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**COMMUNICATION FROM THE COMMISSION TO THE COUNCIL AND THE
EUROPEAN PARLIAMENT**

Extension of the major trans-European transport axes to the neighbouring countries

Guidelines for transport in Europe and neighbouring regions

Impact Assessment

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COMMISSION STAFF WORKING DOCUMENT

Impact Assessment of the Communication on the extension of the major trans-European transport axes to the neighbouring countries

EXECUTIVE SUMMARY

This impact assessment document accompanies the Communication on the extension of the major trans-European transport axes to the neighbouring countries.

1. PROCEDURAL ISSUES AND CONSULTATION OF INTERESTED PARTIES

1.1. Procedural issues

Transport planning between the EU and in its neighbouring countries needs to be updated to better reflect that changes that have taken place in EU and to meet the needs of the growing trade and transport flows. The enlargements of the EU in 2004 and 2007 brought major changes both inside and outside of the EU. The aim of the Communication is to respond to those challenges and changes and to develop a framework for transport planning between the EU and its neighbouring countries in a world of growing interdependence. It follows the work of the High Level Group on *the extension of the major trans-European transport axes to the neighbouring countries and regions*, which was set up by the Commission to look into transport connections between the EU and its neighbouring countries. The Group concluded its work in November 2005 and the chair of the Group, Loyola de Palacio handed the report¹ for Vice-President Barrot on 7th December 2005.

1.2. Stake-holder consultation

The Commission services organised a two-phase consultation process to integrate the views and concerns of the stakeholders throughout the policy development process. The first phase took place in the beginning of the High Level Group exercise and it aimed at collecting ideas and views from stakeholders on relevant issues to be looked at, on traffic, environmental and other bottlenecks that exist or are likely to emerge in the near future as well as on traffic corridors that are most used by international transport. Some 70 written contributions were received and a public consultation conference was organised in April 2005 with about 300 participants and interventions of almost 20 stakeholders.

The second phase was launched in December 2005 and aimed at collecting the stakeholders' views on the High Level Group's report and recommendations. Almost 100 written contributions were received from a wide range of stakeholders and a public consultation conference was held in March 2006. In this conference, there were ca. 120 participants and again around 20 stakeholders presented their views and suggestions.

¹ See http://europa.eu.int/comm/ten/transport/external_dimension/index_en.htm

2. PROBLEM DEFINITION

2.1. Political framework

The enlargements of the EU in 2004 and 2007 meant that the borders of the EU moved towards the east and the south. This created new neighbours for the EU. In a Communication on Wider Europe², the Commission outlined a new framework for relations between the enlarged EU and its surrounding areas. Its aim is to ensure a balanced and sustainable development for both the EU and its neighbours. Regional and intra-regional cooperation is an important component of this policy framework.

The need to better connect the transport networks of the EU27 with its neighbouring countries, is set as a clear priority in the process of integrating the neighbouring countries into the EU markets and society. This requires compatible and interconnected infrastructure networks as well as harmonised regulatory environments. The above mentioned Communication clearly states that trans-European networks should draw up strategies towards reaching this objective.

The policy framework was further defined in a Communication on a strategy paper for European Neighbourhood policy³. This document sets out concretely how the EU proposes to work with the neighbouring countries and in the development on transport sector and especially on transport infrastructure, the existing exercises such as the Pan-European Corridors or the Euro-Mediterranean transport network form the basis from which to move forward.

2.2. Transport sector

2.2.1. Trans-European transport networks for the EU territory

The enlargements of the EU brought also changes into the transport sector. In 2004, the Guidelines for the development of the trans-European transport network (TEN) were revised and extended to the 12 new Member States. The new Guidelines revised and modernised the plans drawn up in the 1990's by concentrating investment priorities on 30 major trans-European axes and priority projects. The estimated cost of the priority projects is €250 billion, whilst the completion of the whole TEN network would exceed €600 billion.

The priority axes of the TENs serve primarily long-distance and international traffic within the Single Market of the EU. Trade and transport between the EU, its neighbours and other major trade partners were, however, not covered by the assessment of traffic flows that was carried out in support of the revision process. The Guidelines therefore do not include priority projects⁴ to link the EU with the neighbouring countries despite the high traffic volumes that currently exist on many such connections. Nor are there any connections to the Western Balkan region.

² COM (2003) 104

³ COM (2004) 373

⁴ Apart the projects no 12 Nordic Triangle and no 6 Lyon-Trieste-Divaca-Ljubljana-Budapest-Ukrainian border

Connections between the EU and the neighbouring countries are covered in a separate exercise, the Pan-European Corridors and Areas, which follows a different logic and decision-making process.

2.2.2. *Pan-European Corridors and Areas*

The Pan-European Corridors and Areas⁵ (PEC) were developed during two Ministerial Conferences in Crete (1994) and in Helsinki (1997) with the aim of connecting the EU15 with the then neighbouring countries. The cooperation along the Pan-European Corridors is organised through Memoranda of Understanding, which also establish a Chair and Secretariat for most of the PECs.

Following the 2004 and 2007 enlargements and the revision of the TEN Guidelines, major parts of the Pan-European Corridors became parts of the TEN network and only small parts remained outside the EU, in Western Balkans and in Russia, Belarus, Ukraine, Moldova and Turkey. There are clear pressures from the countries concerned by many of these Corridors to extend them further to better account the changing trade patterns and traffic flows in the region and to change the coordination frameworks set up for the Corridor development. For instance, Russia has proposed to extend the PEC II from Nizhniy Novgorod further to the East to Yekaterinburg, and PEC IV is considering an extension from Istanbul to Ankara.

The Corridors have been successful in varying degrees and much depends on the particular circumstances of the Corridor. In particular the following weaknesses have been identified:

- As an MoU is a voluntary agreement and it is not legally binding, it works well only where there is political will to work together towards a common goal. For some of the Pan-European Corridors and the neighbouring regions these are lacking.
- The work of the Secretariats has typically been covered by one country along the Corridor through e.g. a department in the Ministry of Transport or in a regional administration. Another example is e.g. the PEC IX, whose management and monitoring is divided among three regional Corridor Chairs and Secretariats. This leads often to unbalanced technical support and monitoring of the whole axis. The financing has also been very uneven to the point that for some Corridors/Areas no Secretariat has been set up. The Community financial instruments have not allowed to set up Secretariats for the whole length of a Corridor.
- Planning and prioritisation of investments along the Pan-European Corridors and Areas is in many cases done in a piecemeal way and follows a national logic addressing the needs of domestic traffic whilst neglecting those of international movements along the whole axis. This means that strategic planning and analysis of bottlenecks at the Corridor level is weak and that no serious strategic environmental analysis can be carried out. This often leads to implementing small projects and thus neglecting the environmental impacts (“salami slicing”) of the overall programme at strategic and cross-border levels. One example of this is the

⁵ See the progress report on http://europa.eu.int/comm/ten/transport/documentation/index_en.htm

PEC VII and the development of the Danube delta in Ukraine. A strategic environmental assessment has been done covering the delta area in Ukraine. It does not, however, cover the other countries in the region and the assumptions of the environmental assessment of the proposed project variants are contested by the environmental organisations.

- There are no commonly accepted or agreed methodologies to assess the socio-economic and environmental impacts of the plans and projects along the Corridors. The appraisals are done according to national practices, which differ considerably between the countries concerned and which are not always in line with the EU legislation and best practice. This is in particular the case when projects are funded through national sources.
- No priority network or axes have been defined for the Pan-European Areas especially in the Barents region and in the Mediterranean. Whilst for the Mediterranean the definition of a regional core network is progressing under the MEDA programme, it needs to be better coordinated with the Pan-European Corridor/Area concept to ensure synergies. Cooperation in the Barents region focuses on the development and integration of the regional economies, whilst the integration of the region with the Pan-European Corridors further in the south has not been completed.
- The focus of the Pan-European Corridors and Areas is on infrastructure and insufficient attention is paid to removing non-infrastructure related bottlenecks. Therefore, despite improvements of the infrastructure, delays persist, particularly at border crossings and for the rail mode, which suffers from the additional problem of non-interoperable national systems. For example, the average journey duration of a freight train between Berlin and Moscow on PEC II takes today some 12 days, mainly because of lengthy border-crossing procedures. The journey time could be reduced considerably, to maximum 3-5 days, by making border crossing procedures more effective and interoperable without costly infrastructure investments.
- The concept of the Motorways of the Sea, which was introduced in the TEN Guidelines in 2004, has not been integrated into the Pan-European Areas.

The above described weaknesses in the development of the Pan-European Corridors and Areas are already apparent today. Despite the existing structures, coordination remains weak and the development plans of the Corridors address mainly national bottlenecks, leading to the persistence of unnecessarily lengthy delays particularly at borders. Rail being more affected by these delays, shift from rail to road can also be expected with increasingly detrimental impacts on the environment and traffic safety.

The situation will get worse in the future, as trade and transport between the EU and its neighbours are expected to continue growing rapidly.

2.3. Trade and traffic forecast to grow rapidly

2.3.1. Current situation

Exports and imports between the EU and the neighbouring countries are unbalanced, with 116 million tons imported goods and 464 million tons exported. This tendency is expected to continue in the coming years. In year 2020, the total volume of EU imports from the neighbouring countries is estimated to be 254 million tons and the volume of exports is estimated at 859 million tons assuming that the rate of economic growth follows past trends. The EU's main trade partners among the neighbouring countries are Russia and Turkey. Overall, trade flows are concentrated on the eastern borders of the EU, where the volumes of goods are higher than at the southern border (MEDA countries).

2.3.2. 2020 forecast

Recent studies forecast that rapid growth in trade flows and freight transport will continue. One of the most recent estimates⁶ shows that the highest growth in trade is forecast to take place between the "old" and recently joined EU Member states (almost 2% pa) and even more so between the enlarged EU and other European countries such as Turkey or Russia (up to 2.6% pa). Overall, traffic volumes between the EU and the neighbouring countries are expected to grow by 100% between 2000 and 2020.

Whilst road traffic is typically the dominant mode for domestic transport, international traffic by rail is particularly important for trade between the EU and its North-Eastern neighbours, Russia, Ukraine and Belarus. In the figure 1 below, the estimated rail volumes for 2020 are presented for traffic between the EU and Northern and South-Eastern neighbouring countries as well as with the countries of Southern Caucasus. Traffic originating from trade with China, Japan and other Asian countries transiting through the neighbouring regions is also accounted for.

Maritime transport accounts for a high share in the total trade between the EU and particularly its Mediterranean neighbours where direct lead connections are rare. Figure 2 below highlights the traffic volumes on the main maritime routes in the Mediterranean Sea including also traffic volumes by land transport modes.

Maritime traffic is expected to continue to be the dominant mode, particularly as concerns trade with the Mediterranean countries. Regarding land modes, there are higher volumes on the rail network compared to road. Highest rail traffic flows are observed in relation to/from Russia on the following main axes:

- Hungary – Czech Republic – Poland – Belarus – Russia (Moscow)
- Baltic/Nordic countries – Russia (St. Petersburg)
- Bulgaria – Romania – Ukraine – Russia

Highest road traffic flows are observed in relation to/from Russia and Turkey on the following main axes:

⁶ The EUN-STAT study analysed traffic volumes between the EU and its northern and south-eastern neighbours; and the MEDA study examined traffic between the EU and the Mediterranean neighbours.

- Germany – Poland – Belarus – Russia (Moscow)
- Germany – Poland – Baltic countries – Russia (St. Petersburg)
- Turkey - Bulgaria – Balkan Countries – Germany (North-West & South West)
- Turkey - Bulgaria – Balkan Countries – North Italy – South of France – East of Spain
- Bulgaria – Romania - Ukraine

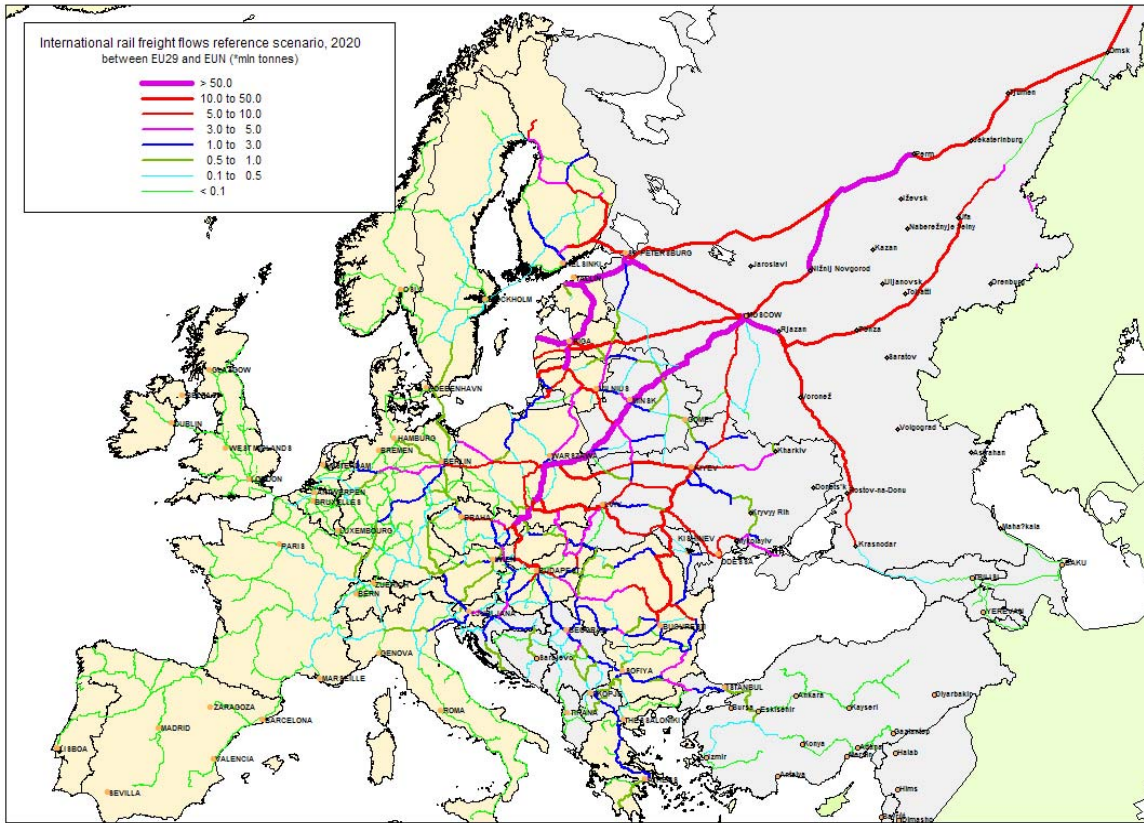
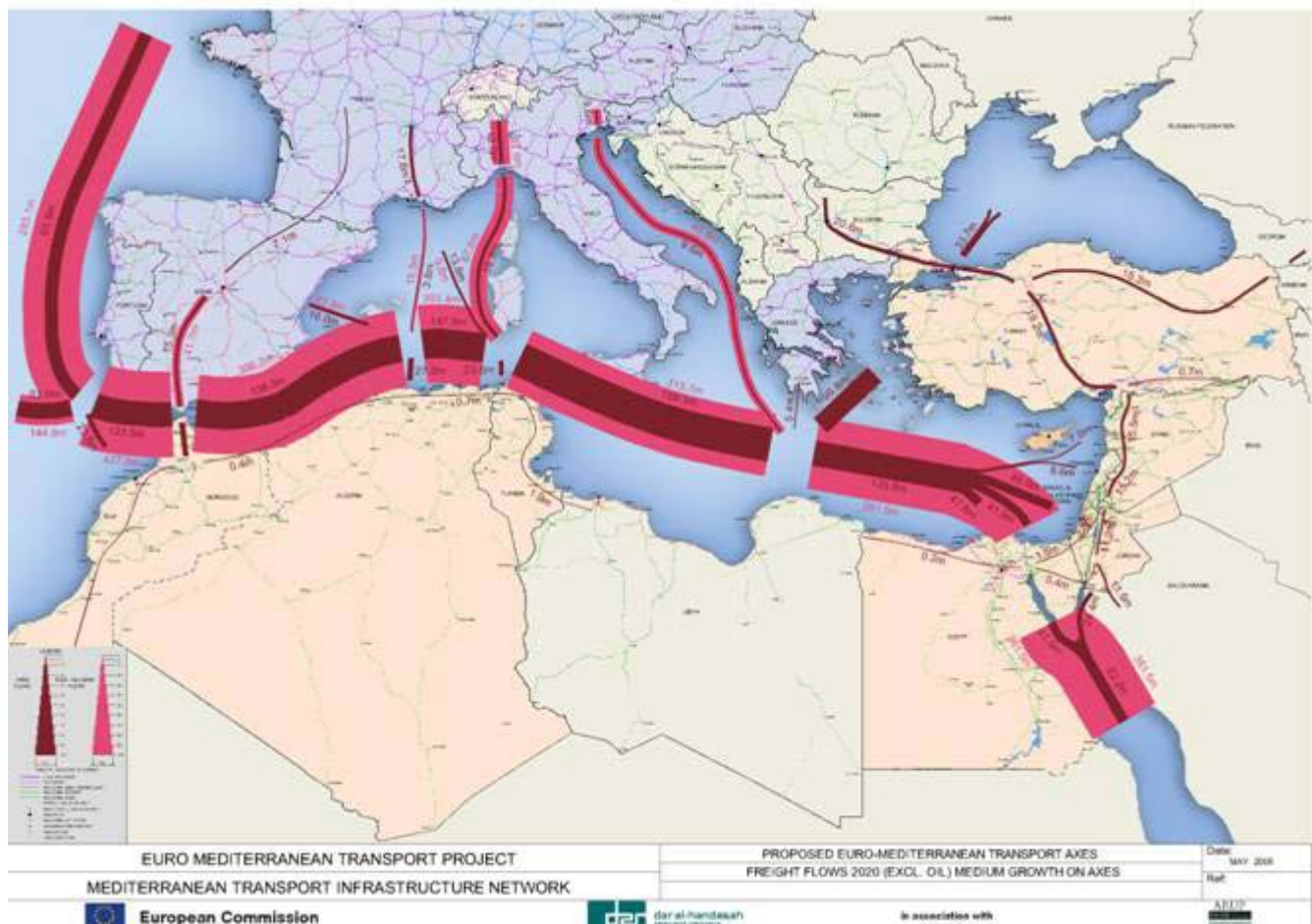


Figure 1: International traffic volumes between the EU and the North-Eastern and South-Eastern neighbouring countries in 2020

Figure 2: Traffic volumes in the Mediterranean region



2.4. High Level Group

To respond to the problems identified in the preceding chapters, the Commission⁷ set up a High Level Group on *the extension of the major trans-European transport axes to the neighbouring countries and regions* in autumn 2004, to make recommendations to the Commission on how to tackle these issues. Former Commission Vice President Loyola de Palacio was appointed Chair of the Group, which comprised 26 neighbouring countries, the 27 EU States, the European Investment Bank, the European Bank for Reconstruction and Development and the World Bank. The report of the Group was submitted to the Commission on 7 December 2005 and a public consultation was launched immediately thereafter.

2.5. Questionnaire to the Pan-European Corridor Chairs

In parallel to the High Level Group exercise, the Commission services continued the discussions with the Pan-European Corridor Chairs and Secretariats on how to develop the Corridor concept in the new context after enlargement.

The results of a questionnaire done in early 2005 with the Chairs of the Pan-European Corridors and Areas show clearly that there is a need to develop the concept further. It showed that the coordinated development of a Corridor should be monitored and supervised at international level and financing for a Secretariat should be guaranteed on long term basis.

The implementation of “soft” measures was seen as a high priority in addition to infrastructure improvements. Currently, the development of these Corridors is based on a Memorandum of Understanding (MoU), which is not a legally binding document, but rather a form a political intent. The results of the questionnaire clearly show that this was not considered to be sufficient basis for Corridor development and a legally binding international agreement between the parties concerned was preferred.

3. OBJECTIVES

3.1. Objectives of the Commission’s proposal

The overall aim of the Commission’s proposal is to facilitate and stimulate trade between the EU and the neighbouring countries through efficient transport connections. These would in turn foster economic growth and regional development. This can be achieved through the implementation of policy measures aiming at improving the functioning of the transport systems, reducing journey times, transport costs and congestion as well as making the transport network more sustainable.

3.2. Summary of the recommendations of the High Level Group

3.2.1. Five transnational axes

The High Level Group adopted five major transnational axes that contribute most to promoting international exchanges and traffic as well as to enabling regional cooperation and integration. The identification of these axes facilitates also the ordering of priorities and the establishment of consistency between national plans. All of the five axes comprise one or

⁷ Commission Decision C(2004) 3618 of 29 September 2004

more branches reflecting the volumes of international traffic today and the forecast for 2020 and ensuring connectivity between the neighbouring regions and the trans-European networks of the EU. The axes are the following⁸:

- Motorways of the Seas: linking the Baltic, Barents, Atlantic (including Outermost Regions⁹), Mediterranean, Black and the Caspian Sea areas as well as the littoral countries within the sea areas and with an extension through the Suez Canal towards the Red Sea.
- Northern axis: to connect the northern EU with Norway to the north and with Belarus and Russia to the east. A connection to the Barents region linking Norway through Sweden and Finland with Russia is also foreseen.
- Central axis: to link the centre of the EU to Ukraine and the Black Sea and through an inland waterway connection to the Caspian Sea. A direct connection to the Trans-Siberian railway and a link from the Don/Volga inland waterway to the Baltic Sea are also included.
- South Eastern axis: to link the EU with the Balkans and Turkey and further with the Caucasus and the Caspian Sea as well as with the Middle East to Egypt and the Red Sea.
- South Western axis: to connect the south-western EU with Switzerland and Morocco, including the trans-Maghrebin link connecting Morocco, Algeria and Tunisia and its extension to Egypt.

3.3. Infrastructure projects

The Group also proposed a number of priority investment projects along the axes. However, as data limitations did not allow for a full analysis of the proposals, the Group therefore simply classified them into two categories depending on their maturity and the potential role they could have in alleviating bottlenecks that affect international and long-distance traffic, i.e.

- Projects ready to start before 2010 (completion by 2020) - Projects in this category aim at addressing the most pressing bottlenecks stemming from congestion, poor quality infrastructure or from environmental considerations that hamper international exchanges and traffic at present. These projects are expected to bring about time and operating cost savings to the users and operators in comparison to today's situation. The estimated cost for this category is ca. €35 billion.
- Projects of longer term interest (works to start by 2020) - With forecast traffic growth from today to 2020 and beyond, congestion, environmental or other bottlenecks are likely to occur in the medium to longer term. Projects in this category aim at addressing these bottlenecks before they become too acute and costly to the users and operators. This category includes typically the second stage of a project that increases the infrastructure

⁸ For more details on the methodology and the alignment of the axes; see the final report of the High Level Group, op.cit.

⁹ Canary Islands, Azores and Madeira)

capacity gradually, the first phase being among projects ready to start prior to 2010. The cost of these projects is estimated at app. €10 billion.

The Group was very clear in that these lists of projects are just a starting point, not necessarily exhaustive, and that there is need for further studies and analyses before any of the projects may be considered for implementation. These should concern particularly financing and fiscal space issues, the project's economic viability, technical specification as well as environmental and social impacts.

3.3.1. Horizontal measures

The High Level Group put forward a number of so-called horizontal measures in view of making transport along the axes more rapid and effective by removing bottlenecks that unnecessarily slow down traffic, with a particular focus on border crossings. The measures concern all transport modes with a particular focus on the five axes proposed and include, among others:

- Technical and administrative interoperability as regards e.g. railway networks, signalling systems, infrastructure charging schemes.
- Speeding up border crossing procedures by implementing without delay the relevant international conventions, by introducing “one-stop” offices through shared facilities and by simplifying and harmonising trade and transport related documentation.
- Implementation of new technologies like traffic management and information systems, including satellite navigation (Galileo), that are effective and compatible with those implemented in the EU territory.
- Measures to improve safety and security and working conditions in all transport modes, e.g. through harmonising procedures at the highest level of performance.
- Application of international conventions and environmental impact assessment, public procurement procedures etc. in accordance with donors' funding rules and best international standards and practice.

As highlighted by the Group and confirmed by the stakeholders through the public consultation process, the potential impact of the horizontal measures can be considerable whilst their cost is typically low in comparison with infrastructure investments. In the absence of such measures, bottlenecks would occur especially at border crossings even if infrastructure works were completed along the axes.

3.3.2. Coordination and implementation

The High Level Group felt that there is a need to improve the coordination between different instruments in existence today (TENs, European Coordinators for some TEN priority projects, Pan-European Corridors, Traceca, etc.) in order to ensure effective and timely implementation of the transport axes and priority projects as well as the horizontal measures. Coordination structures based on MoUs have not proven very successful (see ch. 2.2.2), as they are often limited in scope and effect. The Group highlighted the need to improve and where necessary to strengthen the coordination framework to ensure coherence between the different mechanisms and also to make them more effective. The commitment of the countries

concerned to implement the agreed axes/projects and horizontal measures should also be increased.

The Group recommended that for the implementation and improvement of the functioning of the major transport axes, targeted cooperation frameworks should be put in place, taking into account the existing cooperation modalities, political situation and cross-border traffic. In this way it would be possible to set clearer objectives and a timetable for actions (including financial engineering) and these could be endorsed and followed-up more effectively on the major trans-national transport axes identified by the Group.

When setting up these new coordinating mechanisms, the Group considered it important to establish a Secretariat per transport axis/region and to reflect upon the integration of the existing structures of the Pan-European Corridors' Steering Committees into the new mechanisms, whenever possible. Sustainable, sufficient and long-term financing for the Secretariat should be guaranteed jointly by the European Union and the countries concerned by the axis/region.

3.4. Results of the stakeholder consultation

3.4.1. Introduction

La Consultation publique sur le rapport du Groupe à Haut Niveau s'est déroulée via Internet du 10 décembre 2005 au 10 mars 2006. Une conférence ouverte à toutes les parties intéressées a été organisée le 28 mars 2006.

Cette consultation recueillit 93 contributions écrites et presque 20 interventions orales¹⁰, en provenance d'organisations et de structures de niveau européen, national, régional ou local et représentant les différents modes de transport (aérien, maritime, fluvial, routier, ferroviaire), la logistique et l'intermodalité. Se sont également exprimées des Organisations du secteur de l'Industrie et des Affaires, des Associations environnementales, des Organisations de recherche et de consultance, des Chambres de Commerce et d'Industrie locales et régionales, des Associations locales et interrégionales, plusieurs autorités nationales, régionales et locales, des Corridors Pan-Européens, des Organisations de sécurité et de travailleurs, ainsi que des citoyens européens.

D'une manière générale, le rapport du Groupe à Haut Niveau et ses recommandations ont été bien accueillis par les contributeurs. Les principaux points soulevés et propositions formulées par les contributeurs sont détaillés ci-après.

3.4.2. Axes proposés par le Groupe à Haut Niveau

Une très large majorité de contributions reconnaît la pertinence des axes retenus, soulignant plus particulièrement l'importance des liaisons avec les Balkans, la Turquie et le Russie, notamment en matière de transport de fret. Toutefois, plusieurs contributeurs pointent l'absence de liaisons leur paraissant pertinentes. Ont notamment été soulignées l'absence du corridor méditerranéen le long du littoral espagnol et français, du « corridor Pyhrn » en Europe centrale, d'un certain nombre de liaisons ferroviaires dans les Balkans notamment entre les capitales, et de plusieurs zones portuaires dont l'ajout aux axes retenus par le Groupe

¹⁰ Both the written and oral contributions can be downloaded from http://europa.eu.int/comm/ten/transport/external_dimension/index_en.htm.

à Haut Niveau a été demandé à plusieurs reprises. Plusieurs contributions ont en outre relevé la pertinence de voir développées des lignes ferroviaires à grande capacité dédiées au fret.

Il a également été relevé une sous représentation des aéroports dans l'exercice du Groupe à Haut Niveau, bien que l'extension du ciel européen unique (Single European Sky) soit très bien accueillie, et un manque de prise en considération des régions périphériques de l'Union. Plusieurs contributeurs ont ainsi appelé de leurs vœux le développement des liaisons aériennes (de fret notamment) entre régions périphériques de l'Union Européenne aux fins de pourvoir un développement territorial équilibré de l'Union et éviter les encombrements existants sur les axes majeurs de transport du territoire communautaire. Il a également été regretté que les voies fluviales ne fassent pas l'objet d'une plus grande priorité dans l'exercice du Groupe à Haut Niveau.

Concernant les Autoroutes de la Mer (MoS), la plupart des contributeurs concernés ont mis en avant les spécificités de cet axe par rapport au rail et la route, une spécificité parfois insuffisamment prise en compte dans le rapport. Plusieurs ports ont demandé à être intégrés dans la liste des ports des Autoroutes de la Mer (tels que les ports du littoral méditerranéen espagnol, Marseille, Toulon, Trondheim, les ports de Lettonie), alors que plusieurs contributeurs se sont étonnés de ne pas voir figurer les ports européens sur la liste des ports des Autoroutes de la Mer retenue par le Groupe à haut Niveau. Les avis sont par ailleurs partagés concernant la définition du concept même des Autoroutes de la Mer. Notamment, la sélection d'un seul port par pays et par région maritime ne fait pas l'unanimité dans les contributions reçues, car elle amène à concentrer les investissements sur certains ports au détriment des ports non sélectionnés appelés alors à péricliter.

Ces recommandations n'ont cependant pu être prises en compte pour les raisons suivantes.

Concernant les axes additionnels proposés, tant en ce qui regarde les axes continentaux que les Autoroutes de la Mer, et que les lignes ferroviaires à grande capacité demandées, ils sont dans la plupart des cas relatifs au territoire de l'Union européenne et au réseau trans-Européen de transport, et ne concernent donc pas directement les connexions aux pays et régions voisins de l'Union européenne. Plus spécifiquement, pour ce qui est des Balkans, le Groupe à Haut Niveau n'a en effet retenu que les axes connaissant un volume de trafic suffisamment pertinent.

Concernant la prise en compte insuffisante des aéroports, l'exercice du Groupe à Haut Niveau mit volontairement l'accent sur le fret et ne souhaitait pas interférer avec les différents exercices régionaux en cours.

Quant aux régions périphériques de l'Union, elles sont d'ores et déjà impliquées dans le réseau transeuropéen de transport et n'entraient pas spécifiquement dans l'exercice du Groupe à Haut Niveau qui était de se focaliser sur les connexions avec les Etats tiers voisins de l'Union européenne.

Le concept d'Autoroute de la Mer suppose le développement de flux de trafic suffisants afin d'obtenir une rentabilité économique. La concentration des flux et des investissements sur certains ports paraît donc à ce titre nécessaire. Concernant la liste des ports des Autoroutes de la Mer, le mandat du Groupe à haut Niveau consistait seulement à examiner l'extension de l'Axe aux ports des Etats tiers voisins de l'Union Européenne. Par ailleurs, la sélection des ports européens amenés à être intégrés dans les Autoroutes de la Mer n'a pas encore été

effectuée par les Etats Membres. Ceux-ci ne pouvaient donc être mentionnés dans le rapport du Groupe à Haut Niveau.

Plusieurs contributeurs remettent par ailleurs en question la pertinence de certains axes inscrits dans l'exercice du Groupe à Haut Niveau, à l'instar des extensions proposées vers le Nord de la Russie ou le Moyen-Orient au regard de l'importance du trafic international.

Les recommandations des contributeurs sur ce point n'ont pu être prises en compte pour les raisons suivantes. Les volumes de trafic actuellement observés en Europe septentrionale sont en réalité d'ores et déjà importants, et seront très certainement amenés à croître rapidement avec le développement économique futur de l'Asie, et notamment de la Chine et l'Inde. Outre l'absorption du volume de trafic attendu, les extensions envisagées doivent par ailleurs permettre d'amorcer une intégration régionale sectorielle en dépit des problèmes politiques que les régions concernées peuvent connaître, notamment au Moyen-Orient.

3.4.3. Projets d'infrastructure

Plusieurs organisations environnementales ont exprimé de sérieuses réserves concernant la liste des projets d'infrastructure proposée et les carences en matière d'études d'impact environnemental et de transparence, particulièrement pour ce qui est des régions concernées en Ukraine, dans les Balkans et le Caucase.

Le Groupe reconnaissait en effet le manque de données sur cette importante question et la nécessité de conduire des analyses et des études d'impact approfondies aussi bien au niveau stratégique (plans et programmes) qu'au niveau du projet. La proposition de la Commission vise à mettre en place une structure engagerait les pays concernés par un axe d'effectuer les analyses socio-économiques et environnementales selon les meilleures pratiques.

3.4.4. Mesures horizontales

Dans la très large majorité des contributions, les mesures horizontales ne sont pas remises en cause et satisfont les contributeurs, notamment en matière de sécurité. Elles font néanmoins l'objet de quelques suggestions de mesures additionnelles telles que par exemple concernant les temps de repos pour les conducteurs longues distances dans les mesures de sécurité routière, et en matière d'expertise des projets (évaluation, étude et sélection).

Une large part des contributions met cependant l'accent sur le renforcement et le développement de l'intermodalité et l'interopérabilité des modes de transports, le développement des centres logistiques et l'importance de renforcer les mesures de sécurité dans tous les modes de transport.

Enfin, quelques contributions déplorent l'absence de référence au volet social des projets et aux études d'impact social.

La Commission Européenne a pris note de ces recommandations dont elle tient compte dans sa proposition.

3.4.5. Perspectives de financement

De nombreux contributeurs ont également exprimé des inquiétudes quant aux perspectives de financement, compte tenu du difficile contexte budgétaire de l'Union Européenne ainsi que des Etats voisins, qui connaissent parfois également une instabilité politique. Conscient de ces

difficultés, le Groupe à Haut Niveau a procédé au cours de son exercice à une étroite sélection des axes et des projets retenus, exercice qui vit la participation active de trois Banques internationales (Banque Mondiale, Banque Européenne pour le Développement et la Reconstruction et Banque Européenne d'Investissement).

Les Partenariats Public-Privé (PPP) sont, malgré les inquiétudes exprimées, retenus comme devant jouer un rôle non négligeable à la condition que les Etats jouent un rôle accru en matière de garantie, avec cependant une mise en garde concernant les projets ferroviaires pour lesquels un soutien des secteurs public et bancaire doit rester prédominant. L'existence d'une législation adéquate en la matière est également retenue comme une condition essentielle d'une mise en œuvre efficace de schémas de PPP. Il a notamment été proposé la création d'une Association Public-Privé chargée de faciliter les financements privés par la promotion de l'adoption d'une législation adéquate auprès des Etats concernés. La mise en place de groupes de travail, en particulier sur les PPP, est soutenue par la plupart des contributeurs, qui apparaissent nombreux à être prêts à y participer.

Le recours à des Plans d'Actions Financiers pluriannuels a également été évoqué à plusieurs reprises, avec une implication à la fois de la Commission Européenne, des Etats concernés et des Comités permanents et secrétariats techniques des différents axes. La création d'un Fonds d'Investissement a également été suggérée.

Le recours aux « user charges » ne fait par ailleurs pas l'unanimité parmi les contributeurs. Les avis sont notamment partagés selon les coûts à recouvrer et les modes de transport considérés.

Enfin, quelques contributions soulignent la nécessité de focaliser le soutien communautaire en matière de transport transeuropéen plus spécifiquement sur les pays candidats ou potentiellement candidats à l'adhésion, sur les projets prioritaires sur le territoire de l'Union ou sur le renforcement des liaisons en Europe centrale.

La Commission Européenne a pris note de ces recommandations dont elle tient compte dans sa proposition.

3.4.6. Mise en œuvre des recommandations du rapport

Le recours à des accords internationaux, tant bilatéraux que multilatéraux, est bien accueilli par l'ensemble des contributeurs qui s'accordent sur la nécessité d'une coopération plus étroite entre les Etats. D'une manière générale, les contributions préconisent le recours à un instrument juridique plus contraignant qu'un protocole d'accord, instrument d'ores et déjà utilisé dans le cadre des Corridors Pan-Européens, mais plus souple qu'un traité international dans ses modalités de négociation, d'adoption et de mise en œuvre. A notamment été évoqué par les contributeurs l'exemple de l'Energy Community Treaty et la possibilité de le voir étendu au secteur des Transports. Mais quelque soit l'instrument juridique choisi, plusieurs contributeurs ont souhaité y voir inclus un chapitre social et environnemental afin d'assurer le respect des standards communautaires dans ces matières.

Nombre de contributions préconisent également l'inclusion de mesures de sanctions dans le document juridique de référence. Il a été par ailleurs suggéré à plusieurs reprises l'intégration des structures actuellement en place pour la mise en œuvre des Corridors Pan-Européens, ce qui devrait permettre d'obtenir des résultats immédiats.

Enfin, une approche différenciée par axe et par région est plébiscitée par l'ensemble des contributeurs (avec la mise en place d'un Secrétariat technique par Axe), ainsi que la nécessité de voir développer une réelle cohérence entre les projets le long des axes. Il a également été suggéré de considérer l'engagement juridique des régions concernées différemment par exemple selon que les Etats sont candidats à l'adhésion à l'Union européenne, ou plus ou moins impliqués dans la politique de voisinage et/ou de développement de l'Union.

Plusieurs contributeurs souhaiteraient en outre voir les régions et les compagnies de transport associées au processus concernant les projets à mettre en œuvre.

La Commission Européenne a pris note de ces recommandations dont elle tient compte dans sa proposition.

4. POLICY OPTIONS

4.1. Selection of relevant policy alternatives

Following the analysis of the problems (ch. 2), the work of the High Level Group and the valuable experience of the Pan-European Corridor Chairs and the contributions of the public consultation process (ch. 3), the policy options considered in this impact assessment concern the following three dimensions:

- Should the geographical coverage of Pan-European Corridors/Area be extended to better connect the major axes of the trans-European transport with the neighbouring countries?
- Should the type of measures to be looked at be broadened from transport infrastructure measures to include also horizontal measures to ensure efficient traffic flows along the axes?
- Should the coordination framework be strengthened from a Memorandum of Understanding to a more binding form such as an international agreement to ensure efficient planning, monitoring and implementation of the measures?

The combination of the above three policy dimensions would in theory lead to several different policy options. However, not all of them are equally relevant or likely. For example, with the current MoUs, only minor geographical extensions to the Pan-European Corridors/Areas would seem feasible. On the other hand, if the aim was to implement both infrastructure projects and horizontal measures along extended Corridors, an extended MoU or a stronger form of cooperation would seem the relevant options to be assessed in more detail. Therefore, the following three have been chosen for a more detailed analysis:

- **Continuation of current situation (“do-minimum”)** – The geographical coverage of the Pan-European Corridors/Areas would remain in their current form or slightly extended to reflect the recommendations of the High Level Group. Focus would continue to be on infrastructure measures only. The monitoring and implementation of these measures would continue under the existing Memoranda of Understanding (MoU) between the countries concerned and the Commission. For Turkey and the Caucasus, Traceca would continue to be the basis for cooperation.

- **Loose cooperation structure (extended Memoranda of Understanding)** – The Pan-European Corridors/Areas would be extended geographically in line with the HLG proposals. In addition to infrastructure projects, also horizontal measures would be addressed when relevant for the Corridor. The existing MoUs for the Pan-European Corridors would be extended along the axes proposed by the High Level Group where geographically relevant. For Turkey and the Caucasus, Traceca would continue to be the basis for cooperation. For the other regions (Mediterranean, Middle East), an MoU, along the lines of the Pan-European Corridor MoUs, would be proposed for the countries concerned.
- **Stronger cooperation structure (international agreement)** – A multilateral agreement would be signed including all the neighbouring countries and the EU. It would cover all the measures – both infrastructure development and horizontal measures – proposed by the High Level Group. This would mean integrating the Pan-European Corridors into the new structure and ensuring strong coordination with Traceca in the Caucasus. Whilst the horizontal measures would require coordination across all the countries to ensure harmonised rules and interoperable systems, the agreement would foresee a strong regional element for the effective implementation of the infrastructure measures along each axis or a meaningful part of it.

5. ANALYSIS OF IMPACTS

The analysis of impacts aims at assessing the consequences of the different policy options regarding multilateral cooperation along the axes. It should be noted that this impact assessment does not aim at analysing the effects of further development of the axes - through infrastructure projects or horizontal measures - as these have not been defined in sufficient detail.

One of the aims of the coordination structure, which the Commission is proposing to set up, would be to work together towards improving data collection and quality, developing compatible or common methods for economic, environmental and social assessment of transport master plans and projects, as well as monitoring their effective implementation.

5.1. Geographical extension of the Pan-European Corridors/Areas

The five axes proposed by the High Level Group integrate most the Pan-European Corridors and Areas and extend them only slightly. The extensions and their impacts are the following:

- The four Pan-European Areas (Barents, Black, Ionian and Mediterranean Seas) are incorporated into the Motorways of the Seas as far as sea connections are concerned.

Integration of the neighbouring countries into the concept of the Motorways of the Seas has several advantages. The countries have to commit to certain quality criteria related to port infrastructures and port services, administrative procedures and co-ordination of inspections, maritime and intermodal services. Safety in the sea areas would improve as the vessels used for the Motorways of the Seas shall comply with IMO norms for ships and, wherever possible, be aligned to higher standards following specific agreements between the entities responsible for the Motorways of the Sea

- Northern axis incorporates the PEC II and the northern part of PEC IX. A land connection to the Pan-European Area of Barents linking Norway through Sweden and Finland with Russia is added.

This axis carries today the heaviest volumes of traffic between the EU and Russia and beyond, as can be seen from the analysis of traffic flows (ch. 2.3.1-2). The share of rail is high on this axis and its further development should ensure that this positive trend continues. The inclusion of the link to the Barents region – the so-called North East West “NEW” rail link – aims particularly at traffic between Russia/Asia and North America that currently transits through the heavily congested regions and networks of Central Europe.

- Central axis includes the PECs III and V.

A direct connection to the trans-Siberian railway is added to allow traffic from Asia to avoid going through Moscow and this way to strengthen the competitiveness of rail transport.

- South Eastern axis merges and extends the PECs IV and X, incorporates PECs VII, and VIII as well as a branch of PEC V and is connected with the Traceca alignment in Armenia, Azerbaijan and Georgia in the Southern Caucasus.

This axis is extended to connect with the main North-South transport corridor in the Middle East up to Egypt.

- South Western axis connects the TEN priority project n° 16 in Spain with Morocco and also includes a land connection in the Pan-European Area of the Mediterranean.

East-West traffic volumes in North Africa are currently relatively low because of the political situation and the ensuing low levels of trade between the countries concerned. The connection was, however, seen necessary to strengthen regional cooperation and integration and to stimulate regional trade.

Most of the Pan-European Corridors I, IV, V, VI and VII are now in the territory of the EU27 and thus part of a priority project of the trans-European transport networks. They are therefore not part of the extensions proposed to the major axes of the trans-European networks.

5.2. The different cooperation structures

5.2.1. Continuation of current situation (“do-minimum”)

In the do-minimum scenario cooperation continues based on the Pan-European Corridors and Areas, which were developed in the political context of the early 1990s and have not been updated since then. As described in above (ch. 2) the political context has however changed dramatically with the enlargement of the EU in 2004 and as a consequence major parts of the Pan-European Corridors have become parts of the TEN-T networks. Some of the Corridors have been identified as priority projects in the TEN-T guidelines and other have retained their status as only Pan-European Corridors. This has created a situation, which is difficult to manage effectively because of the coexistence of both the TENs and the Pan-European Corridors which leads to confusion in coordination and implementation especially in the “new” EU Member states.

The pressure from the EU Member States, the countries outside the EU and the Corridors themselves to redefine and to extend some of the Corridors would be ignored in the do-minimum scenario. Under the MoU structure, the benefits of the work done in the High Level Group would not be taken into consideration and thus would not be realised. The High Level Group addressed the need to redefine and to extend the Corridors and in addition it addressed other measures, which can improve the functioning of the transport networks between the EU and its neighbours.

The MoU structure has been considered to be quite weak and dependent on the particular circumstances of each Corridor. The MoU structure was originally set up to develop main transport corridors and the emphasis is more often placed on the development of physical infrastructure and other measures are somewhat neglected. Therefore, the incentives for effective implementation of infrastructure and other measures are limited, as described in the ch. 2.2.2 on problem definition.

As a result, the expected benefits of investments, e.g. in terms of savings in vehicle operating cost and in time, environmental sustainability and social objectives, would not be fully achieved. Nor would effective monitoring of the implementation of the infrastructure or horizontal measures take place with the risk of non-compatible approaches.

5.2.2. Loose cooperation structure option (extended Memoranda of Understanding)

The policy option based on loose cooperation structure would continue on a basis of the MoUs, but would take into account the development of the transport axes and the horizontal measures in the High Level Group exercise. The MoUs would be extended to cover the redefined transport axes mainly in the East covering Belarus, Russia, Ukraine and possibly also Turkey. The South East Europe would continue to have both the individual Corridor MoUs and the regional MoU. In the Mediterranean, where no MoU is in existence today, one would be proposed to the countries concerned and the Caucasus region and to some extent Turkey would continue to cooperate under the Traceca framework.

This approach would suffer from the same limitation as the do-nothing scenario because of the limitation of the MoU structure itself. The MoUs are limited in their effect and extending the MoUs to cover even longer stretches or more countries would make these limitations even more apparent. The impacts across economic, environmental and social dimensions as well as on the new EU Member States and the neighbouring countries are estimated to be similar to the impacts under the do-nothing scenario.

The benefits of this policy option stem from its weaknesses. The MoU being a loose form of cooperation, the willingness of the countries concerned to go ahead with an extended MoU is likely to be high and a rather rapid agreement could be expected on the terms of the MoU.

5.2.3. Stronger cooperation structure option (international agreement)

The stronger cooperation structure option would foresee the signing of an international agreement (or agreements) between the EU and the neighbouring countries. The agreement would set up a coordination framework, which would cover all the issues proposed by the High Level Group meaning both the transport axes and the related measures. It would include integrating those parts of the Pan-European Corridors, which are not covered by the TEN-T, into the new structure.

The agreement would foresee a strong regional element for the effective implementation of the infrastructure measures along each axis of a relevant part thereof, whilst the horizontal measures would require coordination across all the countries to ensure harmonised rules and interoperable systems. This would also lead to less confusion in the new EU Member States, which are currently covered by both the TENs and the Pan-European Corridors, and they would also benefit more from the effective implementation of the measures and actions in the EU's neighbouring countries being at closer proximity.

Development of transport infrastructure is a lengthy process and some of the projects are scheduled to be completed only by 2020. A common coordination framework led by the Commission would allow to establish the necessary technical and administrative structure i.e. Secretariat that would allow a sustainable monitoring and implementation of the measures. A synchronised master plan of the infrastructure and horizontal measures would ensure that the most urgent and socio-economically and environmentally beneficial measures to be taken.

The benefits to transport users in terms of time and operating cost savings, particularly at borders would be considerable. These would lead to increase in the productivity of the companies in the EU and in the neighbouring countries and further stimulate trade.

A common framework for project identification, appraisal and implementation would allow addressing and mitigating eventual environmental problems up-stream by choosing the least damaging alignment, transport mode and type of investment. A common framework would also ensure that the same criteria are used for assessing the environmental impacts of measures in all the neighbouring countries.

In terms of social impacts, a harmonised implementation of the proposed measures would ensure that the same procedures and rules are applied in the neighbouring countries. This would improve e.g. the safety and security of transport, in particular in the maritime sector where problems of substandard shipping prevail today. It would also improve regional cooperation at different levels bring new opportunities and possibilities for the local populations.

A multilateral coordination structure would bring all the relevant players together, including particularly the international financial institutions, and to work towards a commonly determined set of measures. This would make it easier for the neighbouring countries to access financing also in the form of public-private-partnerships.

The drawbacks of this policy option are actually a consequence of its strengths. An international agreement typically needs to be ratified by national parliaments, which could prove out to be politically difficult, even impossible in some of the neighbouring countries. Even if successful; this option is also likely to be a lengthy process and if no interim solutions are sought could lead to a standstill in developing transnational axes.

6. COMPARING THE OPTIONS

The impacts of the do-minimum scenario and the loose cooperation structure scenario are quite similar as they are both based on MoUs. The development of the axes would continue to be based on national logic neglecting the needs of international movements along the whole axis and setting up master plans for the axes would not be likely.

In comparison, the strong cooperation structure scenario would set up a structure (framework agreement), which would allow for a coordination of the implementation of the actions along the transport axes. This structure would allow on the one hand the horizontal measures to be addressed globally, taking into account the need to ensure harmonised rules and interoperable systems across all countries, and on the other hand to build on strong regional implementation which would be needed for the infrastructure projects along the axes. Secretariats would be established as part of the agreement, which would make it possible to monitor the implementation of the measures in a sustainable and coordinated way.

However, there are some issues that need to be taken into consideration given the political situation in some of the neighbouring countries. As mentioned above (ch. 5.2.3), it could be difficult to sign an agreement with all the countries concerned and on all the proposed measures and possibly also the ratification procedures might be rather lengthy in some of the countries.

7. MONITORING AND EVALUATION

A regular update and revision of the main axes and their further development is considered necessary. Such a revision could take place in 2010 and regularly, e.g. every five years, thereafter. This process could also consider the extension of the main axes to countries currently not covered by them.

Further analysis of project proposals is necessary before master plans for the development and completion of the axes can be elaborated and agreed upon. This work is currently well underway in the Western Balkans and is progressing in Turkey and the Mediterranean regions under the regional cooperation structures. In cooperation with Russia, a pilot study is being launched to analyse bottlenecks related *i.a.* to infrastructure and border crossing procedures as well as to environmentally sensitive zones and biodiversity along the Northern axis. One of the outcomes of the development of such master plans would be to agree on performance indicators. These could be related e.g. to border crossing times, average speed along the axes, modal shares etc.

It should also be stressed that the regional master plans should be subject to strategic economic, social and environmental impact assessment in line with best international practice and when relevant with EU legislation.

8. ANNEX 1: THE TRANSNATIONAL AXES PROPOSED BY THE HIGH LEVEL GROUP

Motorways of the Seas

- Extension of the motorway of the Baltic Sea towards Russia including Kaliningrad
- Extension of the motorway of the sea of western Europe towards Norway in the north and towards Morocco in the south
- Extension of the motorways of the Mediterranean Sea towards North Africa and Middle East, including the Red Sea
- Extension of the motorways of the Mediterranean Sea to the Black Sea

Northern axis

- Multimodal connection Berlin – Warsaw – Minsk – Moscow – trans-Siberian

- Multimodal connection Finnish border – St Petersburg – Moscow
- Rail freight connection St Petersburg – Vologda – Moscow/trans-Siberian
- Multimodal connections from Baltic ports to Minsk/Moscow:
 - Tallinn – St Petersburg – Moscow
 - Ventspils – Riga – Moscow
 - Klaipeda/Kaliningrad – Vilnius – Minsk – Moscow
- Multimodal connection in Norway of the TEN priority axis n° 12 (Nordic Triangle)
- Multimodal connection St Petersburg – Vartius – Tornio – Haparanda – Narvik

Central axis

- Multimodal connection Dresden – Katowice – Lviv – Kiev
- Multimodal connection Budapest – Lviv
- Multimodal connection Moscow – Kiev – Odessa
- Inland waterways Belarus – Kiev – Odessa (Dneper)
- Inland waterways Don/Volga linking the Caspian Sea – Black Sea and a connection from Volga to the Baltic Sea
- Multimodal connection Minsk – Kiev
- Multimodal connection Kiev – Kharkiv – trans-Siberian

South Eastern Axis

- Multimodal connection Salzburg – Ljubljana – Zagreb/Budapest – Belgrade – Nis, including the following connections:
 - Sofia – Istanbul – Ankara – Georgia/Armenia – Azerbaijan (Traceca)
 - Skopje – Thessaloniki
- Multimodal connection Budapest – Sarajevo – Ploce
- Multimodal connections Bari/Brindisi – Durres/Vlora – Tirana – Skopje – Sofia – Burgas/Varna
- Inland waterways Danube¹¹ and Sava
- Multimodal connection Ankara – Mersin – Syria – Jordan – Suez – Alexandria/East Port Said, including the following connections:
 - Sivas – Malatya – Mersin
 - Tartus – Homs
 - Beirut – Damascus
 - Haifa – Israel border
 - Jordan border – Amman
- Multimodal connections Damietta – Cairo including the Nile river

South Western Axis

- Multimodal connection Algeciras – Rabat – towards Agadir
- Multimodal connection Rabat – Fes – Oudja – Constantine – Al Jazair – Tunis – Libyan border (the “trans-Maghreb”) including also the connection Tunisia – Egypt
- Extension of the TEN-T priority axis n° 24 through Switzerland

¹¹The exact alignment of the Danube to the Black Sea requires further analysis.