



European  
Commission



**Evaluation of EU support  
to the transport sector in  
Africa 2005-2013  
Final Report  
Volume 4A  
Synthesis country case studies  
June 2016**

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*Evaluation carried out on behalf of  
the European Commission*

International Cooperation  
and Development  
EuropeAid





Consortium composed of  
ECDPM, Ecorys, Lattanzio, Mokoro and Particip  
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**Framework Contract Lot 1: Multi-country evaluation studies of economic sectors/themes of EC  
external cooperation**

**Specific Contract N°2013/330827**

**This evaluation was commissioned by the Evaluation Unit  
of the Directorate General for International Cooperation and  
Development – EuropeAid (European Commission)**

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***The opinions expressed in this document represent the authors' points of view, which are not necessarily shared by the European Commission or the authorities of the countries involved.***

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# Annex 4A: Synthesis of the country case studies of the evaluation of EU support to the transport sector in Africa 2005-2013

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## Glossary of acronyms

ACP	Africa, Caribbean and the Pacific
AFD	Agence française de Développement
AfDB	African Development Bank
AMU	Arab Maghreb Union
ANE	Administração Nacional de Estradas (Mozambique)
ARM	Autorité Routière de Madagascar
ASECNA	Agence pour la Sécurité de la Navigation Aérienne en Afrique et à Madagascar.
BOAD	Banque ouest africaine de développement
CAM	Cameroon
CAR	Central African Republic
CEMAC	Economic and Monetary Community of Central Africa
CFM	Caminhos de Ferro Moçambique
DRC	Democratic Republic of Congo
DY	Benin
EAU	Uganda
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EDF	European Development Fund
EEAS	European External Action Service
EIB	European Investment Bank
EIRR	Economic internal rate of return
EQ	Evaluation question
ERA	Ethiopian Road Authority
ESIA	Economic and Social Impact Assessment
ETH	Ethiopia
EU	European Union
EUD	EU Delegation
FE	Fundo Estradas (Mozambique)
FED	Fonds européen de Développement
FER	Fonds d'Entretien Routier
FERA	Fonds d'Entretien Routier Autonome
GDP	Gross domestic product
GoE	Government of Ethiopia
HQ	Headquarters
JICA	Japanese International Cooperation Agency
LAM	Linhas aéreas de Mozambique
LRRD	Linking relief, rehabilitation and development
MA	Morocco
MDG	Millennium Development Goal
MIT	Ministry of Infrastructure and Transport
MOC	Mozambique
MPW	Ministry of Public Works
NAO	National Authorising Officer
NIP	National indicative programme
OdR	Office des Routes
PARPA	Poverty reduction action plan of Mozambique
PFM	Public finance management
PPP	Public private partnerships
PRISE	Programa Integrado do Sector de Estradas (Mozambique)
RM	Madagascar
RN	Route nationale
RSA	Republic of South Africa
RSS	Road sector strategy

RIM	Islamic Republic of Mauritania
RIP	Regional indicative programme
RSDP	Road sector development programme
RSS	Road Sector Strategy
SBS	Sector budget support
SME	Small and medium sized enterprises
SN	Senegal
SWAp	Sector wide approaches
TA	Technical Assistance
UNRA	Uganda National Roads Authority
URF	Uganda Road Fund
WB	World Bank
ZRE	Democratic Republic of Congo

## 1 Introduction

Ten country case studies have been carried out, each of them undertaken by one of the core members of the evaluation team supported by a local consultant. Each country visit lasted 9 to 10 days. Meetings were held with relevant sector institutions, stakeholders, beneficiaries and other sector donors and funding agencies while briefing and de-briefing meetings with the EU Delegations took place at the beginning and the end of each country visit. Furthermore site visits have been carried out, as far as time and distance allowed within the restricted timeframe of these missions.

An overview of the visited countries and the experts involved is presented in table 1.1.

**Table 1.1. Overview of country case studies**

Country	Core team member	Local consultant	Mission period
Morocco	Basile Keita	Abdeljalil Derj	23 - 31 March 2015
Uganda	Klaus Broersma	Michael Daka	16 - 25 March 2015
Mauretania	Basile Keita	Abdellahi Abdel Jelil	03 - 12 April 2015
Benin	Max Hennion	Placide Badji	06 – 14 April 2015
Senegal	Max Hennion	Joseph Michel Cissé	14 – 24 April 2015
Mozambique	John Clifton	Nkululeka Leta	13 – 23 April 2015
Cameroon	Basile Keita	Henri Gwet	27 April -05 May 2015
Ethiopia	Klaus Broersma	Amara Asefa	05 - 14 May 2015
Madagascar	Max Hennion	Joana Andrianantenaina	16-26 May 2015
DRC	Max Hennion	Jean Paul Libebele	27 May- 06 June 2015

The main findings and conclusions of the ten country case studies are summarised in this Synthesis Note. The main texts of the ten country case study reports as well as the methodology used for selecting the ten case study countries are presented in Volume 3B of this transport sector evaluation.



## 2 Synthesis of the country case study reports

### 2.1 Data collection

Preparation for each field visit included compilation of:

- introductory notes.
- 'Approach and Methodological Tools for the Field Phase' (including a *checklist* of preliminary observations, 'gaps' and hypotheses.
- list of financing decisions (upon which an initial selection of interventions for further investigation was based<sup>1</sup>).
- set of EUD responses to a web-based questionnaire previously circulated.

It was not intended to evaluate individual interventions but rather consider EU policy, strategy for sector support, implementation issues and modalities, outcomes, impacts and constraints. Investigation of individual projects or other interventions was intended to illustrate wider findings and lessons learned. Documentation was sourced for many support interventions and this was scrutinised before the field visit and discussed with EUD during the course of the visit. Some additional documentation only available in EUD archives was also accessed.

The in-country period was used for:

- meetings with representatives of EUD, partner government, NAO, other sector donors and independent experts;
- collecting perceptions of stakeholders and individuals to assess the credibility of (claimed) associations between different elements of the intervention logic in order to compare components of a theory of change, contribution analysis being an aspect of this evaluation;
- site visits to on-going and completed EU sector support construction projects as far as logistically possible;
- exploring and discussing alternative explanations of why observed changes in selected indicators (especially outcome and impact indicators) might (or might not) have occurred;
- drawing upon the experience and detailed knowledge of key informants from the partner country in order to reflect upon and validate (or refute) evaluation hypotheses;
- investigating experiences and performance of Sector Budget Support (SBS) and blending of financing instruments.

Wherever possible triangulation and cross-checking of data and information has been carried out.

### 2.2 Main characteristics of the transport sector in the case study countries

#### **Ethiopia**

Ethiopia is landlocked and predominantly served by Djibouti port (98% of national maritime traffic), Port Sudan (Sudan) and Berbera (Somaliland) with imports exceeding exports by a factor of 5.5 such that a high percentage of haulage trucks travels empty in the direction of the port.

**Roads** are by far the predominant transport mode with the federal road network having expanded by almost 70% over the past 17 years whilst the length of the regional network has tripled over the same period. Road network condition compares favourably

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<sup>1</sup> This list was modified in consultation with the EUD.

with many African countries – 74% of paved roads, 58% of gravel roads and 55% of rural roads reported to be in good condition.

The narrow gauge **rail line** connecting Addis Ababa to Djibouti (780km) was the principle transport corridor. However, in recent years only 300km of the line was operational (from Djibouti to Dire Dawa). Despite considerable legal, contractual and technical preparatory work by EUD and EU HQ the overall outcome of EU involvement in a proposed refurbishment of the line was disastrous. A new standard gauge line is now being constructed (and will be operated) by a Chinese consortium. A further 7 national rail corridors have been identified (totalling 4750 km) of which 1400 km are under construction.

**Water transport** is of little importance and being confined to Lake Tana. Air transport is more important. Ethiopia has 15 **airports** (managed by the parastatal Ethiopian Airports), 4 of which are of international standard. Ethiopian Airlines is the national carrier.

The **Ministry of Transport**, responsible for all transport modes, is composed of five main directorates (policy formulation & monitoring, strategic management, project and programme coordination, transport logistics, and sectoral capacity building) and has eleven transport sector institutions under its supervision.

Ever since 1997, but even more vigorously since 2007 (during the third Road Sector Development Programme, RSDP-III), the GoE has identified the transport sector as a priority, allocating a lion's share of the National Budget to it (more than 20% of actual expenditures), equal to around 4% of GDP. While the focus was primarily on the road sub-sector, throughout the three successive RSDP phases, the GoE's first Growth and Transformation Plan (2010-2015) identified the rail sub-sector as a second focal transport sub-sector (for which massive financial support would be received from the Chinese government and Chinese banks).

The **Ethiopian Roads Authority** is the autonomous agency responsible for:

- initiating policies and legislation on roads;
- undertaking feasibility studies, designs, construction and maintenance of highways;
- enforcing vehicle (axle) weight and size control regulations.

**Sector problems** include:

- the salary gap between the private sector and the civil service, which causes a high staff turn-over in the public administration and loss of quality staff;
- lack of leadership in the (road) construction industry and insufficient, equipment modernization and skills development at the level of local contractors;
- rapid expansion of the federal network (paved roads) and rural roads has dramatically exceeded resources available for adequate road maintenance;
- road safety is a growing concern (with more than 3,000 fatalities annually).

As regards **EU support**, transport was a focal sector in the National Indicative Programmes (NIPs) of both EDF-9 and EDF- 10, with allocations of €211 million and €220 million respectively. Whereas the support was initially designed as largely project oriented, early in the EDF-9 cycle the switch was made to Sector Budget Support, which was continued under EDF-10 (and will be continued under EDF-11).

The major EU interventions under EDF-9 were (i) the rehabilitation of two existing, but degraded roads, that were part of the second Road Sector Development Programme (RSDP-II; Harrar - Jijiga, 102 km and Mieso - Dire Dawa, 155 km), (ii) the provision of training, technical assistance and surveys destined to strengthen the capacity of the Ethiopian Road Authority (ERA) in managing the RSDP, and (iii) providing support to

the implementation of some transport policies (on road safety and axle load control, formulated by earlier EU-funded studies). The major EU interventions under EDF-10 were (i) to provide continued support to the country's RSDP and (ii) to supplement regional projects (Addis-Djibouti corridor).

### Uganda

Uganda is a representative land-locked country in Anglophone East Africa, with transit transport functions for other (even more) land-locked countries. It has also been considered 'fragile' (by the EU) in the sense that part of the country suffered from border-related conflicts or instability.

The **road network** is the backbone of the transport system in the country with road transport accounting for more than 90% of all passenger and cargo traffic (but there is no reliable data on the actual number of vehicles). Vehicle licensing has been abandoned and may not so easily be re-introduced, but technical vehicle inspection will be re-instated. The (classified) road network comprises 64,770 km (5,499 km paved), with an additional 42,250 km of Community Access Roads. Only 51% of the paved roads and 22% of the unpaved roads are reported to be in good condition. Over the past 4 years between 25% and 63% of national road maintenance needs<sup>2</sup> were believed to have been met whilst the situation for unpaved district roads is an even a greater challenge with about 50% reported to be in poor condition in mid-2014. Over the last 10 years, (road) construction prices have increased well above the rate of general inflation, which had implications for the quantity of road works and maintenance that could be undertaken on a fixed budget. This situation is aggravated by overloading – reported at 55%<sup>3</sup> of vehicles weighed whilst a reported 2,937 fatal road accident victims in 2013/14<sup>4</sup> represented a fatality rate of about 30 per 10,000 vehicles, one of the highest in Sub-Saharan Africa.

Until the early 1990's the **railway network** extended for 1,266 km (metre gauge), but currently there is about 320 km of functioning track between Malaba-Kampala (250 km), Kampala-Port Bell (10 km), and Tororo-Mbale (60 km), operated by RVR since 2006 under a 25 year concession. The Government plans to construct a standard gauge rail track between Malaba-Kampala and also in the direction of Gulu. When oil exploitation comes on stream in the Lake Albert area, it seems important to keep the existing track passable up to Gulu at least, for transport of the heavy oil industry equipment by rail instead of carrying this over the vulnerable roads. A strategy has been recommended to maintain and optimally use 650 km (including Tororo-Mbale-Gulu) of the meter gauge railway in the transition period to the new standard gauge track, with a focus on inter-modal facilities at strategic locations.

Presently, a single rail wagon ferry vessel is operating a much reduced **lake transport service** between Port Bell and Mwanza (Tanzania), whilst one Government owned and two private vessels offer passenger transport services on Lake Victoria. On the inland waterways (some 18% of the country's surface is covered by water) numerous small crafts (the "informal sector") are operating, often well below reasonable safety standards.

Entebbe International Airport dominates **air transport**, while five other airports are considered for a potential gateway function and 13 airfields can receive charter flights. International passenger traffic has almost doubled over the last 5 years; domestic passenger transport has been in longterm decline, but started to grow again since 2012 due to increased tourism.

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<sup>2</sup> ie these are major roads under the responsibility of UNRA (20,543 km of which 3,565 km are paved); an average budget of <50% of maintenance needs has been made available during this period

<sup>3</sup> 'Policy' target was reduction to 40% overloading

<sup>4</sup> In the period 2004-2006, annual number of deaths were in the range 2,032-2,171 (in terms of fatality rate even higher than today)

The Ministry of Works and Transport is the lead agency in the transport sector - an institutional reform process was commenced early in the millennium and is still ongoing. UNRA (Uganda National Roads Authority) became operational in July 2008, mandated to develop and maintain national roads (incl. ferries linking the network across waterways), and enforce axle load control. The Uganda Road Fund (URF) started to operate in January 2010, with a mandate to collect road user charges and manage the funds so collected to finance the road maintenance programmes prepared by the Designated Agencies (such as UNRA). URF remains handicapped in this function by conflicting legislation (URA & URF Acts) awaiting rectification for some time already.~

**Sector issues** include:

- road maintenance must become more prominent (Road Fund, budget allocation, planning/programming/supervision/monitoring);
- institutional reform remains to be completed (road industry oversight, metropolitan [public] transport, urban & rural roads management, road safety).
- national road industry development is crucial (contractor registration/ certification, unified procurement manual, independent parallel bid evaluation, etc.);
- Identification of multi-/inter-modal transport development possibilities;
- urbanization (secondary cities along National Corridors) and urban transport management;
- response to the growing influence of civil society (Safe Way Right Way, Uganda Contracts Monitoring Coalition, Roads Users Satisfaction Surveys)<sup>5</sup>.

Given the dominance of road transport, there has been very little **EU support** for transport modes other than the road sub-sector, whilst SBS was considered but did not materialize. Major EU support has included three typical project groups, notably:

- Five Northern Corridor Road Infrastructure Investment projects (EU contribution approximately. € 350 million plus an additional € 410 million from EDF-8 before 2005; in addition 34.5 km Kagamba-Rukungiri at M€ 17 towards DRC);
- Two feeder/rural roads for rural/agricultural development (EU contribution approximately € 24 million);
- Two Capacity Development projects for the Road Sector (EU contribution approximately € 11 million).

Recently, 'blending' of financial instruments has been introduced as a new financing modality, in an attempt to attract more private sector funding for (regional) transport solutions. The EUD succeeded in keeping Transport as a focal sector under the 11<sup>th</sup> EDF, as is the case in neighbouring country Kenya.

### **Mozambique**

Mozambique has a strategic regional role as transport corridors across the country connect a number of landlocked countries (Zambia, Zimbabwe, Malawi, and DRC) to Indian Ocean ports in Mozambique. As such, Mozambique is a representative 'transport corridor' country in Southern Africa. Mozambique is also representative of other selection parameters (Sector Budget Support, blending of financing instruments, support to transport sub-sectors other than roads) and is the only Lusophone country case study. It has now been more than two decades since the peace accord ended the civil war and the intervening period has been largely concerned with rebuilding shattered infrastructure, including the transport sector. The country is no longer classed as 'fragile' although there have been periodic hostilities

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<sup>5</sup> Government and sector institutions are not familiar with such involvement of CSOs

**Road transport** is the main means of transport in Mozambique representing >80% of all movement of passengers and freight. Road density is only 29 km per 1000 square km and 1.28 km per 1000 inhabitants<sup>6</sup> and 39% of the rural population live within 2 km of an all-weather road. The classified road network comprises 30,464 km of road (7,344 km surfaced and 23,120 un-surfaced) of which 64% is considered to be in good or reasonable condition. In addition there is a network of unclassified roads, mostly rural roads in very bad condition. The length is not known but estimated to be >20,000 km.

**Railways** connect the major ports to neighbouring countries and to strategic coal mining developments in Tete province (i) Maputo – Swaziland (Goba line); Maputo – RSA (Ressano Garcia line); Maputo – Zimbabwe (Limpopo line); ii) Beira – Zimbabwe (Machipanda line); Beira – Tete & Malawi (Sena line); iii) Nacala – Malawi (Nacala line). All lines are being/have been upgraded and a new connection linking Tete to the Nacala line providing access to Malawi is under construction. All lines have been concessioned to the private sector by CFM (Caminhos de Ferro Moçambique).

With a coastline of some 2700 km, Mozambique has 3 major Indian Ocean ports (Maputo, Beira and Nacala with 13 other less important ports. The management of major **ports** have been concessioned to the private sector by CFM.

Of a total of 19 **airports**, 7 are classed as principal – Maputo, Beira, Nampula, Tete, Lichinga, Pemba and Quelimane. The domestic air transport sector has been liberalised although scheduled domestic and international flights are handled by LAM (Linhas aérias de Mozambique). LAM plus a number of bilateral air service agreements. Rehabilitation and upgrading of airport facilities have taken place at most airports in recent years.

Some features of the main **transport sector institutions**:

- The Ministry of Public Works and Housing (Ministerio de Obras Publicas e Habitação) is responsible for roads, the ANE (Administração Nacional de Estradas) and the FE (Fundo Estradas), but has little or no capacity for establishment or management of sub-sector policy.
- The Ministry of Transport and Communications (Ministerio de Transportes e Comunicação) is responsible for all other transport modes. Although this Ministry published in 2014 the ‘Strategy for the Integrated Development of the Transport System’, the document is a light-weight document.
- FE is the funding agency for the roads sub-sector; the 1<sup>st</sup> generation Road Fund.
- ANE is the implementing agency for the roads sub-sector. It is characterised by centralised decision making, despite establishment of provincial delegations.
- There are only two Concessionaires – TRAC (EN4) and ‘Estradas do Zambeze’- in the road sub-sector (despite various unsuccessful attempts to set up financial blending arrangements for other concessions).
- The National Institute of Land Transport (Instituto Nacional de Transportes Terrestres) has recently been created as regulator (but without key powers on tariff setting or regulations for public-private sector partnerships) and is responsible for road safety and axle load control. It is highly politicised.

Mozambique has not yet explicitly established an integrated **transport strategy** and master plan that could guide decision making and optimise management of the whole set of modes of transport and related infrastructure including rural and urban specific approaches. Therefore uncertainty on priority of investments remains. However the road sub-sector has a Road Sector Strategy (RSS 2007–2011; extended de facto up to 2014) that explicitly links optimization of investments in the classified road network to

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<sup>6</sup> Compared with 88km/1000 sq. km average low income countries; 8.44 km/1000 persons in RSA.

poverty reduction objectives of the PARPA (poverty reduction action plan) and the Millennium Development Goals (MDGs). RSS is implemented and monitored through PRISE (Programa Integrado do Sector de Estradas) which is a detailed multi-annual forward rolling program for the implementation of road works and sector support activities. The PRISE budget approached €400 million for 2012 (8.7 % of the total national budget) and tripled up to €1200 million for 2013 (31 % of the total national budget). However, funding actually made available and disbursed is much less.

Many of the **problems** from 2005 remain valid in 2013, including:

- following the catastrophic 2000 flooding in the Limpopo valley, further flooding in 2012, 2013 and 2015 suggest a need for climate change resilience of at least major structures;
- multi-modal transport linkages remain largely unexplored;
- transport master planning remains partial with large projects being negotiated on a non-transparent bi-lateral basis outside agreed sector programmes;
- limited integration of national and regional transport networks, governance issues and 'non-physical barriers' to transport of people and goods remain.
- ANE continues to suffer from management and communication weaknesses; network planning and road management systems are weak and maintenance remains deficient;
- periodic maintenance is seriously deficient and whole life costing will inevitably increase whilst expected service levels and design life will not be achieved;
- capacity deficits remain and professionalisation of the sector is necessary;
- national small and medium sized enterprises active in the transport sector remain weak;
- unit costs in construction contracts have led to hugely increased costs;
- road safety is a serious issue.

Transport has been one of the focal sectors of the **EU support** to Mozambique for successive EDF cycles up to the 10th EDF. That's however no longer the case under the 11th EDF, which concentrates on General Budget Support and Rural Development (albeit that a major component of this support is proposed to comprise rural roads). Under EDF 9 and 10 in total 15 projects (including rehabilitation/upgrading of national roads, SBS, institutional strengthening and capacity building, rehabilitation of railway facilities, emergency response and support to SMEs) have been financed with a total allocated amount of € 329 million, while the total contracted amount was € 230 million and the total paid amount € 190 million (up to June 2014).

### **Madagascar**

Madagascar is one of the few African examples of a transport sector functioning in an island economy (the contribution of transport activities to the GDP is estimated to be 17%) with limited regional integration prospects and with strong links between rural poverty alleviation and accessibility. The country is considered (by the EU) to be fragile and EU cooperation was on hold from 2009 to 2014 in response to a long political transition period.

Out of the total **road network** of 32,000 km, only 13% is paved. The road density is low: 9.7 km per thousands of square km, compared to the SSA average of 31 km/km<sup>2</sup>. About 52% of the trunk road network (routes nationales primaires) is in good condition, 36% in fair condition and 12% in poor (to very poor) condition. During 2002-2012, the Government concentrated its meagre resources for road maintenance on maintaining the trunk roads, while donors financed upgrading of trunk roads. Consequently, the rest of the network is in very poor condition. A Road Fund (Fonds d'entretien routier - FER) was established in 2002, resourced by a fuel levy and limited allocations from the general government budget. 90% of the maintenance needs of the national roads

network were reportedly covered in 2009 when the Government established a fixed price for fuel, until then liberalized. Thereafter, fuel levy revenues collapsed and in 2014, the FER revenues were as low as €5 million.

Madagascar has two unconnected **railway lines**: one between Antananarivo and Tamatave port (732 km), and the other between Fianarantsoa and the East Coast (163 km). Each line is managed separately, the northern line by Madarail, a South African concessionaire that was initially supported by the EIB and the EU, and the Fianarantsoa – Côte Est (FCE), a publicly-owned company, for the southern line. Freight volumes are declining and the lack of maintenance and further investments in rehabilitation, after EIB support of €150m in the early 2000s, is threatening the viability of the undertaking. The southern line has mostly a social and touristic function, with no more than 75,000 passengers a year and 8,000 tons of freight.

The island has 8 international **airports**, far more than needed for international arrivals which are mainly at Antananarivo (Ivato) which is the only airport meeting international standards. There are more than 50 other airports and air strips.

In 2004, a **Road Agency** was established (Autorité Routière de Madagascar, ARM), which became really operational in 2006 with EU technical assistance. ARM was to manage the entire trunk roads network (routes nationales), including upgrading and maintenance to be carried out under contract management using funds from the Road Fund). However, at present the **Ministry of Public Works (MPW)** has delegated to ARM only 46% of the trunk road network. Donors (including the EU) blocked upgrading projects due to political instability and the Road Fund revenues did not allow much more than sporadic emergency works. ARM is almost idle since its establishment, whilst salaries were paid by the EU and now by the World Bank.

MPW capacity is limited at both central and decentralised levels. Budget allocations during the transition period and even before did not allow maintenance works to any significant extent, inducing a massive loss of practical know-how at the level of the MPW . Most MPW works since 2009 were under an emergency status, outside conventional procurement rules.

**EU support** under the NIP 2002-2007 (EDF-9) comprised the transport sector as one of the two focal sectors with two geographical areas of concentration, the Centre-South (Fianarantsoa region) and the South-West (Tulear region). EU interventions were based on a sector policy promoting trunk road network modernization and the operationalisation of the Road Fund (Fonds d'entretien routier – FER). Out of the A-envelope of EDF-9 totalling €265 million, 49% (€ 130 million) was allocated to the transport sector<sup>7</sup>. The two most important projects were the rehabilitation of RN6 in the North-East (FED/2003/016-316) and unlocking the Southern part of the island (FED/2004/016-589).

EDF-10 (2008-2013) never came into being because the EU aid programme in Madagascar was suspended due to political instability (application of article 96 of the Cotonou Agreement). In the Country Strategy Paper (2008-2013) the EU took stock of significant improvements in implementing the reform agenda under EDF-9. Furthermore the need for sector fiscal reform was emphasised in order to find adequate financial resources for the Road Fund. However, the NIP was never issued because of the above mentioned aid suspension. EU interventions in the transport sector under EDF-10 were limited to post-cyclonic repairs and studies funded by the Technical Cooperation Facility.

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<sup>7</sup> In comparison, “rural development and food security” was allocated €60m. Envelope B = €60m.

The only EDF-8 project still being active in 2005 (start of the evaluation period) was dedicated to rail transport, with €11 million transferred to the IEB in support of a rail concession (to Madarail, a South-African company). Even taking into account this particular project, 94% of the EU interventions during the period under review (2005-2013) was focused on the road sub-sector and 5% on the railway sector. Sector policy and management support (mainly technical assistance to the road agency – Autorité Routière de Madagascar) accounted for only 1% of the EDF expenditures in the transport sector in that period.

With the resumption of EU and other donor support in 2014, EDF-11 programming is now on-going. Road sector has been kept as a focal sector with a significant financial allocation, because of the state of disrepair of most national roads, and particularly those in the concentration areas foreseen for EDF-11 (the North around Diego, the Centre around Antananarivo and the South around Tolagnara). EU does not yet see the value of carrying out a roads sector review in order to set up a comprehensive strategy for the roads sector and to optimise the window of opportunity that EDF-11 can provide for setting up a sustainable road management system. The issue of financing future maintenance by the FER of roads to be upgraded under EDF11 is not yet settled.

### **DRC**

DRC is a central African country considered (by the EU) as fragile as the country is at the state rebuilding phase, 10 years after an armed conflict with significant national integration issues. DRC is also unusual due to dependence upon river transport caused by limited coverage of the national roads network. As regards regional integration, the DRC is the 'missing link' for three major continental corridors.

DRC has fewer all-weather paved **highways** than any country of its population and size in Africa — a total of 2,250 km (of which only 1,226 km is in good condition)<sup>8</sup>, which is equal to 35 km of paved road per 1,000,000 of population (comparative figures for Zambia and Botswana are 721 km and 3,427 km respectively). The two principal highways are:

- National Road No. 1 connecting the Atlantic seaports with Kinshasa and southeast Katanga, the most important economic area of the country due to its copper and other mines.
- National Road No. 2, Kisangani-Bukavu–Goma, connecting the principal waterway systems of the country, namely Kinshasa-Kisangani on the Congo River and the Lake Kivu and Lake Tanganyika systems on the eastern edge of the country.

DRC has more **navigable rivers** and moves more passengers and goods by boat and ferry than any other country in Africa. The total length of waterways is estimated at 15,000 km including the Congo River, tributaries and unconnected lakes. However, much of the infrastructure — vessels and port handling facilities — has, like the railways, suffered from poor maintenance and internal conflict. The 1000-kilometre Kinshasa-Kisangani route on the Congo River is operated by river tugs pushing several barges lashed together. ,

The DRC has 5,033 km of **railway lines** made up of 4 un-connected networks (but are generally connected by river transport), which do not have the same gauge. Only 858 km are electrified (in Southern Katanga, associated to copper mining). The infrastructure is increasingly dilapidated by lack of maintenance; locomotives and other rolling stock are in an appalling state of decay. Rail sub-sector reform is supported by the WB Multimodal transport project, with limited results.

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<sup>8</sup> To put this in perspective, the road distance across the country in any direction is more than 2,500 km (e.g. Matadi to Lubumbushi, 2,700 km by road).



DRC has 24 **airports** with a paved runway and 205 unpaved strips. All national airlines are blacklisted by the EU, including the largest operating regular services between Kinshasa and a dozen domestic destinations.

The **Ministries of Infrastructure and Transport** have responsibility for transport services and infrastructure, the **Office des Routes** being responsible for road network management.

There are many **sector issues**. At the start of the evaluation period the road and waterways network was disappearing almost everywhere due to lack of maintenance and rehabilitation, because of insufficient funding of the increasingly inefficient and costly Force Account Units of the Office des Routes. Many regions were isolated, threatening further the fragile DRC national integration. Faced with this situation, the EU strategy focused on road rehabilitation and selecting support interventions according to emergencies: transporting food to the capital and pacifying the eastern regions. The rationale did not change for more than a decade up to EDF11. EU interventions in the transport/road sector in the DRC are atypical in several ways demonstrating (i) flexibility in utilising EDF resources in order to adjust to instable environments and (ii) a capacity of the EUD and EU procedures to adapt to post-conflict situations where the rule of law is limited.

In the **post-conflict** and re-building periods, EU interventions in the transport sector were geared towards urgency matters related to national integration, thus targeting re-opening of critical sections of the national roads network and connecting Kinshasa to its hinterland. Thus, in line with the “linking relief, rehabilitation and development (LRRD) approach, the EU successfully adjusted to the relief challenge, though at high cost with limited and unsustainable results – but with high impact - , while adjusting the relief project approach under central EU-HQ management to decentralised EUD management. The last step of the LRRD link, namely the change from rehabilitation activities to development cooperation, has not yet been achieved. Being fully focused on road re-opening and upgrading, the EU did not yet get involved in reforming the road management systems, which are plagued by inefficiencies related to the reliance of the Office des Routes on dilapidated Force Account Units and regional bureaus. The scope for policy dialogue is limited by the lack of interest on the side of the Government, which has also not demonstrated much openness to lessons learnt from other countries. On the EUD side, the uneasiness in conducting a policy dialogue and the outstanding work overload contributed to an isolated approach focused solely on managing projects.

As regards **EU sector support**, the NIP 2003-2007 (EDF-9) with a budget of €171 million focused on three areas: health in a LRRD perspective; institutional support and capacity development for the transition towards democracy; and macroeconomic support. The transport sector was not mentioned specifically, although later on an EDF9 addendum allocated between €80-100 million to transport infrastructure. The NIP 2008-2013 of EDF-10 allocated 50% of envelope A to the transport sector, mainly to the road subsector with the rehabilitation of a section of the RN1 and the continued support to gravelled roads reopening and maintenance. Support to some Office des Routes (OdR) Force Account Units was considered as a contribution to operationalise the recently established Road Fund. Finally, a contribution was targeted on waterways along the Congo River and its tributaries, as well as ferries on Lake Kivu in the East. Actual EU support to the transport sector in the DRC was €128.5 million under EDF9 and €113.7 million under EDF10, thus a total of €242 million. EU did not provide technical assistance or fund studies aimed at improving transport sector policies and sector management nor did the EUD participate in sector policy dialogues beyond chairing the sector donor coordination group up to 2013 during a period of major deficiencies in transport sector management, in particular as regards maintenance. EU

support under EDF-11 continues with transport as a focal sector and a continuation of previous support strategies.

### Cameroon

Cameroon is located on the Gulf of Guinea bounded to the west by Nigeria, to the east and north by the Central African Republic (CAR) and Chad, and south by Gabon, Congo and Equatorial Guinea. This geographical positioning makes Cameroon a transit country and a "facilitator" of sub-regional trade in Central Africa such that regional integration has been identified by Cameroon as a matter of strategic importance for its development. The port of Douala serves as an ocean port for landlocked neighbouring countries (Chad and CAR). Cameroon's transport development policies are linked to those of the two regional organizations, namely the Economic and Monetary Community of Central Africa (CEMAC) and the Economic Community of Central African States (ECCAS). Cameroon continues to benefit from relatively stability despite a regional background of political and security crisis.

The total length of the **road network** has doubled between 2006 and 2013 (from ~50,000km to 100,713km including 5,701 km of paved roads and 95,012 km unpaved roads and unclassified rural roads. Main roads carry an important flow of goods to and from the landlocked countries of Chad and the CAR. The road network is inadequately maintained. The state of the priority road network, which is the focus of most maintenance efforts, has experienced a sharp deterioration in recent years (54% is now in poor condition). Currently 38% of the national roads (4,061 km paved and 3,045km unpaved) are in good condition.

The Government established a Road Fund in 1997 with the support of the EU and other donors to ensure a steady supply of capital for maintenance of roads. This Road Fund worked well and was considered a benchmark for financing road maintenance providing funding for routine and periodic maintenance of the priority road network and road safety. However, since 2011, the Road Fund and the Road Maintenance System are faced with significant problems of organization and operations including i) insufficient resources for road maintenance; ii) gap between the resources mobilized and their use for road maintenance; iii) elimination of direct collection of road user charge by the Road Fund; iv) inadequate management of road maintenance contracts by the Ministry of Public Procurement and v) poor performance of SMEs. Hence the worrying deterioration of the road network.

Efforts have been made by the Government, with the support of the EU, to put in place an effective vehicle weighing system. The load control operations have resulted in a significant decline in the national average rate of overloaded vehicles, which reduced from 89% in May 2007 (start of weighing) to 6.8% in 2013. However, strong overload of petroleum product carriers continues to be recorded on the main roads equipped with weighing stations.

On road safety, the results obtained with the support of the EU, are positive. From 2011 to 2013 a decrease in the number of deaths from 1588 to 1170 has been recorded.

Cameroon has a **rail network** of 1,016 km (metre gauge) consisting of Transcam1 (Douala. – Yaounde: 294 km), Transcam 2 (Yaoundé - N'Gaoundéré: 619 km) and the West line (Douala - Mbanga - Kumba : 103 km) The total capacity of these facilities is estimated at 2.5 million tonnes of goods and 4.2 million passengers per year (primarily between Douala - Yaounde and Yaounde - N'Gaoundéré). Since 1999, rail operations have been run by Camrail (Cameroon Railways Co) Bolloré Group.

Cameroon has a coastline on the Atlantic Ocean of about 250 km. The country has 4 **ports**, three ocean ports (Douala, Kribi and Limbe) and a river port on the Benue River

in Garoua. The port of Douala is the main hub port of the country with 95% of national traffic and 98% of foreign trade in Cameroon. It is the main transit port in the sub-region, particularly for imports and exports to and from landlocked countries (Chad and CAR). Between 2000 and 2013, maritime traffic from the port of Douala has doubled from 5.5 million tonnes to 10.5 million tonnes in 2013.

Cameroon has 15 **airports**, including three international airports (Douala, Yaoundé, Garoua) and two other major airports (Maroua and Ngaoundere). Between 2006 and 2013, 96% of flights used the three international airports, Douala (72 %), Yaoundé (20%) and Garoua (4%).

During the period 2005-2013, the EU transport sector support was concentrated on the road sector. During this period the **EU support** has greatly contributed to the development of the paved roads network with the construction and rehabilitation of 364 km of paved roads (EDF 9 and 10 Transport was a focal sector under EDF-9 (with 50% of the A envelope), including support to the upgrading and safety measures on the Douala – Yaounde road and institutional support to Ministry of Public Works. EDF-10 continued with transport as a focal sector with the same strategy focussing on roads and safety works (Garoua Boulai – Nandéké; Kumba – Mamfé; Douala – Yaounde) and institutional support. EDF-11 abandons transport as a focal sector but support to rural road construction will continue under the rural development focal sector.

**Blending** of financial instruments will be applied for funding the Eastern Access rehabilitation project in Douala (AFD loan of €60 million and an interest rate subsidy of about €5.7 million from the EU-Africa Infrastructure Trust Fund)

**Sector issues** include:

- Efforts in maintenance of the road network are very insufficient, given the rapid expansion of the road network and the pressures of heavy transit traffic. Factors include:
  - capping of the Road Fund resources (estimated at less than 50% of needs);
  - late payment of contractors and consultants (4-6 months instead of the specified 10 days);
- Road Fund's revenues transit through the Treasury (and revenues are not fully remitted in a timely manner to the Road Fund);<sup>9</sup>
- Delays due to the Ministry of Public Procurement. All road maintenance and construction contracts have been transferred to that Ministry, which is struggling to manage procurement. This transfer has the effect of lengthening approval times by 4-5 months.
- Poor SME performance on road maintenance. With the support of the EU under EDF 7, 8 and 9, SMEs in public works have been established and supported but many of these SMEs (about 80%) have disappeared. Heavy vehicles in transit to landlocked countries (Chad and the CAR) should also be subjected to load control.

## Benin

Benin is a west African country with an Atlantic port (Cotonou) as end-terminal of road/rail regional corridors (to Niger and Burkina Faso). Benin is the only Francophone country where the SBS aid modality is being used (though as earmarked sector budget support to finance periodic maintenance through the Road Fund rather than a Sector Policy Support Programme<sup>10</sup>).

<sup>9</sup> It is in this context that the donors (EU, AfDB, WB, AFD, JICA) have taken initiatives to the Government for the establishment of a 2<sup>nd</sup> generation Road Fund.

<sup>10</sup> Programme d'Appui au Secteur des Transports (PAST): FED/2008/020-956 – Volets A & B; FED/2009/021-544 – Volet C

**Road transport** is the main transport modality in Benin. A key characteristic of the transport sector in Benin being two north-south road corridors and one east-west coastal corridor (plus the would-be northern parallel at Kandi) which make up most of the national trunk road network and even of a large part of the urban road axes of the main cities (Cotonou, Porto-Novo and Parakou).

The total road network comprises 6,076 km of classified roads, 1,800 km of urban roads and some 47,000 km of rural roads. Out of the classified roads, 2,211 km are paved and 3,865 are gravelled. The two north-south regional corridors and the coastal corridor are fully paved. 35% of the road network is in good condition, 35% in medium condition and 22% in bad condition; the remaining 8% ranges from bad to very bad. The proportion of the road network in bad condition has been increasing over the last decade. Road maintenance financing is the responsibility of the Road Fund (in existence since early 2000). The Fund was initially expected to cover the full cost of road maintenance but fuel smuggling from neighbouring Nigeria deprived the Fund of part of its revenues. The Road Fund covers an estimated 30% of the maintenance needs, while it was formally rated at 60% (in 2009) and it was as low as 10% in 2012 and 2013. International haulage activities are undertaken by small private operators without any regulatory authority. Prices are not regulated or controlled. Regional corridors are plagued by roadblocks. The 2004 regional agreement on axle-loads limits, penalties and unloading measures was translated into national legislation. Timid attempts of the government to enforce axle-load controls quickly fell short and today overloading is common practice with about 80% of the trucks overloaded.

A north-south **railway** complements the road network up to Parakou (about 475 km). However, the share of railway traffic in land transport has progressively decreased over the last 20 years and disappeared in recent years when the OCBN (Organisation commune Bénin-Niger des Chemins de fer et des Transports) stopped operations. Recently (in 2014) the railway line was given under concession to the Bolloré Group, which has resumed railway operations.

Road network management is the responsibility of the Ministry of Public Works (MPW)). Road construction and maintenance are contracted to the private sector (except emergency works).

**Sector issues** include:

- the Road Fund is not viable because of insufficient revenues from fuel levies and toll rates; the former due to fuel smuggling from Nigeria and the latter due to the difficulty to increase the toll rates - unchanged since the 1980s;
- irrespective of the content of the sector policy documents and of the Road Fund revenue limits, successive governments have been promoting the upgrading and expansion of the road network with the support of the International Financial Institutions. However, resources being made available for adequate maintenance have not kept pace with such expansion such that sustainability is not assured whilst some sector policies have been ignored;
- the MPW has a weak capacity for programming, bidding, contracting and controlling maintenance operations; road data management systems are not operational and are hindered by the lack of annual updates; prioritised programmes are extensively amended at several levels, taking on board non-technical imperatives, mainly under political pressure/patronage;
- construction works are mostly carried out by large international companies; capacity of local SMEs for carrying out maintenance works is low, while they do not have facilitated access to financial services;
- transport regulation is embryonic, haulage is fully left to a jungle-like free market;

- corruption and political patronage is a major issue in road construction and maintenance, the MPW is affected by political nepotism and clientelism causing lack of professional ethics, chronic inefficiencies and delaying practices at all levels.

**EU support** interventions in the road sector since the 60s contributed to upgrading 1,547 km of roads at a cost of about €332 million. During EDF 8, 9 and 10, the EU has funded upgrading of about 100 km of roads per year on average. In addition to trunk road upgrading projects, EU-supported interventions included construction of rural roads (EDF 8 and EDF 10), institutional support to the Ministry of Public Works (MPW) under EDF 9 & 10 and financial contributions to periodic maintenance of the classified network. There were two SBS operations, namely « Appui à l'entretien périodique du réseau classé » and « Programme d'appui au secteur des transport, volet C » covering a total contracted amount of about €61.2 million, which represented about 30% of the total contracted amount for the transport sector. All EU transport projects in Benin have been or are being evaluated.

### Senegal

Senegal is a west African country with an ocean port location (Dakar) as end-terminal of a regional road/rail corridor (to Mali), becoming increasingly important and replacing Abidjan.

About 95% of all transport activities in Senegal is by **road**. The total length of the classified network is 16,355 km (paved roads and gravel roads). The rural network is estimated to be around 30,000 km and is not covered by the national road maintenance strategy. The total length of the paved network increased by 1,000 km during the last decade from 4,554 km in 2004 to 5,697 km in 2014 through upgrading of gravel roads to paved roads. 73% of the paved roads are now in good or fair condition, against 28% ten years ago. The length of the gravel road network amounts now to 10,658 km of which 42% is in good or fair condition.

The vehicle fleet has strongly increased in recent years. The haulage fleet consists of an estimated 37,000 number of trucks, with 85% of the vehicles aged of more than 10 years. The total weight of transit freight to Mali is much higher than the total of domestic freight. Most of the transit freight is now handled by Malian haulers that benefitted some years ago of a fleet renewal initiative from the Government of Mali. Freight volume from Dakar to Mali has increased by almost 100% since 2008 following the concomitant improvement of the Dakar - Kayes – Bamako road (with EU funding for both Senegal and Mali) and the Ivory Coast conflict. Moreover, the increase of Dakar port activities is closely linked with the increase of Malian imports, with only a small contribution of transshipments from Europe to other West African ports.

Senegal has only one **railway line** linking Dakar port with Bamako (Mali) with 400 km in Senegal territory. Rail transport takes a declining share of all transit transport to Mali and eventually Burkina Faso. **Waterways transport** is marginal in Senegal.

The **Ministry of Infrastructure and Transport** (MIT) is in charge of policy, legislation, international agreements, and orientation and control of the agencies. Two departments of the MIT are dealing with roads and freight transport respectively. The period 2005-2013 was a period of major institutional reforms with the creation of the 2<sup>nd</sup> generation road fund FERA (Fonds d'Entretien Routier Autonome) in 2005 and the restructuring of the road agency AATR (Agence Autonome des Travaux Routiers) in 2000, and renamed Ageroute in 2010. Since then Ageroute has been in charge of the modernisation and maintenance of the classified road network. In the framework of decentralisation, the management of the rural road network was delegated to the Local

Authorities. Road maintenance needs were increasingly funded by FERA. Maintenance works are executed by the private sector and supervised by the Directorate of Road Maintenance (Direction de l'Entretien Routier) of Ageroute.

In 2014 an update of maintenance needs was made and the new estimate of financial needs for road maintenance needs amounted to FCFA 70 billion (€ 107 million) per year. In recent years FERA had about FCFA 50 billion per year available, of which 50% originated from fuel levy and the rest from the national budget. Hence, prior to 2014 100% of needs were covered but in 2014 only 71% (in view of the new needs estimate).

During the period under review (2005-2013), the ***national transport policy*** was elaborated in two sector policy letters, prepared with the support of successive World Bank supported sector programmes. That policy was not translated into an investment master plan with periodic updates. Prioritisation of investments was concentrated on regional integration corridors and the main trunk road network.

***EU support*** to interventions in the road sector since the 1960s contributed to the pavement and upgrading of 2,078 km. EDF-9 and 10 financed the upgrading of respectively 380 km and 110 km of roads During EDF-9 and EDF-10, the total amount contracted for transport sector projects amounted to €190 million of which 98.2% for the roads sub-sector; a training programme for ASECNA (African agency for air transport safety) being the only exception, with a budget of €3.5 million.

In the roads sub-sector, EU interventions focused most resources (91%) on developing the trunk road network, in particular the regional corridors to Mali and Casamance, as well as a few links of more local interest (RN4, R20, Passi-Sokone). In addition to trunk road projects, the EU interventions covered also rural roads and urban roads (labour-based projects in Ziguinchor and Dakar; € 5.1 million). In Senegal the EU has not been engaged in a specific Technical Assistance project supporting transport sector policy and management.

### ***Mauretania***

The Islamic Republic of Mauritania (RIM) is a desert country, semi-arid and with a long Atlantic coastline. Regionally, the RIM is located between the Maghreb and sub-Saharan Africa. Thus, in terms of transport, the axes of international road transit are geared towards countries of ECOWAS (Senegal and Mali) and to the countries of the Arab Maghreb Union (AMU). Since independence, Mauritania has made efforts to develop transport infrastructure. Significant investments have been made in the roads sub-sector, a rail line linking the northern Zouerate iron ore mines to the port of Nouadhibou, a deep water port in Nouakchott and the airport sector. The EU is the main donor in the transport sector.

Roads are the dominant transport modality The length of the paved road network has increased from 2,813 km in 2005 to 5,303 km in 2015, with a further 1,134 km of un-surfaced roads plus 6,844km of tracks (although the actual status of the entire network is not known as the Road Management Office, the body responsible for keeping records, is not operational). The main paved roads converge on the city of Nouakchott (capital of the country). Since 1996, road maintenance is the responsibility of the National Establishment for Road Maintenance (ENER), created in 1994 with EU support. In 2015, the main road network assigned to ENER constituted 64% of the total network, against 79% in 2006. Financial arrangements for road maintenance in Mauritania, established with the support of the EU, are original. Since 2000, road

maintenance is funded jointly by the Government budget (about €2.3M per year) and the EU indirectly via a SYSMIN grant<sup>11</sup>.

The road maintenance works are executed by ENER. Since 2001, ENER has carried out 'dredging' and routine maintenance of the assigned road. Activities are mainly concentrated on emergency maintenance work and routine maintenance and 'dredging'<sup>12</sup>. But ENER is not effectively fulfilling its role of supervision and development of small and medium enterprises (SMEs) in road maintenance works. Summaries of road damage surveys are however made by ENER, which are used for making the annual work programmes.

Control of the axle load of heavy vehicles, under the responsibility of the Office of Road Control within the Directorate General of Land Transport is not carried out due to a lack of weighing stations. As a result trucks are overloaded representing one of the major causes of premature degradation of Mauritanian roads.

The **rail network**, with a length of 670 km, mainly transports iron ore from its point of extraction (Zouerate) to the processing plant and export (Nouadhibou). Operated by the National Industrial and Mining Company, the railway incidentally provides transport of passengers and freight between Choum and Nouadhibou.

**Port facilities** consist of a deep water port and oil terminal in Nouakchott, four port facilities in Nouadhibou (commercial port and industrial deep-water fishing terminal, a coastal fishing port, an ore terminal and an oil wharf.

There are 10 **airports** including five international airports (Nouakchott, Nouadhibou, Atar and Nema Zoueirat) and five regional airports (Tidjikja, Kiffa, Sélibaby, Kaedi and Ayoun El Atrous).

**River transport** is limited to the only natural axis of communication of the country which is the Senegal River flowing east-west over 1790 km. Currently, the river is navigable only during the period of high water. Infrastructure consists of river crossings provided by ferries and canoes, berthing jetties, slipways and repair facilities in Rosso.

The main national policy document is the Strategic Framework Document for the Fight against Poverty for the period 2001-2015. The policies and strategies for development of the transport sector are in line with the guidelines of that document. Those sector policies are spelled out in the following three **policy** documents:

- la Stratégie du secteur des transports 2011 – 2025
- la Lettre de Politique Sectorielle Transports 2011-2025
- le Plan d'investissement du secteur des Transports 2011-2016

**Sector issues** include:

- rapid expansion of the road network beyond the capacity for adequate maintenance; sustainability is not guaranteed;
- poor SME capacity;

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<sup>11</sup> SYSMIN comes from an agreement signed on 26 July 1995 between the Islamic Republic of Mauritania and the European Commission concerning the grant of €58 million paid to the State to finance the rehabilitation project and rationalization of the National Industrial and Mining Company (SNIM). The funds of the Convention were lent by the Government to SNIM in the form of a loan with repayments, including interest (3% per year). The repayments and the interest had to be assigned exclusively to the national road maintenance program, via the Road Maintenance Fund. Payments are made to an account opened for this purpose with the Central Bank of Mauritania on behalf of the National Authorising Officer and entitled " Road Maintenance Fund - Counterparts SYSMIN Lomé IV 'In favour of ENER'. The use of the road maintenance fund is based on annual work programmes (Devis Programme) approved by the Government and the EU. Since 2001, 4 maintenance (and dredging) programmes have been carried out (2001-2003, 2004-2006, 2007-2009 and 2010-2012); the fifth and last programme is currently in progress (2013-2015). Programme contracts are then broken down into annual Devis Programmes approved by the Government and the EU. is

<sup>12</sup> 'Dredging' in this context is the removal of drifting sand

- no axle load controls; overloading is a major factor in premature deterioration of road pavements;
- continuing technical assistance is necessary

**EU support** under EDF-9 included transport as a focal sector (including TA, construction of the Kaédi – Gouraye road, institutional change) whilst EDF-10 had ‘regional integration and transport’ as a focal sector (Reconstruction of Nouakchott – Rosso road, Phase 1 and institutional support). EDF-11 does not continue with transport as a focal sector but ‘...equitable access’ and ‘...improved access to basic services and infrastructure for vulnerable populations’ are components of the “ food security and sustainable agriculture” focal sector.

### **Morocco**

Morocco does not belong to the group of ACP countries whose relations with the EU are governed by the ACP-EC Partnership Agreement of Cotonou (June 2000). On the contrary Morocco is part of the group of countries on which the neighbourhood policy of the EU is focussed. The partnership between the EU and Morocco is defined in the Agreement of Association, which entered into force in March 2000 and was strengthened by the Action Plan of the European Neighbourhood Policy in 2003. These documents constitute the legal basis of the relations between the EU and Morocco. In addition the EU and Morocco have adopted in 2008 a joint document for the establishment of the Advanced Status of Morocco in its relations with the EU. In terms of transportation and infrastructure, the strategy of the Plan of Action of the Advanced Status aims to "implement the national transportation policy and infrastructure through the establishment of a high quality, efficient, competitive and sustainable transport system" with a view to accelerate convergence of Morocco with the EU.

**Road transport** is the main mode of surface transportation providing for 95% of movement of persons and 75% of freight movement. The road network has expanded by 30% since 2005 currently comprising 10,185km of national roads, 95,120km of regional roads and 21,736km of provincial roads. There are, in addition, 1,416km of motorway with a further 352 km under construction. During the period 2006 – 2012 the percentage of the network in good or average condition has dropped from 60% to 53.5% (which compares favourably with many countries) but still implies large investment needs for the remaining 46.5% in poor condition. The Special Road Fund(FSR), created in 1989, was originally charged to finance exclusively the maintenance and operation of the classified road network. However, currently, this Fund finances both maintenance and operation of the classified road network as well as construction and development of rural roads. Another issue is that Morocco is experiencing a strong increase of road accidents.

The Moroccan **rail network** comprises 2,109 km of which 1,284 km is electrified (75% of the network) and 600km has double tracks (28% of the network). The density of the rail network amounts to 63 km/million inhabitants/square km. In 2012, passenger traffic registered 36 million travellers, representing a growth rate of 10% during the last decade. The transport of phosphate is the main business of transporting freights (>25 million tonnes per year).

The Moroccan coastline with its two maritime facades which extend over a length of approximately 3,500 km has 38 **ports** including 13 ports for international trade, 10 fishing ports of regional character and 9 fishing harbours of local character in addition to 6 marinas.

Port activity overall has recorded in 2013, a total volume of 100.7 million tonnes, an increase of 9% compared to the previous year. The volume of imports amounted to 46.8 million tonnes, a reduction of 4%, and exports at 28.7 million tonnes, an increase of 2 %.



Morocco currently has 24 **airports** including 15 international. Casablanca Mohammed V Airport, the main airport, continues to strengthen its position as an international hub between Europe and Africa with 44 carriers.

The Ministry of Equipment, Transport and Logistics is responsible for overall transport policies, while National Agencies and ministerial Directorates are responsible for individual transport modes (eg ONDA – Office National des Aéroports; ONT – Office National des Transports; DGAC – Direction Générale de l'Aviation Civile; DR – Direction des Routes).

**Transport Sector issues** include:

- EU transport sector support to Morocco has been important, but performed in a dispersed manner. Implementation of investments experienced many problems, whereas support to institutional reform measures was a success;
- development of road infrastructure is not accompanied by adequate durability or adequate road safety; the condition of the surfaced road network has deteriorated between 2006 and 2012;
- the regulatory framework of the transport sector has been improved in the perspective of convergence between the regulations of Morocco and the EU;
- despite the significant results achieved by the program, difficulties and constraints persist, such as the scale of operations of the transport sector (the majority of carriers operating only one or two vehicles) and artisanal management of transport companies, unsatisfactory mentoring of the profession, low participation of the Moroccan carriers in international transport operations and the non-adoption of codes (maritime, civil aviation).
- development of rural roads is one of the objectives of the Moroccan Government but the main problem is support to maintenance of unclassified rural roads which is the responsibility of local communities;
- there is no formal structure for coordination of donors (multilateral and bilateral) involved in the transport sector in Morocco; overall coordination of donors is the responsibility of the Ministry of Economy and Finance and Department of Foreign Affairs and Cooperation

The general objectives of **Morocco-EU cooperation** are determined by the Association Agreement signed by the EU and the Kingdom of Morocco in 1996 and the Plan of Action adopted in the framework of the European Neighbourhood Policy, as well as by the documents summarized below.

The strategy of cooperation between the EU and Morocco developed in the **CSP 2005-2006** was structured around the following priorities: (i) economics and trade (development of trade and the economic environment for enterprises) ; (ii) social aspects, improving the living conditions of disadvantaged populations, the fight against poverty and development of human resources; (iii) protection of the environment. Interventions in the transport sector are part of the second priority aimed at the improvement of living conditions by a regional rebalancing and a better inter-provincial integration, socio-economic development of the northern provinces and opening up of rural areas.

The strategy of cooperation between the EU and Morocco in **2007-2013 and 2010-2011** is structured around the following priorities: (i) the development of social policies (human development, literacy and education, medical governance, health); (ii) economic modernization; (iii) institutional support; (iv) good governance and human rights), and (v) protection of the environment. The interventions in the transport sector are part of the economic modernization priority with the objective of opening up the coastal areas of the provinces of Chefchaouen and Al Hoceima and promoting their

integration into the regional and national economic space by means of construction of the missing sections of the coastline axis east-west, including the development of the Mediterranean rocade.

## 2.3 Synthesis of conclusions

This synthesis is presented as a series of issues responding to each Evaluation Question theme although preliminary answers to EQs are not presented at this stage. Indicators of country sources are given for some conclusions<sup>13</sup> and divergences are identified. Not all findings have been developed into conclusions at this stage; rather major issues have been highlighted. Analysis and synthesis will continue during the coming synthesis phase of the evaluation.

### EQ1: Evolution of EU policies and strategies in response to needs

- EU support is expected to respond to expressed needs of partner governments. Thus, in principle EU policies and strategies should respond to national (and regional) transport sector policies. However, the strong role of donors (by means of TA, policy dialogue and, in some cases, conditionalities) suggests the reverse process ie that national policies (or letters of sector policy eg Senegal) are drafted in compliance with donor policies, strategies and objectives.
- Most countries have transport sub-sector strategies, fewer have over-arching transport sector strategies (ie all transport modes) and only one country (Morocco) has an explicit logistics policy (optimisation of flows of goods and transport for economic benefits)<sup>14</sup>.
- EU support to major road works responded to expressed national needs. However, irrespective of the content of the sector policy documents and of the Road Fund revenue limits, governments have promoted upgrading and expansion of the road network with the support of sector donors, International Financial Institutions (with a mix of grants and loans from AfDB, BOAD and Middle-East Development Banks) and China. Regional corridors plans agreed at regional level are utilized as justification for capital investments in reconstruction or upgrading of national roads in some countries. This rapid expansion of the road network (paved main roads and unpaved rural roads) over the past decade in most countries has dramatically increased maintenance and consequent budgetary needs calling for reallocation of funding (from capital works to maintenance) and improved management, planning, quality and cost control. Sector policies and strategies in most countries cover maintenance but implementation lacunae render such strategies unrealistic<sup>15</sup>
- Even in countries where there is a formal structure for donor coordination<sup>16</sup>, policy dialogue and consultation appears to be weakening as some long standing sector donors supporting coordination processes<sup>17</sup> leave the transport sector and bilaterals increasingly operate independently. Attempts to engage 'new' sector donors in the coordination processes and the policy dialogue have failed in most countries and there is a perception that the EU response is simply to withdraw from

<sup>13</sup> Country sources are identified as per the international list of vehicle codes: Ethiopia -ETH, Uganda – EAU, Mozambique – MOC, Madagascar – RM, DRC – ZRE, Cameroon – CAM, Benin – DY, Senegal – SN, Mauritania – RIM, Morocco – MA.

<sup>14</sup> Most such strategies include the following priority objectives (not necessarily in this order): international corridor roads, primary national roads, urban roads and transport, rural/feeder roads and rural access, rail lines (freight, urban passenger), ports, axle load control, adequate maintenance (funding and works), institutional reform, capacity building, user-pays principles, concessioning, PPP, fair competition between transport modes and improved transport services, mobility needs of the poor and vulnerable groups, tackling corruption and social issues. In most countries after roads, all other transport modes are identified to have similar priority (including NMT in some countries)

<sup>15</sup> MOC, DY, ETH, CAM, RM

<sup>16</sup> Typically quarterly meetings attended regularly by EUD, EU MS and development banks; less regularly by other bilateral and multi-lateral donors and never by other donors

<sup>17</sup> Most long-standing donors supported such coordination (with varying degrees of enthusiasm and compliance). EU has been a major proponent of such cooperation especially for EU MS

the sector (i.e. 11<sup>th</sup> EDF)<sup>18</sup>, despite the fact that 90% of the EUDs reported that EU support should have a continuing role in the transport sector (especially in road network development and sustainability, sector management and social issues).

- Whilst there is strong coherence between EU sector policies and those of EU Member States and development banks, such coherence reduces for other bilateral and multi-lateral donors, whilst there is, at best, very limited coherence with strategies of emerging donors<sup>19</sup>.
- Of the EU sector policies and strategies. COM(2001)637 *Agenda for Change* is the most familiar (90% familiarity to EUDs of whom >60% considered it to be 'useful'). Most of the other sector strategies are unfamiliar to more than 30% of the EUDs<sup>20</sup>; however, on the contrary half of these policies were judged to be useful.
- Perceived EU added value is based on (in decreasing order of perceived value) long sector experience, expertise of individual EUD personnel, political neutrality, policies and strategies, size of funding, in-country presence (i.e. EUD), focus on cross-cutting issues, flexibility in seeking to cooperate with other sector donors (but not flexibility of EDF procedures), and regional integration experience,<sup>21</sup>. The EU appears to be moving away from some added value attributes by abandoning the transport sector under the 11<sup>th</sup> EDF. Perceived 'EU subtracted values' include length of time required for programming and decision making, changing EU strategies (and associated lack of consultation).<sup>22</sup> Not surprisingly most EUDs (>80%) perceive EU as having 'high' or 'very high' added value
- EU has been an advocate of *Division of Labour* amongst transport sector donors (especially EU Member States) and only a few cases of 'overlap' have been detected. However, there are suggestions that the result has been a series of independent interventions of individual donors each 'doing their own thing' with little attempts to generate complementarity and/or additionality from the products of such individual efforts.<sup>23</sup>

## EQ2: Move from project based to sector-wide approach

- SBS was introduced with high expectations regarding contributions to improved maintenance, sector PFM and governance, institutional capacity building and improved monitoring and evaluation<sup>24</sup>. However, experience of SBS has been variable ranging from perceived '*significant achievement of a well-controlled instrument*' (Morocco) and '*highly welcomed .... appreciated....and functioning reasonably well ....*' (Ethiopia) to a perceived failure generating disillusion and disappointment (small value, late and partial disbursement, little donor support, process and conditionalities not well understood by government, little effect on sector [or wider] PFM and governance issues) even if some sector dialogue did result (Mozambique). The key success factors appear to be capacity of the sector implementing agency, realistic sector strategies (and an amenable national economic situation).
- Appraisal of the government's institutional capacity to 'handle' SBS conditionalities in all countries depended upon expectation of delivery of government commitments (which was not always the case)<sup>25</sup>. A majority of EUDs record inadequate capacities in government and sector institutions to handle such a change from a

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<sup>18</sup> MOC, MA

<sup>19</sup> Some such strategies are apparently not available for examination

<sup>20</sup> except COM(2009)301: Partnership between EU and Africa & COM(2012)566: EU External Aviation Policy which were unfamiliar to more than half the EUDs

<sup>21</sup> Whilst EUD personnel and sector donors include 'capacity for policy dialogue' as an EU added value, this has not been identified by partner governments

<sup>22</sup> MOC, ETH, ZRE

<sup>23</sup> DY, ETH, MOC

<sup>24</sup> SBS was expected to have less impact on procurement procedures and capital investment

<sup>25</sup> SBS was considered but not adopted in some countries (e.g. Uganda, Senegal)

project-based approach to a sector-wide approach because of inadequate human resources, financial and institutional capacities<sup>26</sup>.

- In many countries the SPSP was not supported by SBS whilst a majority of countries in which EU contributed to GBS did not include monitoring and/or disbursement indicators referring to the transport sector<sup>27</sup>.
- Multi-annual transport (or at least road) sector investment plans/programmes were prepared in most countries, however, many countries report that these plans are inaccurate and not comprehensive due to poor quality of base information and/or a lack of updating the programme after initial preparation.
- The move from a project based approach to SWAp was sound with claimed efficiency gains (but it was never actually completed in some countries whilst in others the project-based approach was maintained throughout e.g. Madagascar); there is now a trend back to a project based approach under the 11<sup>th</sup> EDF<sup>28</sup>.

### EQ3: Transport Sector Management

- Technical assistance (TA) enjoyed only limited Government support or commitment and has largely filled line functions in the sector agencies and ministries, which resulted in limited residual capacity enhancement with concentration on technical issues instead of management. Current 'demand driven' TA approach appears promising in terms of ownership and outputs<sup>29</sup>.
- In some countries sector strategies and investment plans have not been updated such that credibility and realism of those (out-dated) documents have gradually reduced.
- The EU has not provided support to inter-modal connectivity (80% of EUDs reported 'limited' or no consideration of inter-modality in preparation of sector support programmes)..
- EU support to sector institutional change (with other donors) has been generally effective (if incomplete) and has brought clearer definition of functions but the intended operational autonomy of new and re-organised sector institutions has not been realised (and it was arguably naive to assume to expect that political control would be loosened)<sup>30</sup>. There are suggestions that targeted conditionalities (specified in Financing Agreements and SPSP programmes) along with cooperation of identified '*reform champions*' in the government have effectively contributed to institutional reform<sup>31</sup>.
- Corruption in the transport sector is acknowledged in most countries as an issue but not quantified (although it has been suggested that mismanagement causes greater losses than corruption). Some countries identify political nepotism and clientelism causing lack of professional ethics, chronic inefficiencies and delaying practices at all levels. Against multiple formal safeguards during procurement processes, corruption continues before, during and after bidding, resulting in short economic lifetime of the newly constructed and maintained roads<sup>32, 33</sup>.

<sup>26</sup> In most countries the SPSP was not prepared by government and less than 1/3 of EUDs declared satisfaction with the quality of preparation. A similar percentage of EUDs noted that the SPSP was prepared in close coordination with sector partners

<sup>27</sup> As far as contributing to transport sector management GBS was expected to impact upon sector PFM, institutional capacity building and procurement procedures

<sup>28</sup> DEVCO/C/5 specific remarks on this text are acknowledged '*This is not the same project based approach as it was in the past. The selected modality is blending: compulsory for regional and continental funds and (RIP and PANAF) and largely preferred for national funds (NIP). The only exception is Ethiopia, with 140 M€ for sector budget support in the 11<sup>th</sup> EDF.*' It is suggested that given the situations of countries continuing with transport as a FS the possibilities of viable blending projects are limited; in the case of countries continuing support to rural roads as a component of another FS, the possibilities of viable blending are even less.

<sup>29</sup> It is accepted that consultancy provided TA is expensive and past experience has been disappointing in terms of effectiveness, residual capacity and value-for-money. Perhaps other sources of TA might be considered e.g. 'twinning' with transport agencies in other countries (eg Morocco – civil aviation, maritime, roads sub-sectors); technical cooperation through educational institutions.

<sup>30</sup> MOC, MA, DY

<sup>31</sup> SN

<sup>32</sup> Such issues are not confined to the transport sector but are also evident in all sectors in which major value construction contracts are awarded

- In most countries sector institutions continue to have weak capacity for programming, procurement, bidding, contracting and controlling maintenance operations. Road data management systems are not operational and are hindered by the lack of annual updates. Prioritised programmes are extensively amended at several levels, taking on board non-technical imperatives, mainly under political pressure and patronage. Bidding for standard maintenance works takes a long period of time, aggravated by approval of budgets late in a fiscal year.<sup>34</sup> An overarching concern is the salary gap between the private sector and the civil service (a difference with a factor of 3 or more), which causes a high staff turn-over in the public administration and loss of quality staff. Consequently there is a continuous need for capacity building.
- Construction works are mostly carried out by large international companies. Despite support by the EU and other sector donors' capacity of local SMEs for carrying out maintenance works is low, while they do not have facilitated access to financial services, which is a serious obstacle for purchasing equipment. Furthermore, most of them have little or no professional experience. Despite a majority of EUDs recording improved capacities as a result of said support many trained SMEs have not prospered or even survived in a number of countries (e.g. Mozambique, Cameroon), late payment being a 'killer factor' for such firms<sup>35</sup>. Supervision contracts are often awarded to relatively inexperienced small engineering firms, utilizing under-paid young professionals. There is an urgent need for leadership in the (road) construction industry, addressing equipment modernization and skills development for local contractors, in order to participate in the competition for asphalt works and new road maintenance modalities ('term' contracts, output performance based road contracts).
- Road safety, although not an expressed priority in some countries (e.g. Benin), is a growing concern across many African countries, but it is difficult to address it effectively, given the prevailing civil service handicaps<sup>36</sup> although designs are usually subject to safety audit. The issue is more weak enforcement of traffic regulations than inherently unsafe infrastructure. However, there are examples of reducing accident trends (e.g. Cameroon)<sup>37</sup>.
- Axle load control continues to be a thorny problem in many countries with overloading presenting a safety issue whilst contributing to accelerated deterioration of road pavements<sup>38</sup>. This is more an issue of lack of enforcement and commitment than lack of weigh stations or equipment although there are some differences of axle load regulation of heavy goods vehicles in neighbouring countries.<sup>39 40</sup>. There appears to have been no overt attempts to counter pavement damage caused by overloading by either over-design of road pavements or targeted maintenance/strengthening programmes. EU has supported axle load control (and enforcement of traffic regulations in general) in many countries with only 15% of EUDs reporting significantly improved effectiveness of enforcement (78% report slight improvement or no change).

<sup>33</sup> DY

<sup>34</sup> There are practical problems with such late approvals e.g. programmes cannot be finalised; procurement cannot (or at least should not) take place until assured funding is available to cover contractual commitments; a 'weather window' for works may be missed if works are delayed or there are difficulties in working through the rains (logistical and quality issues). The outcomes are delays and/or incomplete maintenance programmes leading to consequent deterioration of infrastructure condition

<sup>35</sup> E.g. in Cameroon interim payments are reported as taking 4-6 months compared with a specified payment period of 10 days (specified payment periods in conventional contracts are typically 30-60 days from presentation of invoice)

<sup>36</sup> ETH, MOC, ZRE

<sup>37</sup> Ascribed to a combination of safety campaigns, education, safer roads, better signage and greater effort in enforcement of traffic regulations

<sup>38</sup> RIM, MOC, CAM

<sup>39</sup> ETH, MOC, DY

<sup>40</sup> E.g.g in Cameroon tanker trucks enjoy a partial amnesty/exemption from axle load regulations i.e. they are fined but not required to off-load (but it understood that the fine is not representative of the damage caused to the road pavement by over-loading; in Mozambique TRAC (concessionaire for the Maputo – Ressano Garcia toll road) reports serious problems of over-loading including collusion between police, transporters and government officials and informal bypasses being made around weigh stations

#### EQ4: Infrastructure operation and maintenance

- Routine maintenance is deficient, especially on rural unclassified roads (responsibility which has been delegated to low level authorities with little capacity). Periodic maintenance has almost ceased in some countries. Funding is deficient compared with maintenance needs in most countries. Maintenance management and programming, quality control and technical monitoring in many countries remain weak and a decline (or even stasis) in maintenance effectiveness and overall road network conditions has been noted during the past 5-8 years in many countries. Road maintenance efforts in all countries must become more effective (budgets, Road Fund revenues, planning, programming, supervision, quality, monitoring) otherwise infrastructure assets (including those projects funded by the EU and other sector donors) and on-going works of expansion and upgrading of the road network will prematurely decay with serious loss of capital value of that infrastructure, hugely increased whole life costings, lack of serviceability and increased VOCs and transport costs.<sup>41</sup>
- EU support to major road works (EDF 9 & EDF 10 and earlier programmes) has contributed to better overall network condition and serviceability which has also contributed to regional connectivity and linkages to ocean ports (e.g. in Cameroon EU has funded approximately one third of the country's surfaced main roads).<sup>42</sup>
- However, continuing doubts about sustainability and affordability of road networks that continue to expand whilst in some countries the road network is still adjudged to be insufficient for stated national economic and social development ambitions. Whole life costing and transport costs remain high.<sup>43, 44</sup>
- 'User pays' principles are partially accepted by the Governments, but implementation of such principles is partial (only few roads have enough traffic for viable concessions or toll roads) and overall <50% of maintenance needs are satisfied by 'user pays' strategies<sup>45</sup>.
- It is a moot point whether most Road Funds are or will be viable as 2<sup>nd</sup> generation funds<sup>46</sup> because of legislative issues, continuing lack of oversight, insufficient revenues from fuel levies and toll rates in some cases due to the difficulties in increasing the levy and toll rates - unchanged since the 1980s in some countries – because of the low level of service offered. Typically in the African continent, fuel levies represent 90% of Road Fund revenues and cannot be realistically replaced by road user charges. Transfers from the national budget are far from compensating for revenue losses of the Road Fund (all of which demonstrates a poor commitment to road maintenance by governments).<sup>47</sup> A majority of EUDs perceive Road Funds as having only a limited impact on sustainability of the road network.

<sup>41</sup> MOC, DY, ETH, EAU, RM, ZRE, CAM, SN, RIM, MA

<sup>42</sup> MOC, SN, ETH, RIM, CAM

<sup>43</sup> Albeit that it has been contended that growing networks cannot be expected to be financially sustainable in the short term.

<sup>44</sup> MOC, RIM, CAM

<sup>45</sup> The application of 'user pays' strategies in practise relies upon the following measures (in order of application): fuel levy, road tolls, vehicle sales taxes, vehicle and driver licensing and vehicle inspection fees

<sup>46</sup> Road funds have been established in many countries around the world whereby selected road-related taxes and charges (predominantly a 'fuel levy' in Africa) should be deposited into a specific (often off-budget) account (ie the road fund) to support spending on roads, especially maintenance. Myriad problems emerged including weak PFM, auditing issues, unauthorised expenditures and diversion of funds, weak oversight, lack of transparency and governance issues. As a result many of these '1<sup>st</sup> generation' road funds were closed down or are proposed to be transformed into '2<sup>nd</sup> generation' road funds which have specific legal and institutional structures to better ensure accountability and proper management. Legislation should set out roles and responsibilities of a representative 'Road Fund Board' and a 'Secretariat' for operational control of funds to be channelled to road agencies responsible for works. Even if the structures are established, chronic shortages of funding continue, revenues are still not channelled directly to the RF account and political and other interference is the norm. Road funds are established in the following SSA countries (but some are moribund): Benin, Burundi, Cameroon, Cape Verde, Chad, DRC, Côte d'Ivoire, Djibouti, Ethiopia, Gabon, Ghana, Guinea, Kenya, Lesotho, Madagascar, Malawi, Mali, Mozambique, Namibia, Niger, Rwanda, CAR, Tanzania, Togo, Zambia, Zanzibar and Zimbabwe,

<sup>47</sup> MOC, DY, SN

- Although there has been convergence between north African countries and the EU (highway transport, maritime, aviation) transport regulation is limited or absent in most countries such that haulage rates and fares are left to market forces and influence of cartels<sup>48</sup> in fixing rates and fares (with hints of trade off against axle load controls) especially on regional corridors (e.g. Bamako – Abidjan). Regulation issues are highly politicised and implementation of regulatory decisions is rudimentary<sup>49</sup>. Claimed benefits (reduced fares and freight rates) of de-regulation and liberalisation of transport appear to be limited to a few countries (e.g. Morocco – air and maritime transport; Mauritania – legal framework, freight and passenger carriage) whilst the transport fleet continues to be in poor conditions in many countries.<sup>50</sup>
- Development of national road construction industry contractors remains crucial (including contractor registration/certification, procurement procedures, independent bid evaluation and reward of contract, payment conditions (including advance payment), access to credit, payment).
- Most EUDs did not consider support to urban transport in preparation of sector support programmes and EU has not generally supported urban transport infrastructure (on the grounds of complications<sup>51</sup>) but, where actually supported (e.g. Ziguinchor, Senegal) good impacts have been noted<sup>52</sup>.

#### EQ5: Economic and social development

- External studies show linkages between improved transport infrastructure and economic and social development but due to an absence of ex-post monitoring or evaluation of outcomes of EU projects, it is not possible to quantify (or, in some cases even identify) EU contributions to socio-economic change. That being said, it is accepted that EU supported projects have facilitated other development activities that may not have otherwise taken place.
- Little or no EU support has been provided to transport services which remain poor (and expensive). The EU has supported almost exclusively infrastructure and equipment<sup>53</sup>. However, some national sector strategies supported by the EU have included transportation (e.g. Senegal – rural transportation). Whilst reduced Vehicle Operating Costs are an expected outcome of all road rehabilitation projects, transport prices do not similarly reduce in all cases (even if the frequency and quality of transport services improves).<sup>54</sup>
- In many cases there has been an apparent mismatch between over-ambitious claims at the programming and design stage and actual achievements (of outcomes and impacts).
- Whilst a majority of EUDs report promoting labour based methods in EU sector support activities only limited EU support has been given to construction of rural roads using those methods although significant short-term employment is reported to have been generated (including high proportions of women workers) e.g. ACORDS.SE Madagascar. Overall ‘slightly positive’ outcomes have been recorded.
- Cross cutting issues have been covered in project preparation but side-lined during implementation in some countries. Of the multiple issues that have been included in this category in various countries some have been widely covered in EU transport

<sup>48</sup> especially reported from west and central Africa

<sup>49</sup> In some countries members of the political and administrative classes are truck owners. Criteria and effort in axle load control and regulation of transport services is thus somewhat skewed

<sup>50</sup> MOC, DY, MA, RIM

<sup>51</sup> In this context ‘complications’ includes expropriation of land, removal and diversion of services (telephone, electricity, drainage, sewers, pipelines, cables etc.). Such issues are the responsibility of the contracting authority and are a well documented source of delay even in the case of rural infrastructure projects where services are a much smaller problem. This issue is outside the control of EUD.

<sup>52</sup> SN, ZRE

<sup>53</sup> An exception is EU-supported improvement of the ONATRA (parastatal responsible for Congo river and Great Lakes transport in DRC) river fleet. In PAR/PARAU areas EU also supported operation of river ferries (‘bacs’) due to failure of OdR to operate them after rehabilitation with EU support

<sup>54</sup> There are even reports of confused reasoning in project documentation (ie reduced transport costs = reduced transport prices – Benin)

sector support (e.g. environment, HIV/AIDS, road safety, gender and health and sanitation), some less so (e.g. emissions, climate change, disadvantaged groups).

#### EQ6: Contribution to poverty alleviation

- Impacts of EU support to the transport sector on poverty can neither be isolated nor attributed to EU support due to an almost total absence of ex-post evaluations which examine anything other than physical outputs (km of road constructed), timeliness and traffic volume trends, usually shortly after completion of works thus reprising the economic justification calculations<sup>55</sup>. However, there is an overwhelming 'intuitive' perception that EU support to the transport sector does in fact impact positively upon poverty alleviation.
- No attempts have been made to evaluate 'cost-effectiveness' of EU support to the transport sector in terms of poverty impact compared with EU support to other sectors.
- No explicit targeting of the very poorest and most vulnerable people beyond an inference from concentration of EU sector support in areas which have the highest concentration of poverty (e.g. Zambezia and Nampula provinces in Mozambique; Telagnana and Antsiranana in Madagascar). This support has increasingly 'linked' major road investments with rehabilitation of connecting rural roads typically identifying outcome and impact indicators (objectively verifiable indicators, such as trends in establishment of businesses, agricultural production, commodity costs, frequency and cost of transport services as well as road usage statistics (e.g. traffic volumes, transit times). Overall, benefits for the poorest are assumed to result from 'trickle down' effects of transport sector support<sup>56</sup>. Only about 20% of the EUDs report adequate quality of identification and feasibility studies for EU sector support interventions in examination of transportation barriers faced by vulnerable groups, although some 4% of the EUDs assert that safeguards are actually provided to reduce risks to vulnerable groups.
- Economic and Social Impact Assessments (ESIAs)<sup>57</sup> have been carried out at feasibility stages for almost all EU-supported construction projects but there are reports of Economic and Social Management Plans not being taken seriously during implementation in some countries.<sup>58</sup>
- EU responses to emergency situations in Madagascar and the DRC show considerable pragmatic response to situations in which the normal EDF procedures were abandoned<sup>59</sup>. The EUDs showed admirable initiative under pressure (from partner government and EU HQ) but, not surprisingly there were failures (e.g. supply of heavy equipment to Force Account Units) as well as successes. (e.g. PAR and PARAU in the DRC).

#### EQ7: Regional support

- RIPs/NIPs were broadly complementary but programming was dislocated due to differing implementation speeds, priorities and effectiveness., although in some countries the NIP makes little or no reference to the RIP (e.g. Madagascar). NIPs generally evolved independently from RIPs, with major road corridor projects harmonized to regional plans (e.g. Senegal). RIPs provided at best an overall framework, to a large extent limited to a broad objective to contribute to developing regional corridors.
- There has been equivocal national commitment to regional integration.

<sup>55</sup> Less than 20% of EUDs record any studies being carried out to identify poverty alleviation outcomes of EU transport sector support although satisfaction was expressed as to the quality of such studies as were actually carried out.

<sup>56</sup> MOC, ZRE, EAU, SN, DRC. An observation from various post-conflict countries and other countries that have suffered long term disruption of rural access (such as Uganda in the 80s, Mozambique in the 90s, DRC more recently) is the initially small scale development of agriculture (clearance of 'machambas'), commerce and retail (road-side stalls), basic services (health, education, informal markets) and limited transport services that rapidly follow rural road (re)opening.

<sup>57</sup> In a few cases PSAs were carried out (Poverty & Social Impact Assessments)

<sup>58</sup> This is strenuously contested by Mozambique and Madagascar EUDs

<sup>59</sup> In these situations regional integration was considered to be of little priority or relevance to the national situation



- Regional norms were adopted and implemented tardily at national level and sometimes were not actually in accordance with those norms<sup>60</sup>. The tools available to EUDs to facilitate translation of regional agreements into national legislation have not been effective (although regionally-identified corridors have often been used as national justification for capital works on major roads)<sup>61</sup>.
- Capacities of Regional Economic Commissions are widely perceived as weak especially as regards transport sector issues<sup>62</sup>. Regional implementation of EDF programmes, many involving Contribution Agreements, has led to under-achievement of disbursement and objectives, with a partial re-allocation of funding for regional projects to the Sustainable Energy Initiative.
- Only anecdotal evidence of programming of regional programmes being linked to European Partnership negotiations
- No evidence of lessons learnt on regional transport facilitation and corridor management in East Africa being disseminated to the EUDs in other African regions<sup>63</sup>.
- No evidence of operational performance monitoring systems established with EU support along regional corridors that allow an appropriate measure of outputs/outcomes of EU interventions (traffic volumes, export development, job creation, regional integration, integration into the world economy);

#### **EQ8: Selection, planning and prioritisation of EU support to infrastructure investment**

- Selection, planning and prioritisation of EU sector support activities have been done competently (no 'vanity' projects) but there is no evidence of risk assessments being undertaken. In post-conflict situations, selection of projects was based on strategic considerations and social grounds rather than economic viability (e.g. DRC)
- Feasibility studies (of variable quality) have been carried out as part of the formulation stage – these were not used to choose between alternative projects but to estimate viability of a pre-selected interventions. No evidence has been examined of preceding consideration of interventions which would be expected at support identification stage. Viability was assessed using assumptions of delivery of partner government commitments of adequate maintenance and axle load control, and, in some cases, staged strengthening/overlay of pavement. In most countries these assumptions are flawed i.e. government commitments are not delivered such that infrastructure (including, but not only, EU-supported projects) is not attaining expected economic design life or service levels<sup>64</sup>. This loss of capital value across Africa is huge (and, given the EU historical role as a major 'investor' in the transport sector, represents not only a loss to the individual African countries but also a huge potential loss of EU tax-payers' contributions).<sup>65</sup>
- Most EUDs have the opinion that conventional calculations of economic internal rates of return (EIRR) are appropriate measures of justification for capital

<sup>60</sup> e.g. Zambeze concession, Mozambique – Tete: bridge tolls have replaced border fees and transit charges for foreign hauliers, but national carriers pay both; also less revenue to FE as tolls go to concessionaire instead

<sup>61</sup> Although there is some evidence that the utilisation of jointly agreed conditionalities in Financing Agreements, defined with reformers posted in the sector administrations, was an effective way to contribute to translation into national legislation of regional agreements (eg axle load controls). The inclusive preparation of FAs and then the postponement of their signature until conditionalities were effectively implemented, were particularly effective in the road sector in Senegal. The ministerial level was generally reluctant to implement reforms agreed in principle at regional level but was in need of a strong political signal before, during and immediately after election campaigns. The Senegal EU portfolio has the necessary volume to allow several important road projects over each EDF period, hence to seize several opportunities when politicians are in need of support. Strategic steps on reinforcing FERA, Ageroute and enforcing axle load controls were achieved that way.

<sup>62</sup> SN, MOC, ETH

<sup>63</sup> Transport facilitation and corridor management are victims of the institutional weaknesses of the national road sector institutions which have limited incentive, time or capacity to deal with regional transport facilitation eg SN.

<sup>64</sup> No evidence has been examined of attempted mitigation measures other than continued dialogue and some support for weigh stations (e.g. over design in anticipation of overloading and to a lesser extent, maintenance neglect)

<sup>65</sup> MOC, DY, RIM

investment in this sector if combined with social justification (although few examples of this latter analysis have actually been examined).

- Shortcomings of design have been noted in most countries visited during the field phase resulting in delays, changed scope of work, cost over-runs and reduced quality of final product although this problem is not confined to EU sector support. In some cases it is suggested that design quality may have been constrained by budget limits.
- Contractual complications including cost and time overruns are common in construction contracts for most funding agencies despite the use of independent monitoring and control mechanisms (such as technical audits) but there are suggestions that the EU partially decentralised implementation modality is slower in resolving contractual problems than the contracts management arrangements of other donors.<sup>66</sup> It is suggested that EUDs have limited in-house capacity to deal with such contractual issues (such as contractor bankruptcy or default, litigation, arbitration, claims) and that timely recourse to specialist advice may have been advisable. The contractual roles of the national highway agency and the NAO in contract management are a factor here<sup>67</sup>.
- Whilst by far the vast majority of EU support to the transport sector has been to roads -and this responded to expressed national needs - most partner governments also expressed a need for EU support to other transport modes (which, in most countries has not been taken up). A possible factor is that over 60% of the EUDs report to have little or no experience in land transport modes other than roads.

#### **EQ9: Support modalities, cooperation frameworks, implementation mechanisms**

- EU's aid strategies changed for each EDF cycle. Delays in implementation of projects and programmes of the previous EDF cycle resulted in concurrent implementation of multiple modalities during the next EDF cycle. Changed strategies were the result of a top-down decision making process from Brussels without consultation of sector partners (some of whom were bemused, confused, and in some countries, irritated by the continuous changes). Also the 'regular' changes in EU strategies gave governments and sector institutions little incentive to master (with or without TA) a modality that was likely to change with successive EDF cycles. That being said EUDs' management of changing approaches has, on the whole, been pragmatic and effective.<sup>68</sup>
- A majority of EUDs report consideration of linkages between different support modalities and discussion of pros and cons of available modalities with government, whilst in almost all countries there has been mapping of activities of other sector donors<sup>69</sup>.
- Sector dialogue themes generally did not change over a decade or so (because sector problems and shortcomings continue).
- Blending of financing instruments has demonstrated high potential in the transport sector (e.g. Morocco: tram lines – Rabat & Salé; Cameroon - Douala Easter Access) but there are concerns about 'bankability' of road projects (viability threatened by low traffic volumes, durability hampered by poor maintenance), while there is also unfamiliarity with the blending concept in some countries. Also there are reports from some countries that governments are deterred by EIB 'conditionalities' regarding feasibility, environmental and social impact studies or supervision of construction<sup>70</sup>

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<sup>66</sup> MOC, SN, DY

<sup>67</sup> Under the partially decentralised implementation modality NAO is the Contracting Authority whilst the 'road agency' is the Supervisor. EUD only endorses payments and contract modifications where additional works are necessary. EUD has no authority to take contractually binding decisions (such as termination of contract, sanctions, recovery orders, determination of claims) without explicit agreement of the partner government (i.e. NAO and 'road agency')

<sup>68</sup> MOC, DY

<sup>69</sup> Interestingly the EUD opinion is exactly split on whether the driver for selection of a particular modality was the most suitable or was the result of a search for an application that was being 'promoted' at that time

<sup>70</sup> MOC, MA, ETH

- There has been poor communication about the EU's centralised decision making process resulting in changing the strategy under the 11<sup>th</sup> EDF (which came as a surprise to many sector partners). It is not clear whether the EU can credibly continue as transport sector lead donor in view of cessation of support to transport as a focal sector.<sup>71</sup> In some of the case study countries, transport will continue to be a Focal Sector under the 11<sup>th</sup> EDF (Madagascar, Uganda, Ethiopia, DRC) although no consistency of arguments for such continuation can be discerned (either among these countries or in comparison with countries not continuing, except that in all cases where transport continues to be a focal sector, it is reported that the EU responded to robust national lobbying (by the government and the EUD). Some countries are hoping to reverse the decision at mid-term of the 11<sup>th</sup> EDF (e.g. Cameroon)
- EDF procedures are reported to be inadequate to permit rapid mobilisation of funds in response to natural disasters (e.g. Madagascar – cyclones; Mozambique – flooding). EDF procurement and management procedures are comparable to other internationally used procedures (e.g. contract formats) and are appropriate for an informed and capacitated user although most countries report problems of implementation with some EU support modalities<sup>72</sup>. However, these procedures are unforgiving for less capacitated users in situations of possibly weak governance structures, the point obviously being whether procedures should be made more flexible (i.e. easier to apply) in a situation of poor capacity, variable compliance with procedures and greater potential for subversion of process<sup>73</sup>.

#### EQ10: EU procedures and resources

- EUD capacities improved during the evaluation period with suggestions that the move to SPSP and SBS reduced EUD's human resources needs. However deficits remained during implementation of the 10<sup>th</sup> EDF (although a majority of the EUDs consider there is currently adequate staffing to deal with transport-related issues. The situation is now reported to be deteriorating again (in the context of the proposed 11<sup>th</sup> EDF support to rural roads which is likely to be highly resource intensive in terms of identification, design, programming, implementation and monitoring).<sup>74</sup>
- Operations budgets are reportedly limited for management and monitoring of EU transport sector support portfolio<sup>75</sup> but human resources constraints can be problematic given the reported workload associated with contract administration, reporting and increasing EEAS requirements (in Senegal 30% of programme managers' time is claimed to be ascribed to EEAS requirements).<sup>76</sup>
- Available training of EUD staff has been reported as being useful in all cases but there has been limited technical backup (e.g. helpdesk and backup from HQ) and little dissemination of lessons learned.<sup>77 78</sup>
- Recruitment of EUD personnel appears not to be directly informed by estimated capacity needs of EU support programmes<sup>79</sup>.
- Moves towards 'new' financing modalities for which EUDs and partners governments may have limited experience and knowledge (e.g. procedures for development and 'blending' projects) require commensurate information dissemination and training (see also reference to 'communication' and 'blending')

<sup>71</sup> MOC, RM, ETH, EAU, ZRE

<sup>72</sup> Devis programme (Programme Estimates) are most frequently thus identified

<sup>73</sup> DY

<sup>74</sup> MOC, DY, CAM, MA

<sup>75</sup> ~60% of EUDs; <25% report an adequate budget

<sup>76</sup> MOC, RM

<sup>77</sup> MOC, RM

<sup>78</sup> Albeit that lessons learned are not necessarily universally applicable; information is made available through annual meetings of Africa EUD infrastructure sections, website (reportedly not updated) [www.capacity4dev.org](http://www.capacity4dev.org) and the C5 desk officer

<sup>79</sup> DY

above)<sup>80</sup> (less than 10% of the EUDs report adequate in-house capacity to advise on 'Blending' of financial instruments).

- A continuing issue of EUD human resources capacity concerns the hosting and interaction with a large number of external missions to certain countries which are inevitably chosen as 'case studies' (e.g. DRC, Mozambique).

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<sup>80</sup> RM



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