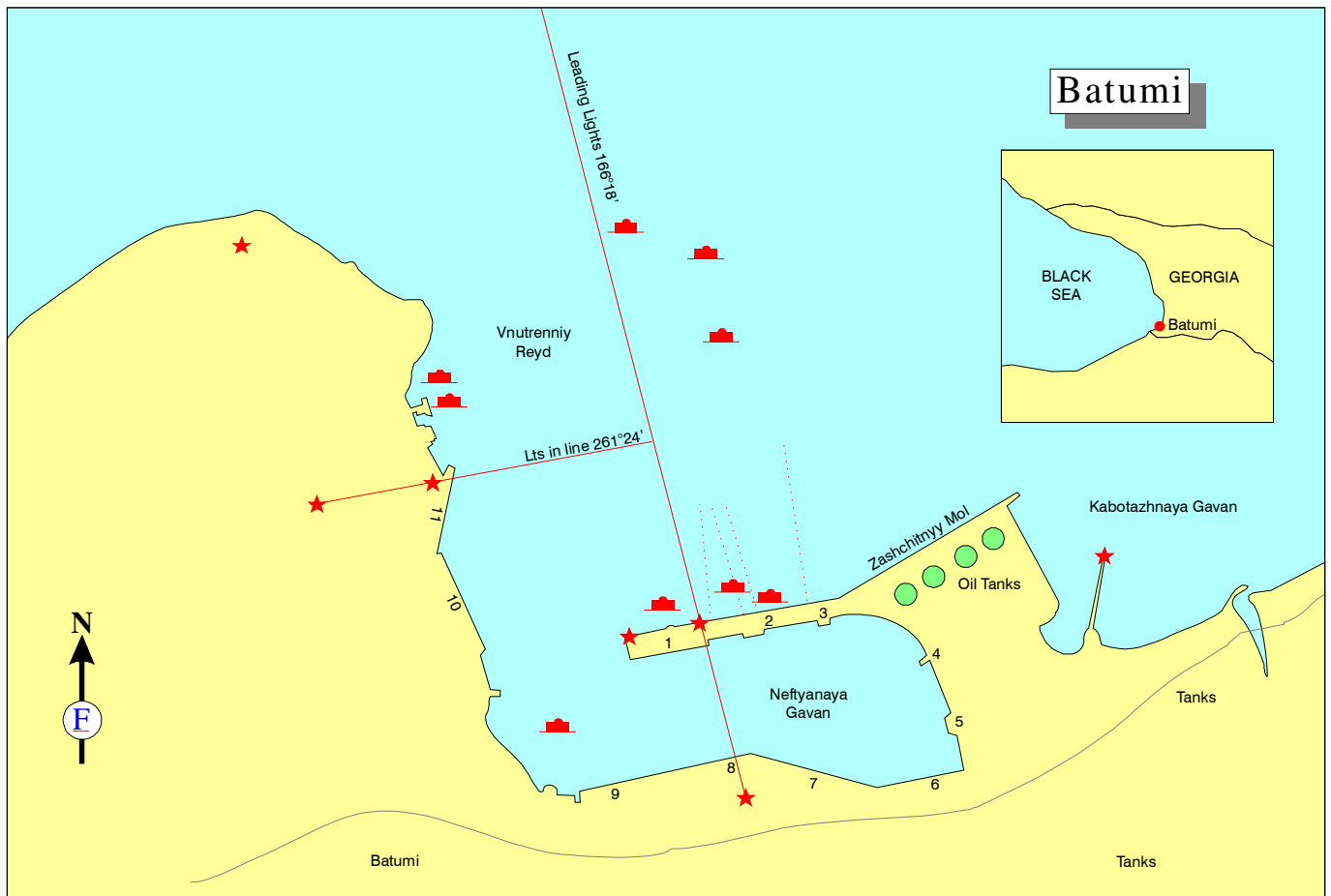
Terminal		Berth Length	Max Draft
Berth			
7	Container Terminal	211	8.2
2	Rail ferry (Russian gauge)	183	12.5
12	Ro/Ro and passenger	250	8.0
13	Ro/Ro and passenger	97	6.5

Throughput: 70,000 TEU in 2007

Capacity: 100,000 containers TEU additional capacity in RAKIA new terminal

Port of Batumi

See map below



Source: Fairplay

- The port of Batumi is predominantly a liquid bulk terminal, now owned by the Kazakh Company KazMunaiGas.
- The Container Terminal and all other Terminals such as Rail/ Ro/Ro (with the exception of the Liquid Bulk Terminal) were purchased by International Container Services (ICS) in September 2007.
- ICS plans to develop the Container terminal to a capacity of 300,000TEU. This is the lower level of projected throughput in 2020, which varies between 350,000TEU and 500,000TEU.
- Container throughput started in 2006 and the future level of traffic will depend on the Batumi market share with the new Poti Terminal and Poti FIZ, and on the railways Container Train service between Poti and Baku.

Rail ferry / Ro/Ro / Container services

- UKRferry operates Combi ferries (Rail/ Ro/Ro and some Containers) from Ilyichevsk /Odessa to Poti/ Batumi, Istanbul/ Derince and Varna.
- UKRferry opened a new rail ferry Combi ferries (Rail/ Ro/Ro and some Containers) from Kerch but the facilities in Ilyichevsk will continue to be used.
- The nominal throughput is reported to be about 700,000 tons.
- UKRferry commenced in March 2009 a bi-weekly service of Combi ferries (Rail/ Ro/Ro and some Containers) between Kerch and Batumi/ Poti.

Berth data

Terminal		Berth Length	Max Draft
Berth			
4	Container Terminal	284	11.5
5	Rail ferry (Russian gauge)	183	12.5

Situation in the Caspian Sea

Azerbaijan: Port of Baku
 Kazakhstan: Port of Aktau
 Turkmenistan: Port of Turkmenbashi

- Until it gets possible to visit ports and operators of the Caspian Sea, the background reports on which the MoS Project will be initially based provides very little data and information for those ports. The only exception to this is the Final Report Master planning and Feasibility Study for the port of Aktau received in February 2009.
- The Caspian Sea is landlocked and can only be accessed by ships via the Volga / Don River/ canal system.
 The largest vessels able to enter the Caspian Sea are those which can navigate the Volga / Don system. The vessel dimensions are restricted in length/ beam /draft by the physical limitations of the locks. 12, 000 DWT crude tankers are the largest vessels in the Caspian Sea, with a maximum loaded draft permissible in Baku and Aktau ports, currently at 7.2 metres; other vessels such as ferries (draft up to 5.6m) and dry bulk (draft up to 4.5m) vessels are generally in the 5,000DWT to 7,000DWT size range.
- Currently a very high percentage of the container and rail traffic to and from the west Black sea to and from Kazakhstan is routed by rail from Odessa via Tolyatti in Russia through to Kazakhstan.
 Recent developments such as Poti and Batumi Terminals, Poti FIZ and container block train services to Baku should attract more container traffic direct to Poti and on the Georgia – Azerbaijan Caucasus.
- The consultants visited the National MOTs and TRACECA NS in Azerbaijan and Kazakhstan but still have to visit Aktau, Turkmenbashi and Baku ports to obtain updated facilities, operations and intermodal connections.
 It will be more particularly useful to review the obstacles and benefits of container and ferry services across the Caspian Sea.
- The master plan has forecasted the following traffic to and from Aktau (x 1,000 tons)

Cargoes	2006	2010	2015	2020
Grain	118	400	1,000	1,250
Rail ferry Inbound (existing traffic)	148	259	417	613
Rail ferry Inbound (new city cargo)	0	330	330	330
Rail ferry outbound (fertilizers)	0	0	1,000	1,200
Containers (existing traffic)	10	51	154	310
Containers (new city traffic)	0	330	330	330

- In conclusion, the current Container/ Rail/ Ro/Ro throughput along the Caucasus corridor is much less than it could/ should be due to the present bottlenecks and lack of commercial competitiveness of the Poti – Baku – Aktau/ Turkmenbashi routes. Shipping companies reported a number of enquiries about the Caucasus corridor, including potentials that will deserve a careful investigation in the next phases.

2.5 Railways

The following is the first analyses data regarding some railway networks from the data base supplied by the cargo flows project

This data, as annexed in details as rail.xls file, contains information regarding:

- Technical characteristics of infrastructure;
- Traffic volumes and railway arches capacity;
- Projects under way.

The legend explaining the meaning of the worksheets of the excel file and the columns on every worksheet is missing. Also most of the units of measurement of the data are missing. In the “Railparameter” worksheet differing units of measurement are specified in the “length” column.

It is understood that not all data were available at this stage and the “PassTrains”, “FreightTrains” and “Capacity” of the “RailVolume” work documents will be most useful as well as the method for assessing “capacity” values.

Data is available for Azerbaijan, Bulgaria, Georgia, Romania, Moldavia, Turkey and Ukraine, It would be useful to have data regarding countries on the East coast of the Caspian Sea involved in the Motorway of the Sea project and there is no data for Turkmenistan and Kazakhstan.

The distinction between “DesignSpeed” and “MaxSpeed” will have to be precised, possibly with distinct values for “MaxSpeed” for the freight trains.

It is remarked that the “MaxTrainLength” remains constant when changing in routes in Ukraine, Azerbaijan and Turkey. It will be verified if this is actually the case for all routes or whether the maximum theoretical value for the national infrastructure has been indicated.

If available in their original language, original documents of the various countries railways, from which data has been derived, should be made available so as to have additional sources of information.

Detailed data regarding large railway infrastructures, such as stations at ports, inter-ports, shunting yards, etc. should complement the file.

Lastly, it would be useful to indicate the rail route that each section belongs to, similarly to the “RailParameter” worksheet for Bulgaria.

2.6 Inland waterways

The following is a synthesis of the issues under investigation:

Scope	First findings	Additional information required
<ul style="list-style-type: none"> • Relevant Countries / markets - Direct beneficiary Countries: <ul style="list-style-type: none"> . Don / Volga: Ukraine / Kazakhstan . Dnieper: Ukraine - Indirect beneficiary Countries: Romania and Bulgaria 	<p>General information on operations, organisation and market conditions on each River axis</p> <p>Specific approach of Romania / Bulgaria Corridor</p>	<p>More update and precise Information and data to be obtained in next field visits</p> <p>This depending on coverage of these Countries</p>
<ul style="list-style-type: none"> • All transport solutions for, respectively: <ul style="list-style-type: none"> - Inland transport as pre / post shipments (part of intermodal) - Sea-river as a one-mode transport, and land connections 	<p>Lack of integrated schemes, particularly between the two seas</p> <p>Containers operations under review by deep sea maritime operators</p>	<p>To be explored on field with operators and users, including potentials</p> <p>To be compared with other solutions</p>
<p>Conclusions:</p> <ul style="list-style-type: none"> • Potentials for containers with reduced costs, improved reliability, security and environmental performance; • Questions marks on new intermodal schemes, border crowing, administrative and transit-time procedures 		

3 Project organization, scheduling and staffing

Table 1: Project progress report

Project title: Motorways of the Sea for the Black Sea and the Caspian Sea		Project number : EuropeAid126588/C/SER/Multi				Countries : Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine				Page : 1								
Planning period : December 2008- December 2010		Prepared on : 30 March 2009				EC Consultant : Egis Bceom International												
Project objectives: The overall objective of the project is to facilitate trade and transport along the corridor Europe- Black Sea Region- Caucasus- Central Asia through improved interoperability and multi-modal transport on the Black sea and the Caspian Sea. The specific objective is to promote the concept of "Motorways of the Sea" in TRACECA countries.																		
		TIME FRAME (months)				INPUTS												
		2008/2009				PERSONNEL EC Consultant		PERSONNEL Local staff		EQUIPMENT MATERIAL		OTHER						
No	ACTIVITIES IMPLEMENTED	1	2	3	4	1	2	3	4	Planned	Utilised	Planned	Utilised	Planned	Utilised	Planned	Utilised	
1	Mobilisation	X								Key experts : 130	117	Local expert: 30	32	None	None	12 trips	17 trips (incl. 5 CE orders out of plan) + Kiev	
2	Review/ analysis of studies	X																
3	Information up-date	X																
4	Market research	X																
5	Info, communication and support for the MoS concept	X																
6	Identification and contact of main stakeholders	X																
7	Partnership structuring support																	
8	Support for the promotion of the pilot projects																	
9	Assistance in the design of pilot projects																	
10	Analysis of business plan																	
11	Elaboration of Road Map																	
12	Pre-feasibility/ feasibility studies																	
13	Impact assessment																	
		TOTAL				Key EU expert		117		Local expert		32		None		12 trips		17 trips

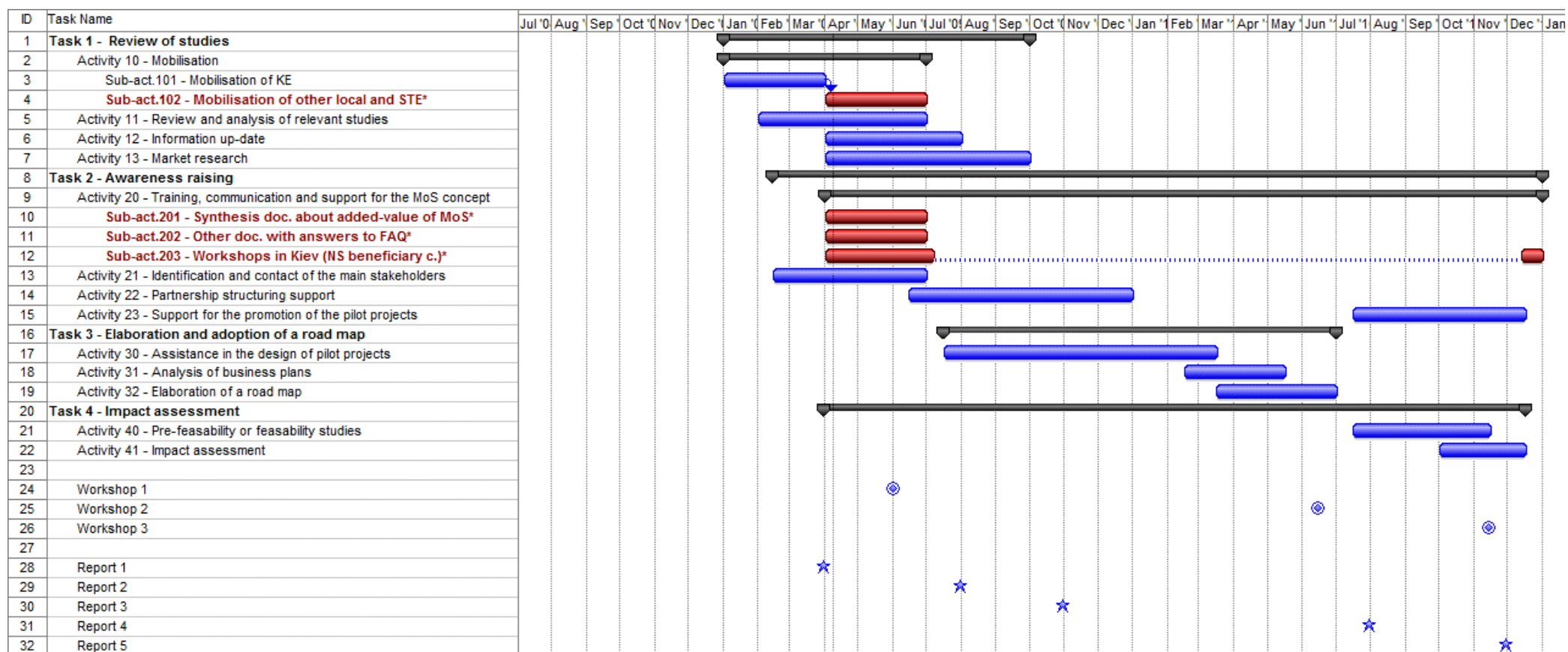
Table 2: Resource utilisation report

Project title Motorways of the Sea for the Black Sea and the Caspian Sea		Project number : EuropeAid126588/C/SER/Multi	Countries Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Page : 1	
Planning period : December 2008- December 2010		Prepared on 30 March 2009	EC Consultant : Egis Bceom International		
Project objectives: The overall objective of the project is to facilitate trade and transport along the corridor Europe- Black Sea Region- Caucasus- Central Asia through improved interoperability and multi-modal transport on the Black sea and the Caspian Sea. The specific objective is to promote the concept of "Motorways of the Sea" in TRACECA countries.					
RESOURCES/INPUTS	TOTAL PLANNED	PERIOD PLANNED	PERIOD REALISED	TOTAL REALISED	AVAILABLE FOR REMAINDER
PERSONNEL					
Long Term	2100	160	149	149	1951
Short Term	586	0	0	0	586
Sub-Total	2686		149	149	2537
EQUIPMENT AND MATERIAL	No office equipment	No office equipment	No office equipment	No office equipment	No office equipment
Sub-Total	None	None	None	None	None
OTHER INPUTS					
Per diems			44	44	
Translation					
Sub-Total			44 PD	44 PD	0 ds
TOTAL	2686 WD		149 WD 44 PD	149 WD 44 PD	2537 WD

Table 3: Overall output performance plan

Project title : Motorways of the Sea for the Black Sea and the Caspian Sea	Project number : EuropeAid126588/C/SER/Multi	Countries : Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Page : 1
Planning period : December 2008 - December 2010	Prepared on : 30 March 2009	EC Consultant : Egis Bceom International	
Outputs (to be described and target dates indicated)	Agreed Objective Verifiable Indicators	Constraints and Assumptions	
<p>Communication documents (January-March)</p> <ul style="list-style-type: none"> ▪ Inception report 30 March 2009 ▪ 1st Progress report 30 June 2009 ▪ 2nd Progress report 30 June 2010 ▪ Pilot projects 30 June 2010 ▪ Road Map 30 June 2010 ▪ Final report 30 Nov 2010 <p>Workshops and similar events to be planned in coordination with project stakeholders</p> <p>Projects documents and data base according to project progress</p>	<p>Documents (English/Russian)</p> <p>Reports submitted on time and subsequently accepted by Project Partners</p>	<p>Target dates to be reviewed in the light of new information and new dates agreed where applicable</p>	

Table 4: Work program (including project planning for next reporting period)



*sub-activities developed for the next three months (further ones to be detailed in the next progress report)

Annex 1: List of key contacts

Name	Surname	Company/ Institution	Position	Adress	Phone+Mobile	Fax number	Mail address	Website
Rustan	JENALINOV	TRACECA	Secretary General	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 598 2718	00 994 12 498 6426	r.jenalinov@ps-traceca-org.org	www.traceca-org.org
Fatima	ATAKISHIYEVA	TRACECA	Assistant Secretary General	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan			a.fatima@ps-traceca-org.org	-
Radoslav	VALCHEV	TRACECA	Manager Group of Experts	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 598 2718 M. 00 994 50 519 9063	00 994 12 498 6426	r.valchev@ps-traceca-org.org	www.traceca-org.org
Nazim	MAMEDOV	TRACECA	Expert in Maritime Operations	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 598 2718 00 994 12 498 9234	00 994 12 498 6426	nazim.mamedov@ps-traceca-org.org	www.traceca-org.org
Anar	ISMAIL	TRACECA	Tariff and Rail Expert	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 598 2718 00 994 12 498 9234	00 994 12 498 6426	anar.ismail@ps-traceca-org.org	www.traceca-org.org
Talgat	LASTAYEF	Ministry of Transport and Communications	Head of the Board for Road Development	Kabanbay Batyr avenue 47 Astana 010000, Kazakhstan	00 7 7172 24 30 65 M. 00 7 777 379 77 77	00 7 7172 24 13 32	lastaev_t@mtc.gov.kz	

Akif	MUSTAFAYEF	TRACECA	National Secretary of Azerbaijan	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 493 3776 00 994 12 498 2718	00 994 12 498 6426	akif.m@ps-traceca-org.org	www.traceca-org.org
Musa	PANAHOV	Ministry of Transport	Deputy Minister	1054 Tbilisi avenue Baku, AZ-1122, Azerbaijan	00 994 12 498 50 87	00 994 12 498 61 27	panahov@mintrans.az	-
Shahin	ISMAILOV	Ministry of Transport International Relations Department	Head of Protocol Service and Diplomatic Corresp. Unit	1053 Tbilisi avenue Baku, AZ-1122, Azerbaijan	00 994 12 430 99 32 M. 00 994 50 304 1144	00 994 12 431 72 66	s.ismayilov@mintrans.az	-
Ulkar	AKHMADOVA		Data Collection Expert	S.Bahlulzade 18 Baku, Azerbaijan	00 994 50 31 27 308		uahmadova@mail.ru	-
Mamuka	VATSADZE	Ministry of Economic Development	National Secretary National Secretary Head of Transport Department	Chanturia street 12 0108 Tbilisi, Georgia	00 995 32 99 98 99	00 995 32 93 45 45	mvatsadze@economy.ge	
P.	TSAGAREISHVILI	Ministry of Economic Development	Head of Transport Department, Deputy of Nat. Secretary	Chanturia street 12 0108 Tbilisi, Georgia			-	
Giorgi	BAGATURIA		Data Collection Expert	Tovstonogov 5 0164 Tbilisi, Georgia	00 995 774 200 75		g.bagaturia@palati.ge	
Mamuka	CHANTLADZE		Local Expert in Transport	Chanturia street 12 0108 Tbilisi, Georgia			traceca@access.sanet.ge	
Murat	BEKMAGAMBETOV	NII TK	National Secretary President of NII TK	76/109 Abai avenue Almaty 050057, Kazakhstan	00 7 327 242 65 09 00 7 327 242 73 45	00 7 327 258 24 49	niitk_murat@mail.ru	www.niit.kz
Yelena	PISSANAYA	NII TK	Regional Coordinator	76/109 Abel avenue Almaty 050057, Kazakhstan	00 7 727 277 8294	00 7 327 258 24 49	pissanaya@niitk.kz	www.niit.kz
Khojamyrat	GELDYMURADOV	Ministry of Finance	Minister of Finance National Coordinator	Turkmenistan			-	
Grygoriy	LEGENKIY	Ministry of Transport and Communications	National Secretary Director	Peremogy avenue 14, room 902 01004 Kiev, Ukraine	00 38 044 461 65 40		-	-

Antonina	KUZMENKO	Dep. Of Dev. And Coord. For Transp. And Com. Systems	Deputy Director	Ukraine			-	-
Leonid	CHUPRYN		Regional Coordinator	Ivan Franko 9, apt17 01030 Kiev, Ukraine			chupryn@inbox.ru	-
V.	GOSPODINOPOVA	Ministry of Transport	National Secretary Deputy Minister	Bulgaria				
Georgi	PETARNELCHEV	Ministry of Transport	National Secretary Deputy Minister	Bulgaria			-	
H.	YANAKIEVA	Ministry of Transport	Expert Trp. Policy Dir.	Bulgaria			-	
G.	DONCHEVA	Ministry of Transport	Expert Trp. Policy Dir.	Bulgaria			-	
Vasko	VASSILIEV		Data Collection Expert	RD Slatina bl. 24 ent. 3, apt 79 1574 Sofia, Bulgaria	00 35 928 70 86 34		vasko.ananiev@gmail.com	
Iordache	IONUT	Ministry of Transport	National Secretary	Romania			-	-
Teodor	SANATESCU		Data Collection Expert	Zizin 5, bl80A, apt25, sectro3 Bucharest, Romania	00 40 7452 82 306		test@mt.ro	-
Secil	SOZYANIK		National Secretary	Turkey	00 90 312 203 11 45		sozyanik@ubak.gov.tr	
Ruchan	DERICI		Data Collection Expert	Angora Cad, Ozbeykent Konutlari 188/5, Ankara, Turkey	00 90 532 633 4872		ruchand@3edanishmanlik.com	
Leonidas	KIOUSSIS	European Commission	Head of Sector DG AIDCO	rue Joseph II-straat 54 1000 Brussels, Belgium	00 32 2299 11 11		Leonidas.Kioussis@ec.europa.eu	-
Roel	HOENDERS	European Commission	Programme Manager	rue Joseph II-straat 54 1000 Brussels, Belgium	00 32 2299 25 10	00 32 22 95 56 65	roel.hoenders@ec.europa.eu	-
Barbara	BERNARDI	European Commission	Programme Manager Transport DG AID CO	rue Joseph II-straat 54 1000 Brussels, Belgium			Barbara.Bernardi@ec.europa.eu	-
Michal	NEKVASIL	EC Delegation	Deputy Head of Operations Section	38, Nino Chkheidze Street Tbilisi	00 995 32 94 37 63	00 995 32 94 37 63	Michal.nekvasil@ec.europa.ec	-

Michel	JAMBOU	EC Delegation	Project Manager	Georgia	00 995 32 94 37 63 00 995 32 94 37 70	00 995 32 94 37 68	michel.jambou@ec.europa.eu	
Gulnara	DUSUPOVA	EC Delegation in Kazakh., Kyrgyzstan, Tajikistan	Project Manager, Technical Cooperation Section	20A Kazibek Bi Almaty 050010, Kazakhstan	00 7 327 291 7676 00 7 327 298 0343-210	00 7 327 291 0749	gulnara.dusupova@ec.europa.eu	www.delkaz.ec.europa.eu
Nigara	SADYKOVA	EU	Tacis Support to NCU Project	92 Kemine Street Ashgabat 744000, Turkmenistan	00 993 12 35 10 20 00 993 12 35 31 14	00 993 12 39 31 20	-	-
Juraté	JUODSNUKYTE	Delegation of EC in Ukraine and Belarus	Project Manager Transport	3 Kruhlio Universytetska st. Kiev 05024, Ukraine	00 380 44 39080 10-385	00 380 44 253 45 47	jurate.juodsnukyte@ec.europa.eu	www.delukr.ec.europa.eu
Marc	ABEILLE	COPETRANS	Project Leader	8 rue Catulle Mendès 75017 Paris, France	00 33 6 62 78 44 80	00 33 1 30 60 04 89	copetrans@wanadoo.fr	-
Natalia	RUDENKO	Euro Ukraina Consulting	Deputy Director	Flat 14-45 Puchkinska Street 01004 Kiev, Ukraine	00 380 44 230 23 87	00 380 44 246 64 48	n.rudenko@bceom.fr	-
Natalia	DASHCHENKO	Euro Ukraina Consulting	Long Term Legal Transport Expert	Flat 14-45 Puchkinska Street 01004 Kiev, Ukraine	00 380 44 246 64 48		dashchenko@euc.kiev.ua	-
Oksana	NOVOSELETSKA	Euro Ukraina Consulting	Local Assistant	Flat 14-45 Puchkinska Street 01004 Kiev, Ukraine	00 380 44 246 64 48		o.novoseletska@bceom.fr	-
Marie-Gaelle	CHABOT	BCEOM	Project Director	Place des Frères Montgolfier 78288 Guyancourt, France	00 33 1 30 12 48 34	00 33 1 30 60 04 89	marie-gaelle.chabot@egis.fr	-
Matthieu	SARDA	BCEOM	Junior Short Term Expert	Place des Frères Montgolfier 78288 Guyancourt, France	00 33 1 30 12 49 09	00 33 1 30 60 04 89	matthieu.sarda@egis.fr	-
Lise	FASKI	BCEOM	Project Assistant	Place des Frères Montgolfier 78288 Guyancourt, France	00 33 1 30 12 47 24	00 33 1 30 60 04 89	lise.faski@egis.fr	-

Yves	GOULIN	BCEOM	Key Transport Expert Key expert 2	Place des Frères Montgolfier 78288 Guyancourt, France	00 33 1 30 12 48 97	00 33 1 30 60 04 89	yves.goulin@egis.fr	
Fabrice	LEGALL		Logistics and Shipping Specialist Key expert 3	5 rue de Chambord 78760 Jouars-Pontchartrain France	00 33 1 34 89 57 48 M. 00 33 6 20 91 00 43	00 33 1 34 89 57 48	fjlegall@wanadoo.fr	
James	FORD		Port Infrastructure Specialist Key expert 4	Sweden	M. 00 46 706 26 44 60		ifgford@hotmail.com	-
Antonella	ANTINORI	ITALFERR		Piazza della Croce Rossa 1 00161 Roma, Italy	00 39 06 44 101		a.antinori@italferr.it	
Laurent	FRANCIOSI	ITALFERR	International Manager	Piazza della Croce Rossa 1 00161 Roma, Italy	00 39 06 49 75 23 33		l.franciosi@italferr.it	
Ralf	BEHRENS	Dornier Consulting GmbH	Leiter Freight Transport/ Logistik	Platz vor dem Neuem Tor 2 10115 Berlin, Germany	00 49 30 25 39 91 42 M. 00 49 151 526 30 108	00 49 30 25 39 91 99	ralf.behrens@dornier-consulting.com	www.dornier-consulting.org
Hannes	RUGER	Dornier Consulting GmbH	Senior Consultant	Platz vor dem Neuem Tor 2 10115 Berlin, Germany	00 49 30 25 39 91 27 M. 00 49 151 526 30 125	00 49 30 25 39 91 99	hannes.ruager@dornier-consulting.com	www.dornier-consulting.org
Andreas	SCHON	Dornier Consulting GmbH	Senior Consultant	Platz vor dem Neuem Tor 2 10115 Berlin, Germany	00 49 30 25 39 91 10 M. 00 49 380 95 877 4170	00 49 30 25 39 91 99	andreas.schoen@dornier-consulting.com	www.dornier-consulting.org
Yulia	USATOVA	Dornier Consulting GmbH	Representative in Russian Federation	Buerogebaude 10 Graf-von-Soden-Strasse 88090 Immenstaad, Germany	00 49 7545 853 55 M. 00 49 151 526 30 272	00 49 7545 854 47	yuliya.usatova@dornier-consulting.com	www.dornier-consulting.org
Carsten	SCHURMANN	Dornier Consulting GmbH	Senior Consultant	Platz vor dem Neuem Tor 2 10115 Berlin, Germany	00 49 30 25 39 91 10 M. 00 49 151 945 81 853	00 49 30 25 39 91 99	carsten.schuermann@dornier-consulting.com	www.dornier-consulting.org

Ingrid Angela	GOSSINGER	TRACECA	Team Leader/TRACECA	8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan	00 994 12 4987 56 73	00 994 12 493 60 07	ingrid.gossinger@gmail.com	-
Gunay	HAJIYEVA	TRACECA		8/2 General Aliyarbekov street Baku, AZ-1005, Azerbaijan			-	-
Klaus	MUNCH	BCEOM	Team Leader of a BCEOM project	Baku, Azerbaijan	M. 00 994 518 286 968		klausmuench@gmx.de	-
Vladimir	POPOV	Eurasian Development Bank	Head of International Relations IFI	98 Panfilova street Almaty 05000, Kazakhstan	00 7 727 244 68 78	00 7 727 244 65 70	Popov_VV@eabr.org	-
Alibek	ABDRAKHMANOV	Eurasian Development Bank	Director of Project Group IFI	98 Panfilova street Almaty 05000, Kazakhstan	00 7 727 244 40 44-6188	00 7 727 250 81 58	abdrakhmanov_aa@eaber.org	-
Norbert	WAGENER	WAGENER & HERBST GmbH	Managing Director	Grobe Weinmeisterstrabe 9 14469 Postdam, Germany	00 49 331 27 5040 M. 00 49 172 289 6398	00 49 331 27 504 41	n.wagener@wagener-herbst.com	www.wagener-herbst.com

Annex 2: Port contacts directory

Ilyichevsk Port Authority

Port Authority/Port Operator/Piloting Authority

Address: PL Truda 6, 68001 Ilyichevsk, Ukraine

Tel: +380 48 628605, Fax: +380 48 693560

Contact: V Bulkin, Manager

Port Agents/Stevedores

- Barwil Agencies Ltd Ilyichevsk
- Formag Ltd
- INFLOT Ilyichevsk Shipping Agency
- Interbroker
- JV Trais
- Mar Shipping
- Metex Ltd
- Pacific Maritime Co Ltd

Odessa Port Authority

Port Authority/Port Operator/Piloting Authority

Address: Tamozhennaya Square 1, 65026 Odessa, Ukraine

Tel: +380 48 729 3661, Fax: +380 48 222 6171, Telex: 614983 PORT SU

Email: gdp@port.odessa.ua, Web: <http://port.odessa.ua>

Contact: Andrey Kharitoshin, Harbour Master

Ministry of Transport and Communications of Ukraine

01135, Kyiv, Peremogy av., 14

+38044 226-22-04 fax +38044 486-72-06

Contact

Yosyp Vinskyi, Minister

Port Agents/ Stevedores

- Albion Ltd
- Alpha Navigation - Agency Division
- AOZT Trans-Port
- Atis Ltd
- Barwil Agencies Ltd Ukraine
- BIMS - Black Sea International Marine Services
- Black Sea General Shipping Agency INFLOT
- Brooklyn-Kiev Co
- BSA Ukraine Ltd
- Formag Group

- Global Navigation Ltd
- OMA Interbroker
- JV Trais
- Klyf Maritime Agency
- Marko Ltd
- **Metex Ltd**
- MGL Shipping Ltd
- **Odessa Shipping Agency INFLOT**
- Pacific Maritime Co Ltd
- Petrel Shipping Agency
- Sea Crew
- Severy South Ltd
- **Sirius ML**
- Sotra Commerce Maritime Agency
- USS Company
- Vival Marine Ltd

Poti Port Authority

Port Authority/Port Operator/Piloting Authority

Address: ul David Agmashenebeli 52, 384691 Poti, Georgia
 Tel: +995 393 20660, Fax: +995 393 20688, Telex: 212175 inf su
 Email: mail@potiport.com, Web: <http://www.potiport.com>

Contacts

Revaz Beridze, Deputy Director General
 Direct Tel: +995 393 20630
 T Chartishvili, Harbour Master
 J Inaishvili, General Manager
 Tengiz Aburdjania, Terminal Manager
 Direct Tel: +995 393 20660

Port Operators

- B&P
- Georgian Pipeline Co
- Metalex
- Prometko Georgia

Port Agents/ Stevedores

- Atlas Ltd
- Barwil Georgia
- F H Bertling Georgia
- INFLOT Poti Shipping Agency
- InterCor - Poti Ltd
- Pace Shipping Agency Ltd
- Poti-Cargoservice Co Ltd
- Potivneshtans Ltd
- Ramstor Ltd
- Sofmar Maritime Agency
- TeRo-Poti Shipping & Forwarding Agency

F H Bertling Georgia
InterCor - Poti Ltd

Batumi Port Authority

Port Authority/Port Operator/Piloting Authority

Address: ul Kutaisi 1, 6000 Batumi, Georgia

Tel: +995 222 76261, Fax: +995 222 76780

Email: bsport@batumiport.com, Web: <http://www.batumiport.com>

Contacts: Thea Diasamidze, Marketing

Direct Tel: +995 222 76958

Vladimir Kikvidze, Port Facility Security Officer

Email: bspwatch@gol.ge

Port Agents/ Stevedores

Atlas Ltd

Barwil Georgia

Batos-Shipping Ltd

F H Bertling Georgia

G & M Logistic Shipping & Transport Services

Inflot Batumi

Inter Maritime Agency Co Ltd

TeRo Shipping & Forwarding Agency

Annex 3: List of relevant TRACECA projects

Num	Title	Beneficiary Countries	Target Groups / Stakeholders	Mode concerned	Type of commodities	Type of analysis	Available Data about Supply relevant for the MoS project	Available Data about Demand relevant for the MoS project
TA61	Motorways of the Sea	Direct beneficiary: Azerbaijan, Georgia, Kazakhstan, Ukraine Associated: Bulgaria, Romania, Turkey	Ministries of Transport, Port and maritime administrations and managements, business community, transport operators (port, shipping & hinterland connection) professional associations, custom authorities	Maritime and sea-land connections and interfaces (rail, road, and possibly inland waterways)	Containerizable commodities (it exclude among other bulk)	Market	Supply Data Need: Analysis of: - Infrastructure and equipments - Services (maritime, port operations, inland (waterways, road and rail) - Information systems: Port / terminal operators, Port maritime and land transport operators - Transport policy: taxes, market regulations, Impacts on competition (costs, time, reliability, safety, environment)	Demand data need: - Socio-economic factors, mainly export, import - General traffic flows (OD, commodities, transport mode) region to regions - Traffic (commodity, type of unit, O/D) - hinterland traffic (rail, road, waterways) - Traffic on alternative routes - Transit (not trading) cargo flows - Forecasts

Num	Title	Beneficiary Countries	Target Groups / Stakeholders	Mode concerned	Type of commodities	Type of analysis	Available Data about Supply relevant for the MoS project	Available Data about Demand relevant for the MoS project
TA52	Analysis and forecasting of traffic flows for the TRACECA Countries and interregional Transport Integration, including organisation of the Transport Dialogue between EU and NIS in the framework of the new European Neighbourhood Policy	All TRACECA countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyz Republic, Romania, Tajikistan, Uzbekistan, Turkey, Turkmenistan, Ukraine and of the "Baku initiative" (covering all TRACECA countries minus Bulgaria and Romania plus Belarus, Russian	Ministries of Transport, to plan transport investment but also for giving a good base to their transport operators to build up their fleet.	All modes: road, rail, maritime, inland waterway, pipeline, aviation	All commodities	Macro, Traffic forecast model	<ul style="list-style-type: none"> - Infrastructure: characteristics rail, road and waterways: (techniques, capacities, etc.). Unequally available by country (mostly in west part of TRACECA region), - Data on projected investments and related costs, benefits and funding - Data on capacity on nodes, train stations, logistic centres, border and some Country information on border crossing delays - Limited data on port characteristics (max draught, length quay, etc.) for some countries (essentially Turkey) - List of some port investment projects (essentially in Turkey and Romania) 	<p>Ongoing collection and analysis:</p> <ul style="list-style-type: none"> - Socio-economic factors: partial information about GDP, population, employment - General traffic flow: no comprehensive matrix yet provided but OD per commodity per country of origin/destin. for Moldavia, Azerbaijan, Turkey. For other countries no detail by commodity or not available - Traffic on ports: volume per country of origin and dest per commodity for Georgian and Turkish ports. Total volume per commodity for Illychevsk and Baku. Volume per commodity for specific link between ports in Caspian and Black seas. - Traffic on hinterland connections: AADT on selected road in Turkey, Azerbaijan, Romania, Georgia, and Kyrgyzstan. Rail freight vol in some countries (Romania, Bulgaria, etc.) - Forecasts : not yet available

Num	Title	Beneficiary Countries	Target Groups / Stakeholders	Mode concerned	Type of commodities	Type of analysis	Available Data about Supply relevant for the MoS project	Available Data about Demand relevant for the MoS project
TA58	Logistic Centres Network for Central Asia, Caucasus and European TRACECA	All TRACECA countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyz Republic, Romania, Tajikistan, Uzbekistan, Turkey, Turkmenistan, Ukraine	Ministries of Transport, investors of logistic projects, business community, transport operators, professional associations, custom authorities	All modes except pipeline: road, rail, maritime, inland waterway, aviation	Containerizable commodities (it exclude among other bulk)	Market	Starting Project: Possible coordination to share information about bottleneck, hindrance in particular on port hinterland and competitive routes	Possible coordination to better surround door to door commodity flow, MoS project being in charge of Maritime and sea-land connections and interfaces and Logistic centres being in charge of land transport
TA49	Improvement of maritime links between TRACECA Corridors and TEN Corridors	Bulgaria, Georgia, Romania, Turkey, Ukraine	Ministries of Transport, Maritime and Port authorities, shipping companies, Maritime Security and Safety services, hinterland mode responsables (rail, road, waterway)	Maritime and sea-land connections and interfaces (rail, road, and possibly inland waterways)	All commodities	Macro, model + micro-economic analysis at the level of the port	- Assessment of several Black Sea ports: Capacities, tariffs, productivity, investment plans and hinterland connections - Data on present and proposed communication & Information system (to be analysed when available)	Database and model to forecast Black Sea port traffic with two scenarios to year 2020. General forecast in ton per word region O/D (no detail by commodity or freight type) Port forecastS in ton and TEU by freight type (gen. cargo, ctn, bulk) without O/D No possibility of O/D matrices and traffic model by commodity and by mode
TA55	Aktau Port Development, Master plan and feasibility study for Port of Aktau in Kazakhstan	Kazakhstan	Ministry of Transport, Maritime and Port authorities of Aktau, shipping companies, hinterland mode responsables (rail, road, waterway)	Maritime and sea-land connections and interfaces (rail, road, and possibly inland waterways)	All commodities	Macro-analysis, model + micro-economic analysis	Existing Port Throughput Capacity with upgrading projects Possible investments	Traffic forecast for oil, dry cargo, ferry, container in 2020 (3 scenarios) - no O/D or type of commodity

Num	Title	Beneficiary Countries	Target Groups / Stakeholders	Mode concerned	Type of commodities	Type of analysis	Available Data about Supply relevant for the MoS project	Available Data about Demand relevant for the MoS project
	Ukraine Port Development Feasibility Study (TACIS)	Ukraine	Ministry of Transport, Maritime and Port authorities, shipping companies, hinterland mode responsables (rail, road, waterway)	Maritime and sea-land connections and interfaces (rail, road, and possibly inland waterways)	All commodities	Macro-analysis, model + micro-economic analysis	<ul style="list-style-type: none"> - UA transport network (rail, road, sea) - Existing tariff system in UA ports (types of charges) - Capacity utilisation, physical (dry, bulk, liquid cargoes and containers) and other constraints (customs, port operations, etc.) 	<ul style="list-style-type: none"> - expected GDP growth rates - economic and industrial data - UA trading partner-countries and commodity structure of trade commodities handled at sea ports (import, export, transit)
	Transport dialogue and interoperability between the EU and its neighbouring countries and Central Asian countries	All TRACECA countries: Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyz Republic, Romania, Tajikistan, Uzbekistan, Turkey, Turkmenistan, Ukraine	Ministries of Transport, various transport players TRACECA project teams	All modes	All commodities	Coordination, communication	<p>Starting Project: will facilitate dialogue between Transport players in TRACECA, between projects and between projects and stakeholders.</p> <ul style="list-style-type: none"> - New internet site to ease communication. - Will manage new database and forecast model. 	
TA45	Transport of dangerous goods in TRACECA countries	Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine	Ministries of Transport	All LPG transport modes (Rail Tank Cars (RTC's), LPG Trucks, LPG containers or LPG vessels)	LPG	only LPG	<p>Transport facility appraisal:</p> <ul style="list-style-type: none"> - type of available rail and ferry infrastructure: terminals and equipments - transportation costs (initial estimates for TRACECA corridor) - detailed appraisal of available facilities 	<p>Market analysis and transport forecast</p> <ul style="list-style-type: none"> - Transport corridors and O/D for LPG
TA54	Rehabilitation of the Railway line between Tbilisi and Yerevan (TRACECA)	Georgia, Armenia	Ministries of Transport, rail transport authorities	Rail			Contract awarded March 24, 2009	

Num	Title	Beneficiary Countries	Target Groups / Stakeholders	Mode concerned	Type of commodities	Type of analysis	Available Data about Supply relevant for the MoS project	Available Data about Demand relevant for the MoS project
TA46	Navigational Channel for Turkmenbashi Port (TRACECA)	Direct beneficiary - Turkmenistan, other TRACECA countries - spill-over effect due to increase traffic via Turkmen-Bashi port	Port authorities	Maritime transport	All commodities	Hydrographic survey, dredging plan	-technical specifications for dredging works - results of hydrographics surveys - Dredging (capital and maintenance), needs assessment in training, EIA	Inception Progress Reports without data
	Support to the integration of Ukraine in the Trans-European Network TEN-T (TACIS)	Ukraine, EU/CEEC and NIS	Initial target group included MoTC, executive agencies for all transport modes, border control authorities, technical institutes, coordination committees, working groups that facilitate the development of the corridor. Ultimate target group includes user	Rail, road (infrastructures and transport), maritime and inland water transport, airports and air transport	All commodities	Policy advice in transport, action plans for transport sectors	integration of Ukraine into European transport systems and networks Inception reported dated November 2008. Not yet specific detail for demand, and supply	It is anticipated that some studies will be undertaken to forecast demand for certain transport modes

Annex 4: Implementation by beneficiary countries of UNECE transport agreement and conventions

Status at 1st March, 2009

No.		Azerbaijan	Bulgaria	Georgia	Kazakhstan	Romania	Turkey	Turkmenistan	Ukraine
1.	European Agreement on Main International Traffic Arteries (AGR), of 15 November 1975	+	+	+	+	+	+		+
2.	European Agreement on Main International Railway Lines (AGC), of 31 May 1985		+			+	+		+
3.	European Agreement on Important International Combined Transport Lines and Related Installations (AGTC), of 1 February 1991		+	+	+	+	+		+
4.	Convention on Road Traffic, of 8 November 1968	+	+	+	+	+		+	+
5.	European Agreement supplementing the 1968 Convention on Road Traffic, of 1 May 1971		+			+			+
6.	Convention on Road Signs and Signals, of 8 November 1968	+	+	+	+	+		+	+
7.	European Agreement supplementing the Convention on Road Signs and Signals (1968), of 1 May 1971		+	+		+			+
8.	European Agreement on Road Markings, of 13 December 1957		+			+	+		
9.	Protocol on Road Markings, Additional to the European Agreement supplementing the Convention on Road Signs and Signals, of 1 March 1973		+	+					+
10.	Agreement concerning the Adoption of Uniform Technical Prescriptions for Wheeled Vehicles, Equipment and Parts which can be fitted and /or be used on Wheeled Vehicles and the Conditions for Reciprocal Recognition of Approvals Granted on the Basis of these Prescriptions, of 20 March 1958	+	+			+	+		+
11.	Agreement concerning the Adoption of Uniform Conditions for Periodical Technical Inspections of Wheeled Vehicles and the Reciprocal Recognition of Such Inspections, of 13 November 1997		+			+			+
12.	Agreement concerning the Establishing of Global Technical Regulations for Wheeled Vehicles, Equipment and Parts which can be fitted and / or be used on Wheeled Vehicles, of 25 June 1998	+				+	+		

13.	European Agreement concerning the Work of Crews of Vehicles engaged in International Road Transport (AETR), of 1 July 1970	+	+		+	+	+	+	+
14.	Convention on the Contract for the International Carriage of Goods by Road (CMR), of 19 May 1956	+	+	+	+	+	+	+	+
15.	Protocol to the Convention on the Contract for the International Carriage of Goods by Road (CMR), of 5 July 1978			+		+	+	+	
16.	Convention concerning Customs Facilities for Touring, signed in New York on 4 June 1954		+			+	+		
17.	Additional Protocol to the Convention concerning Customs Facilities for Touring, relating to the importation of tourist publicity documents and material, signed in New York on 4 June 1954		+			+	+		
18.	Customs Convention on the International Transport of Goods under Cover of TIR Carnets (TIR Convention), of 14 November 1975	+	+	+	+	+	+	+	+
19.	Customs Convention on the Temporary Importation of Commercial Road Vehicles, of 18 May 1956	+	+			+	+		
20.	Customs Convention on Containers, of 2 December 1972	+	+	+	+	+	+		+
21.	European Convention on Customs Treatment of Pallets Used in International Transport, of 9 December 1960		+			+	+		
22.	International Convention on the Harmonization of Frontier Controls of Goods, 21 October 1982	+	+	+	+	+	+		+
23.	European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR), of 30 September 1957	+	+		+	+			+
24.	Agreement on the International Carriage of Perishable Foodstuffs and on the Special Equipment to be Used for such Carriage (ATP), of 1 September 1970	+	+	+	+	+			+

Annex 5: Intergovernmental/bilateral international transport agreements between Ukraine and other project countries

No.		General	Road	Sea	Acceptance of Seafarer's Certificates	Railway	Combined Transport
1.	Azerbaijan		+	+	+	+	+
2.	Bulgaria		+	+		+	+ (Ro-Ferry)
3.	Georgia		+	+	+	+	+ (Ro-Ro/Ro-Ferry)
4.	Kazakhstan	+	+	+		+	
5.	Romania		+		+	+	
6.	Turkey		+	+	+	+	
7.	Turkmenistan	+	+			+	

Annex 6: Implementation by beneficiary countries of IMO's convention (status of 1st March 2009)

		Azerbaijan	Bulgaria	Georgia	Kazakhstan	Romania	Turkey	Turkmenistan	Ukraine
1.	Convention on International Maritime Organization (IMO), 1948	+	+	+	+	+	+	+	+
2.	International Convention for the Safety of Life at Sea (SOLAS), 1974	+	+	+	+	+	+	+	+
3.	International Convention on Load Lines (LL), 1966	+	+	+	+	+	+	+	+
4.	International Convention on Tonnage Measurement of Ships (TONNAGE), 1969	+	+	+	+	+	+	+	+
5.	Convention on the International Regulations for Preventing Collisions at Sea (COLREG), 1972	+	+	+	+	+	+	+	+
6.	International Convention for Safe Containers (CSC), 1972		+	+	+	+			+
7.	International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (STCW), 1978	+	+	+	+	+	+	+	+
8.	International Convention on Maritime Search and Rescue (SAR), 1979		+	+		+	+		+
9.	Convention on the International Maritime Satellite Organization (INMARSAT), 1976		+			+	+		+
10.	Convention on Facilitation of International Maritime Traffic (FAL), 1965	+	+	+		+			+
11.	International Convention for the Prevention of Pollution from Ships, 1973, as modified by the Protocol of 1978 relating thereto (MARPOL 73/78)	+	+	+	+	+	+	+	+
12.	Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter (LDC), 1972	+	+						+
13.	Protocol to LDC Convention, 1996		+	+	+				
14.	International Convention Relating to Intervention on the High Seas in Cases of Oil Pollution Casualties (INTERVENTION), 1969		+	+					+
15.	Protocol to INTERVENTION Convention, 1973		+	+					
16.	International Convention on Civil Liability for Oil Pollution Damage (CLC), 1969	+		+	+				
17.	Convention on Limitation of Liability for Maritime Claims (LLMC), 1976	+	+	+		+	+		
18.	Convention for the Suppression of Unlawful Acts Against the Safety of Maritime Navigation (SUA), 1988	+	+	+	+	+	+	+	+
19.	International Convention on Salvage (SALVAGE), 1989	+		+		+			
20.	International Convention on Oil Pollution Preparedness, Response and Cooperation (OPRC), 1990	+	+	+			+		

Annex 7 - Cargo scope for MoS

SITCCode	prodName	Relevance	Comment
00	LIVE ANIMALS EXCEPT FISH	no	no container - Short distance
01	MEAT & PREPARATIONS	yes	
02	DAIRY PRODUCTS & EGGS	yes	
03	FISH/SHELLFISH/ETC.	yes	
04	CEREALS/CEREAL PREPARATN	partially	except bulk
05	VEGETABLES AND FRUIT	yes	
06	SUGAR/SUGAR PREP/HONEY	yes	
07	COFFEE/TEA/COCOA/SPICES	yes	
08	ANIMAL FEED EX UNML CER.	partially	except bulk
09	MISC FOOD PRODUCTS	yes	
11	BEVERAGES	yes	
12	TOBACCO/MANUFACTURES	yes	
20	UN SPECIAL CODE	no	special code
21	HIDE/SKIN/FUR, RAW	yes	
22	OIL SEEDS/OIL FRUITS	yes	
23	CRUDE/SYNTHET/REC RUBBER	yes	
24	CORK AND WOOD	partially	except bulk
25	PULP AND WASTE PAPER	partially	except bulk
26	TEXTILE FIBRES	yes	
27	CRUDE FERTILIZER/MINERAL	no	mostly bulk
28	METAL ORES/METAL SCRAP	partially	except bulk
29	CRUDE ANIM/VEG MATER NES	yes	
30	UN SPECIAL CODE	no	special code
32	COAL/COKE/BRIQUETTES	no	mostly bulk
33	PETROLEUM AND PRODUCTS	no	mostly bulk
34	GAS NATURAL/MANUFACTURED	no	mostly bulk
35	ELECTRIC CURRENT	no	specialized transport means
40	UN SPECIAL CODE	no	special code
41	ANIMAL OIL/FAT	partially	except bulk
42	FIXED VEG OILS/FATS	partially	except bulk
43	ANIMAL/VEG OILS PROCES'D	yes	
50	UN SPECIAL CODE	no	special code
51	ORGANIC CHEMICALS	no	specialized transport means
52	INORGANIC CHEMICALS	no	specialized transport means
53	DYEING/TANNING/COLOR MAT	yes	
54	PHARMACEUTICAL PRODUCTS	yes	
55	PERFUME/COSMETIC/CLEANSR	yes	
56	MANUFACTURED FERTILIZERS	partially	except bulk
57	PLASTICS IN PRIMARY FORM	partially	except bulk
58	PLASTICS NON-PRIMRY FORM	yes	
59	CHEM MATERIAL/PRODS NES	partially	except bulk
60	UN SPECIAL CODE	no	special code
61	LEATHER MANUFACTURES	yes	
62	RUBBER MANUFACTURES NES	yes	
63	CORK/WOOD MANUFACTURES	yes	
64	PAPER/PAPERBOARD/ARTICLE	yes	

SITCCode	prodName	Relevance	Comment
65	TEXTILE YARN/FABRIC/ART.	yes	
66	NON-METAL MINERAL MANUF.	yes	
67	IRON AND STEEL	partially	except bulk
68	NON-FERROUS METALS	no	mostly bulk
69	METAL MANUFACTURES NES	partially	except bulk
70	UN SPECIAL CODE	no	special code
71	POWER GENERATING EQUIPMT	partially	except bulk
72	INDUSTRY SPECIAL MACHINE	partially	except bulk
73	METALWORKING MACHINERY	partially	except bulk
74	INDUSTRIAL EQUIPMENT NES	partially	except bulk
75	OFFICE/DAT PROC MACHINES	yes	
76	TELECOMMS ETC EQUIPMENT	yes	
77	ELECTRICAL EQUIPMENT	yes	
78	ROAD VEHICLES	no	specialized transport means
79	RAILWAY/TRAMWAY EQUIPMNT	no	specialized transport means
80	UN SPECIAL CODE	no	special code
81	BUILDING FIXTURES ETC	partially	except bulk
82	FURNITURE/FURNISHINGS	yes	
82	FURNITURE/FURNISHINGS	yes	
83	TRAVEL GOODS/HANDBAG/ETC	yes	
84	APPAREL/CLOTHING/ACCESS	yes	
85	FOOTWEAR	yes	
87	SCIENTIFIC/ETC INSTRUMNT	yes	
88	PHOTOGRAPHIC EQU/CLOCKS	yes	
89	MISC MANUFACTURES NES	yes	
90	UN SPECIAL CODE	no	special code
91	POSTAL PACKETS NOT CLASS	no	air
93	SPECL TRANSACT NOT CLASS	no	specialized transport means
96	COIN NONGOLD NON CURRENT	no	specialized transport means
97	GOLD NON-MONETARY EX ORE	no	specialized transport means

Annex 8 - Review of data of the "Analysis of TRACECA traffic flows" study

Introduction

The project is still ongoing and the database is therefore still not completed.

Various Excel files of data on commodity flows that could be used for the diagnostic were analysed. Pipelines and air transportation data and information were not analysed.

Present and potential MoS market assessments rely on:

- Information origins and destinations by zone
- The type of commodities and freight / transport

The most relevant data for ports is the freight volume in ton by commodity:

- For the two main Georgian ports by country of origin and destination and freight volume in ton by commodity for different years
- For the main Turkish ports. The socio-economic section contains freight volumes in ton per type of commodity per country of Origin and Destination for Moldavia, Azerbaijan and Turkey.

List of commodities

Motorways of the Sea are mostly dedicated to commodities caused in transport units (mostly containers), and not to large bulk cargoes containerized. As a consequence, the classification used by WSP, data about the following list of commodities:

prodCode	prodName	Relevance	Comment
1	Petroleum products	no	bulk
2	Solid mineral fuels	no	bulk
3	Ores & metal wastes	no	bulk
4	Metal products	partially	except bulk
5	Wood and paper products	partially	except bulk
6	Building materials	partially	except bulk
7	Machinery, transport equipment & misc. articles	yes	
8	Fertilizer	partially	except bulk
9	Textiles and cotton	yes	
10	Agricultural products and grains	partially	except bulk
11	Foodstuffs and animal fodder	yes	
12	Chemicals	partially	except bulk
13	General goods	yes	Particularly relevant

Maritime and Inland Waterways

Important data on the three main Turkish ports (Haydarpasa, Derince, Izmir) and on Georgian ports (Poti, Batumi) are limited or there's no information for the other ports.

port.xls – tables "PortVolume", "PortFlowToPort", "PortFlowFromPort"

Total port traffic by type of commodity (in ton):

- Haydarpasa
- Derince
- Samsun
- Poti
- Batumi
- Baku International Sea Trade Port
- Ilyichevsk

Port traffic exportation and importation, by country of origin and destination, by type of commodity:

- Poti
- Batumi

Port traffic exportation and importation, by type of commodity for different years

- Haydarpasa
- Derince
- Samsun
- Izmir

waterway.xls – table "WaterwayVolume"

Traffic flow in tons, per type of commodity for the following links:

- Ilyichevsk – Poti / Batumi (only Ferry line?) (two directions together)
- Ilyichevsk – Istanbul / Derince (only Ferry line?) (two directions together)
- Ilyichevsk – Varna (only Ferry line?) (two directions together)
- Aktau – Baku
- Baku – Aktau
- Turkmenbashi – Baku
- Baku – Turkmenbashi

Rail - rail.xls

Table RailVolume

Rail Traffic per section: (average daily freight train, annual freight volume):

Turkey
Azerbaijan
Georgia
Romania
Bulgaria
Moldavia

Table RailNodeVolume

Traffic Generation at the main points of the network (borders, ports and other stations) per type of commodities
Traffic on Freight Station
Border Station Azerbaijan / Georgia
Stations of Bulgaria

Total freight traffic for exportation and by type of commodity for importation
Batumi,
Poti
Border Georgia / Azerbaijan
Border Georgia / Armenia

Road - road.xls

Table "RoadVolume"

Volume in: Average Annual Daily Traffic + "Heavy Good Vehicle Share":
Turkey (160 sections)
Azerbaijan (2 sections)
Romania (75 sections)
Georgia (1 axe)
Kyrgyzstan (14 sections)

Table "RoadNodeVolume"

Traffic generation at certain points of the network (Borders, ports and others?):
Turkey (number of vehicles at the Border)
Georgia (number of vehicles ; total import/export ; goods by type of commodities)

Socio-economic Data - socio-econ.xls

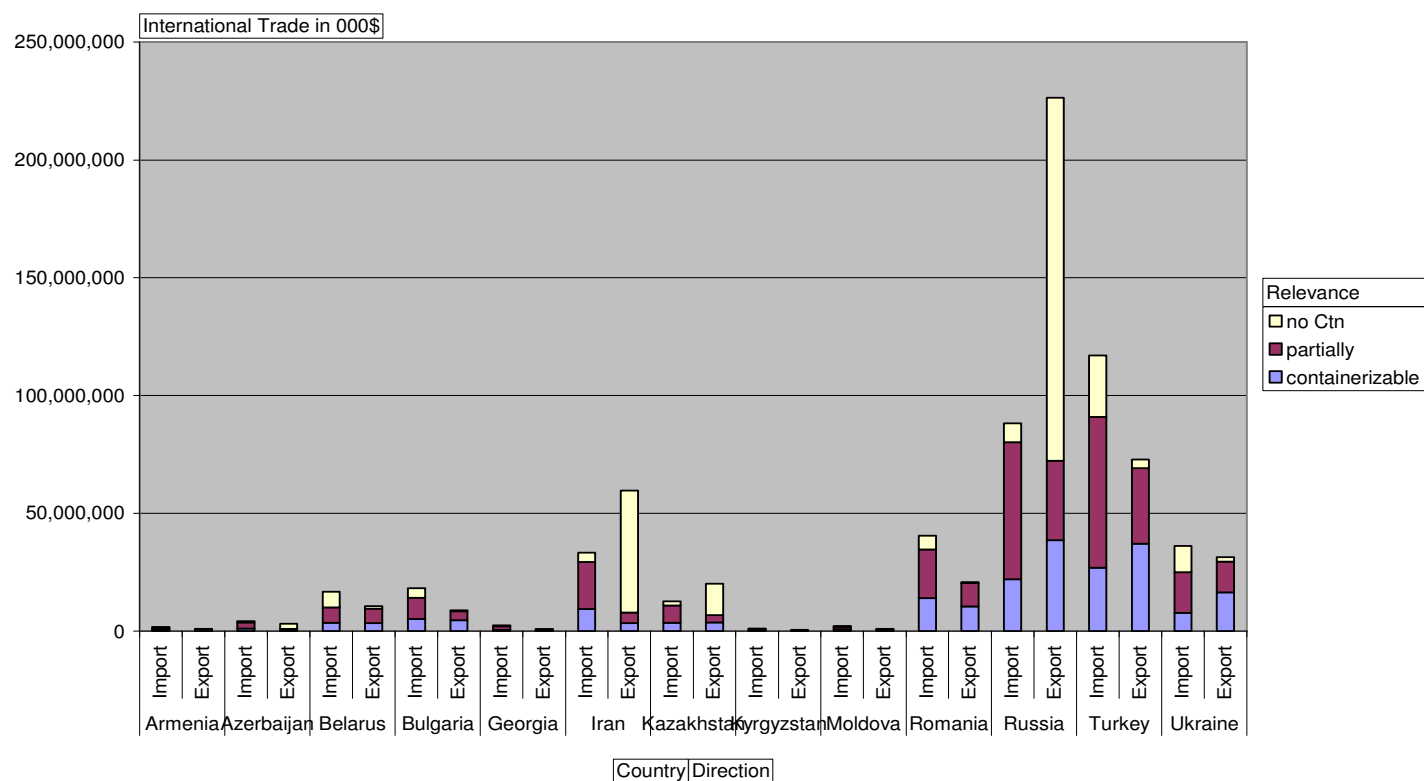
Table "CountryExport" and "CountryImport"

Import/Export by country of origin/destination by type of commodities:
Georgia (No detail by type of commodities)
Tajikistan (No detail by type of commodities)
Romania (No detail by type of commodities) (surrounding countries)
Moldavia
Azerbaijan
Turkey (several years)

Annex 9 - A general overview of exports / imports

Value based US \$

MoS Relevant commodities



Source: International Trade Centre - COMTRADE database and consultant classification

Traffic flow on Danube: tons from ports to ports

Motorways of the Sea for the Black Sea and the Caspian Sea, Azerbaijan, Georgia, Kazakhstan, Turkmenistan and Ukraine- Inception report- 31 March 2009

Egis Bceom International in association with Copetrans, Italferr, Euro-Ukraina Consulting

Annex 10: Maritime services from/to the main ports of the beneficiary countries

January 2009

UKRAINE						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Ilyichevsk	Poti/Batumi	UKRferry	Ro/Ro + Rail ferry			Russian gauge
	Istanbul/Derince	UKRferry	Ro/Ro + Rail ferry			Russian gauge
	Varna	UKRferry	Ro/Ro + Rail ferry	Sporadic		Russian gauge
Odessa	Poti/Batumi	UKRferry	Ro/Ro + Rail ferry			
	Varna/Burgas/Istanbul/Odessa/Costanza/Varna	Bulcon	Lo/Lo	1 x 9 days	"Varna" 543 TEUs	
	Med/Costanza/Odessa/Novorossiysk/Poti/Derince	Oldendorff Express Line	Heavy lift	Bi-weekly		
	Istanbul/Derince	UKRferry	Ro/Ro + Rail ferry			
	Malta/Costanza/Odessa/Novorossiysk/Poti/Trabzon/Costanza/Varna/Malta	CMA-CGM	Lo/Lo	Weekly	2 x 118 TEUs, 1 x 907 TEUs	Feeder service
	Odessa/Varna/Costanza/Port Saïd	K-Line' Black Sea Express	Lo/Lo	Weekly		Feeder service
	Malta/Odessa/Costanza/Varna	Medex Container Shipping / Intramediterraneo SA	Lo/Lo	1 x 10 days	5334 dwt container vessel	
	Costanza/Odessa/Poti/Costanza	Maersk	Lo/Lo	2 x week		Intra Black Sea (feeder)
	Gioia Tauro/Costanza/Odessa/Costanza/Gioia Tauro	Maersk	Lo/Lo	Weekly		Gioia Tauro Costanza Odessa Service (feeder)
	Costanza/Odessa/Ilyichevsk/Costanza	MSC	Lo/Lo	2 x week	1 x 957 TEUs, 1 x 924 TEUs	Feeder service

	Haifa/Izmir/Costanza/ Odessa/Varna/Haifa	Zim Black Sea Ukraine Service	Lo/Lo	Weekly	2 x 956 TEUs	
	Asia/Damietta/Istanbul/Costanza/Odessa/ Costanza/Istanbul/Damietta/Asia	New World Alliance ABX Service (Direct Med/Asia)	Lo/Lo	Weekly	2,500/2,700 TEUs	Suspended since Feb 2009

GEORGIA

Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Poti	Bourgas		Ro/Ro	Weekly		
	Kavkaz		Ro/Ro	Twice weekly		
	Varna	UKRferry	Rail ferry	Sporadic		Russian gauge
	Ilyichevsk	UKRferry	Rail ferry		4 x 103/108 railcars	Russian gauge
	Riseria/Novoribirsk		Ro/Ro			At project stage since 2005
	Med/Costanza/Odessa/ Novorossiysk/Poti/Derince	Oldendorff Express Line	Heavy lift	Bi-weekly		
	Malta/Costanza/Odessa/ Novorossiysk/Poti/ Trabzon/Costanza/ Varna/Malta	CMA-CGM	Lo/Lo	Weekly	2 x 1118 TEUs, 1 x 907 TEUs	Feeder service
	Costanza/Odessa/Poti/ Costanza	Maersk	Lo/Lo	2 x week		Intra Black Sea (feeder)
	Gioia Tauro/Bosporus/Poti/ Bosporus/Gioia Tauro	Maersk	Lo/Lo	Weekly		Poti Service (feeder)
	Istanbul/Poti/Trabzon/ Istanbul	MSC	Lo/Lo	1 x 3 days	1 x 976 TEUs, 1 x 923 TEUs, 1 x 563 TEUs	

	Costanza/Poti/Costanza	X-Press Container Line	Lo/Lo	1 x 10 days	1 x 200 TEUs	Costanza/Black Sea X-Press 2
	Costanza/Poti/Costanza	Zim	Lo/Lo	Weekly	1 x 605 TEUs	
Batumi	Varna	UKRferry	Ro/Ro + Rail ferry			Russian gauge. May be stopped (lack of terminal space)
	Ilyichevsk	UKRferry	Ro/Ro + Rail ferry	Sporadic		Russian gauge. May be stopped (lack of terminal space)
AZERBAIJAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Baku	Aktau		Rail ferry			
	Turkmenbashi		Rail ferry			
KAZAKHSTAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Aktau	Baku		Rail ferry			
TURKMENISTAN						
Port	Service from/to	Shipping Line	Mode	Frequency	Capacity	Notes
Turkmenbashi	Baku		Rail ferry			