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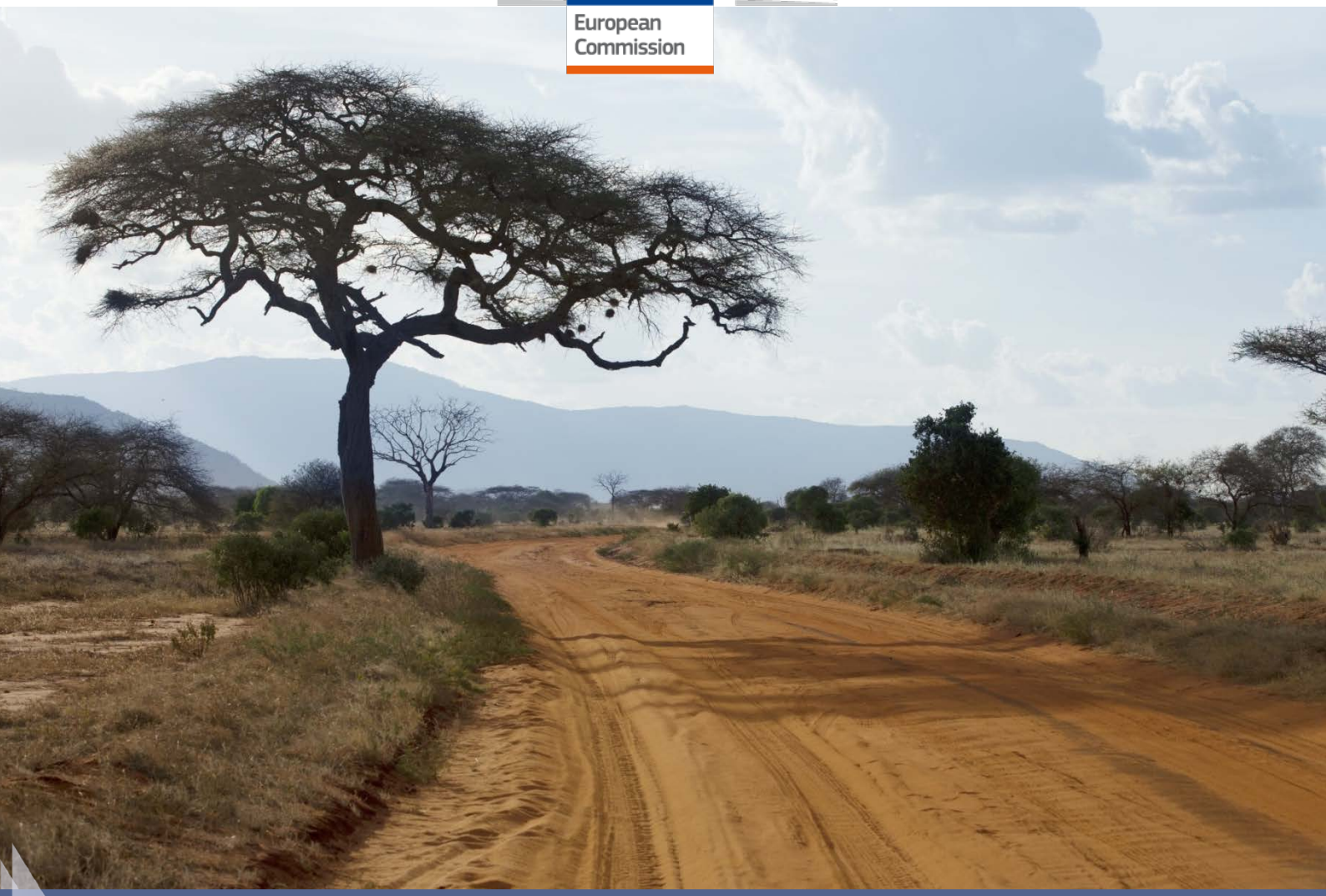

Evaluation of EU support to the transport sector in Africa 2005-2013

Final Report
Volume 4B
Country case studies

June 2016

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EuropeAid

Consortium composed of
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Leader of the Consortium: Ecorys

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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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Country case studies of the evaluation of EU support to the transport sector in Africa 2005-2013

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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 a Synthesis Note, which is presented in Volume 3A of the Transport Sector Evaluation Reports. The methodology used for selecting the ten case study countries is set out in chapter 2 of this Volume 3B, while the main texts of the ten country case study reports – thus without the annexes – are presented in the chapters 3 to 12.

2 Selection of case study countries

Out of the 52 African countries, ten have been selected as a case study country on the basis of a number of selection criteria and minimum conditions, as set out hereunder. The robustness and sensitivity of the methodology has been tested by considering 4 alternative weighting systems (which have resulted in very similar rankings of countries). The four selection criteria used, as well as the weighting system for each alternative are presented in table 2.1

Table 2.1 Case study selection criteria

Selection criteria	Alternative A		Alternative B		Alternative C		Alternative D	
	Score	Weight	Score	Weight	Score	Weight	Score	Weight
1. Total contracted EU funding for the transport sector in the country concerned	Pro rata	2	Pro rata	2	Pro rata	3	Pro rata	3
2. Total disbursed EU transport sector funding disbursed	-	-	Pro rata	1	-	-	Pro rata	1
3. Proportion of NIP funds allocated to the transport sector	Pro rata	1	Pro rata	1	Pro rata	1	Pro rata	1
4. Transport as focal sector:								
- for EDF 9 and EDF 10	0.50	1	0.50	1	0.50	1	0.50	1
- for EDF 9	0.25	1	0.25	1	0.25	1	0.25	1
- for EDF 10	0.25	1	0.25	1	0.25	1	0.25	1
Total possible score	4.00		5.00		5.00		6.00	

Furthermore a number of minimum conditions have been taken into account (see table 2.2) Given the relative proportions and values of EU transport sector support in SSA and North Africa it is thus proposed that the balance of 'case study' countries should be one from North Africa together with 9 from SSA.

Table 2.1 Case study selection and screening criteria

Minimum requirements	Guideline Parameters
Geographical coverage	All African regions should be represented more or less in proportion to their share in total EU funding of the transport sector in Africa, which is 35% for West Africa, 23% for East Africa, 19% for Central Africa, 12% for Southern Africa and 6% for North Africa.
SBS	At least 2 countries should have experience with Sector Budget Support for the transport sector.
Blending	At least 2 countries should have experience with blending of grants and loans for funding transport sector projects.
EU support to rail	At least 2 countries should have received EU support for railway projects.

EU support to maritime & IWT	At least one country should have received EU support for maritime and inland water transport projects.
Different types of country	Fragile, island and landlocked countries should be included in the sample..

The 17 countries with the highest scores on the selection criteria listed in table 3.3 (different lists per alternative).

Table 2.2 Ranking of case study countries on the basis of the four selection criteria

	Alternative A	Alternative B	Alternative C	Alternative D
1	Uganda	Uganda	Uganda	Uganda
2	Mali	Ethiopia	Mali	Ethiopia
3	Ethiopia	Mali	Ethiopia	Mali
4	Cameroon	Cameroon	Cameroon	Cameroon
5	Kenya	Tanzania	Kenya	Tanzania
6	Mauritania	Kenya	Tanzania	Kenya
7	Tanzania	Madagascar	Mauritania	Madagascar
8	Benin	Benin	Benin	Benin
9	Madagascar	Senegal	Burkina Faso	Burkina Faso
10	Burkina Faso	Mauritania	Madagascar	Congo, Dem. Rep.
11	Senegal	Burkina Faso	Congo, Dem. Rep.	Mauritania
12	Niger	Niger	Niger	Mozambique
13	Congo, Dem. Rep.	Congo, Dem. Rep.	Senegal	Senegal
14	Mozambique	Mozambique	Mozambique	Niger
15	Zambia	Zambia	Zambia	Zambia
16	Ghana	Ghana	Ghana	Ghana
17	Malawi	Malawi	Malawi	Malawi

On the basis of these four rankings and taking into account the minimum requirements mentioned in table 2.2, the following ten countries were selected for case studies:

- three countries in West Africa: Mali (if security allows), Benin and Mauritania (back-up Burkina Faso and Senegal);
- two countries in East Africa: Uganda and Ethiopia (back-up Kenya and Tanzania);
- two countries in Southern Africa: Madagascar and Mozambique (back-up Zambia);
- two countries in Central Africa: Cameroon and DRC (back-up Burundi);
- one country in North Africa: Morocco.

Due to a deterioration of the security situation In Mali shortly before the start of the mission, Mali had to be replaced by Senegal

This selection of ten countries met also the minimum requirements listed in table 2.2 in the following way:

- SBS is provided in three countries: Benin, Ethiopia, and Mozambique;
- Blending occurs in five countries: Cameroon, DRC, Mozambique, Uganda and Morocco;
- two countries are classified as fragile: Madagascar and Uganda;
- three countries are landlocked: Burkina Faso, Ethiopia and Uganda;
- One country is an island: Madagascar.

Coverage of all minimum requirements and a few other parameters of the 18 countries with the highest scores on the selection criteria is presented in table 2.4.

Table 2.3 Coverage of minimum requirements and a few other parameters.

	Region	SBS	CSE 2005 - 2014	Rail projects	Maritime & IWT projects	Blending	Island	Landlocked	Fragile	Francophone	Anglophone	Lusophone
Benin	W	x	x					x		x		
Burkina Faso	W		x			x		x	x	x		
Burundi	C		x					x	x		x	
Cameroon	C		x		x	x				x		
DRC	C		x			x		x		X		
Ethiopia	E	x	x	x				x			x	
Kenya	E		x								x	
Madagascar	S			x			x		x	x		
Mali	W		x	x				x	x	x		
Mauritania	W			x	x				x	x		
Morocco	N					x				x		
Mozambique	S	x		x		x						x
Niger	W		x					x	x	x		
Senegal	W		x							x		
Tanzania	E	x	x	x	x	x					x	
Uganda	E		x			x		x	x		x	
Zambia	S	x	x	x	x	x		x			x	
Backup countries			Initially selected countries									

3 Ethiopia case study

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List of acronyms and abbreviations

AACRA	Addis Ababa City Roads Authority
AARTB	Addis Ababa Road Transport Bureau
AC	Asphalt Concrete
ADT	Average Daily Traffic
AFCAP	Africa Community Access Programme
AfDB	African Development Bank
BADEA	Arab Bank for Economic Development in Africa
CB	Capacity Building
CCAE	Construction Contractors Association of Ethiopia
CDE	Chemin de fer Djibouti-Ethiopia
COMESA	Common Market for Eastern and Southern Africa
CRIS	Common Relex Information System (EU)
CSA	Central Statistics Authority
CSO	Civil Society Organisation
CSP	Country Strategy Paper
DAG	Development Assistance Group
DBST	Double Bituminous Surface Treatment
DFID	Department for International Development (UK)
DP	Development Partner
EAC	Ethiopian Airlines Corporation
EAE	Ethiopian Airports Enterprise
ECAA	Ethiopian Civil Aviation Authority
ECEAA	Ethiopian Association of Consulting Engineers and Architects
ECX	Ethiopian Commodity Exchange
EDF	European Development Fund
EDRI	Ethiopian Development Research Institute
EFY	Ethiopian Financial Year / Fiscal Year
EIA	Environmental Impact Assessment
EIB	European Investment Bank
EMI	Ethiopian Management Institute
EPE	Ethiopian Petroleum Enterprise
EQ	Evaluation Question
ERA	Ethiopian Road Authority
ERC	Ethiopian Railway Corporation
ERCC	Ethiopian Road Construction Corporation
ESLSE	Ethiopian Shipping and Logistics Services Enterprise
ESSP	Ethiopia Strategy Support Program
ETB	Ethiopian Birr
ETRE	Ethiopian Toll Road Enterprise
EU(D)	European Union (Delegation)
EUR (€)	Euro
FA	Financing Agreement

FASID	Foundation for Advanced Studies on International Development
FTA	Federal Transport Authority
GDP	Gross Domestic Product
GTP	Growth and Transformation Plan
GoE	Government of Ethiopia
HQ	Head Quarters
ICB	International Competitive Bidding
ICT	Information and Communication Technology
IDA	International Development Association
IFPRI	International Food Policy Research Institute
IMF	International Monetary Fund
IWT	Inland Water Transport
JICA	Japan International Cooperation Agency
Km	Kilometre
LBT	Labour-Based Training
LRT	Light Rail Transit
Ltr	Litre
M	Million
MAA	Maritime Affairs Authority
MBT	Machine-Based Training
MDG	Millennium Development Goal
METEC	Metal and Engineering Corporation
MoE	Ministry of Education
MoFED	Ministry of Finance & Economic Development
MoT	Ministry of Transport
MoWUD	Ministry of Works and Urban Development
MRA	Municipal Road Authority
NAO	National Authorising Office
NCB	National Competitive Bidding
NDF	Nordic Development Fund
NGO	Non Governmental Organization
NIP	National Indicative Programme
NRSC	National Road Safety Council
NSDS	National Strategy for Development of Statistics
NTMP	National Transport Master Plan
OFID	OPEC Fund for International Development
OPEC	Organisation of Petroleum Exporting Countries
OPRC	Output Performance-based Road Contract
ORF	Office of Road Fund
OSBP	One Stop Border Post
PASDEP	Plan for Accelerated and Sustained Development to End Poverty
PBS	Protection of Basic Services
PCM	Project Cycle Management
PFM	Public Finance Management
PM	Project Manager

PPP	Public Private Partnership
RADS	Road (Traffic) Accidents Data System
REC	Regional Economic Commission (e.g. at COMESA)
RIP	Regional Indicative Programme
RMF	Results Measurement Framework
RRAs	Regional Road Authorities
RSDP	Road Sector Development Programme
RTTB	Regional Trade and Transport Bureau
SBS	Sector Budget Support
SPSP	Sector Policy Support Programme
SWAp	Sector Wide Approach
T	Ton
TA	Technical Assistance
TCF	Technical Cooperation Facility
TEU	Twenty feet Equivalent Unit
ToR	Terms of Reference
TPO	Transport and Poverty Observatory
TSWG	Transport Sector Working Group
UNDP	United Nations Development Program
UNHCR	United Nations High Commission for Refugees
URRAP	Universal Rural Road A Programme
VAT	Value Added Tax
Veh-Km	Vehicle-Kilometres
VO	Variation Order
VOC	Vehicle Operating Cost
Vpd	Vehicles per day
WB	World Bank
WiM	Weigh in Motion

Exchange rate: 1 Euro = 22.26 Ethiopian Birr (ETB), dd. 02.06.15.

3.1 Introduction

This Ethiopia case study provides information on the EU support to the transport sector in Ethiopia and to a limited extent at the regional level (Djibouti Port-Addis Ababa and Addis Ababa-Kenya corridors) in order to feed the earlier desk phase findings of the evaluation of EU support to the transport sector in Africa during the years 2005-2013. Several important (technical and procedural) reports were made available (in addition to what had already been collected during the desk phase), while the series of interviews with key stakeholders in the sector broadened the perspective on local conditions affecting success factors of the EU support programmes or projects.

Ethiopia is regarded as a representative low-income, land-locked country in East Africa, with so far limited transit transport functions for other land-locked countries (South Sudan, and onward to Uganda). It was one of the first countries where the EU provided Sector Budget Support (SBS) to the transport sector within the context of a Sector Policy Support Programme (SPSP), based on a positive assessment of road sector governance.

Given the dominance of road transport within the transport sector, the EU support was concentrated on the road sub-sector, although a serious attempt was also made to support the railways (Djibouti-Addis Ababa line), whereas the support to carrying out the National Transport Master Plan study underscored the EU policy to promote a sector-wide approach (SWAp).

The EUD succeeded in keeping transport as a focal sector ("Roads and transition to Energy") under the 11th EDF, as explicitly requested by the Government of Ethiopia (GoE) and after long negotiations with EU headquarters in Brussels.

3.2. Data collection methods used

Data inputs for this Country Note were collected from (i) reports identified through CRIS as well as cross references found in the initial documents, and (ii) stakeholder interviews during meetings held in the period 6-14 May 2015 in Ethiopia. Initial questionnaires had been prepared, one for each of the main Evaluation Questions, which were used as a guidance during the discussion meetings.

This country case study is not meant to carry out a detailed assessment of the eight individual EU interventions implemented during the years 2005-2013, but rather to collect country-level information for answering the ten Evaluation Questions of this continent wide evaluation. Project level assessments can be found in audit and evaluation reports, which have been reviewed by the evaluators in search of main lessons learnt and recommendations. The interviews were held to collect perceptions of complementary groups of stakeholders, including implementers and beneficiaries, EUD staff, representatives of policy departments and implementing agencies of the GoE, other donors, road users, and independent experts[1]). The interviews were focussed on assessing the credibility of the provisional findings or hypotheses formulated at the end of the desk phase of this continent-wide transport sector evaluation, i.e.to confirm or refute 'overall' responses to each of ten Evaluation Questions, from the perspective of the projects and programmes funded by the EU in Ethiopia.

[1] Civil society representations, active with regard to transport matters, e.g. NGO's or consumer forums, could not be identified, in the limited time of the country visit.

The analysis was focussed on four groups of typical projects characterizing the EU transport sector support in Ethiopia, namely:

- Three road infrastructure investment projects, to which the EU contributed close to €300 million and which had been started (long) before 2005.[2] These projects prepared in fact the grounds for the Transport Sector Policy Support Programme (SPSP) including the provision of Sector Budget Support (SBS), which started later on.
- The SPSP, including the provision of SBS and support to capacity development in the road sector during the 9th and 10th EDF. Three SPSP programmes, one under EDF9 and two under EDF10, have been funded with a total budgeted EU contribution of about € 392 million, of which € 8 million earmarked for institutional capacity building (including costs of evaluations and audits).[3]
- Rehabilitation of the degraded railway line with the objective to create a viable business case for a private sector railway concession. The EU had budgeted € 48 million for this activity and finally paid € 31 million for it, but it hasn't been successful.
- The National Transport Master Plan Study, highlighting a sector-wide approach, and aimed at the identification of viable investment opportunities in the various sub-sectors (road, rail, in-land water transport, aviation), as well as multi- and inter-modal interfaces. The total allocated and paid amount for this study amounted to € 1.9 million.

3.3. EU support to the transport sector in Ethiopia

In the National Indicative Programmes (NIPs) of both EDF-9 and EDF-10, transport was a focal sector with allocations of € 211 million and € 220 million respectively[4]. 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 foreseen 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); whilst GoE/ERA was expected to (i) implement its RSDP in a satisfactory manner using its performance monitoring system, (ii) reduce its periodic maintenance backlog and ensure sufficient resources for its Road Fund, and (iii) promote a competitive level playing field for transport services. Due to the switch to SBS, prioritization of road works was henceforward left to ERA decision-making in the context of the RSDP.

The major EU interventions foreseen under EDF-10 were (i) to provide continued support to the country's RSDP and (ii) to supplement regional projects (Addis-Djibouti corridor). The GoE would continue implementing the RSDP in accordance with its provisions and timetable, the Road Fund (RF) would gradually increase collection of road user charges to a level sufficient to cover the entire maintenance costs, and the

[2] In addition, a road project called "Carrefour d'Arta-Guelile" has been supported in Djibouti with an amount of more than € 25 million, contributing to Djibouti-Ethiopia corridor improvement.
[3] The third SPSP (€ 49 million) has been approved in 2013 and no disbursements had yet taken place in June 2014 when the CRIS data analysis of this evaluation was carried.
[4] The totals of the allocations found in CRIS are slightly lower (see table 3.1)

sectoral institutions would encourage active involvement of the private sector, ensuring a level-playing field, both in the road construction and maintenance industry and in transport services provision.

The financial data of the eight projects/programmes funded by the EU under EDF-9 and 10 in Ethiopia during the period 2005-2013 are presented in the following table.

Table 3.1. Financial data of the EU funded transport projects in Ethiopia in the period 2005-2013 (in '000 of €)

Decision code	Decision title	Allocated	Contracted	Paid
EDF-9				
FED/2003/016-448	Djibouti –Ethiopian Railway Line – Minimum Safety Works	47,826	47,325	31,142
FED/2003/016-440	Technical Cooperation Facility (TCF) - 3 FCs	1,835	154	415
FED/2005/017-839	National Transport Master Plan Study	1,893	1,893	1,893
FED/2007/020-815	Technical Cooperation Facility II (TCF II) - 2 FCs	2,837	347	347
FED/2007/018-778	Sector Policy Support Programme in Support of Ethiopia's Roads Sector Development Programme	155,331	155,185	155,216
Total EDF-9		**209,721**	**204,905**	**189,013**
EDF 10				
FED/2008/019-725	Second Sector Policy Support Programme (SPSP II) in support of Ethiopia's Road Sector Development Programme (RSDP)	187,625	187,625	187,625
FED/2008/020-933	Technical Cooperation Facility III (TCF III) - 2FCs	2,653	148	148
FED/2011/023-007	Technical Cooperation Facility IV (TCF IV) - 3FCs	2,412	317	235
Total EDF 10		**192,690**	**188,089**	**188,007**
Total 2005-2013		**402,411**	**392,994**	**377,020**

Source : CRIS, June 2014.
Note: In 2013, the Financing Agreement of a third SPSP was signed, being part of EDF-10. That FA amounts to € 49 million and most of the funds will be provided in the form of SBS. Because no disbursements had taken place before June 2014, that FA does not yet appear in the above list retrieved from CRIS in June 2014.

3.4. Short description of the transport sector in the country

Ethiopia is the second most populated country on the African continent, nearing 90 million of which 81% lives in rural areas (2014), highly scattered around the country. Only 6 cities have more than 200,000 inhabitants (Addis Ababa has more than 3 million people, while 5 cities - Mekele, Adama, Dire Dawa, Gonder and Hawassa - have each 210,000 to 280,000 inhabitants). The distribution of the population with one main city and a high percentage of rural population dispersed throughout Ethiopia's territory, brings about specific geographic patterns of production, consumption and distribution, which have a major influence on domestic transport patterns. Moreover, Ethiopia's cross-border transport is strongly influenced by the fact that Ethiopia is a land-locked country and that its international trade is characterized by a strong imbalance between exports and imports (7.34 million tonnes of imports and 1.34 million tonnes of exports in 2013[5]). The latter has a direct impact on transport efficiency, with a high percentage of empty trucks in the direction of the neighbouring foreign ports.

[5] Port of Djibouti accounts for 98% of total maritime traffic and 91.5% of Ethiopia's total foreign trade, the balance (2%) passing through Port Sudan (Sudan, nearest to the Northern part of Ethiopia, mainly certain exports/sesame seeds) and Port of Berbera (Somaliland/ mainly certain imports).

The Ministry of Transport is composed of five main directorates (policy formulation & monitoring, strategic management, project and programme coordination, transport logistics, and sectoral capacity building) and has eleven institutes under its supervision (including ERA, ORF, FTA, ERC, EAE, EAC, ERCC and ECAA). The Ministry has the following powers and duties:

- ensure integration of provision of transport services in line with the country's development strategies (and promote the expansion of transport services);
- ensure construction, upgrading and maintenance of transport infrastructures;
- establish/implement regulatory frameworks guaranteeing reliable and safe transport services (including maritime and transit services).

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 (see table below). While the focus was primarily on the road sub-sector throughout the three successive RSDP phases, the GoE's first Growth and Transformation Plan (GTP-I, 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).

Table 3.2. Transport sector expenditures in Ethiopia 2007/08 – 2013/14 (in millions of Ethiopian Birs; ETB).

Year	2007/08	2008/09	2009/10	2010/2011	2011/2012	2012/2013	2013/14
Transport sector expenditure	8,608	10,444	15,102	19,863	29,576	35,227	41,071
Total GoE expenditures including external financing	46,915	57,775	72,598	93,943	124,416	154,010	184,974
Transport sector as % of total GoE expenditures	**18.3%**	**18.1%**	**20.8%**	**21.1%**	**23.8%**	**22.9%**	**22.2%**
GDP at current market price	245,836	332,060	379,135	515,079	747,326	864,673	1,047,393
Transport sector as % of GDP	**3.5%**	**3.1%**	**4.0%**	**3.9%**	**4.0%**	**4.1%**	**3.9%**

Source: MOFED (Macro Economics Department)

The long term GTP (2010-2030) was championed by the late Prime Minister, who unexpectedly passed away in August 2012. It is widely hoped that the high calibre approach on which GTP embarked can be sustained. With GTP-II (2016-2020) in the making, no great changes in main development directions are expected in the foreseeable future.

Road sub-sector

The Ethiopian Roads Authority is the autonomous agency responsible for:

- initiating policies and legislation on roads, i.e. classification and designation of the road network, determination of road and bridge design standards, preparation of long and short term road development plans;
- undertaking feasibility studies, designs, construction and maintenance of highways, and take necessary measures for the safe use of the highways and for the protection of the environment during road works;
- enforcing vehicle (axle) weight and size control regulations.

The road network is the backbone of the transport system in the country. The development of the (classified) road network has been impressive (see table below) - in 17 years, the federal network has been extended by 69%, while the regional network length more than tripled and the total network of classified roads increased by almost 73,000 km including more than 39,000 km of Woreda roads during the last 4 years.

Table 3.3. Length of road network in Ethiopia in kilometres.

Road type / class		End of RSDP-I (5 years)	End of RSDP-II (5 years)	End of RSDP-III (3 years)	RSDP-IV (4 years)
	1997	***2002***	***2007***	***2010***	***2014***
Federal –Asfalt	3,708	4,053	5,452	7,476	12,640
Federal –Gravel	12,162	12,564	14,628	14,373	14,217
Federal Total	15,870	16,617	20,080	21,849	26,857
Regional	10,680	16,680	22,349	26,944	33,609
Woreda					39,056
Classified Network	26,550	33,297	42,429	48,793	99,522
Km/1000 population	0.46	0.49	0.55	0.58	1.1
Km/1000 sq.km	24	30	39	44	91

Source: ERA (Annual Assessments of RSDP)

By mid-2014, 74% of the paved roads, 58% of the gravel road and 55% of the rural roads was considered to be in good (or fair) condition. At the start of the RSDP in 1997, these figures were 17%, 25% and 21% respectively.

The present size of the national motor vehicle fleet has been estimated at 450,000 to 500,000, but according to insurance company data, the active (insured) fleet is about 350,000, which is a relatively small fleet size for providing the road user charges needed for maintenance of the rapidly extending road assets. The composition of the active national motor vehicle fleet - largely concentrated in Addis Ababa - could be roughly: 200,000 cars/taxis, 65,000 buses (all sizes), 70,000 small trucks and 15,000 large truck-combinations. The growth of the vehicle fleet and of its fuel consumption in particular is of great importance for the growth of the Road Fund (fuel levy) for road maintenance. The annual vehicle-kilometre performance (2014) on the classified road network was estimated at 5.95 billion Vehicle-Km/year (16.3 million/day), but is likely to be at least 30% larger (7.7 billion Vehicle-Km) when including Addis Ababa and other urban traffic flows.

In 2013/14, the registered number of road accident fatalities was 3,115 (244 drivers, 1,266 passengers, and 1,605 pedestrians) and around 14,000 casualties, which was about twice as many as in mid-1990's. Nevertheless, the fatality rate[6], calculated as number of (registered) fatalities divided by the (estimated) 1,000 Vehicle-Kilometres/Day, has come down to 0.192 from around 0.50 in the mid-1990's.

Lately (2013/14), some 180,000 trucks (with a total of 800,000 axles) have been checked on overloading, with only 6% found exceeding legal limits, whereas this used to be more than 30% in the period until 2009. Further strengthening of Axle Load Control is expected after implementation of a network of 14 truck weighing stations (incl. relocation of 3 of the 10 existing stations), where the out-dated equipment will be replaced by WiM (single platform) equipment including a pre-selection facility to exclude empty and lightly loaded trucks.

[6] GTP-I set a 2015-target of 27 *fatalities per 10,000 motor vehicles (i.e. another international indicator),* but the actual figure is still several times higher.

Freight haulage is regulated by the Federal Transport Authority, which provides vehicle usage and operating licences to companies and individuals who supply road transport services. Tariffs are negotiated between the transporter and the user.

Railways

The old 780 km long Djibouti-Ethiopia railway line, managed by Chemin de fer Djibouti-Ethiopia (CDE; established in 1981), linking Addis Ababa with the port of Djibouti, served an important transport corridor, with about 30% of the Ethiopian population and 70 % of the Djibouti population situated along the line. Lately, only the Djibouti-Dire Dawa section (308 km) could be kept operational with three passenger trains per week, and no freight transported at all. The old line could no longer provide the desired services, but the route is still important for Ethiopia.

A new Addis Ababa-Djibouti Port standard gauge railway line under construction is expected to completely replace the old line soon (before the end of 2015). The new line has a total length within Ethiopia of about 671 km and about 82 km in Djibouti, with some 14 km tracks in the port area. The construction contract price is about US$ 1.7 billion. The rolling stock will be provided by Norinco (China North Industries Corporation) and a Chinese concessionaire will operate the line during the first 5 years, while training staff of the Ethiopian Railway Corporation (ERC).

This is the first priority of a total of eight designated railway corridors with a total length of almost 4,750 km, of which more than 2,000 km were planned to be constructed during the GTP-I period (2010-2015); some 1,400 km is now under contract, i.e. Northern line Awash-Weldiya: 2 contracts, one Turkish and 2nd Chinese contractor, with financing by Credit Suisse consolidating bank loans from a group of countries; Weldiya-Djibouti 2nd Port Tajourah for potash export, with combined Chinese/Indian financing; and first sections of Western line Addis Ababa-Ejaji-Jima).

Air and water transport

The Ethiopian airport network is managed by Ethiopian Airports Enterprise (EAE; a public company), administering 15 Airports and two airstrips across the country. Four of the airports are of international standard (Addis Ababa, Bahir Dar, Dire Dawa and Mekele).

In 2013, a total of 5.8 million international passengers and 1.15 million domestic passengers used air transport, most of them moving through Addis Ababa Bole International Airport (6.25 million). Air transport moved 133,500 tons of international freight (including transit), less than 2% of the total of 8.7 million tons of Ethiopian external trade. Domestically, air transport moved just under 1,100 tons of freight between domestic airports. The most important air transport operator (and main foreign currency earner) is Ethiopian Airlines, a public airline that has been operating for 65 years. There are about 14 other international and 5 other domestic airline operators.

Water transport is of small and local importance only, mainly on Lake Tana.

Inter- and multi-modal opportunities

Inter- and multi-modal opportunities are yet to be better exploited (seaport-rail-road, air-road).The Maritime Affairs Authority (MAA) of the Ministry of Transport is the regulator of maritime transport, inland (dry/fuel) ports and international logistics (import-export processes). The Ethiopian Shipping and Logistics Services Enterprise (ESLSE), being

a public company supervised by MAA, operates the inland ports and the international multimodal transport services.

The dry port network consists of 7 terminals, the most important one is located in Modjo, handling 70% of the container flow (totalling 61,000 full and 54,000 empty Twenty feet Equivalent Units (TEUs) in 2013). ESLSE plans to significantly extend the Modjo Terminal and to build 5 additional dry ports in new locations: Bahar Dar, Hawassa, Nekempte, Jimma and Jijiga.

3.5 Findings on the sector

A ***sector-wide approach (SWAp)*** was advocated by the EU and other Development Partners (DPs) through the policy dialogue with the GoE since 1996/97. It now appears to be effectively implemented by the GoE since the start of GTP-I with the Universal Rural Road A programme (URRAP) fostering rural connectivity, and with the National Railway Network Development Plan of the ERC.

In 2008 the EU organised and funded the comprehensive ***National Transport Master Plan Study*** (NTMP study; see ETH-2) dealing with formulating a (i) strategy, (ii) an investment and action plan for all modes of transport, (iii) legal, social, environmental and road safety issues, and (iv) a national Transport Model. Unfortunately, the NTMP did not reach the state of being "owned" by the Ministry of Transport (MoT), which had been re-established in 2010 after a reshuffling of sector agencies. The NTMP was later on overtaken by the ambitions of the GTP-I and by new studies, notably (i) the preparation of the Federal Road Network Master Plan (ETH-4) and (ii) the Analytical Work on Transport Sector in Ethiopia: Growth, Competitiveness and Regional Integration.

Institutional reforms becoming effective with the start of the GTP-I (2010) comprised the separation of the policy, planning and regulatory functions of the Ethiopian Road Authority (ERA) from physical (Force Account) works implementation[7], with the latter assigned to the newly created Ethiopian Road Construction Corporation (ERCC). Both ERA and ERCC, as well as the Office of the Road Fund (ORF) came under the control of the MoT, whereas before ERA had been reporting to the Ministry of Works and Urban Development.

At the same instance (in 2010), the Ethiopian Railway Corporation (ERC) was established under the MoT aegis, with the intention to dismantle the CDE (Chemin de fer Djibouti-Ethiopia) as soon the new standard gauge railway line Djibouti-Addis Ababa would become operational and the operations of the old line (Djibouti-Dire Dawa) would be terminated. An earlier EU-attempt to support the old Djibouti-Ethiopia railway infrastructure and operations had failed due to an unfortunate combination of factors: (i) lack of political will of both governments co-owning CDE, to underwrite the logic of the EU-supported "Djibouti –Ethiopian Railway Line – Minimum Safety Works" intervention, which was to make a full-fledged rail line rehabilitation investment attractive, possibly for concessionary operation by a private party, (ii) badly performing contractor with (iii) very weak supervision, (iv) under-estimation of costs and (v) little experience at the EUD to manage the compound problems. Meanwhile the GoE switched to a radical railway modernisation scenario, with extensive assistance from China.

[7] Force Account means the Public Sector, e.g. Ministry of Works, or ERA in this case, undertakes the works with its own work force at its own account.

Mainly due to the proliferation of road works and the associated project cycle management requirements, ***ERA was restructured*** into three main "columns", i.e. Planning & ICT, Engineering and Road Asset Management, and Human Resources & Finance. Furthermore. Engineering was "de-centralized" into 6 Regional Contract Management Directorates, which brought new challenges in sustaining uniform professional standards across the regional units, and a need to continue with capacity building support (source: meetings with ERA and ECEAA).

Transport sector management is primarily the responsibility of the MoT which, in contrast to ERA, has so far received very little capacity building support (technical assistance). All agencies (MoT, ERA, ERCC, FTA, ERC) are subject to government civil service rules and have great problems with recruiting and retaining professionally qualified (and trained) staff[8]. ERA, with a tradition in capacity building since the start of the RSDP (in 1997) and ERC as a young and ambitious agency with (Chinese) training opportunities, appear to be more attractive to young graduates than agencies such as the MoT, Federal Transport Authority (FTA) and the Ethiopian Road Construction Corporation (ERCC).

Sector Budget Support for (road) transport infrastructure has been granted solely by the EU under the 9th and 10th EDF, and will continue under the 11th EDF. This has been and still is highly appreciated by the Ministry of Finance and Economic Development (MoFED), the MoT and ERA, because the volume is substantial (see table below, whilst the predictability of disbursements was greatly improved (compared to earlier project support), despite delays compared to the original disbursement schedule. ERA in particular was relieved from the bureaucracy of dealing with the National Authorising Office (the contracting agency in the project modality) and obtaining EUD endorsement of many issues, and could proceed according to significantly faster and familiar government procedures (source: meetings with MoFED and ERA).

Table 3.4. Disbursements of Sector Budget Support for the Transport Sector (in millions of Euros).

	Fixed Tranches		Variable Tranches			TA capacity building	
	Number	Amount	Number	Amount	Not disbursed	Budget	Actual expenditure
SPSP-1 (EDF-9)	3	117	3	40	6.8	4.8	4.5
SPSP-2 (EDF-10)	3	155	2	45	12.4		
SPSP-3 (EDF-10)	1	30	1	16	?	3	
SPSP-4 (EDF-11)	3	78	3	60		2	

About €19 million of the five variable tranches of SBS/SPSP-1 and 2 (totalling € 85 million) was not disbursed because the 'road safety performance' indicator was not achieved. This sanction did however not trigger notable road safety actions at the level of the GoE. As such the conditionality was not effective. Moreover, the GoE was in fact rewarded with an additional SPSP-3 funded with unspent 10th EDF funds, including the unspent parts of the variable tranches. It might have been more effective to start a dedicated road safety action plan ('project approach') way back in 2008, using the non-disbursed amounts of the variable tranches..

Transport sector performance indicators have been used for 16 years in the context of monitoring the successive RSDPs, and during the last 10 years also to monitor progress with achieving the Millennium Development Goals. The sustained assessments and consistent application of the methodology, with certain adjustments

[8] This appears to be a national institutional problem that will be hard to solve at the level of the roads or transport sector alone.

from time to time, by an external consultant (with an economic background), have significantly contributed to improvements of the underlying data systems, as well as to the conduct of a more focused and in-depth policy dialogue. This consistent review of performance indicators and the related policy dialogue seem to be more important than the use of indicators for determining the disbursement of the variable tranches, although the current practice should perhaps not be abolished, in order to retain GoE's alertness for painful policy issues.

The road construction industry is dominated—but not yet monopolized—by Chinese contractors, as shown by the participation in 100 recently finished and on-going RSDP projects (see table hereunder). Among the 22 foreign contractors, 14 originate from China, which are having a market share of almost 50% (in value terms).

Table 3.5. Number of contractors

Type of contractor	No of contractors	No. of projects	Road length (km)	Contract Value (billion ETB)	% road length	% contract value
Chinese	14	35	2,631	41.3	41.4%	49.6%
Other foreign	8	13	1,024	11.1	16.1%	13.3%
Local	31	52	2,697	30.9	42.5%	37.1%
Total		100	6,352	83.3	100%	100%

Source : ERA

The average "contract value per kilometre road length" is ETB 14.3 million (about € 0.64 million) for the foreign contractors (predominantly engaged in asphalt/paved road projects) versus ETB 11.5 million (€ 0.52 million) for the local contractors (believed to be engaged mostly in gravel/unpaved road projects). This seems to be a rather small difference which needs further explanation. Very recently, a World Bank supported "Road construction cost study in Ethiopia" has been carried out.

Road asset management

Over the past 17 years, 5.7% of total RSDP expenditure has been spent on maintenance of federal roads, and 1.3% on emergency and routine maintenance of regional roads. Since recently there is increased attention for periodic maintenance (of federal roads). Some key figures of road maintenance are presented in the following table.

Table 3.6. Key figures of road maintenance in Ethiopia (in millions of ETB)

	Routine maintenance of federal roads		Emergency + routine maintenance of regional roads		Total RSDP expenditure (federal, regional, Woreda + urban)
	Expendi-ture	Average ETB/km	Expenditure.	Average ETB/ Km	
RSDP-I (5y)	676	16,250	170	13,700	7,285
RSDP-II (5y)	848	18,350	513	19,500	18,113
RSDP-III (3y)	1,370	21,000	439	24,500	34,958
RSDP-IV (4y)	2,010	24,350	1,068	30,000	120,502
RSDP-IV periodic maintenance[9]	1,746				

Source: ERA (2014), Road Sector Development Program: 17 years performance assessment.

[9] Thus is an additional allocation earmarked for funding periodic maintenance

The Ethiopian Road Construction Corporation (ERCC) is the most important ("publicly-owned") contractor for road maintenance. Last year it had a turnover of about ETB 3 billion (€ 58 million), of which ETB 1.3 billion related to construction works and ETB 1.7 billion to maintenance works. The ERCC comprises 10 regionally based contractors dealing only with federal roads. The ERCC employs about 13,000 people.

Another eight private contractors are engaged in routine maintenance contracts (usually of a duration of 2 years) for 11 road sections with a total length of 2,879 km (78 to 473 km per road section), mostly unpaved roads, for a total contract value of ETB 695 million (€ 31.2 million). The overall average unit price is 240,000 ETB/km for 2 years (€ 10,782 per km). In general, 30% of the routine maintenance expenditure is based on labour-based methods (for all type of roads), generating off-farm employment.

Only two private contractors are presently engaged in three periodic maintenance projects of in total 161 km of unpaved roads for a total costs of almost ETB 96 million, corresponding with an average unit price of almost ETB 595,000 per km (respectively € 4.3 million and € 26.730 per km).

There is broad awareness, certainly at the Office of the Road Fund (ORF) and ERA's Road Asset Management Department, that more needs to be done on maintenance, particularly on periodic preventive maintenance. At the start of the RSDP-I (in 1997), ORF received annually ETB 320 million which increased gradually to one billion ETB per year five years later, while today (2015) it is still only 1.2 billion ETB (€ 54 million) per year. With a carry-over of 0.4 billion ETB from previous year(s), this year's road maintenance budget is said to be 1.6 billion ETB, but the actual release is expected to be lower, and certainly not enough for periodic maintenance needs. However, there is an additional 1 billion ETB allocation from MOFED, to be used by ERA for periodic maintenance, primarily for overlaying asphalt roads.

In case the VAT (15%) on fuel and a fuel levy of 2 ETB per litre would be made available for road maintenance, then at least 4 Birr/litre fuel should flow to the ORF[10]. In that case, a national fleet of 350,000 operating motor vehicles, traveling 20,000 km/year on average (i.e. 7 billion vehicle kilometres per year), at an average fuel consumption of 8 km/litre, would annually raise a total amount of (350,000 x 20,000/8) x 4 = 3.5 billion ETB. However, the actual transfer to the ORF is much lower: ETB 1.2 billion in 2015 (see above). This implies that the actual fuel levy is about 1.4 Birr/litre, while the VAT on fuel is not made available for road maintenance (calculation based on the above mentioned technical parameters).

The Ethiopian Petroleum Enterprise (EPE) channels the fuel levy (and/or part of the VAT on fuel) directly to the ORF bank account. ORF applies a fixed distribution of the funds: 65% for ERA, 25% for the nine Regional Road Authorities, 10% for the Municipal Road Authorities with 50% of this going to Addis Ababa City Road Authority. The operational costs of the ORF are covered by MOFED's recurrent budget (source: meeting with the ORF).

The nationwide highway maintenance needs and associated costs have been studied in depth in 2011.[11] The recommendations made therein are still valid[12]. At that time, the

[10] Estimate based on a price of 16.1 Birr/Litre for diesel and 17.4 Birr/Litre for petrol (prices in Addis Ababa in May 2015).
[11] One of the main conclusions: Ethiopia fulfils 100% of the routine maintenance requirements, but falls short on periodic maintenance.
[12] The structure as well as additional/new sources of the Road User Charges needs to be rationalized in view of the growing maintenance needs and costs in the country.

entire road network maintained by ERA was observed to be in reasonable condition, and perhaps that is largely still the case today. Roughly estimated, 12,640 km of asphalt and 14,220 km of gravel roads maintained by ERA (figures from mid-2014) require an annual asphalt overlaying effort of at least 1,200 km and an annual re-gravelling effort of 2,000 to 3,000 km. Likewise, 34,000 km of regional gravel roads will require an annual re-gravelling effort of around 5,000 km. The main concern is not with the regular maintenance but with a shortfall of periodic maintenance.

Maintenance costs of the Woreda roads (URRAP roads) constructed under the RSDP-IV (2010-2014) are and will not be funded by the ORF, but are supposed to be financed by the local authorities, with the maintenance being managed by the Woreda Road Bureau, including unpaid labour provided by local communities (Kebeles). The feasibility of this approach needs to be tested in the near future. Annualized maintenance cost of the anticipated URRAP network (72,000 km) have earlier been estimated at ETB 0.5 billion per year.

Poverty impact of (rural) connectivity
During the period 2007-2012, ERA has undertaken Transport and Poverty Observatory (TPO) studies in four selected road corridors, i.e. Alemgena-Butagira-Sodo (309 Km) in the South, Dera-Mechara (240 Km) in the East, Woreta-Woldiya (300 Km) in the North and Asosa-Guba (221 Km) in the West of the country. A second series of TPO studies (2012-2017) is on-going focussed on a new set of corridors : Aposto-Wondo-Negele (267 Km), Mekenajo-Dembidollo (181 Km), Kombolcha-Bati-Mille (13 0Km) and Ankober-Aliyu Amba-Awash Arba (89 Km).

Institutional capacity building, supported in a coordinated manner by all main DPs (World Bank, EU, DFID, AfDB and JICA), has been concentrated on the ERA, right from the start of the RSDP (in 1997). A large component was financed by the EU, lasting 3 years (2008 –2010) and covering the second half of SPSP-1 and the first half of SPSP-2. Only lately, capacity building support has been provided to other institutions as well: support from the World Bank and JICA to the Addis Ababa City Roads Authority and the Addis Ababa Road Transport Bureau, support from the EU and the World Bank to the Ministry of Transport (MoT) and the Federal Transport Authority and support from China provided to the ERC[13]. SPSP-3 and 4 include respectively will include also significant capacity building interventions, also for the MoT and the Federal Transport Authority (for promoting road safety in particular).

During GTP-I, which started in 2010, ERA itself has been instrumental for capacity building at three levels, namely: (i) h*igh level professional engineers* (150 successfully qualified, whilst some 3,500 are still in study process, scheduled to end in 2016); (ii) *Short training in 8 different specializations* (total of 4,670 trained over a 4-year period, of which 1,265 ERA staff); and (iii) m*iddle level technicians* for machine-based technology (at the Alemgena Training Centre of ERA) and for labour-based methods including the use of specially designed light machinery, e.g. tractor-towed grader, (at the 2 Labour Based Training Centres of ERA and 25 selected 'vocational' level training institutions of the Ministry of Education) striving for uniform 'occupational standards' through 'model' curriculums and competency assessments. A nationwide need of 40,000 middle level technicians have been estimated with nearly 7,000 certified so far.

The Transport Sector Work Group (TSWG), chaired by the State Minister of Transport and co-chaired by the EUD, is the main forum for ***coordinated sector policy dialogue***. It functions well according to all DP representatives interviewed. However, the frequency of the TSWG meetings has lately (since July 2014) been disrupted,

[13] China also provided TA to the new Expressway Operations (Control Centre, etc.)

awaiting the appointment of a new General Director of ERA and the results of the elections (held on 24 May 2015). Meanwhile the policy dialogue has been fed with two important recent studies: the Unit Cost Study funded by the World Bank and the Transport Strategy Study funded by the African Development Bank.

Regarding ***Regional programs***, COMESA will receive a substantial envelope for transport infrastructure. The road Dire Dawa-Dewele has been prioritized (the feasibility study was financed by the EU back in 2007) and could have been an opportunity for 'blending' (including EIB funding), but that modality did not materialise. Meanwhile construction has started in October 2014 with finance from the Chinese EXIM Bank. Furthermore, both the EU and DFID have expressed interest in helping to develop the 'whole' Berbera corridor: road rehabilitation in Ethiopia and Somaliland, the electricity interconnector between Ethiopia and Somaliland, the deep water port in Berbera and the dry port in Modjo (Meetings with EUD and DFID]. However, *t*he results of past RIP projects have clearly been disappointing, mainly because of the Regional Economic Commissions of COMESA not having the necessary capacities to implement projects, especially in the transport infrastructure sector. In the RIP of the 11th EDF, the idea is to deal with RECs only regarding the establishment of regional priorities and reaching political consensus as regards those priorities, but to work with national entities for the implementation of the projects (e.g. if the Mieso – Dire Dawa road section of the Berbera corridor in Ethiopia will be financed by the RIP, ERA will be the contracting authority, not COMESA).

3.6. Conclusions

Main transport sector issues in Ethiopia

- An overarching, main concern is the salary gap between the private sector and the civil service (a difference with a factor of 3), 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..

- 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).

- The quick expansion of the federal network (paved roads) and the rural roads will increase dramatically the road maintenance needs, calling for re-allocation of funding, and improved cost and quality control.

- Road safety is a growing concern (with more than 3,000 fatalities annually), but difficult to address effectively, given the prevailing civil service handicaps (recruitment of qualified staff, lack of clear leadership).

Elements confirming or refuting desk phase hypotheses

- SBS was highly welcomed and appreciated by the recipient GoE and functioned reasonably well in the roads sub-sector (see EQ 1 and 9) thanks to (i) a vibrant implementing agency (ERA), in charge of (ii) a straightforward and consistent long term Road Sector Development Programme, placed in (iii) the solid framework of a

comprehensive national economic development plan (first PASDEP, followed by GTP), and (iv) blessed by a high and sustained economic growth rate.

- SBS increased the efficiency (see EQ 2 and EQ 9) in comparison with EU's preceding 'project approach' road schemes, by eliminating bureaucratic hurdles in project cycle management, putting a capable ERA in charge, which was eager to develop further.

- EU played an important role in capacity building and its coordination (through the Transport Sector Working Group), thanks also to the continuous commitment of ERA. The GoE-led RSDP process ensured alignment of DPs, coordinated capacity building support, and feed-back on achievements (annual RSDP reports and meaningful performance indicators). ERA developed itself well in its roads sector management role thanks to continuous and systematic multi-donor capacity building support and its adjusted internal organisation (EQ 3). However, the transport sector as a whole (MoT) received little institutional support, and remains weakly staffed and organised.

- EU support to rural and district roads was coherent with the Protection of Basic Services programme led by the World Bank, supporting staffing and capacity building (engineers) for the Woreda road desks.

- Performance indicators, attached to SBS (variable tranche) disbursements, gave focus to the policy dialogue, but failed so far to achieve desired GoE policy change in road safety. An Environmental Impact Assessment indicator has been introduced in SPSP-4 (2016-2019) to flag environmental impact concerns in the roads sector (EQ 3).

- The road sector will continue to be a focal sector under the 11th EDF, including the provision of SBS in the context of SPSP-4 (FED/2014/037-753), upon GoE explicit request, and justified by past performance. However, the large and quick expansion of the classified road network and, lately the community/rural roads, will increase dramatically the maintenance needs. The Government of Ethiopia will have to undertake significant reforms to cope with this scenario (EQ 4).

- There were early (2007-2012) and sustained (2012-2016) initiatives as regards socio-economic and poverty reduction impact assessment of (main) road infrastructure provision, although further improvements are desirable in terms of depth of analysis (EQs 5 and 6). Recent IFPRI research in Ethiopia can help achieve this.

- The GoE managed to engage a new Development Partner (DP) in its widened sector approach, namely China for modern railway development. The latter is overall a risky undertaking in the eyes of traditional DPs, due to absence of transport demand assessments and associated financial-economic feasibility analysis (see EQ 8). This does however neither apply to the Djibouti-Addis Ababa main line, nor to the urban LRT in Addis Ababa, which should become viable schemes. Unfortunately, policy dialogue with China, the main bilateral stakeholder in the rail and road sub-sectors, has proved to be almost impossible.

- Blending is considered with regional funds coming from the 11th EDF COMESA envelope, for possible further corridor development (including Berbera Port/Somaliland corridor), and might also be an option for the inland dry ports

network development (EQ 7). GoE is however in doubt about the role and performance of the (local) private sector, and despite comparatively attractive EIB interest rates, certain 'conditionalities' (on procedures of project preparation, supervision, etc.) are unpopular with the GoE.

- The partially decentralised implementation modality (beneficiary country is the contracting authority, EU endorses payments) is not adequate, leading often to lengthy conflicts and discussions with the supervisor and the contracting authority with no clear solution because the EU is not empowered to take drastic measures (termination of the contract, penalties, recovery orders) without the agreement of the beneficiary (the GoE). According to the capacities and transparency of the beneficiary country, either a direct approach (EU contracting authority) or sector budget support appear to be more effective modalities.

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4 Uganda case study

List of Acronyms and Abbreviations

ADT	Average Daily Traffic
AfDB	African Development Bank
ASPR	Annual Sector Performance Report
BRT	Bus Rapid Transit
CAA	Civil Aviation Authority
CB	Capacity Building
CIP	CrossRoads Intervention Proposal
CISCOT	Civil Society Coalition on Transport (in Uganda)
CRIS	Common Relex Information System (EU)
CSO	Civil Society Organisation
CSP	Country Strategy Paper
DA	Designated Agency
DC	District Council
DFID	Department for International Development (UK)
DP	Development Partner
DRC	Democratic Republic of Congo
DUCAR	District, Urban and Community Access Roads
EAC	East African Community
ED	Executive Director
EDF	European Development Fund
EIB	European Investment Bank
EQ	Evaluation Question
EUD	European Union Delegation
FA	Force Account (Uganda) / Financing Agreement (EU)
FY	Financial Year / Fiscal Year
GBS	General Budget Support
GKMA	Greater Kampala Metropolitan Area
GoU	Government of Uganda
ICD	Inland Container Depot
IPBE	Independent Parallel Bid Evaluation
IWT	Inland Water Transport
JAF	Joint Assessment Framework
JBSF	Joint Budget Support Framework
JTSR	Joint Transport Sector Review
KCCA	Kampala Capital City Authority
KIIDP	Kampala Infrastructure Investment Development Programme
Km	Kilometre
MATA	Metropolitan Area Transport Authority
MC	Municipal Council
MDG	Millennium Development Goal
MELTC	Mount Elgon Labour-based Training Centre
MoFPED	Ministry of Finance, Planning & Economic Development
MoLG	Ministry of Local Government
MoWT	Ministry of Works and Transport
MTA	Maritime Transport Authority
MTEF	Medium Term Expenditure Framework
Mv-Km	Motor vehicle-Kilometres
NAO	National Authorising Office
NCIP	National Construction Industry Policy
NDP	National Development Plan

NIP	National Indicative Programme
NMT	Non-Motorised Transport
NRSA	National Road Safety Authority
NRSC	National Road Safety Council
NTMP	National Transport Master Plan
O&M	Operations and Maintenance
ODI	Overseas Development Institute
OPRC	Output Performance-based Road Contract
OSBP	One Stop Border Post
PFM	Public Finance Management
PPDA	Public Procurement and Disposal Authority
PPP	Public Private Partnership
PSIA	Poverty and Social Impact Assessment
RAFU	Road Authority Formation Unit
RCDS	Road Crash Data System
RIC	Road Industry Council
RIP	Regional Indicative Programme
RSDP	Road Sector Development Programme
RTI	Rural Transport Initiative
RVR	Rift Valley Railways
SBS	Sector Budget Support
SGT	Standard Gauge Track
SPSP	Sector Policy Support Programme
SWAp	Sector Wide Approach
TA	Technical Assistance
TC	Town Council
TMEA	TradeMark East Africa
ToR	Terms of Reference
TSDP	Transport Sector Development Programme
UACE	Uganda Association of Consulting Engineers
UCICO	Uganda Construction Industry Commission
UGX	Ugandan Shillings
UNABCEC	Uganda National Association of Building and Civil Engineering Contractors
UNRA	Uganda National Roads Authority
URA	Uganda Revenue Authority
URC	Uganda Railways Corporation
URF	Uganda Road Fund
Vpd	Vehicles per day
WB	World Bank
WiM	Weigh in Motion

Exchange rate: 1 € = 3,475 Ugandan Shillings (UGX), dd. 11.06.15.

4.1. Introduction

Purpose of the Country Note

This Uganda case study gathered information on the EU support to the transport sector at country level and to a limited extent at regional level (East Africa, Northern and Central corridors) in order to feed and verify the preliminary findings and conclusions of the desk phase of the continent wide Transport Sector Evaluation. Several important (technical and procedural) reports were analysed, while a series of interviews with key stakeholders in the sector broadened the perspective on local conditions affecting success factors of the EU support programmes and projects.

Role of Uganda as a case study country

Uganda is regarded as a representative land-locked country in 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.

Given the dominance of road transport, there has been very little EU support for other transport sub-sectors, whilst Sector Budget Support (for transport) has been considered but did not materialize. Lately, 'blending' has been introduced as a new financing modality in an attempt to attract more private sector funding for (regional) transport investments with 'seed money' from the EU grants (NIP/RIP).

The EUD succeeded in keeping transport as a focal sector under the 11th EDF, just like in the neighbour country Kenya.

4.2. Data collection methods used

Data for this Country Note were collected from (i) reports identified in CRIS as well as cross references found in the initial documents, and (ii) stakeholder interviews during meetings held in the period 16-25 March 2015. Initial questionnaires had been prepared for each of the ten Evaluation Questions, which were used as a guidance during the discussion meetings rather than as a checklist to be ticked off.

This country case study was not meant to carry out (another) detailed assessment of the nine selected EU transport projects in Uganda. That has already been done in various evaluation of projects and programmes[14]. Those reports have been reviewed and the main findings, conclusions, lessons learnt and recommendations have been taken into account when drafting this Country Note.

The interviews were held to collect perceptions of complementary groups of stakeholders, including implementers and beneficiaries (representatives of the EUD, partner government, the NAO, other donors, independent experts and civil society representatives), to assess the credibility of the provisional findings or hypotheses reported at the end of the desk phase, i.e. confirm or refute 'general' responses to each of ten Evaluation Questions from the perspective of the mentioned three typical project groups that characterize the EU transport sector support in Uganda.

[14] See for instance the Final Evaluation of FED/2008/019-711: Ugandan Road Sector Policy Support Programme - Capacity Development Component yet to be completed.

4.3. EU support to the transport sector in Uganda

In the NIPs of both EDF-9 and EDF-10, transport was one of the focal sectors with allocations of respectively €93.5 million and €172 million. Support has been provided as project aid and in line with the priorities indicated in Uganda's Road Sector Development Programme (RSDP).

The major EU interventions foreseen under EDF-9 were (ii) the provision of training, technical assistance and surveys for the establishment of the Road Agency, (ii support to national road maintenance and axle load control programme and (iii) rehabilitation of priority sections of the main road between Kampala and Rwanda. The Government of Uganda (GoU) committed (i) to establish a National Road Authority in charge of the management of the country's main roads, (ii) to reduce the backlog of periodic road maintenance backlog and (iii) to ensure sufficient resources for the Road Authority Formation Unit (RAFU).

The major EU interventions foreseen under EDF-10 were (i) institutional support and capacity development activities for the Uganda National Roads Authority (UNRA) and the Uganda Road Fund, (ii) Sector Budget Support (SBS) for the Road Fund and (iii) funding the rehabilitation of the Northern Corridor route. The GoU would be committed to institutional reforms, to increase funding of road maintenance and to mainstream various crosscutting issues. However, the envisaged SBS did not materialize due to the fact that the EUD felt that the GoU's budget allocations for road works were too lows and the GoU's procurement practices not sound enough. The funds allocated for SBS were then redirected towards project financing.

Both NIPs (EDF-9 and EDF-10) included an envisaged intervention framework and monitoring indicators.

The EU support to the transport sector in Uganda can be clustered in three typical categories of projects, notably:

- Northern Corridor Road[15] infrastructure investment projects. In total 5 projects funded by the EU. Total EU contribution amounted to about € 350 million; plus more than € 410 million invested before EDF-8.
- Rural access roads (feeder roads for rural/agricultural development). Two projects funded by the EU with a contribution of approximately € 24 million.
- Capacity Development for the road Sector: two projects funded by the EU with a total contribution of approximately € 11 million.

The financial data of the 11 projects/programmes[16] funded by the EU under EDF-8, 9 and 10 in Uganda during the period 2005-2013 are presented in the following table.

[15] Malaba (Kenya border) – Kampala/East: 232 km; Kampala Northern Bypass: 21 km; Kampala/West – Katuna (Rwanda border): 412 km (partly ongoing). Altogether ~ 665 km (from Busia-Kenya border ~23 km shorter).

[16] Three projects appear two times in the table; under different EDFs.

Table 4.1. Financial data of the EU funded transport projects in Uganda in the period 2005-2013 (in '000 of €)

Decision code	Decision title	Allocated	Contracted	Paid
EDF-8				
FED/2000/015-261	Strengthening the Northern corridor route	69.166	41.322	41.329
FED/2002/015-954	Kampala Northern bypass	52.195	45.129	45.128
	Total EDF-8	**121.361**	**86.451**	**86.457**
EDF-9				
FED/2000/015-261	Strengthening the Northern corridor route	See EDF-8	18.978	18.978
FED/2002/015-954	Kampala Northern bypass	See EDF-8	5.000	5.000
FED/2003/016-438	Technical cooperation facility (TCF) 2004-2009	3.158	743	933
FED/2004/016-550	Technical assistance to the Road Agency Formation Unit	2.941	2.941	2.941
FED/2006/017-948	Reconstruction of priority sections of the Kampala-Mbarara road	117.000	91.146	90.775
FED/2006/018-457	Backlog Roads Maintenance Programme (BRMP)	11.138	10.638	8.981
FED/2006/018-626	Technical Cooperation Facility (TCF) II	2.805	2.084	2.084
FED/2007/020-899	Post-floods rehabilitation of rural road and infrastructure in Northern Uganda	5.000	2.892	1.896
Total EDF-9		**142.042**	**134.423**	**131.588**
EDF 10				
FED/2006/017-948	Reconstruction of priority sections of the Kampala-Mbarara road	See EDF-9	25.000	25.000
FED/2008/019-711	Ugandan Road Sector Policy Support Programme - Capacity Development Component	8.419	8.128	6.310
FED/2008/020-220	Technical Cooperation Facility III	2.943	627	591
FED/2009/021-504	Northern Corridor Route Improvement Project: Mbarara - Ntungamo - Katuna	129.200	112.717	63.825
	Total EDF-10	**140.562**	**146.471**	**95.726**
Total 2005-2013		**403.965**	**367.345**	**313.771**

Source : CRIS, June 2014.
Note 1 : EDF-9 and EDF-10 projects not having had any disbursement in 2005 and the years thereafter, are not included in this table.

4.4. Short description of the transport sector in Uganda

The Ministry of Works and Transport is the lead agency in the transport sector. An institutional reform process commenced early in the millennium and is still on-going. The Uganda National Road Authority (UNRA) became operational in July 2008, mandated to develop and maintain the national roads (incl. ferries linking the network across waterways), and exert 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 (e.g. UNRA, Kampala Capital City Authority). URF remains handicapped in this function by conflicting legislation (URA & URF Acts) awaiting rectification for some time already.

Since 2007/08, the Government of Uganda (GoU) has targeted the (road) transport sector as a priority area, allocating a lion's share of the National Budget to it, as shown in the following table.

Table 4.2. GoU transport sector budget compared to the overall budget
(in billions of Ugandan Shillings; 1 € = 3475 Ug.SH, dd. 11/06/15)

Fiscal year	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15
Transport budget	564	1,084	1,134	1,038	1,228	1,651	2,395	2,389
Total GoU budget	3,964	5,193	6,282	6,407	9,326	11,157	13,169	15,054
Sector/total	14.2%	20.9%	18.1%	16.2%	13.2%	14.8%	18.2%	15.9%

Source: MoWT, Annual Sector Performance Report 2013/14.
Note: On 20/03/15, the mission received slightly different transport sector budget figures, for the years 2008/09 till 2014/15 respectively: 1,103 – 993 - 1,212 - 1,574 - 2,370 and 1,920.

Road sub-sector

The road network is the backbone of the transport system in the country. The (classified) road network receiving maintenance funds from the URF comprises:

- National roads (UNRA): 20,543 km (3,565 km paved around mid-2014);[17]
- Kampala roads (Kampala Capital City Authority: 1,218 km (467 km paved);
- Municipal Council Roads (22 Councils): 4,500 km (745 km paved);
- Town Council roads (174 Councils): 8,500 km (744 km paved);
- District Council roads (111 Councils): 30,000 km (none paved).

This adds up to a network length of 64,770 km (of which 5,499 km paved), with an additional 42,250 km of community access roads (of which about 1/3 is receiving also some URF funding). Developments in road conditions of the national road system are shown in table 4.3.

Table 4.3 Conditions of the national road system

	Paved roads condition (km)					Paved roads condition (%)			
Year	**Good**	**Fair**	**Poor**	**Rest**	**Total**	**Good**	**Fair**	**Poor**	**Rest**
2009/10	1,230	1,180	709		3,119	39%	38%	23%	
2010/11	1,742	680	843		3,265	53%	21%	26%	
2011/12	1,717	856	744		3,317	52%	26%	22%	
2012/13	1,794	893	803		3,490	51%	26%	23%	
2013/14	2,033	336	96	1,100	3,565				31%
	Unpaved roads condition (km)					**Unpaved roads condition (%)**			
2009/10	1,535	2,340	3,436		7,311	21%	32%	47%	
2010/11	3,719	7,215	6,186		17,120	22%	42%	36%	
2011/12	3,926	7,853	5,904		17,683	22%	44%	33%	
2012/13	3,852	7,705	5,954		17,511	22%	44%	34%	
2013/14	3,463	4,601	2,147	6,767	16,978				40%

Source: UNRA
Note 1: Rest = not surveyed
Note 2: 2013/14 results are based only on surveyed roads. On-going works or contracts awarded at the time of surveying were not surveyed.
Note 3: In 2010, almost 10,000 km district (feeder) roads have been added to the National Roads Network

National roads maintenance needs were believed to be met for 25-63% over the last 4 years. UNRA's maintenance expenditure was at a level of UGX 110 billion per year in the

[17] Paved National network length was 2,200 km in 1996, expanded to 2,650 km in 2003. NTMP expected 4,100 km of paved National roads by 2013, actual achievement was about 600 km short (3,500 km). Annual increase in paved national roads averaged 150+ km/year since 2008/09, but was 300 km in 2013/14.

period 2007-2010 (with about 80% of the budget expended), and double that amount in fiscal year (FY) 2013/14 (with 84% expenditure level). Road maintenance of district roads (all unpaved) is even a greater challenge; about 50% of district roads were reported to be in poor condition in mid-2014, while the public outcry is for tarmac roads. For urban roads, about 58% of the paved roads and 49% of the unpaved roads were considered to be in fair to good condition.

In FY 2013/14, almost 192,000 trucks on national roads were weighed, with more than 105,000 (55%[18]) found overloaded (UGX 383 million paid in fines). The busiest weighbridge (of 7 fixed Weigh in Motion and 3 portables) is at Magamaga (east of Jinja) on the Northern Corridor road.

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 that could be undertaken with a fixed budget. In the last quarter of 2014, more than 2,300 km were reportedly under tarmac construction (UNRA magazine), of which just over 500 km were near completion, some 400 km more or less half-way completed, about 700 km in early stages of construction and approximately 700 km contracted but yet to commence. A next batch of over 1,200 km has been prepared to follow suit. The drive for upgrading to tarmac standard is very visible, in contrast with the wish to focus on long term road asset management (maintenance) advocated mainly by the URF and Development Partners (DPs).

Even though road transport accounts for more than 90% of all passenger and cargo traffic, there is no reliable data on the actual number of vehicles that (could) use the roads. Vehicle licensing has been abandoned and may not so easily be re-introduced, but technical vehicle inspection will be re-instated[19]. In 2004/05 the vehicle fleet size was estimated at about 250,000[20] (including 90,000 motor cycles), whilst the annual vehicle registrations (all categories) have gone up from about 55,000 in 2005/06 to around 135,000 (incl. approx. 50,000 motorcycles) in 2012/13. Thus the total number of motor vehicles today is likely to exceed 800,000 and could be around one million, including probably 250-300,000 motorcycles. The growth of the vehicle fleet and its fuel consumption in particular, is of great importance for the growth of the Road Fund for road maintenance.

The registered 2,937 fatal road accident victims in FY 2013/14[21] represented a fatality rate of about 30 per 10,000 vehicles, still one of the highest in Sub-Saharan Africa. Speed reducing features such as rumble strips and traffic hump arrangements, are spreading out mostly in (late) response to public complaints about rising death tolls on roads upgraded to tarmac standard or rehabilitated from very poor condition.

Railways

Until the early 1990's the railway network extended for 1,266 km (metre gauge), but currently there is only about 320 km of functioning track between Malaba-Kampala (250 km), Kampala-Port Bell (10 km) and Tororo-Mbale (60 km), since 2006 operated by Rift Valley Railways (RVR) under a 25 year concession. Freight transport within Uganda reached 138 million ton-km in FY 2013/14. Wagon transit time stood at 9 days (Mombasa-Kampala) with total turn-around time at 34 days—indicating a negative development. GoU plans are to construct standard gauge rail track (SGT, 1.435 m) between Malaba-Kampala and also in the direction of Gulu. The challenge is to keep current operations going in combination with the reconstruction to SGT. Moreover, when oil exploitation comes on

[18] 'Policy' target set was reduction to 40% overloading.
[19] On 17th March 2015, MoWT signed a contract with SGS (Switzerland) to manage the mandatory inspection.
[20] Source: Table TA.1-2.3 Northern Corridor Pre-Feasibility Study.
[21] 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) – Ref. Table TA. 1-2.5.

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 (incl. Tororo-Mbale-Gulu) of the meter gauge railway in the transition period to the new SGT, with a focus on inter-modal facilities at strategic locations (construction of inland container depot Mukono is underway).

Water transport

Presently, a single rail wagon ferry vessel is operating a much reduced service between Port Bell and Mwanza (Tanzania), whilst one GoU-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 craft (the "informal sector") are operating, often well below reasonable safety standards. Where waterways pose barriers and bridge construction is too expensive, rural road connectivity may be greatly improved by small rural ferries.

Air transport

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.

Greater Kampala Metropolitan Area Transport (GKMA)

A GKMA land use-transportation model was developed in 2003 to make future transport demand projections for underpinning the 15-year Investment Programme 2008-2023. Reorganisation and restructuring of the public transport system (using the three railway corridors towards Mukono, Port Bell and Bujuko, in conjunction with dedicated bus-ways/BRT corridors) and improvement of the existing road network (fly-overs, area traffic management), including non-motorised transport facilities, were the main elements of this (delayed) programme supposed to be implemented by a single GKMA Transport Authority (yet to be established).

4.5. Findings on the sector

Sector-wide approaches (SWAp) have been advocated by the EU and other DPs since 1996 and appear to have gained ground finally in the second National Development Plan.

The institutional reform process has included the establishment of the Uganda National Roads Authority (UNRA for national roads network management), the Uganda Road Fund (URF for funding nationwide road maintenance), the Civil Aviation Authority (for aviation sub-sector regulation) and the Uganda Railways Corporation (rail sub-sector management). However, the creation of five other designated agencies – planned to operate under the aegis of Ministry of Works and Transport (MoWT) - is advancing only slowly, notably the Districts, Urban and Community Access (DUCAR) Authority, the National Road Safety Authority (NRSA), the Metropolitan Area Transport Authority (MATA), the Maritime Transport Authority and the Ugandan Construction Industry Commission (UCICO). In each case, legislation needs to be passed. The last one (UCICO Bill) might be the first one to get parliamentary approval, while the first one (DUCAR authority) probably presents the most difficult and lengthy process. In the absence of the intended (semi-) autonomous agencies, the MoWT remains both the policy maker and implementing agency in these areas.

The road industry comprising about 800 road contractors operating in Uganda, is composed of three groups:

- numerous small-scale contractors working on many low-value contracts with limited capital and expertise;
- a few medium-sized contractors able to undertake larger and higher value contracts, and needing a substantial and predictable flow of work to allow them to invest and develop work force competence;
- a very small number of large contractors, with foreign domination, and tendencies towards monopolization of the market.

The currently recommended way to further develop the road industry is primarily focused on providing better perspectives to the medium-sized contractors group. This is complicated by the current dominance of Chinese contractors, lately winning practically all (paved) road rehabilitation contracts under national and international procurement procedures (often the numbers 1-10 among around 15 bidders are Chinese, whereby successful, lawyer-supported 'challenging' of initial ranking is not uncommon).[22] What appears to be fierce competition among Chinese contractors is considered by some as an 'engineered' route to monopolization of the road industry.

Despite notable improvements there are still cases of poor road contract performance in the procurement and contract management process exemplified by:

- poor planning and design calling for changes to scope of work, increasing time and cost;
- weaknesses in evaluation so that contracts are awarded based on unverified tender documentation, leaving the contractor's track record, competence and capacity unchecked; for donor funded projects this has now been addressed through the Independent Parallel Bid Evaluation (IPBE) Technical Assistance funded by DFID. The problem remains with locally funded projects where the IPBE is not done;
- poor interaction between contracting agency, supervisor and resident engineer (the representative on site) during implementation, resulting in delays and costs due to late mobilization, as well as delays and disputes in certification and payment (moreover, underperforming contractors are seldom held to account due to weaknesses in the supervision chain).

Greater insight in procurement practices has been provided by the introduction of the IPBE[23]. A recent evaluation indicates that the outcome of the parallel exercise corresponds in 50% of the cases with the Agency's decision, while the Agency has been prepared to adjust the initial selection in about 1/3 of the non-corresponding outcomes.

Table 4.4 illustrates the great increase in UNRA's budget starting in 2010/11, while the URF budget for road maintenance increased stepwise. UNRA's budget utilization ratio was only 70% to 80% in the years 2009/10 till 2011/12, but that ratio has increased to close to 100% in more re4cent years. URF succeeded to disburse its budget almost entirely all along those years. However, full disbursement by URF does not mean that all money is actually spent. Particularly at district level, there are unspent balances flowing back to the Consolidated Fund of the GoU Treasury, although districts have 3 months after the end of the fiscal year (until September) to settle contract payments.

[22] Rehabilitation works tend to be more 'loosely' specified (under national procurement rules), with more 'occasional' (less strict) supervision, in comparison with upgrading works (unpaved-to-tarmac), mostly tendered under international procurement rules) with more control by external financiers.

[23] Introduced by DFID and carried out by Crown Agents, UK.

Table 4.4. Annual budget allocation to UNRA and URF & actual expenditure (in billions of UGX)

	2009/10	2010/11	2011/12	2012/13	2013/14
UNRA - Budget Allocation	809	577	799	1,177	1,897
UNRA - Actual Expenditure	588	401	649	1,168	1,852
URF - Budget Allocation	116	284	279	278	351
URF - Actual Expenditure	111	283	258	235	352

Source: MoWT.
Note 1: FY 2014/15 incomplete (URF just 1st Quarter – UNRA possibly 3 quarters?).
Note 2: URF provided slightly different figures as regards its budget and expenditures

In FY 2008/09, MoFPED had allocated UGX 1,100 billion for road development and maintenance, the largest budgetary allocation for road construction in Uganda's history, which could however in no way be absorbed by the young UNRA organisation. Table 5.4 illustrates that such a level of expenditure was not reached until FY 2012/13.

Table 4.5 shows the annual and actual disbursements of URF to UNRA, KCCA and DUCAR for road maintenance, plus the amounts used for financing the operations of URF itself. The trend is moderately upwards, with annual variations of the agencies' shares in the following ranges: UNRA: 59-72%, DUCAR: 22-34%, KCCA: 4-5% (only!), and URF operations: 2-3%.

Table 4.5. Actual disbursements of URF to UNRA, KCCA and DUCAR (in billions of UGX)

	FY 2010/11	FY 2011/12	FY 2012/13	FY 2013/14	FY 2014/15 Estimate (Q1-Q3) x 1.3
UNRA	178	168	139	254	253
KCCA	12	11	12	12	18
DUCAR	85	73	79	79	108
URF	8	6	5	7	7
Total	**283**	**258**	**235**	**352**	**386**

Source: URF.

The rationale of the focus on road maintenance is (long term) road network asset value protection. If for example UGX 200 billion is added in a year to the asset value by upgrading roads to tarmac standard (in particular parts of the country), while UGX 300 billion is lost from the asset value (spread all over the country) due to lack of maintenance (and therefore the need to rebuild sooner or later at high prices), then the value of the overall road network asset of the country will fall in value, gradually but steadily. The battle is between short-term 'political profiling' (with tarmac roads) and long-term 'asset value growth' (network asset management), the latter so far on the losing side, particularly during election campaigns.

Latest recorded achievements in roads maintenance of the National Roads (~ 20,500 km), show manual *routine* maintenance on almost 19,500 km and mechanized *routine* maintenance on around 1,700 km of paved roads and 10,500 km of unpaved roads. However, there is hardly any *periodic* maintenance on paved roads and re-gravelling of unpaved roads reaches just 600 km/year.

Of the District, Urban and Community Access Roads DUCAR (~ 58,000 km in total), about 18,000 km receive manual routine maintenance, less than 5,000 km mechanized routine maintenance and less than 1,500 km periodic maintenance. Clearly, also maintenance management processes needs to be improved through:

- more independent supervision and inspection by trained teams of inspectors (measure work done against set targets and standards);
- more precise record keeping followed by regular review of such records.

This highlights failure in quality as well as doubtful priority choices—both sensitive issues wherever local politics are involved.

Force Account works are likely to continue, with a new round of (Japanese) equipment distribution to all districts in the making.[24] For the near future, it seems most practical to accept this as "force majeure" and make the best of it by ensuring that (i) District Works Committees[25] will prepare improved and timely Action Plans and (ii) input resources will be safeguarded for funding the equipment operators (including training of skilled operators, purchase of fuel and financing maintenance and repairs).

The top issue of the MoWT strategy flagged at the latest Joint Transport Sector Review (October 2014) was "inadequate sector funding for maintenance". It was envisaged to "submit to Parliament amendments to the URA Act enabling direct transfer of Road User Charges to URF".

Meanwhile URF had commissioned PwC to carry out Road Users Charges (RUC) study, including drafting a Framework with Regulations for the collection and management of RUCs to be used for funding of road maintenance. The ToR of that study reflects a comprehensive approach, but the (short) period available for the study raises questions about the fulfilment of the ambitious outputs.

A well-designed network of Axle Load Control stations (weighbridges) and their technical outfit is largely completed, but the challenge of effective and independent operations remains. A recent study has recommended a private sector management contract with a reputable international operator.

A National Road Safety Authority (NRSA) can do little more on road safety than the National Road Safety Council (NRSC) could do in the past, as long as there is no operational Road Crash Data System (RCDS) in Uganda. Year 2013 has been used to agree on the needs and system design of this RCDS which was then piloted in 2014. It will take 2015 (if not longer) to roll out the RCDS countrywide, and probably a few more years to consolidate all functions including a permanent manager of the system, next to a data analyst and an IT specialist who has followed the software development with the responsibility for software sustainability after hand-over, and a Data analyst. These three constitute the absolutely essential permanent "work force" of a future NRSA (or current NRSC) governed by a collective composed of the MoWT, the (Traffic) Police, the Road Agencies and the Ministry of Health (with MIS on hospital cases, ambulance services, etc.).

Sector Budget Support has been considered by the EU under the 10th EDF, but was considered too risky in view of the road works budget allocation and procurement practices at the time, and funding initially allocated to SBS was then redirected towards project financing. None of the other DPs has considered SBS for the transport sector.

General Budget Support (GBS) is provided to the GoU since 2001. The GoU, three multi-lateral and seven bi-lateral partners (including the EU) signed a Joint Budget Support Framework in 2008. However, since a couple of years the volume of GBS has significantly diminished accompanied by a swing back to projects in donor portfolios. Bi-lateral donors insisted on a broader design of the Joint Budget Support Framework (JBSF) in order to address also governance issues. The period since 2012 has been characterized by (temporary) suspension of budget support by all donors, while it was felt that over time the

[24] This will be the 4th attempt of this kind in 20 years: 1st in the mid-90s (Japan), 2nd early this Millennium (AfDB?), 3rd in 2012 (China). All failed due to an "incompetent operating environment". Yet there is an example of 1988-equipment in operation thanks to careful treatment.

[25] Under DRRP-1, EU also supplied equipment to Districts.

domestic policy context was not favourable for achieving tangible results with providing general budget support.

Transport has been one of the 'assessment' sectors in the EU's GBS provided under the MDG contract. The EU allocation for the 5 year period 2008/09-2012/13 was € 122 million, of which a limited sum of the variable tranches has not been disbursed as a result of the annual reviews of the Joint Assessment Framework (JAF). In these assessments, transport sector development was addressed by four performance indicators in JAF-2, seven indicators in JAF-3, eight indicators in JAF-4 and only two performance indicators in JAF-5 (% of national roads, paved and unpaved, in fair-to-good condition and % of district, urban and community access roads in fair-to-good condition). Reportedly, the transport performance indicators have not played a decisive role in taking disbursement decisions (no detailed 'weighing' of all 16 to 21 sector performance indicators). These decisions were mostly based on a 'more general' appreciation of performance.

Coordination among DPs is reportedly more than satisfactory, with in particular the 'multi-laterals' (EU/WB/AfDB) pursuing the longer term policy issues. The WB is engaged in a 10 year Output Performance Based Road Contract (OPRC) tackling the tedious road maintenance issue[26], while other multi-lateral DPs are interested to follow suit (AfDB). UNRA appears to be hesitant fearing reduced control and is concerned that local contractors may not benefit. The WB is furthermore focused on the third Transport Sector Development Programme (TSDP-3 implemented by the MoWT) and the second Kampala Infrastructure Investment Development Programme (KIIDP-2 implemented by KCCA).[27] JICA focuses on enhancement of international corridors (new Nile bridge at Jinja, Master Plan study Northern Corridor-all-along, Atiak–Nimule Road) and amelioration of traffic congestion in Kampala area (in collaboration with KIIDP-2). DFID has strongly supported CrossRoads (with EU co-financing) and TradeMark Uganda (One Stop Border Post, ASCYUDA system), while contributing to Mbarara–Mirama road upgrading (the parallel Northern Corridor road branch to Rwanda) and to Kigumba-Hoima-Bulima road (southern access to "oil belt", with AfDB and GoU), but intends to re-focus on other sectors. DANIDA has supported rural transport for the last 20 years, lately through the Rural Transport Initiative in 23 districts (including support to the Mount Elgon Labour-based Training Centre promoting the use of using labour intensive technologies for road construction and maintenance). However, Danida has decided to phase out its support to the transport sector.

4.6. Conclusions

Main transport sector issues in Uganda

Road maintenance is to become more prominent (Road Fund, budget allocation, planning/programming/supervision/monitoring). URF is the main voice advocating road maintenance (supported by the Secretariat of the Road Industry Council and the DPs). Even without the confirmation of the establishment of a second generation road fund, URF can develop further, as it appears to get increasing allocations from MoFPED. An UNRA-like setup, independent from MoWT, i.e. a DUCAR agency, is not likely to materialize soon. It seems preferable to support the MoWT, in conjunction with the Ministry of Local Government, in improving the road maintenance project management cycle at district level, rather than to have URF fill this gap, and thereby step outside the mandate of a road fund.

[26] North Eastern Road-Corridor Asset Management Project.

[27] Investment in urban infrastructure, including transport, is considered to be very critical. Without strong interventions, Kampala is believed to become a mega slum in 10 years' time.

UNRA has great project and contract management challenges ahead, complicated by the suspended top management (since September 2014); more technical support than originally planned may still be needed when the current uncertainties have been sorted out.

Future EU-supported technical assistance in these areas could perhaps adopt 'CrossRoads-like approaches' facilitating rapid-response mobilization of the desired expertise, loosening tight ToR and CV-approval rules, with delegation of decision-making to a trusted (and tested) Programme Secretariat. Co-financing of the World Bank's TSDP could perhaps be an option.

Institutional reform requirements remain (road industry oversight, metropolitan [public] transport, urban & rural roads management, road safety). There are few signs that DPs, with EU continuing in the 'lead' of the (focal) transport sector, can orchestrate greater pressure on the GoU to pursue the desired institutional adjustments, but the routine schedule of meetings at different levels (some more 'policy dialogue' than others) can keep the key issues in the limelight.

Road industry development remains crucial (UCICO/RIC: contractor registration/ certification, unified procurement manual, independent parallel bid evaluation, young graduate & vocational training of consultants & contractors through strengthened associations). The "CrossRoads Handover and Sustainability Strategy" document of February 2015 (2 page Executive Summary) stresses the activities that would need to be pursued as long as UCICO (incorporating RIC) is not established. The challenge is in establishing public-private relationships (partnership) between the road agencies (MoWT, UNRA, URF, KCCA) and the organisations hosting the development initiatives.

Identification of multi-/inter-modal transport development opportunities. TMEA, JICA and the EU all study in parallel on the Northern Corridor: TradeMark East Africa in a multi-corridor context, JICA in the broad context of potential investment opportunities benefitting from optimal accessibility, and the EU in search of blending opportunities.

Urbanization (secondary cities along National Corridors) and urban transport management (GKMATA: KIDP-WB/JICA). EU is now not engaged in this 'sector', and the EUD delegation is not equipped to do so, but there may arise blending opportunities, e.g. in Bus Rapid Transit Kampala.

The growing influence of civil society (Safe Way Right Way, Uganda Contracts Monitoring Coalition, CISCOT, Roads Users Satisfaction Surveys). The CrossRoads programme has been a notable stimulus for civil society initiatives in the transport sector [meetings SFRW/CISCOT], while EU advocates support in this area under the 11th EDF; a challenge for the national engineer at EUD to manage this—and get early training for that.

Elements that confirm or refute desk phase hypotheses (see Evaluation Questions 1-10)

Clearly, significant vehicle operating cost and time savings on the 665 km long Northern Corridor road in Uganda have been achieved as a result of the EU support to road infrastructure (EQs 1, 5, 7, 8), although it came with considerable delay on various sections.

The efficiency in terms of value for money (kilometres of 'good' roads) has been low (EQ 3), due to price escalation. Financing flexibility under grants is limited (unlike loans), so that the GoU had to mobilise the additional funds, causing further implementation delays. Sometimes EU insisted on changes during design (e.g. as a result of a road safety audit), which -though reasonable- led to price escalations expected to be paid by the GoU.

EU road contractors had high rates (EU procurement procedures are “protectionist”) compared to the Chinese whose rates are sometimes even below those of local contractors. However, it is important to critically analyse whether the cost reductions are not at compromised quality standards.

The EU focus on the Northern Corridor road responded to expressed national needs, while other DPs assisted in other (inter)national road corridors, in harmonised operations of DPs and the GoU (EQ 1). From time to time, DPs as well as the GoU suffer from weak implementation capacity, with procurement delays taking sometimes 12 to 24 months (EQ 3).

There were attempts of convergence and creating complementarity between the main road corridor function and hinterland connectivity with rural districts (EQ 1: Karamoja region, district roads periodic maintenance), however remaining rather ‘stand-alone’ initiatives in the absence of a national (DUCAR) strategy. DANIDA is ending its 20 year track record in support to rural roads, and it will be a challenge to fill that gap.

Ministerial engagement in day-to-day operations of UNRA (Mukono-Katosi road project scandal[28] has blighted the otherwise good performance of UNRA) and strengthening of district force account operations (a new round of Japanese equipment distribution is in the making) are signals of continuing sector governance frailties (EQ 2).

Major inter-modal transport opportunities seem to be scarce, but lately they are more actively searched (EQ 2).

The World Bank was instrumental in supporting the dis-bundling of the MoWT as part of the Road Maintenance Initiative (in 1990s), later leading to the creation of the Road Authority Formation Unit (as a unit in MoWT), then eventually the UNRA and also the URF. The EU contributed greatly in capacity building of the new entities with technical assistance. The (currently suspended) Director of Planning of UNRA and the Executive Director of URF were the “champions” of co-ordination of the TA’s, which had their inefficiencies in staffing adjustments and late responses to specific expertise requirements (EQ 3).

Appreciation for the cross-cutting issues in the sector is still lacking (EQ 3); lumping all social issues in the transport sector under cross-cutting issues. Moreover, the absence of clear financial codes (budget lines) in the policy settlement has hindered implementation and mainstreaming of these issues. The cross-cutting issues are frequently sacrificed in the budget (a designated % of total contract sum to cater for the cross-cutting issues might be considered). Contractor attitude towards safeguarding issues remains poor, while there is limited staffing at UNRA Safeguards Unit (and elsewhere) to manage the work.

Significant progress has been made on data systems management at UNRA, URF and the Road Industry Council (CrossRoads Secretariat) raising the potential for improved handling of the Project Management Cycle (EQ 4), thanks to the combined efforts of all DPs supporting the sector. Yet, shortcomings in implementation capacity are believed to be more of a constraint than shortage in funding[29].

[28] There are multiple references to this story in the public domain e.g. http://www.independent.co.ug/cover-story/9298-inside-unras-katosi-rd-scam; http://www.monitor.co.ug/Magazines/PeoplePower/Katosi-road--The-fraud-that-lifted-lid-off-politics-of/-/689844/2600720/-/hn01taz/-/index.html.

[29] At the estimated present annual fuel consumption of roughly 1.5 billion litres, and with just US$ 10 cents/litre fuel levy, about US$ 150 M/year (i.e. more than 400 billion UGX) could be raised and allocated for road maintenance (see also Annex 10 & UG38).

Impact studies, ex-post assessment of economic and social development or poverty reduction indicators, have not been a priority in Uganda (EQs 5, 6). Sometimes the results were so obvious (visible), that scarce resources were rather allocated to design an additional improvement scheme.

The new EU instrument of blending (EQ 9) is welcomed by other DPs *[meeting WB/AfDB]*, but will require training in Public-Private Investment modalities and procedures at both sides (concerned DPs and GoU agencies: UNRA, KCCA, URC, UCICO/RIC).

Uganda is one of the few countries where transport has been maintained as a focal sector. A focus on energy has been considered, but there is no shortage of funding in that sector, including private capital inflows, unlike for roads/transport *[EUD meeting]*. Despite disappointing developments in the institutional reform process, two main reasons to continue supporting the transport sector are:

- blending can offer the needed leverage to raise significant investment at attractive financing terms (particularly for the congested Kampala-Jinja link and congested Kampala metropolitan traffic circulation);
- there is a continued need for capacity building both in public road agencies and private road industry (long term commitment needed).

Further consolidation of institutional capacity building efforts, and mobilisation of the civil society in the policy dialogue with the GoU (MoWT, District Councils and Members of Parliament) on key issues of road industry development (such as Output Performance based contracting for maintenance (OPRC), low cost sealed pavements, road safety and metropolitan (public) transport), should maintain 'pressure' on the GoU to perform better (and reform). Hopefully, the EU Delegation will be facilitated with the necessary (human) resources for managing all this (EQ 10).

Finally, from the EU self-interest ("taxpayers") perspective one may conclude that:

- EU road contractors today are certainly not in a better position on the Ugandan market than 10 years ago, but during the last decennium, several got good earnings;
- EU (road) transport consultancy had a considerable work load in Uganda (more problems .... more consultants mobilized), and this may continue with an 11th EDF transport focal sector. From a capacity building perspective, EU may wish to require a mandatory 10+% local consultant's content (of contract value) in each consultancy, incl. Framework Contracts;
- the share of Europe and Central Asia in Uganda's import and expert is declining significantly. In 2013 Uganda's top five import trading partners were: India, China, Kenya, UAE and Japan, and for exports: Kenya, DRC, Sudan, Rwanda and South Sudan.

5 Mozambique case study

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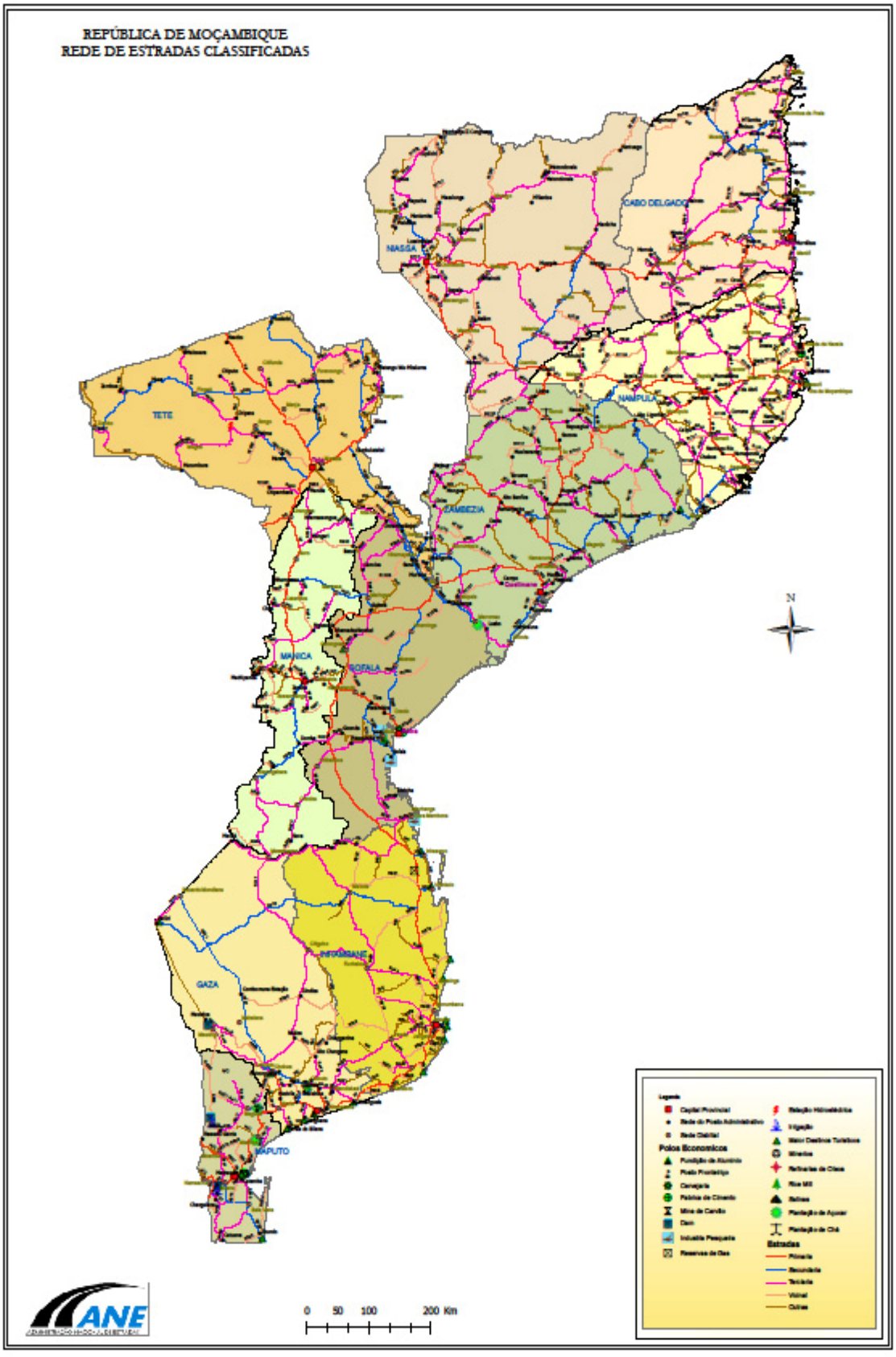
Glossary of acronyms

ADM	Administração Maritima de Moçambique
AFD	Agence Française de Development
ANE	National Road Administration
ASDI	Swedish International Development Agency (SIDA)
BAD	Banco Africano de Desenvolvimento
CCFB	Companhia dos Caminhos de Ferro da Beira SARL
CFM	Caminhos de Ferro de Mozambique
CRM	Core road network
Danida	Agência Dinamarquesa para o Desenvolvimento Internacional
DEP	Provincial Delegations
DfID (UK)	Departamento para o Deenvolvimento Internacional de Reino Unido
DG	Director Geral
DPOPH	Department of the Ministry of Public Works and Housing
DRC	Democratic Republic of Congo
ECD	European Consensus on Development
EDF	European Development Fund
EIB	European Investment Bank
EMP	Environmental Management Plan
ESIA	Environmental and Social Impact Assessment
ESMP	Environmental and Social Management Plan
EU	European Union
EUD	Delegation of EU
FE	Fundo de Estradas
FRELIMO	Frente de Liberação de Moçambique
GATE	Gabinete de Assistência Técnica de Estradas
GBS	General Budget Support
GOM	Government of Mozambique
GON	Gabinete de Ordenador Nacional
HR	Human Resources
ICAO	International Civil Aviation Organisation
INATTER	Instituto Nacional de Transporte Terrestre
INS	Instituto Nacional de Estistica
ISUTC	Instituto Superior de Transportes e Communicações
JICA	Agência Japonesa de Cooperação Internacional
LAM	Linhas aerias de Mozambique
LEM	Laboratorio de Engnharia de Mozambique
MF	Ministerio de Finanças
MICOA	Ministerio para a Coordenação da Acção Ambiental
MOPH	Ministry of Public Works and Housing
MTC	Ministry of Transport and Communication
MZN	Mozambique New Metical
NAO	National Authorizing Office
NIP	National Indicative Programme
PAF	Performance Assessment Framework
PARPA	Action Plan for the Reduction of Poverty
PI	Performance Indicators
PIP	Program Implementation Plan
PIU	Project Implementation Unit
PPP	Public Private Partnership

PRISE	Road Integrated Sector Program
PRODEPEMES	Programma de desenvolvimento dos pequenos e medio empresas na sector de estradas (Development Programme For Small And Medium Enterprises In Road Maintenance)
REC	Regional Economic Community
RF	Road Fund
RIP	Regional Indicative Programme
GOM	Government of Mozambique
RENAMO	Resistencia Nacional de Moçambique
ROCS	Road and Coastal Shipping Programme
RPMCB	Road Periodic Maintenance and Capacity Building
RSD	Road Sector Donors
RSS	Road Sector Strategy
SBS	Sector Budget Support
SME	Small & Medium Enterprises
TA	Technical Assistance
TRAC	Trans-African Concession s
WB	World Bank

Exchange rate: 1 € = 39.5 MZN (Mozambique New Metical) dd. 27.05.15.

Mozambique country map



5.1. Introduction

The purpose of the Country Note

The objective of the field phase of the continent-wide Transport Sector Evaluation is to continue and complete the collection of information and to test and investigate hypotheses, findings and preliminary answers to the Evaluation Questions leading to validation or refutation of such hypotheses, findings and preliminary assessments.

This Mozambican case study is one of the ten country case studies undertaken during the field phase of this evaluation. Information collection concentrated on EU country level support to the transport sector. Regional and national experts have been identified to support evaluation team members during the field visits. These experts have been involved with logistical preparation for the case-study visits, in collection of information and arranging a programme of interviews. EUD comments on the draft country note have been incorporated in this revised country note and errors of fact have been corrected.

The findings of the ten country notes will be consolidated in a synthesis note of the field phase, which, in turn should contribute to the synthesis report for the evaluation as a whole. The synthesis note and the main text of country notes will be published as an annex to the final report of the evaluation.

Mozambique as a case study country

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 (SBS), Blending of financing instrument, 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 between disaffected RENAMO supporters and government (FRELIMO) forces.

5.2. Data collection methods used

Preparations for the field visit included:

- Drafting and 'Introductory note' (Field Phase – visit to Mozambique 13 – 20/04/2015)
- Drafting the "Approach and methodological tools for the Field Phase" (including a *Checklist* of preliminary observations, 'gaps' and hypotheses together with a coverage matrix of EQs by case study countries);
- Compilation of a list of Financing Decisions (upon which an initial selection of sector interventions for further investigation has been based);
- Analysing the EUD responses to the questionnaire previously circulated (for identifying issues to be clarified and for further discussion).

A tentative list of EU sector support of potential interest to the evaluation was prepared and later on modified in consultation with the EUD in Maputo. The following EU-funded projects and programmes have been studied in some kind of detail in order to find information of use for answering the evaluation questions:

- Road Maintenance and Capacity Building Programme (FED/2007/018-851);
- Construction of a Bridge across the Zambezi river (FED/2005/017-763);
- Limpopo Railway Line – Rehabilitation of Facilities (FED/2005/017-873);
- Airside Infrastructure Rehabilitation for Maputo International Airport (CMZ 1103, AFD):
- Road Sector Budget Support 2010-2013 (FED/2010/021-448);
- Road Periodic Maintenance Capacity Building (FED/2003/016-252);
- Rehabilitation of Namacurra – Rio Ligonha Road (FED/2003/016-244);
- Feasibility and detailed study for rehabilitation/upgrading of the Beira-Machipanda road (FED/2006/018-67) .
- Beira Corridor Project (EIB investment project).

It was not intended to evaluate individual interventions but rather consider EU policy, strategy for EU 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 has been sourced for many support interventions. This was scrutinised before the field visit and checked with EUD contacts during the course of the field visit. Some additional documentation was only available in EUD archives.

The in-country period was used as follows:
- meetings with representatives of the EUD, partner government, NAO, other donors and independent experts;
- collecting perceptions of stakeholders and other individuals to assess the credibility of (claimed) associations between different elements of the intervention logic in order to compare the elements of a theory of change and contribution analysis;
- exploring and discussing alternative explanations of why observed changes in selected indicators might (or night 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) the evaluation hypotheses;
- investigate experiences and performance of SBS and 'blending'.

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

Logistical constraints precluded site visits to on-going EU sector support construction projects (far from Maputo) but most projects detailed in project fiches have been previously visited by the evaluator.

5.3. EU support to the transport sector in Mozambique

Transport has been one of the focal sectors of the EU support to Mozambique during successive EDF cycles up to the 10th EDF. The 11th EDF support concentrates on General Budget Support (GBS) and Rural Development (albeit that a major component of this support is proposed to comprise rural roads).

EDF 9, 2001 – 2007. Focal Sector : Transport Infrastructure

EU priorities were identified as improving periodic maintenance, capacity building, rehabilitation of rural roads (in support of promoting food security), agricultural development and rehabilitation of a long section of the EN1 in Zambezia (which was originally programmed for the 8th EDF) including specific actions aimed at prevention of HIV/AIDS. The EUD engineering capacity was strengthened in view of the size of the programme and the complex policy dialogue.

EU support continued within the framework of the ROADS III Programme (2001 – 2009)[30]. Major programmed interventions included:

- support to the reduction of backlog periodic maintenance: €32 million allocated plus €6 million from previous balances available, to be channelled through the Road Fund;
- capacity building (€4 million) in support of the MOPH (decentralised maintenance systems in Nampula, Zambezia and Sofala provinces and institutional role in reformed road sector management), the ANE (road maintenance) and the Road Fund and its Board (procedures and accountability);
- rehabilitation of rural roads (€9 million) in support of the EU interventions in the food security and agricultural sector (in collaboration with non-state actors, local contractors and communities);
- construction of the a section of the Rio Ligonha – Namacurra section of the EN1 (€40 million; was originally part of EDF-8).[31]

The funding of the first two mentioned components was planned to be disbursed to the Road Fund. The Government committed to guarantee the autonomy of the Fund, to increase its financial contributions to the Fund, to undertake external financial and technical audits of the Fund's activities and to complete the preparation of the Integrated Road Sector Strategy. During this period the Zambezi Bridge (cost sharing by EU, Italy, Sweden and JICA) was also started.

EDF 10, 2007- 2014. Focal Sector: Transport Infrastructure and Regional Economic Development

An evaluation revealed that the 9th EDF support to the Road Fund (RF) for periodic maintenance had been of little help in overcoming capacity weaknesses. Therefore a new innovative and structural approach was required in line with the new road policy. Furthermore, the institutional capacity of road sector institutions needed more strengthening by means of Technical Assistance (TA) for capacity building (in particular in favour of the RF and ANE) whilst EDF funded TA to the Ministry of Public Works (MOPH) aimed at 'reducing lack of technical staff'.[32]

At this stage the issue of backlog payments associated with VAT reimbursements for externally funded large infrastructure projects combined with accumulated debts associated with counterpart funds became a wider problem of relevance to the national budget policy. The immediate impact on the road sector was an inflation of unit rates and contract prices as bidders raised rates to accommodate expected delays in payments.

Efforts were being made to harmonise (and reduce) road sector performance indicators in compliance with PARPA-II (the National Poverty Reduction Programme) and it was judged necessary to improve sector coordination leading to the replacement of traditional project support by Sector Budget Support (SBS). The RF was expected to lead sector monitoring together with improving the policy and information exchange.

EU transport sector support was consistent with the PARPA-II goals for the road sector, including: supporting markets and district access, promoting connectivity, enhancing decentralisation, ensuring quality of works and improving maintenance. EU support also directly supported the new roads policy called PRISE 2007 – 2011 (Programa Integrada do Sector de Estradas) and the associated PIP (Programme Implementation Plan) 2007-2009,

[30] Phase I (2001-2006).
[31] By the end of 9EDF his was estimated at €70M.
[32] In other words, line function.

including institutional reform (separation of responsibilities, autonomy and financial capacities of RF and ANE).

Specific objectives of the EDF-10 support were/are:

- asset preservation (focus on maintenance) of existing road network, by providing SBS for the Road Fund (jointly with other donors);
- strengthening planning and implementation capacity of the RF and ANE at central and provincial levels leading to streamlined RF responsibilities for policy making and financial management and better ANE implementation;
- implementing specific priority capital investments on a project basis for strategic transit corridors promoting regional integration and for other infrastructure creating a more favourable environment for maritime transport, trade and competitiveness in Southern Africa. [33]

Within these objectives proposed activities included:

- providing support to improving the coherence between regional and national transport regulations;
- establishing a sector-wide approach (prioritising road infrastructure for the most needy, increased capacity for road maintenance and periodic maintenance, TA to the RF and ANE;
- paying more attention to road safety, axle load control and opportunities for inter-modal transport integration;
- mainstreaming cross-cutting issues (HIV/AIDS, environmental protection, gender and recruitment of local labour).

EDF-11, 2014 – 2020.

In the new EDF-11 policy approach, transport ceased to be a Focal Sector[34]. This implies a complete exclusion of grants for road and rail projects (only blending of financial instruments). The EU engagement in the transport sector will be limited to:

- studies: diagnostics, design of master plans, investment plans and sector strategies, and feasibility studies of bankable projects;
- support to transport sector reform and governance (management of maintenance and budgets, institutional capacity building, axle load control, trade facilitation barriers to free movement and TA) using SBS and grants;
- promotion of blending of financial instruments for funding transport sector capital works.

Conditions are expected to be imposed including political commitment for reform and implementation of policies for improving efficiency and competitiveness in the transport infrastructure sector. At regional level the EU support should improve regional integration through: (i) regional programmes managed by the Regional Economic Commissions for harmonisation of regional procedures, regulations and standards, and (ii) financing infrastructure (to be managed by DEVCO).
EU support to Mozambique under EDF-11 is still under discussion but it is expected to consist of General Budget Support and Rural Development as focal sectors. The will be focussed on agricultural production. Rural roads are considered to be an essential element of

[33] At the time of preparing the 10EDF programme feasibility studies were going ahead for Beira Corridor road rehabilitation (potential blending project with EIB), preparation for upgrading of the Mocuba-Milange road (Quelimane Corridor linking Malawi to Indian Ocean ports at Quelimane and Beira) which was due to link to the ongoing rehabilitation of EN1 Namacurra – Rio Ligonha. This programme went spectacularly wrong with the bankruptcy of Tamega, the contractor awarded 2 of the 3 Lotes on Namacurra – Rio Ligonha section which led to cost over runs, legal problems and delays which spilled over thus delaying Mocuba-Milange which had to be split into 2 phases. Meanwhile GOM came to a bilateral agreement with China to do the rehabilitation works on Beira Corridor. It is not clear to what extent these two situations were directly linked.
[34] Except in special circumstances.

rural development and thus support to rural roads will be a major component. However, detailed proposals have not yet been prepared.

Financial data of EU funded transport sector projects.

Financial data of the EU funded transport sector projects are presented in table 5.1. Under EDF 9 and 10 in total 15 projects 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 the end of 2013).

Disbursement rates of the EDF programmes during the evaluation period 2005 – 2013 were:

- EDF 9: 96% of the allocated amount has been contracted and 90% actually disbursed (94% of the contracted value);
- EDF 10: 54% of the allocated amount has been contracted and 37% actually disbursed (69% of the contracted value).

The weaker disbursement performance during EDF10 can be linked in part to the disbursement rate of the Road Sector Budget Support programme 2010–2013: 82% of the allocation has been contracted but only 21% actually disbursed (25% of the contracted value). Disbursement of FED/2013/023-473 is still on-going.

Table 5.1. EU funded transport sector projects in Mozambique 2005-2013 (in '000 €)

Decision code	Decision title	Allocated	Contracted	Paid
EDF 9				
FED/2003/016-244	Rehabilitation of the Namcurra – Rio Ligonha Road	70,000	69,184	61,372
FED/2003/016-252	Road Periodic Maintenance and Capacity Building Programme	10,000	9,160	9,203
FED/2004/016-601	Reconstruction of Cyclone Damaged Sections of Roads in Five Provinces	1,914	1,850	1,850
FED/2005/017-763	Construction of a Bridge over the Zambezi River	24,885	24,885	24,885
FED/2005/017-873	Limpopo Railway Line Rehabilitation of Facilities	4,894	4,894	4,894
FED/2006/018-671	Feasibility and detailed study for the rehabilitation/upgrading of the Beira-Machipanda road	1,164	1,164	1,164
FED/2006/018-678	Feasibility and engineering design and supervision services for the upgrading of the Milange-Mocuba road	1,029	1,029	1,029
FED/2007/018-851	Road Maintenance and Capacity Building (including a SBS component of € 9.2 million contracted and paid)	12,160	10,289	10,289
FED/2006/018-478	Technical Cooperation Facility II (TCF II)	1,743	176	176
Total EDF 9		**127,789**	**122,631**	**114,862**
EDF 10				
FED/2008/020-977	Up-grading Milange-Mocuba Road	80,000	78,945	63,776
FED/2009/020-998	Construction of Zambezi Bridge – Rider Nr. 1 to FA 9364/MOZ	4,927	4,927	4,927
FED/2009/021-482	Technical Cooperation Facility Moçambique III	1,779	110	110
FED/2010/021-448	Road Sector Budget Support 2010-2013	24,500	20,147	5,088
FED/2012/023-168	Technical Cooperation Facility IV	8,800	237	171
FED/2013/023-473	Integrated Development of Milange-Mocuba Corridor, Zambezia Province[35]	81,000	3,356	671
Total EDF10		**201,006**	**107,722**	**74,743**
TOTAL 2005-2013		**328,796**	**230,353**	**189,606**

Source: CRIS, June 2014[36].

[35] FA signed 11/07/2013

[36] TCF funds not exclusively for transport sector support.

5.4. Short description of the transport sector in Mozambique

There are 4 transport modes operational in Mozambique – road, rail, air and coastal shipping (cabotagem) – whilst the country is a transit corridor to the landlocked neighbouring countries – Swaziland, Zimbabwe, Zambia, Malawi (and DRC). The surface transport system is thus of critical importance not only for national socio-economic development but also for regional integration and facilitation of export and import movements to neighbouring countries.

Maritime Transport
With a coastline of some 2700 km, Mozambique has 3 major Indian Ocean ports (Maputo, Beira and Nacala with 13 other less important ports.[37] The management of major ports have been concessioned to the private sector by CFM (Caminhos de Ferro Moçambique).

Railways
Rail lines 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.[38]

Air Transport
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 plus a number of bilateral air service agreements.[39] Rehabilitation and upgrading of airport facilities have taken place at most airports in recent years.

Roads
Transport by road is the main means of transport in Mozambique representing >80% of all movement of passengers and freight. Road density is only 29km per 1000 square km and 1.28km per 1000 inhabitants[40] and 39% of the rural population live within 2km of an all-weather road.

The classified road network comprises 30,464 km of road (7,344 km surfaced; 23,120 un-surfaced) of which 64% is considered to be in good or reasonable condition, 21% in poor condition, 9% in very poor condition and 6% not transitable. 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.

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[41]. Therefore uncertainty on priority of investments remains.

Mozambique has been working on the basis of a Road Sector Strategy (RSS 2007–2011; extended de facto up to 2014) that explicitly links optimization of investments in the classified

[37] Quelimane, Pemba, Vilanculos, Chinde, Macuze, Pebane, Moma, Angoche, Ilha de Mozambique, Palma, Ibo and Mocimba da Praia.
[38] Albeit that the CCFB concession (Sena line) has been terminated by GOM.
[39] LAM is banned from movement in EU airspace.
[40] Compared with 88km/1000 sq. km average low income countries; 8.44 km/1000 persons in RSA.
[41] Although MTC produced a light-weight document in 2014 'Strategy for the Integrated Development of the Transport System'.

road network to poverty reduction objectives of the PARPA (poverty reduction action plan) and the Millennium Development Goals (MDGs). It puts forward objectives like improved rural and market access, connectivity, sustainability and complementarities to support productive sectors (mainly agriculture and fisheries) and values them as an important source for employment generation. 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. It includes a mix of investments & maintenance efforts channelled through different types of projects. External resources still dominate the sector budget and maintenance continues to be neglected, especially periodic maintenance of paved roads.

PRISE has recently proposed a set of 8 indicators - previously there were 21 indicators - to monitor performances for the period 2012-2014, yet these indicators pose a series of technical issues questioning the relation between investments and performances as well as their feasibility and rational. Technical notes on the indicators will certainly be challenged when made available.

Works on the classified network are implemented through different tools: (i) maintenance is mainly implemented by the national private sector after procurement through open local tender processes; (ii) upgrading or construction is mostly financed by external funds that tend to use external financial management procedures whether they are harmonised with the national procedures or not, and are a form of tied or untied aid, and (iii) two concessions supposed to implement maintenance works as a part of their obligations.

Problems

Revision of the RSS is now long overdue and could provide the basis for an updated PRISE (which is now equally urgent).[42] Many of the problems from 2005 remain valid in 2013, including:

- Following the catastrophic 2000 **flooding** in the Limpopo valley, further floodings occurred in 2012, 2013 and 2015, which 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.
- Integration of national and regional transport networks relies upon efforts of individual countries (usually with different priorities). Governance issues and 'non-physical barriers' to transport of people and goods remain.
- The National Road Administration (ANE) continues to suffer from management and communication weaknesses. Network planning and road management systems are weak and maintenance remains deficient (especially for lower category rural roads)[43] and periodic maintenance of sealed roads. Decentralisation is not yet effective
- Concessions have been established on EN4 (TRAC) and Tete (Estradas do Zambeze). However, ANE has little capacity to advise negotiations for such public-private partnership approaches (or supervision of such concessions).
- Periodic maintenance is seriously deficient and whole life costing will inevitably increase whilst expected service levels and design life will not be achieved. Viability of investment is threatened.

[42] Drafting of RSS is expected to begin shortly following a review in 2014.
[43] Responsibility for these unclassified rural roads has been delegated to districts.

- Capacity deficits remain and professionalisation of the sector is necessary (although this also implies empowerment at appropriate levels and a reduction in political manipulation of programming and budget allocations).
- National small and medium sized enterprises active in the transport sector remain weak with interlinked capacity problems and a lack of access to financing.
- Unit costs in construction contracts have led to hugely increased costs during the past decade. Factors include a weak Euro[44], 'cosy' tendering arrangements for a limited number of bidders[45], inflation due to increasing investments in natural resource 'mega-projects' etc.[46]
- Road safety is a serious issue, related to excessive speed, un-roadworthy vehicles, overloading, poor road condition, lack of warning signs and protection barriers, driving whilst having consumed alcohol or drugs and lack of enforcement of traffic regulations.

Institutions

Some features of the main transport sector institutions:

- MOPH (Ministerio de Obras Publicas e Habitaçâo) is responsible for roads, the ANE and the FE (Fundo Estradas), but has little or no capacity for establishment or management of sub-sector policy;
- MTC (Ministerio de Transportes e Communicaçâo) is responsible for all other transport modes. Although the MTC published in 2014 the 'Strategy for the Integrated Development of the Transport System', the document is a light-weight document.[47]
- FE (Fundo de Estradas) is the funding agency for the roads sub-sector; the 1st generation Road Fund.
- ANE (Administraçâo Nacional de Estradas) 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 arrangement for other concessions).[48]
- INATTER (Instiituto Nacional de Transportes Terrestres) has recently been created as regulator (but without key powers on tariff setting or PPP regulation) and is responsible for road safety and axle load control. It is highly politicised.
- The Police is responsible for enforcement of traffic regulations. Its enforcement is weak and it is widely regarded as collector of 'informal road tolls'.
- Districtos (and municipios) are responsible for unclassified road networks (unknown length but could be as large as the classified network). They have little capacity and little funding (from FE) for road maintenance. They should receive technical assistance from the ANE, provincial delegations and provincial maintenance consultants but little such assistance is reported to have been provided.
- Maputo Sul is a public company established for developing the Maputo – Katembe Bridge and road to Ponto Douro, thus linking to the Maputo Ring Road. It is not transparent in terms of planning, programming or financing.
- LEM (Laboratorio de Engenharia de Moçambique) is a peripheral, under-resourced institution, which could perhaps be more involved in the promotion of the use of local material for road construction.

[44] This is a more recent phenomenon.
[45] Common in many African countries – usually ascribed to perceived legal and institutional fragility, economic and political instability and other risks.
[46] Albeit that the unit prices of the recently tendered Mocuba-Milange Phase II were lower than preceding contracts presumably due to the increased competition of a large number of bidders.
[47] Relations between MTC and MOPH are strained and distant as representing 'competing' ministerial portfolios.
[48] With the possible exception of a few bypasses (e.g. Maputo) and perhaps N6 Beira Corridor, there is insufficient traffic in Mozambique to male such concessions and/or toll roads viable.

5.5. Findings on the sector

This chapter is devoted to checking (confirming or refuting) desk phase hypotheses and to filling information gaps. The hypotheses, gaps and additional information are presented per Evaluation Question.

EQ. 1: To what extent have changing policies and strategies for EU support been responsive to the evolving needs of the transport sector in Africa?

	Hypotheses	**Agree**	**Situation in-country was different, as elaborated below**
1	National policies were drafted in compliance with donor policies rather than the contrary;	Yes	Largely agreed
2	Whether national priorities were respected or subordinated by 'imposition' of national sector policies by sector donors;	Yes	National priorities were generally respected
3	Existence of clear national interest or prioritisation for corridor development and regional connectivity;	Yes	Certainly an interest in corridor development but more for national rather than regional connectivity. (The last sections of corridors to be developed go to the border of a neighbouring country [e.g. Mocuba- Milange; Nacala Corridor]).
5	Existence of convergence and complementarity between sector policies and strategies at country and regional levels and with EU sector and development policies;	Yes	Appears to be the convergence between RIPs and NIPs although different implementation speeds and effectiveness reduce complementarity.
6	EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value;	x	11th EDF may reduce value (as regards transport sector). EU added value also claimed in terms of variety of instruments, flexibility, funding, political neutrality, strategies/policies, EDF procedures and focus on existing issues.
7	EU competencies offer reduced 'added value' in current and future sector support and if so, why?	Yes	
8	Perceived comparative disadvantages are a continuing and/or reducing problem and to what extent such perceptions are in fact borne out in terms of constraints to implementation of EU support at national and regional levels;	Yes	Multiple complaints about programme estimates. Many references to long decision making process.
9	Consultation processes are (in) adequate to achieve desired levels of coherence at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders;	-	Consultation processes appear to have weakened in recent years. At present they are inadequate to ensure coherence. Recent elections have resulted in wholesale institutional changes, such that there is a current void in the dialogue landscape as new holders of portfolios are not familiar with their responsibilities[49].
10	Capacities at regional institutional and national government levels are (in)adequate to manage sector consultation and coordination processes	-	Capacities at national level are weak and at regional levels even weaker. Provincial and district level capacities (for road maintenance) are variable but generally weak.
11	Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.	x	Some evaluations are more historical records than assessments leading to lessons to be learned. Moreover, recommendations of evaluations have only practical if they are timely enough to be implemented.

	Gaps	**Situation in-country as elaborated below**
I-	Perspective on soundness/depth of	Generally good quality analysis but delayed updating of sector

[49] This situation is outside of the TSE period 2005 – 2013 but provides an indication of potential short term communication issues.

	Gaps	Situation in-country as elaborated below
111 I-112	analysis of national transport sector/needs/problems	documentation reduces effectiveness (e.g. PRISE extended three times from 2011 to 2012, 2013 and 2014.
I-131	Further investigation of acknowledgment 'that certain competencies are not available in EUDs'	EUD personnel cannot be expected to cover all infrastructure sectors even if some 'recycling' is undertaken. (i.e. combining EUD section 3: Infrastructure with Section 4: Rural Development, Agriculture and Food Security[50].
I-132	Perceptions of sector partners and stakeholders that EU support policies and strategies offer added value.	Some added value recognized. Also some subtracted value.
I-141	Information on programming processes for 11th EDF (before 2014)	Dialogue and communication about changed 11th EDF policies/strategies have not been disseminated effectively to sector partners (although NIP has not yet been approved)[51].
I-142	Perceived coherence between regional and national transport sector programmes	OK, but a sense of remoteness or irrelevance of regional programmes (may have something to do with poor implementation performance of regional programmes).

EQ.2 : Did the change from project-based approach to a sector-wide approach and budget support (SBS and GBS) meet expectations regarding outcomes for EU support to the transport sector in Africa?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);	Yes	There was general disappointment and disillusion with SBS (small value, limited disbursement, few donors actually entered although most had agreed to enter). However, the dialogue did lead to development of 'trail-blazing' sector strategies. Donors, especially bilaterals. have increasingly operated outside of sector strategies, funding off-budget projects while the Government has increasingly accepted such bilaterally negotiated project financing; often these financial agreements are not transparent.
4	The transport sector was especially vulnerable to PFM frailties (due to the elevated value of infrastructure provision and operation);		PFM frailties have affected all sectors which are/were involved in high value procurement (e.g. construction contracts). Although since 2011 EUD has undertaken external technical audits, safety audits etc in cognisance of such risks even though international practises of procurement and contract management are followed. More recently such independent checking has been extended to include cross-cutting issues.
6	Engineering judgement and professional ethics were not robust enough to resist subversion of quality assurance and contractual due process in infrastructure provision;	Yes	Reports refer more to maintenance contracts than to infrastructure construction. The system for certification of payment of construction contracts relies upon the honesty and professional ethics of the supervisor (fiscal) with ample opportunities to (literally) bury substantial work or vary measured quantities.
7	There was little political support and commitment to technical assistance activities and this has manifested in reduced TA support to national PFM reform	-	There was limited support or commitment for technical assistance (TA) in the past because the effectiveness of such TA in terms of long term capacity building was limited (although line functions had a short term practical value). No sector TA contributions to national PFM reform[52].
8	Information overload on SPSP and SBS inhibited accessibility and take-up of lessons learned by EUDs	x	No reference to information overload but the learning process in implementation of successive SBS programmes in Mozambique appears to be drawn only from Mozambique's (ineffective) experiences.

[50] Although EUD reports *' a loss of ~12.5% of infrastructure engineering management capacity'*.
[51] The process required particular sensitivity as it coincided with electoral changes. EUD reports that this change was *'outside induced'*.
[52] Although EUD notes *' a belief that strengthened sector structures do contribute to national PFM'*.

	Gaps	Situation in-country – as elaborated below
I-211	• Evidence of application of 2012 Guidelines in BS; • Current trends in quality of PFM standards and practices (see also 2.2.1 below).	• No • Trends in overall PFM appear broadly positive as reported under SBS indicators.
I-222	• Whether or not there are perceptions that FAs lack specificity; • Existence of formal evaluations of TA funding for PFM reform.	• No lack of detail in Financing Agreements (FAs) rather than that some FAs exaggerate potential outcomes and impact that could reasonably not be expected to be generated. As there is almost never an ex-post evaluation carried out, potentially over-stated outcomes and impact are rarely tested. • No information.
I-243	Whether EUDs perceive information overload (or the reverse) as inhibiting take up of lessons learned	Not information overload as such, rather overload in adequate coverage of implementation (including dialogue) coupled with a lack of relevant information and examples of good practice from other countries or Brussels.
I-251 I-252	• Current situation regarding timeliness of BS disbursement; • Perceptions of whether or not SBS has improved predictability of disbursements.	• SBS implementation has been characterized by late and limited disbursement. • Strong perception that SBS has not delivered improved predictability of disbursements albeit that SBS is a centralised programme (i.e. controlled from BXL) and some delays are reported to have resulted from delays in processing of EUD disbursement requests and long periods of time in issuing addenda to FAs.
I-253	• Wider perceptions on the effectiveness of use of conditionalities to EU sector support; • Quality of national audit authority reports.	• Conditionalities seen as strongly counterproductive by the Government – perceived as 'excuses' for late payment of fixed tranches and partial payment of variable tranches. However, there is wide misunderstanding of SBS terms and conditions on the side of the Government. On the other hand DFID (now withdrawn from SBS) considered it was important to disburse fully and on time (unless there were major governance issues) in order to comply with the spirit of SBS (i.e. predictability and timeliness of disbursements).
I-254	Perceptions of effectiveness of EU support to SWAps, SBS and GBS.	GBS support perceived as effective; SBS ineffective and SWAp, on the whole, as effective.

EQ. 3 To what extent has EU institutional support and capacity building resulted in enhanced transport sector management in Africa?

	Hypotheses	Agree	Situation in-country was different, as elaborated below
1	Adequate institutional resources and capacities ensure that network conditions will (or will not) continue to be maintained or improve;	x	At present there are inadequate resources and capacities for maintenance of network conditions. Arguably improvement in network conditions over recent years has been largely if not entirely due to large upgrading and construction works on the main road network (which is then subject to maintenance neglect).
2	There are (or are not) realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);	x	The Road Sector Strategy (RSS) urgently requires updating and this is expected to take place shortly following the review carried out in 2014. That being said, the strategies for maintenance and rural access appear to be reasonable. The problems are to do with implementation. Maintenance has a funding shortfall compounded by poor management and quality issues (even an inadequate budget may not be fully disbursed). Responsibility for unclassified roads, which form the majority of rural roads, is devolved to districts which have little or no resources or capacity (although most districts have been provided with some construction equipment for

	Hypotheses	Agree	Situation in-country was different, as elaborated below
			which there is however little or no operating budget (fuel, spares) even if they have operators. This provision of equipment (from China, Japan and Korea) appears to be a politically motivated tool and a tacit return to force account units.
3	Management decisions are (or are not) based on technical appreciation of base data of improving quality;	x	Quality of data is a perennial problem. There is no evidence that such data is improving (or, indeed deteriorating). Decision making tends to be centralized whatever the quality of data.
4	Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments);	x	EU support has concentrated on roads (with a single 9th EDF support to the Limpopo rail line) although the EIB is involved in supporting (blending-loans) the Sena rail line rehabilitation and Maputo Airport runway works. EDF support to roads continues under the 11th EDF (rural roads as a component of rural development/food security).
5	National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;	x	RSS urgently requires updating to take into account changing national situations. This would allow an updated PRISE (forwards rolling programme) to be developed.
7	Anti-corruption measures are being actively pursued in the transport sector together with appropriate monitoring and control measures;	x	There are no overly anti-corruption measures being implemented. The general consensus is that better implementation of tighter procedures would give less opportunity for corrupt practices.
8	Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector	x	Consistently identified but not necessarily fully implemented or mainstreamed. No explicit transport sector coverage of emissions, climate change, or disadvantaged groups.

	Gaps	Situation in-country as elaborated below
I-312	To what extent (if any) infrastructure asset management approaches, including whole life costing have been applied to EU support to capital investment.	EU project support follows HDM4 analysis which includes life cycle costing of maintenance and 'with' and 'without' project intervention scenarios.
I-313	Whether there has been any investigation into rural transport availability pre and post EU support to improved rural accessibility.	No investigation has been undertaken.
I-314	What consideration is being given to future wider public use of rail lines currently being upgraded by a single firm (or consortium) for primary/sole movement of bulk mineral product?	• No consideration under EDF. • EIB funding of Sena rail line rehabilitation involves principles of non-discrimination and open access operation, passenger service being offered, equal access to freight services and implicit cross – subsidy from freight to passenger services without recourse to Government subsidy. However, following termination of the CCFB concession and reversion to CFM. Fulfilment of these conditionalities are in serious doubt and it is not clear how such issues are addressed by the EIB (there is little or no EUD input).
I-321	Evidence of updating of national policy documents including reference to the transport sector	RSS renewed in November 2014 and revision of RSS currently being discussed – potential EU support.
I-331 I-332 I-333 I-334	Review of current situation of sector management institutions (especially Road Fund, Highways Agency, Regulator) as regards autonomy of operations (decision making), PFM, corruption, due process (e.g. procurement), staffing levels.	Reference to most recent review of PRISE. Redatorio do Primeiro Semestre de 2014.
I-341	Perceptions of what should be considered to be 'cross cutting'	HIV/AIDS, environmental impact, gender, road safety, resettlement..
I-342	Current situation regarding enforcement	• All EU capital works projects are subject to

	Gaps	Situation in-country as elaborated below
	of national environmental legislation (including issuance of environment license for construction and maintenance works); Consideration of mitigation and protection measures for infrastructure assets against effects of global warming; Consideration of environmental issues at regional levels.	ESIA/ESMP and to licensing by MICOA. Maintenance works not subject to environmental licensing for individual work sites. • No explicit EU support to climate – proofing measures but other donors are supporting studies for major river valleys (e.g. World Bank – Limpopo valley)[53].
I-343	Current situation regarding axle load control and GVW regulation at national and regional levels; Trends in road accident statistics and road safety campaigns (if any) at national levels.	EU has not supported axle load control or enforcement of traffic regulations. No statistics on trends of accidents are included in the latest 6-monthly report on PRISE.
I-344 I-345	Strategies for coverage of HIV/AIDS and gender issues under 11th EDF support.	Preliminary notes on possible structure of 11th EDF support to rural roads include reference to 'accompanying measures for transport services, improvements and other cross-cutting dimensions' and also identify road safety and axle load control as cross-cutting issues. There is no reference to cross-cutting issues in the draft ToR identification of the 11th EDF Pre-feasibility Study for Integrated Rural Development through improved rural transport[54].

EQ.4. To what extent has EU sector support contributed to sustainable and affordable transport infrastructure in Africa?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);	x	'User pays' strategy (road tolls, fuel levy, border taxes) are estimated to cover <50% of maintenance needs. Not all such funds are actually disbursed.
2	National records are available that systematically record road service levels/ conditions linked to records of maintenance interventions (routine and periodic)	x	No systematic records linking road works, maintenance, usage and condition.

	Gaps	Situation in-country – as elaborated below
I-411	Current trends in adequacy of national maintenance budgets (compared with maintenance needs), comparison of maintenance and capital works budgets and levels of disbursement against budget allocations.	PRISE/PES 2014 records that in the last 6 months of 2014 Government funds (made available) were 58% of target whilst external funds were 16%. Overall, 35% of the targeted amounts were made available. During the same period disbursements were 30% of the overall programme target (73% of national funds; 27% of external funds).
I-412	Further information on preparation and quality of MTEFs and PER for the transport sector (including time-series examples if available).	Forward rolling programme of PRISE has been extended for some years i.e. 2011 – 2014 and now urgently requires revision.

[53] EUD reports that €10M has been mobilised after the 2015 floods for climate resilient 'build back better' in Zambezia and Nampula provinces (10EDF) with consideration of a further €16M (11EDF). A further example of adaptation for climate-sensitivity is the use of locally available gravel for road base on Mocuba-Milange II, thus avoiding use of cement stabilisation i.e. reduced carbon emissions from cement production.

[54] EUD notes that this is 'a draft programming document under evaluation' and that it can be assumed that cross-cutting elements will be strengthened/elaborated in the document'.

	Gaps	Situation in-country – as elaborated below
I-413	Adequacy of revenues accruing to Road Funds compared with maintenance needs (levels of fuel levy and strategy for review and adjustments of fuel levy); Review of current situation regarding transit charges (trends in revenues, traffic volumes, audit, etc.); Review of current enforcement scenario as regards emission controls.	Revenues are increasingly insufficient for maintenance needs with recent changes in the revenue base of FE (the Road Fund), e.g: changed toll regime in Zambezia with bridge tolls going to Concessionaire, not to FE; exemption of major fuel imports of diesel fuel. No enforcement of emission controls.
I-414	Evidence of effectiveness of application of CRN concept and approach for prioritisation of limited funding.	No reference to use of Core Road Network concept.
I-422	Current developments in decentralisation strategies, especially impacts upon management and condition trends of rural roads.	In 2014 each district received a budget of MZN 2 million (€53,000) for 'estradas vicinais e não classificados). In the first 6 months of 2014 the only maintenance contracts let were in Maputo and Sofala provinces (attaining 28% and 9% of targets respectively), 0% for all other provinces.
I-423	Review of establishment of national transport regulators including autonomy, decision making and implementation of regulatory decisions and tariffs.	INATTER established but reportedly not effective (DG replaced unexpectedly during the field visit). Only reference to road safety campaigns and control of exceptional loads in PRISE 6-monthly reports.
I-424	Evidence of increasing involvement of national private sector (contractors and consultants) in road maintenance (and capital works) programmes and of capacity building programmes for such SMEs (including addressing constraints of licensing, eligibility for contract award and access to credit/finance).	In 2014, 383 national contractors were engaged in 994 contracts for routine maintenance of paved and unpaved classified roads. Some contracts were used for local contractor training (e.g. EN3 Impaputo – Goba – patching) whilst adoption of the road camp system and multi- annual contracts were included to support local contractors to draw up work plans for negotiating bank finance for acquisition of equipment etc. In parallel there are programmes aimed at improving district and municipal capacities (including SMEs). EU is launching the PRODEPEMES project for capacity building of SMEs in the road sector.
I-431, 2, 3	Updated figures from national sector statistics.	Sector statistics published in PRISE 6 monthly report.

EQ. 5. To what extent has EU support to the transport sector in Africa contributed to sustainable social and economic development?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.	Yes	Agreed but with the promise that transport services are promoted entirely by the private sector. EU can support only the infrastructure in rural areas'.
2	Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and efficient transport services.	-	No evidence of reducing influence of cartels (although the downturn in the European economies [especially Portugal] has led to the entry of 'new' firms in the Mozambique market).
3	Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and	Yes	No systematic system of data collection. Some information is of doubtful quality.

	Hypotheses	Agree	Situation in-country was different as elaborated below
	management.		
4	Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.	Yes	EU projects are subject to a safety audit during detailed design (e.g. Mocuba – Milange VI).
5	Adoption of a regional approach to traffic safety would pay dividends in terms of ensuring that best practice is disseminated.	-	Possibly, but the issue is more lack of enforcement of road traffic regulations, while the record of national implementation of measures agreed at regional level is poor.
6	The role of the EU has been recognised by sector stakeholders.	Yes	Mainly in terms of leadership of the Road Sector Working Group and the size (budget) of the EU support.
7	Development activities have taken place that would not have occurred without EU funding	Yes	Stated (and accepted) but no evidence examined (except, arguably for the bridge over the Zanbeze at Caia).
8	EU is reluctant to engage in support to urban transport in SSA	Yes	Such support not considered as it was thought to be over ambitious in terms of available human resources in EUD.

	Gaps	Situation in-country as elaborated below
I-513	• Current situation regarding national road safety statistics, trends and effectiveness of safety campaigns. • Any cross-learning examples of good (and bad) practice.	PRISE first 6 monthly report of 2014 refers to activities carried out including load control, road warning signage, control of use of road reserve and road safety campaigns by ANE in partnership with INATTER.
I-514	Existence of up-to-date traffic counts and other transport sector statistics at national level.	No systematic routine collection of traffic data.
I-521	• Deeper understanding of management processes of SBS including management of non-compliance by partner government and/or governance issues. • Wider perceptions on utility and effectiveness of conditionalities	The current program is a third generation of Road Sector Budget Support. It entails an allocation of € 24.5 million, having Sector Budget Support (SBS) as operating modality for € 20 million. The facilities for the provision of Technical Assistance to ANE, the Road Fund, the Ministry of Public Works and Housing and SME contractors were reinforced with a budget increase to € 3.8 million through an addendum to the Financing Agreement in November 2013. The respective addendum has extended the implementation period of the agreement until March 2017. Technical assistance objectives will be achieved through project modalities. The support to ANE, Road Fund, the Ministry of Public Works and Housing commenced in May 2014, while the SME project is under procurement for selecting a service provider. The respective balance is reserved for monitoring, evaluation and audits. *Schedule of disbursements:* In September 2011, after favourable assessment by the Commission of the last tranche of the EDF 9 - Road Maintenance and Capacity building program (FED/2007/018-851) a combined fixed and variable tranche of € 5.078.125 were disbursed. In July 2012, the fixed tranche of € 5 million for the current Programme (Road Sector Budget Support 2010 – 2013; FED/2010/021-448) was authorized by Brussels. It constituted the first instalment under the 10th EDF Financing Agreement. In August 2013 a request for the release of the second disbursement was introduced at the Delegation. This request was refused mainly because of non-compliance of the general PFM conditions for budget support in late 2013 (the EMATUM case). The correspondent €5 million programmed under the fixed and variable tranches was de-committed as the assessment of the EMATUM case was being prepared.

	Gaps	Situation in-country as elaborated below
		Moreover a parallel addendum to the Financing Agreement was proposed to formalise the agreement of a revised PAF for 2014 and to revise the disbursement schedule for the last fixed and variable tranches of the programme (fourth tranche). The latest payment in 2013 responds to the government's request for payment of the 2nd tranche based on 2011 performance. This payment consists of a fixed tranche of €2M and a variable tranche of a maximum of €3M which is assessed upon 2011 performance (which is the most recent assessment information). Application of conditionalities has been fraught with problems. During 2012 the PRISE monitoring framework consisting of 21 indicators was revised and new proposals were discussed during the PRISE meetings. There was a need to set new goals and there was consensus that the original framework had to be adapted in line with national priorities as well as considering lessons learnt from the previous years (experiences proved that some indicators were no longer relevant and/or measurement was not feasible) but it took time to reach an agreement without external "midterm" review of the RSS. Indeed it was only in 2013 that the goals and targets for the period 2012-2014 were adopted. Finally a new framework of eight indicators was retained including two new indicators to monitor district roads and periodic maintenance. These last two indicators are a result of the policy dialogue conducted during late 2012. Although there are still questions related to the technical notes, these two indicators confirm the focus of the monitoring and dialogue on two relevant issues of the sector, which were neglected by the previous frameworks. An addendum to formalise the revised PAF in EU's Financing Agreement has been proposed in parallel to the disbursement request of the third tranche assuming that it is acceptable for all parties involved[55].
I-523	Sector partner perceptions on role of EU support.	Sector partner perceptions of EU added value vary: very high added value as regards political neutrality, high added value as regards sector experience, limited or no added value as regards variety of available instruments, flexibility, amount of funds, strategies/policies, EDF procedures, and focus on cross-cutting issues. Other respondents perceive certain EU attributes as delivering even negative added value, such as lack of flexibility, slow decision making, cumbersome EDF procedures, etc.[56]
I-531	Updated national information on rural accessibility	No information examined. PRISE six-monthly programme makes reference to the importance of rural accessibility to 80% of the total national population living in rural areas involved in agricultural production.
I-533	More detailed and up-to-date information on transport services available at national levels	No change in recent years in terms of degree of detail or quality of information.
I-534	Insight into apparent reluctance of EU to engage on urban transport issues in SSA (other than provision of infrastructure eg Kampala Bypass, Nelson Mandela Way, Dar es Salaam)	Stated that EUD does not have resources to address this issue.
I-541	Information on new/recent initiatives in EU support to national contractors (eg PRODOPEMES, Mozambique).	Services contract awarded in April 2015. The objectives are: (i) to improve the quality of road maintenance works performed by existing SMEs and (ii) to increase market access to the best performing SMEs. Expected Results: (i) EU financed training program is implemented according to the quality and conditions as described in the ToR;

[55] The addendum has subsequently been accepted by BXL and the 3rd tranche released.
[56] Although EUD comments that '*EDF procedures are 'more or less at par with other internationally agreed procedures....'*

	Gaps	Situation in-country as elaborated below
		(ii) SME's have an informed advice and support to participate and influence the governance of the sector in the areas supported by the program; (iii) Commercial advice, technical findings and best practices are disseminated and knowledge management is achieved, including implementation of a proactive communication and visibility plan.
I-542	• Stats on short term employment creation resulting from EU support to LB methods; • Perceptions of the appropriateness, utility and effectiveness of LB methods.	Labour based methods have not been promoted by the EU. No audit information on short term employment arising from labour based methods.
I-543	Evidence of actual outcomes (as opposed to claimed potential benefits set out in FAs).	None. No ex-post evaluations undertaken for EU projects.
I-551	Up to date statistics on national/regional trade.	Available at the National Institute of Statistics (INS).
I-552	Perceptions on relevance of EU sector support interventions to facilitation of increased trade/commerce.	Perceived as relevant, especially strategic works e.g. EN1.

EQ. 6. To what extent do EU transport sector support policies, strategies and interventions contribute explicitly to poverty reduction in Africa?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	EU programming and project intervention design do not take into account lessons learned from an expanding body of research on factors influencing poverty impact	Yes	No reference to such studies has been examined in programming documentation for EDF-9 and 10 (CSP/NIP)[57].
2	Targeting of the poorest and most vulnerable people and equity considerations were not actually identified or intended by EU sector policy and programming documents.	-	Whilst not explicitly identified in programming documentation, such targeting was intended even if such intervention can only be lightly inferred from programming and project documents (e.g. Financing Agreements)

	Gaps	Situation in-country as elaborated below
I-611	Further information on public transport services especially in rural areas	No additional information encountered, apart from a proposed indicator for the monitoring framework of the Mocuba-Milange Phase II: 'Frequency and cost of transport services on upgraded roads').
I-612	Further information on EU support to IMT, NMT and other land transport accessibility infrastructure (eg footbridges)	No EU support to non-motorised transport (NMT), intermediate means of transport, etc. other than indirectly by provision of better rural roads.
I-613	Further information on availability and reliability of commodity price information	Ministry of Agriculture records weekly commodity prices at regional centres (e.g. Mocuba and Milange) for monitoring of cost trends of selected commodities at district and local levels (in this case in connection with the monitoring framework of the Mocuba-Milange Phase II project).
I-641	Further evidence on coverage of sector performance indicators regarding poverty impacts, equity	All EU sector support is compliant with PARP (Plano de Accâo de Redução da Pobreza) 2011-2014 in terms of PRISE objectives in increasing personal mobility and movement of

[57] EUD notes that SSATP and AFCAP studies have influenced programming of 10EDF interventions.

	Gaps	Situation in-country as elaborated below
	considerations and facilitatory vectors between output/outcome and impact levels	goods whilst also contributing to Government priorities of development of the road infrastructure in support of programmes in agriculture, industry and commerce and increasing rural incomes. However, there appears to be no monitoring or evaluation of such outcomes.

EQ. 7. To what extent has EU cooperation at regional levels resulted in better facilitation of movement of people and freight?

	Hypotheses	Agree	Situation in-country was different as elaborated below
3	RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;	-	RIPs/NIPs were broadly complementary but programming was dislocated due to differing implementation speeds, priorities and effectiveness.

	Gaps	Situation in-country as elaborated below
I-712	• Current situation on national implementation of transport sector regulations agreed at regional levels (see also 7.4.1 below); • Current perception on the activities and influence of the 'haulage lobby;	National implementation slow and sometimes not compliant with regional agreements (e.g. Zambeze concession – 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). No information on current situation regarding cartels in haulage.
I-721	Current situation of REC capacities for programme implementation (10th & 11th EDF)	The capacities of the Regional Economic Community (REC) are widely perceived as weak.
I-732	Evidence of development of EU policy on corridor development (e.g. increasing private sector investment in rail, strategic importance of port efficiency, value and significance of transit times).	No direct evidence although EIB is supporting corridor development. Two examples of blending: Beira corridor (which did not go ahead after preparatory studies done) and the rehabilitation of the Sena rail line (see project fiches A and B for more details).
I-741	Current situation regarding axle load control and adoption of regional GVW regulations (including, if appropriate, any mitigation/strengthening measures that may be required)	Weigh stations are being installed at strategic points (e.g. Nacala and Pemba ports) but enforcement is a challenge. TRAC reports serious problems in controlling over-loading including collusion between police, transporters and government officials, bypasses around weighbridges etc.

EQ. 8. Were selection, planning and prioritisation procedures for EU transport sector support interventions in Africa appropriate?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values;	Yes	See above also. It is contended that the Economic Internal Rates of Return (EIRR) are appropriate measurements of viability if combined with measures of social justification. But EIRR depends on quality of input data and assumptions about trends, both may be suspect especially in the situation of inadequate sector capacity and resources. EU project support follows HDM4 analysis which includes life cycle costing of maintenance and 'with' and 'without' project intervention scenarios.
4	The specific dis-enabling	Yes	Yes, but the point here is whether EDF regulations and

	Hypotheses	Agree	Situation in-country was different as elaborated below
	environment of Africa for works in transport infrastructure is insufficiently addressed by EU procurement regulations and contract management procedures		particularly, procurement procedures should be made more flexible (i.e. easier or less rigorous) to make them easier to apply in an African situation of poor capacity, variable application of procedures and greater potential for subversion of process. The obverse is of course to increase capacity to apply EDF procedures which are broadly in accordance with international norms.
5	Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs	Yes	In Mozambique this is linked to national decisions on ministerial roles. The road network, certainly in the earlier post war years (90s and first decade of 2000), could only be financed by public funding (i.e. grants as Government funding was negligible) as few such investments were economically viable given little traffic. Other modes of transport were, and are, more economically viable in recent times and thus other sources of funding were potentially accessible. That being said, EUD personnel has little experience with other modes.

	Gaps	Situation in-country as elaborated below
I-823	Trends in unit cost of construction; cost and time control; claims	The most recent EU project (Mocuba-Milange II) has actually seen lower unit rates than previous procurement, which may have something to do with a greater number of bidders. It remains to be seen whether there is a similar improvement regarding time and cost over-runs and claims but anecdotal evidence from other sector projects (not EU) suggests continuation of previous practices by contractors (i.e. claims-based approach to 'bidding low').
I-832	Any evidence in increasing EU consideration of multi-modal exchange	EUD personnel have little experience with land transport modes other than roads.
I-842 I-843	Evidence of EU capacities (and active interests) in support to urban transport infrastructure	EU support to urban transport was not considered on the grounds that *it was over-ambitious in terms of human resources availability.*

EQ. 9. To what extent were EU aid modalities, cooperation frameworks and implementation mechanisms, and legal instruments appropriate for support to the transport sectors of partner countries?

	Hypotheses	Agree	Situation in-country was different as elaborated below
1	Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership;	Yes	Changes largely mirrored successive EDF programmes and, given delays in implementation, resulted in multiple modalities being implemented concurrently e.g. in Mozambique concurrent projects, SWAp, SBS, blending and 11th EDF. Arguably adoption of 11th EDF implies a return to a project based approach.
2	Governments' capacity to adjust to newly introduced preferred aid modalities with technical assistance support funded by the EU that did not anticipate the move, was not proportionated to actual needs and unable to treat root causes of capacity shortcomings (civil service reform, PFM…);	Yes	Changes in modalities were not anticipated by the Government – this was top-down with decision making in Brussels. Thus the Government had to react to imposed changes with Technical Assistance usually focusing on a line function for implementation of the current phase. However, given the regular changes in EU sector support strategies, the Government had little incentive to capacity building to master a modality that was likely to change in a few years.
3	Adjustments of EU approaches and use of mix of instruments were more in response to emergencies	No	Neither one nor the other. Certainly no evidence of change in response to emergencies (use of EDF procedures in response to 2000 flooding in Mozambique

	Hypotheses	Agree	Situation in-country was different as elaborated below
	(conflicts, civil unrest) rather than focused on capacity shortcomings;		led to long delays and criticism of EU's lack of flexibility). Changed approaches included components of capacity building but focus on capacity shortcomings was not the origin of such changes. Reference to discussion of such changes with government '*to some extent'.*

	Gaps	Situation in-country as elaborated below
I-911	Examination of EUD management of implementation of concurrent difference aid modalities (from successive EDF programme)	EUD management of concurrent implementation of successive EDF approaches has generally been effective or at least pragmatic as such concurrence has generally resulted from implementation delays of preceding EDF programmes (at least some of which have been outside of EUD control).
I-912	Any evidence of risk analysis being undertaken by EUDs	No risk analysis carried out (albeit that assumptions were usually included in Logical Framework Matrix even if the possibility of non-fulfilment of assumptions was not explicitly identified as a risk).
I-921 I-922	Government views on EU 'blending' approach (see also 9.5.1 below)	Disappointment as a whole (although there does not seem to be good understanding of the potential 'penalties' when there was non-compliance with indicators especially for Variable Tranches). The Government expected more donors to adopt the SBS modality and the non-delivery of some donors who had signed or at least agreed in principle to the Memorandum of Understanding and the Code of Conduct disillusioned sector institutions.
I-931	Current situation regarding EU leadership in transport sector (including sector partner and government perceptions of EU change of approach under 11th EDF)	EU continues as lead donor of Road Sector Working Group albeit that coordination and dialogue has faltered over the last year or so due to the fact that (i) the new Government has made many institutional changes, (ii) the number of sector donors is reducing and (iii) the Government is agreeing more bilaterally funded projects – especially but not only funded by China – because those projects are not accompanied by conditionalities regarding issues the Government feels are not important. Given the changed EU strategy under the 11th EDF it is not clear whether the credibility of EU as lead sector donor will be reduced (although potential EU support to sector reform and governance are permitted under the 11th EDF). Also the institutional changes within EUD may reduce capacity for sector dialogue.
I-933	Perceptions of transport sector partners regarding any added value of EU support modalities	See above. Usual perceptions of EU added value include the size of the support budget, presence in country, flexibility in seeking cooperation with other donors (not flexibility of EDF procedures) and EUD expertise (which is directly related to the EUD persons in post). On the other hand there are perceived 'subtracted values' – length of time for programming and decision making, and changing EU strategies (and associated lack of consultation).
I-943	Latest position on EU stance in relation to 'new' sector donors	EU should adapt but adaptation requires dialogue with also those bilaterals who have shown little or no interest in dialogue (e.g China). There should also be an understanding with the Government on programming bilateral support. '*Some high level political understanding would be useful*'. *'It is in no one's interest not to include such projects in sector programmes or strategies. EU should concentrate on specific issues but without losing sight of the overall picture and stop changing modalities with each EDF cycle'.*
I-952	Any further current information on pros and cons of blending in transport sector	High potential. Blending can use the same EUD expertise as previous EDF programmes. Only the financial engineering/funding modality is changing. The same engineering due diligence is required i.e. flexibility, design, supervision, operation and maintenance.

EQ. 10. To what extent were EU procedures and resources appropriate for support to the transport sectors of partner countries?

	Gaps	Situation in-country as elaborated below
I-1011	Actual/current capacities of EUDs for programming and implementation (10th & 11th EDF programmes)	Inadequate staffing reported. The situation is likely to worsen during preparation and implementation of the 11th EDF programme, which suggests a mis-match between HR strategies and EU programmes.
I-1012	Effectiveness of technical support mechanisms and systems for dissemination of lessons learned (e.g. from evaluations) available to EUDs	Training seminars reportedly effective and useful. No information on dissemination of lessons learned (from evaluations). Reference to limited back up by Unit C5.
I-1013	Examination of strategies for human resources development in development cooperation	No information on human resources strategies of different directorates.
I-1021	Information on correspondence between EUD activities and operations budgets.	Reports of inadequacy of operations budgets.

5.6. Conclusions

This main conclusions as regards the EU support to the transport sector in Mozambique are presented hereunder per Evaluation Question.

EQ1: Evolution of EU policies and strategies on response to needs

- Compliance of national sector policies with EU policies, strategies and objectives largely due to lead role of donors in supplying Technical Assistance to prepare national policies (i.e. national policies drafted in compliance with donor policies).
- EU support to major road works responded to expressed national needs.
- Policy dialogue and consultation appears to be weakening as donors leave the transport sector and bilaterals increasingly operate independently.
- EU added value based on the size of funding, long sector experience, regional integration experience, political neutrality and the qualities of individual EUD personnel. The EU appears to be moving away from some added value attributes by abandoning the transport sector under the 11th EDF.

EQ2: Move from project based to sector-wide approach

- SBS has been a failure generating disillusion and disappointment (small value, late and partial disbursement, little donor support, process and conditionalities not well understood, little effect on sector [or wider] PFM and governance issues) even if the sector dialogue did provide some results.
- Move from project based approach to SWAp sound (but never actually completed); now trending back to project based approach[58].

EQ3: Transport Sector Management

- Technical assistance (TA) enjoyed only limited Government support or commitment and has largely filled line functions, 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[59].

[58] PRISE embedded a SWAp and EU supported PRISE including SBS (9DF & 10EDF). The revised RSS is expected to continue SWAp principles but 11EDF support no longer has transport as a FS.

[59] 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 road authorities in other countries; technical cooperation through educational institutions.

- Sector strategies and investment plans (RSS & PRISE) have not been updated and credibility and realism have gradually reduced[60].
- No EU support to inter-modal connectivity.
- Cross cutting issues have been covered in project preparation but side-lined during implementation.
- Sector institutional change has brought clearer definition of function but intended autonomy has not been realised (and it was arguably naive to assume to expect that political control would be loosened).
- Sector corruption issues acknowledged but not quantified, although it is suggested that mismanagement causes greater losses than corruption.

EQ4: Infrastructure operation and maintenance

- Routine maintenance is deficient, especially on rural unclassified roads. Periodic maintenance has almost ceased. Funding is deficient compared with maintenance needs. Maintenance management and programming, quality control and technical monitoring are weak.
- EU support to major road works has contributed to better overall network condition and serviceability.
- Continuing doubts about sustainability and affordability of a road network that continues to expand. Whole life costing and transport costs remain high[61].
- 'User pays' principles partially accepted by the Government, but implementation of such principles is partial (only few roads have enough traffic for viable concessions or toll roads).

EQ5: Economic and social development

- External studies show linkage 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.
- Transport services remain poor (and expensive); no EU support provided to improving transport services.
- Apparent mismatch between over-ambitious claims at programming and design stage and actual achievements (of outcomes and impacts).

EQ6: Contribution to poverty alleviation

- Impacts of EU support to the transport sector on poverty can neither be isolated nor attributed to EU support (absence of ex-post evaluations).
- 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 support in Zambezia and Nampula provinces which have the highest concentration of poverty.
- ESIAs and ESMPs have not been taken seriously during implementation[62].

EQ7: Regional support

- General complementarity of EU national and regional support programmes.
- Equivocal national commitment to regional integration.

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[60] It is hoped that the proposed revision of RSS will address these shortcomings.
[61] Albeit that it has been contended that growing networks cannot be expected to be financially sustainable in the short term.
[62] This conclusion received comment '*harshly worded but basically correct statement'*. However, some nuance is identified – contractual payment was made for say, rehabilitation of borrow pits/camp areas and, within '*limitations of resources'* EUD has inspected to detect ineligible expenditure. This conclusion is retained due to other sources of information.

- Tardy adoption and implementation of regional norms at national level.

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

- Competent selection, planning and prioritisation of EU sector support (no 'vanity' projects).
- Feasibility studies not used to choose between alternative projects but to estimate viability of a pre-selected intervention.
- Design quality may have been constrained by budget limits.
- Cost and time overruns are common in construction contracts for most funding agencies (but suggestions that EU resolution of contractual problems may be slower than other donors).

EQ9: Support modalities, cooperation frameworks, implementation mechanisms

- EU's aid strategies changed for each EDF cycle but delays in implementation resulted in concurrent implementation of multiple modalities. Changed strategies were a top-down decision making process from Brussels without consultation of sector partners (some of whom were bemused by the continuous changes).
- Sector dialogue themes generally unchanged over a decade or so (because sector problems and shortcomings continue to exist).
- Blending has demonstrated high potential in the transport sector but there are concerns about 'bankability' of road projects (viability threatened by low traffic volumes, durability hampered by poor maintenance).
- Poor communication about the EU's centralised decision making process resulting in changing the strategy under 11th EDF (surprise to many sector partners). Not clear whether EU can credibly continue as transport sector lead donor in view of cessation of support to transport as a focal sector.

EQ10: EU procedures and resources

- EUD capacities improved during the 9th EDF but deficits remained during implementation of the 10th EDF. Situation now deteriorating (in context of proposed 11th EDF support to rural roads in specified geographical areas, which is likely to be highly resource intensive in terms of identification, design, programming, implementation and monitoring).
- Operations budgets insufficient for adequate management and monitoring of EU support portfolio but HR constraints are problematic.
  Training useful but little technical backup and little dissemination of lessons learned.

6. Madagascar case study

Table of Content

Glossary of acronyms

ADEMA	Aéroports de Madagascar
AfDB	African Development Bank
ARM	Autorité Routière de Madagascar
ASECNA	Agence pour la Sécurité de la Navigation Aérienne en Afrique et à Madagascar.
CV	Curriculum vitae
EDF	European Development Fund
EIB	European Investment Bank
ESIA	Environmental and Social Impact Assessment
ESMP	Environmental and Social Management Plan
EU	European Union
EUD	EU Delegation
FA	Financing agreement
FCE	Fianaranstsoa – Côte Est
FED	Fonds Européen de Développement
GBS	General Budget Support
GOM	Government of Madagascar
HIMO	Haut intensité de main d'œuvre (labour-based)
HQ	Head Quarters
IMF	International Monetary Fund
MPW	Ministère de l'Infrastructure
NAO	National authorising officer
NIP	National indicative programme
PFM	Public finance management
REC	Regional Economic Community
RF	Road Fund
RIP	Regional Indicative Programme
RN	Route nationale
SBS	Sector Budget Support
SME	Small & Medium Enterprises
SPSP	Sector policy support programme
TA	Technical Assistance
ToR	Terms of Reference
TSE	Transport sector evaluation
UE	Union européenne
WB	World Bank

Exchange rate: 1 € = 3156.85 Ariary.

6.1 Introduction

The purpose of the Country Note

The objective of the Madagascar Country Case Study, being part of the evaluation of the EU support to the transport sector in Africa during the years 2005-2013, is to continue and complete the collection of information and to test and investigate hypotheses, formulated during the desk phase of this evaluation, at the level of Madagascar in order to validate or refute those hypotheses, findings and preliminary assessments. The assessment concentrated on the policy and strategy issues of the EU transport sector programmes in Madagascar. Individual interventions were reviewed and analysed as examples of practical implementation, procedural aspects and achievements of EU transport sector support.

This Country Note respects the mandatory structure of all Country Notes (see table of content above). The checklist with desk phase hypotheses - prepared for all country case studies - has been used as guidance for this case study. The assessment of those hypotheses is presented in section 6.5 of this Note. A couple of sector level conclusions are presented in section 6.6.

Madagascar as a case study country

Madagascar was selected as a case study country because:

- It is an illustrative case of how the transport sector functions and is managed in an island economy with limited regional integration prospects;
- the country is said to show strong links between rural poverty alleviation and accessibility;
- it is one of two Southern Africa countries to be selected (with Mozambique);
- it is one of the three countries considered as fragile (with Democratic Republic of Congo and Uganda). In fact the EU cooperation was on hold from 2009 to 2014 in response to a long political transition period.

6.2. Data collection methods used

Data collection comprised compilation of exhaustive documentation on projects and sector reviews made available by the EUD (including evaluations of individual road projects[63] and a recent country-level evaluation covering the transport sector), briefing and debriefing with the EUD (using the results of the on-line questionnaire), interviews with sector partners (Ministère des Travaux Publics, Autorité Routière de Madagascar, Fond Routier,…), senior officials previously in charge of EU projects, NAO, donors (including EU Member States involved in the sector) and stakeholders (transporters), and a field visit to inspect the maintenance of classified roads and upgrading of rural roads in the Southern part of Madagascar. In total about 20 persons (see annex 2) have been interviewed between 16th and 25th of May 2015.

Three interventions have been reviewed in detail and specific project fiches have been made for them. These cover 77% of the total amount disbursed for transport sector projects during the years 2005-2013. Those three interventions are (see also table 6.1):

- Road up-grading in Diana and Sofia regions: « Désenclavement des régions Diana et Sofia dans le Nord du Madagascar (FED/2003/016-316) »;

[63] Notably the final report (2012) of the evaluation of 9th EDF road rehabilitation projects.

- Upgrading the classified road network in the South: « Réhabilitation du réseau routiers national dans le sud du Madagascar (FED/2004/016-589) » ;
- Rural roads up-grading component of the DRU-ACCORDS II project – «Appui aux communes et organisations rurales pour le Développement du Sud (FED/2006/017-939) ».

After the political crisis of 2009, a labour-based project (HIMO) was formulated having a road maintenance component. The Financing Agreement (amounting € 50 million; EDF-10 funds) was signed in 2012/2013. It has not been reviewed by the Evaluation Team because implementation had not yet started at the end of the evaluation period under review (end of 2013).

Limits and constraints

The main limit was the inability to visit the EU projects in the Northern part of the country, too far for the short span of time available during the mission. Therefore only two projects have actually been visited. The number and quality of the interviews was satisfying although indeed more in-depth analysis inside the Autorité Routière de Madagascar (ARM) and Ministry of Public Work (MPW) would have been useful to triangulate some assertions made by the Heads of Department. Finally, it was not possible to organise a focus group involving beneficiaries due to the nature of the projects and the timing of the field visit.

6.3. EU support to the transport sector in Madagascar

In the NIP 2002-2007 (EDF-9), the transport sector was one of the two focal sectors (rural development being the other one). The EU selected also 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). The latter was in line with a commitment of the Government of Madagascar (GoM) to prioritise maintenance over investment.

Of the A-envelope of EDF-9 totalling €265 million, 49% (€ 130 million) was allocated to the transport sector [64]. The two most important projects were the rehabilitation of RN6 in the North (FED/2003/016-316) and 'Opening up the Southern part of the island (FED/2004/016-589). "Conditionalities", set out under the "government's contribution", were:

- Implementation of the sector reform agenda (i.e. establishment of a Road Agency);
- Stabilisation of factors influencing transport costs (fuel price, in particular);
- Operationalisation of the Road Fund.

EDF10 (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 its Country Strategy Paper (2008-2013) the EU took stock of significant improvements in implementing the reform agenda under EDF-9. Furthermore the need for the 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.

An overview of EU's transport sector projects active in Madagascar during the years 2005-2013 is provided in table 6.1. The total allocated amount of those projects was € 325.8

[64] In comparison, "rural development and food security" was allocated €60 million. Envelope B = € 60 million.

million, of which € 218.3 million has actually been contracted and € 217.0 million disbursed up to the end of 2013.

Table 6.1. EU funded transport sector projects in Madagascar 2005-2013 (in '000 of €)

Decision code	Decision title	EU allocation	Contracted 2005-2013	Paid 2005-2013
EDF-8				
FED/2003/016-155	Réseau Nord de Chemins de Fer (MADARAIL) (22153)	11,000	11,000	11.000
	Total EDF-8	**11,000**	**11.000**	**11.000**
EDF-9				
FED/2003/016-248	Etudes Détaillés de Routes Nationales Secondaires dans le Sud de Madagascar	2,940	2,940	2,940
FED/2003/016-316	Désenclavement des Régions Diana et Sofia dans le Nord de Madagascar	111,133	111,133	111,184
FED/2003/016-449	Facilité de Coopération Technique (FCT)	2,813	390	390
FED/2004/016-589	Réhabilitation du Réseau Routiers National dans le Sud de Madagascar	42,679	42,679	43,054
FED/2005/017-742	Réhabilitation Complémentaire des Routes Nationales Sud - Est_	26,260	26,260	26,406
FED/2006/017-939	DRU-ACCORDS II – Appui aux Communes et Organisations Rurales pour le Développement du Sud	30,337	13,714	13,572
FED/2007/018-845	Franchissements sur la côte Nord-Est et pistes rurales connexes aux travaux FED sur le réseau routier national Nord	519	519	519
FED/2007/020-883	Travaux Routiers Post-Cycloniques suite aux Dégâts INDLALA et JAYA	5,000	148	117
FED/2008/019-795	INF – Route du Sud – Réhabilitation des Ponts Métalliques du Réseau Routier National	2,270	2,270	2,238
	Total EDF-9	**223,932**	**200,052**	**200,419**
EDF 10				
FED/2010/022-592	Travaux de réparation des infrastructures de transport suite aux dégâts de la tempête tropicale Hubert	5,400	5,118	4,678
FED/2011/022-789	Facilité de coopération technique	6,000	936	676
FED/2012/023-503	Amélioration de la Sécurité Alimentaire et Augmentation des Revenus Agricoles (ASARA)	40,000	21	5
FED/2012/024-076	Travaux de réparation des infrastructures suite aux dégâts climatiques	39,500	1,154	176
	Total EDF-10	**90,900**	**7,230**	**5,535**
TOTAL 2005-2013		**325,832**	**218,281**	**216,954**

Source: CRIS, June 2014.

Note: Only EDF-8 projects still active (=disbursements made) in the period 2008-2013 are included in this table.

The only EDF-8 project still 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.

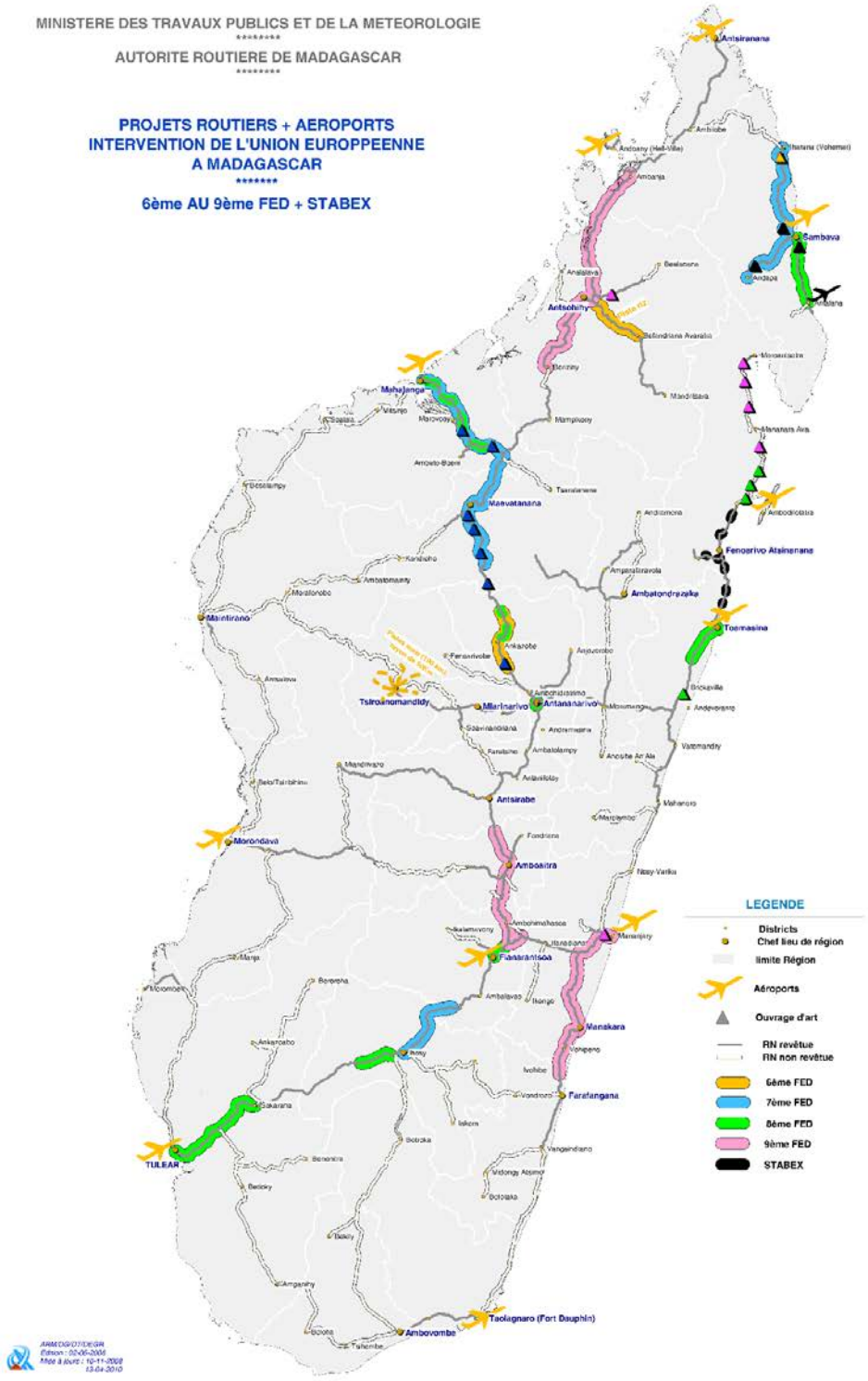
Within In the road sub-sector, 91% of the EU interventions was focused on developing the trunk road network, including the main links of economic importance towards the north-west (RN6) and the south (RN7) and roads in the north-east (Diana and Sofia regions) and the centre/south-east (Fianarantsoa and Tolanaro regions). Rural roads took an important share as well (compared to other country case studies) notably due to the ACORDS projects in the South, with a total of € 17.5 million (6.7% of road transport disbursements).

Disbursement rates of the transport sector projects of EDF-9 was excellent (100%), while the disbursement rate of EDF-10 was mediocre with 76% (paid amount as % of contracted amounts). A major factor causing the relatively low disbursement rate under EDF-10 was the fact that EDF-10 disbursements were blocked for some time because of the political crisis. Only at the end of 2012 two main Financing Agreements (one for emergency climate damages and another for HIMO) were signed.

From the total paid amount, 86.3% concerned payments for works, 12.8% payments for services and 0.9% payment for supplies. These proportions are somewhat distorted due to the fact that the €11 million managed by the EIB in support to Madarail was wrongly coded in CRIS as services.

The amount dedicated to “public sector policy and administrative management” totalled only €2.8 million over the whole evaluation reference period, and consisted mainly of technical assistance provided by four individual experts under the RN6 project.

EU interventions in the road sector since the 1960s, which contributed to the upgrading of major trunk roads and bridges, are shown in the map on the next page.


MINISTERE DES TRAVAUX PUBLICS ET DE LA METEOROLOGIE
AUTORITE ROUTIERE DE MADAGASCAR
PROJETS ROUTIERS + AEROPORTS
INTERVENTION DE L'UNION EUROPPEENNE
A MADAGASCAR
6ème AU 9ème FED + STABEX
Antsiranana
Sambava
Antsohihy
Mahajanga
Maevatanana
Fenoarivo Atsinanana
Toamasina
Tsiroanomandidy
Antananarivo
Antsirabe
Morondava
Fianarantsoa
Manakara
Farafangana
TULEAR
Taolagnaro (Fort Dauphin)
Ambovombe
LEGENDE
Districts
Chef lieu de région
limite Région
Aéroports
Ouvrage d'art
RN revêtue
RN non revêtue
6ème FED
7ème FED
8ème FED
9ème FED
STABEX

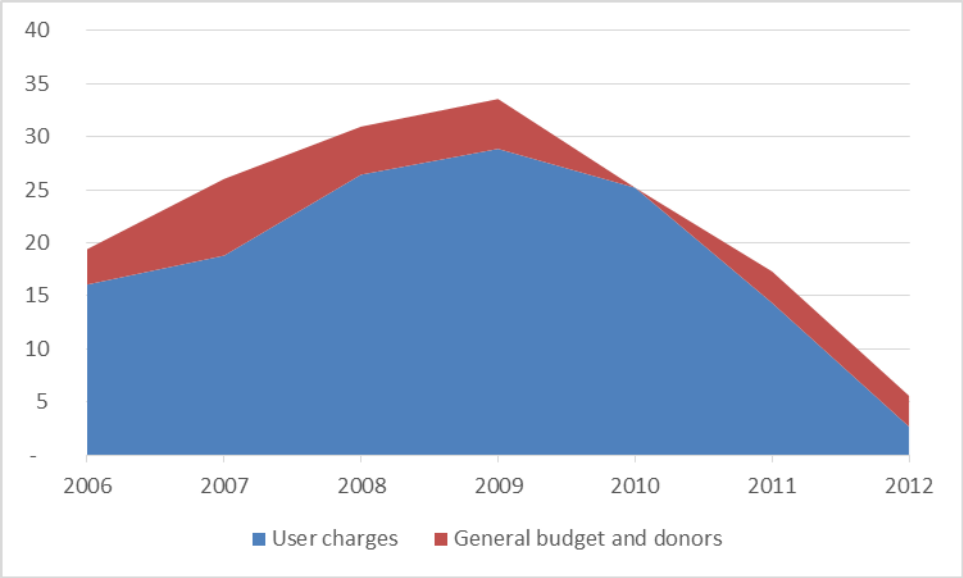
6.4. Description of the sector

The contribution of transport activities to the GDP is estimated to be 17% (including construction of transport infrastructure).

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/km². In 2009 about 52% of the trunk road network (routes nationales primaires) was in good condition, 36% in fair condition and 12% in poor (to very poor) condition. Since then, after 6 years of lack of maintenance, the condition of the road network has considerably worsened. The respective share of good/fair/poor is estimated to 20%, 45% and 35%. The cost of rehabilitating the trunk road network was, in 2014, estimated at €1 billion by the WB. During 2002-2012, the Government concentrated its meagre resources for road maintenance on maintaining the trunk roads, while donors financed upgrading on trunk roads. Consequently, the rest of the network is in very poor condition.

A 2nd generation Road Fund (Fond d'entretien routier - FER) was established in 2002, resourced by a fuel levy and limited allocation from the general government budget. Maintenance needs of the national roads network were covered by 90% in 2009 when the GoM established a fixed price for fuel, until then liberalized. From then, fuel importers ceased reversing the fuel level to the FER because the Government failed to pay them the agreed subsidies in case of international price hikes. In 2014, FER's revenues were as low as € 5 million.

Figure 7.1 - Evolution of the road fund revenues 2006-2012



Source: FER

In 2004, a Road Agency was established (Autorité Routière de Madagascar, ARM), which only became 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, up to now, the Ministry of Public Works has delegated to ARM only 46% of the trunk road network in order to keep itself a hand on some investment/emergency works projects. 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 (undertaken by the MPW). ARM is almost idle since its establishment, while its salaries were paid first by the EU and now by the WB.

The capacity available within the MPW is limited at both central and decentralised level. Budget allocations during the transition period did not allow procurement of maintenance works to any significant extent. Before the crisis maintenance levels were not perfect but sufficient to keep up normal standards. The lack of resource for road maintenance since 2009 induced a massive loss of practical know-how at the level of the MPW . Most works executed by the MPW since 2009 were undertaken under emergency conditions, sometimes outside regular procurement rules.

The capacity available within the MPW is limited at both central and decentralised level. Budget allocations during the transition period and even before did not allow procurement of maintenance works to any significant extent, inducing a massive loss of practical know-how at the level of the MPW[65] . Most works executed by the MPW since 2009 were undertaken under an emergency status, outside regular procurement rules.

Madagascar comprises two un-connected railway lines: one between Antananarivo and Tamatave port (732 km) and the other one 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 Fianaranstsoa – Côte Est (FCE), a publicly-owned company, for the southern line. The Northern line is mostly used for bulk transport (mainly fuel). Due to the strong and unregulated price competition from road transport, transport by train does not appear to be attractive for non-bulk transport, because of the relatively short distance (300 km along the R2), the limited volume of goods to be transported and the low speed of train transport. Freight volumes of train transport are declining and the lack of maintenance and further investments in rehabilitation since the early 2000s, (after the EIB investment of €150 million had been used), is threatening the viability of the Northern line. The Southern line, serving an isolated region with about 200.000 inhabitants, has mainly a social and partly also a touristic function, with no more than 75,000 passengers and 8,000 tons of freight a year.

The island has 8 international airports, far more than needed, with international arrivals concentrated at Antananarivo airport (Ivato). Only Ivato meets international standards. The 12 most important airports (out of a total of more than 56 other airports) are managed under concession by ADEMA, an Aéroport de Paris subsidiary.

6.5 Findings on the transport sector

EQ-1: To what extent have changing policies and strategies for EU support been responsive to the evolving needs of the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	National policies were drafted in compliance with donor policies rather than the contrary;	+	The last transport master plan was elaborated in 2003 with EU funding. At the time, the transport minister was a former WB staff member and provided a strong momentum to align with donors' views on transport sector reform. The Road Fund (2003) and the Road Agency (2004) were set up soon after the finalisation of the master plan.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			The Government of Madagascar (GoM) did not formally adopt the master plan and it appeared soon after the departure of the minister that the level of ownership of the reform by staff of the ministry of public works and of the prioritisation of transport regulation by the ministry of transport was low. Since 2003, the GoM issued several national development plans with general considerations on transport infrastructure but no sector or sub-sector policy document has been made. The WB elaborated a sector note in 2013 that had the ambition to frame policy statements for the road sector. However, the initiative was not taken on board by the GoM.
2	National priorities were respected (or subordinated by 'imposition' of national sector policies by sector donors)	+/-	Because the master plan and the reform were elaborated under the guidance of the then minister of transport and public works (and incidentally the vice-president), priorities set in 2003-2008 can hardly be said to be imposed by sector donors. In the road sector in particular, the institutional reform was set by laws and decrees. However, there was a clear gap between the decision-makers' priorities and principles for sector management and those of ministries' staff. Since the beginning of the 2009 political crisis that ended in 2014, the disruption of the rule of law by the transition authorities and the further weakening of the already poor authority of the government, the MPW is keen to reduce the initial ambitions of the sector institutional restructuring.
3	Existence of clear national interest or prioritisation for corridor development and regional connectivity;	NA	Madagascar being an island, the question of regional corridors is not relevant. The GoM clearly prioritises regional connectivity by supporting donors' initiatives on Toamasina port, the main port in the country. A JICA project (US$ 300 million) of extension of the docks, dredging for adjusting to panama and upgrading equipment is expected to be approved mid-2015. GoM is also prioritising basic maintenance of RN2, which connects the port with Antananarivo, the capital (80% of freight flows). The road is already in such a poor condition (age, overloading and gradients) that regional connectivity will be hindered if the traffic of Toamasina port increases. The "Plan National de Developpement" (PND) approved in 2014 foresees corridors prioritisation
4	Clear 'ownership' of regional institutional priorities, policies and strategies;	-	Madagascar is a member country of SADEG and COMESA-IOC. There is no clear evidence of ownership of regional institutional priorities, policies and strategies.
5	Existence of convergence and complementarity between sector policies and strategies at country and regional levels and with EU sector and development policies;	- +	As a large island, Madagascar has limited opportunities to capture additional financing and few incentives to align on regional regulations regarding land transport. In maritime and air transport, international regulations prevail. The (road) sector reform adopted in 2003-2008 is strictly aligned with principles advocated by the EU and other sector donors.
6	EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value;	- NA	All three main sector donors (EU, WB and AfDB) have a permanent representation in Madagascar. In terms of staff competencies, interviewees in the sector administration do not see a clear difference between competencies of EUD staff and WB staff. Both donors have provided studies and technical assistance and participate in sector policy dialogue the same way. Madagascar is one of the rare cases where the transport infrastructure sector continues to be a focal sector in the PIN of EDF-11 with an allocation of about €180 million.
7	EU competencies offer reduced	NA	

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	'added value' in current and future sector support and if so, why?		
8	Perceived comparative disadvantages are a continuing problem and to what extent such perceptions are in fact borne out in terms of constraints to implementation of EU support at national and regional levels;	+	If constraints in implementing EU support are acknowledged by interviewees (lengths of the PIN/RIP and project cycle, de facto unilateralism in programming), they are generally outweighed by comparative advantages in terms of granted financial volumes, administrative rigour and probity, with extensive use of audits, monitoring and evaluations, which are clear advantages. Management of EU support is perceived as unchanged by local partners.
9	Consultation processes are adequate to achieve desired levels of coherence: at all levels (country, regional and regional intra-country),	-	The formal consultation processes organised by the EUD are focused solely on NIP programming, and generally take place prior to transmitting the draft NIP to Headquarters, thus very early (for example in case of the on-going EDF-11 preparation). It should be noted that Headquarters has a large influence on the content of the NIP and the allocation of resources across focal sectors. Even if the national policy framework calls for coherence, the link between the transport sector support strategy defined in the NIP and transport sector policy of the present GoM is not very strong and to a large extent based on formal statements, and partly also referring to decisions taken by another government in 2003 in another context. A specific issue in Madagascar for EDF11 is the poor quality of the recent (2014) national development plan, which hardly allows alignment or harmonisation. EDF10 programming was cancelled due to the suspension of EU development cooperation after the 2009 political crisis. Consultations are only one rather formal step in the continuous policy dialogue held by the EUD with the GoM. It is however almost the only one where local sector NGOs (Lalana for example) can openly express their views on sector issues.
	between development, cross-cutting or sectoral EU policies	-	Consultation processes are not called for to reach or improve coherence between development, cross-cutting or sector EU policies.
	and between EU policies and those of other sector donors and stakeholders;	+	The three main transport sector donors in Madagascar are the EU, the WB and the AfDB. They are sharing the same views on the path to enforce the reform agreed in 2003-2006, to the extent that they issued several times joint letters to the GoM, providing their comments and recommendations on sector issues. Only the respective weight each donor attaches to the various issues (overloading, road maintenance financing, and operationalisation of the road agency) varies.
10	Capacities at regional institutional and national government levels are adequate to manage sector consultation and coordination processes	-	After relatively formal regional consultations in 2004 for finalizing the transport master plan, the GoM was not involved in similar process. Sector donors' coordination is organised by donors themselves within the infrastructure sector group. All donors contributing and intending to contribute to investment or policy dialogue in the transport sector are participating. Meetings were held before the 2009 political crisis roughly on a quarterly basis. After the crisis and the suspension of development aid by the EU and the WB (but not by AfDB), meetings became more circumstantial and focused on key issues related to the only partial implementation of the sector reform. In 2014, after the presidential election, the Prime Minister's Office launched a general donor coordination initiative to which all donors – including the EU – are now participating. The transport sector is not reported to be a

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			priority in this new fora and the overall feeling shared by interviewees is that the effectiveness of this initiative is still to be improved.
11	Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.	-	The recommendations of the 2014 country-level evaluation are progressively being taken into account in programming EDF-11: more focus on sector governance (political dialogue and sector budget support); provision of coordinated TA to the 3 road subsector structures (under the Afif rehabilitation programme); and promotion of Labour Based current maintenance of rural roads (an on-going 50 M€ HIMO project regarding more than 300 kms national roads).

EQ-2: Did the change from project-based approach to a sector-wide approach and budget support (SBS and GBS) meet expectations regarding outcomes for EU support to the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);	+	SBS/SPSP was not undertaken in Madagascar. The only related fact is the transport-related indicator in the GBS launched in 2014, after resuming the EU cooperation following the presidential election and the nomination of the Prime Minister. The chosen indicator was the re-establishment of the Road Fund (FER) Board, with a majority of members from the private sector. The measure was key for avoiding further misuses of FER procedures by the MPW to launch supposedly emergency works outside the procurement regular framework. The GoM set in recent months a high priority to abide to this measure, without further consideration of other linked key issues (such as implementing the compensation scheme agreed with fuel importers to allow them to pay fuel levy).
2	There has been a loosening of PFM eligibility conditionality for SBS (and/or increased diplomatic use of macro-economic statistics by IMF);	NA	
3	Choice of aid modality impacted upon PFM quality;	NA	
4	The transport sector was especially vulnerable to PFM frailties (due to the elevated value of infrastructure provision and operation);	+	SMEs interviewed witness a high level of corruption (15-20% of contract value) in the road infrastructure bids and contract management by the MPW and the road agency (ARM) alike. Contractors are also hindered by petty corruption in the tax administration. This frailty is if not explicitly and specifically confirmed by donors, at least strongly suggested. The situation is fairly coherent with the multiple breaches of the rule of law in the administrative management in all sectors, and thus particularly the road sector because of the high contract values. PFM discipline within the GoM itself is challenging, with a largely disorganised budgetary cycle leading to late, partial and unpredictable release of funds to the MPW.
5	Wider governance issues (especially electioneering) threatened transport sector due process and management;	+	The last presidential campaign is repeatedly said to have benefitted from significant private financing from the haulers. By this same token, several supposedly emergency works were financed by the general government budget through the FER right before the election campaign. One year after the election, financial audits are commissioned by the FER.
6	Engineering judgement and professional ethics were not robust enough to resist subversion of quality assurance and contractual due process in	+	The whole process of infrastructure design, bidding, contractual and administrative management is reportedly acknowledged as very weak and open to corruption and collusion in the public sector: for both emergency works with the MPW and maintenance works with ARM. Most local

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	infrastructure provision;		contractors are fake and count on their connections and dumping practices to capture public contracts. Engineering firms hired for road work supervision lack capacity, particularly for the staff actually present on the work sites and are open to collusion, being themselves corrupted by project managers in the public sector. Only the issue of fake contractors is being addressed by the MPW by introducing a technical classification system of firms, assessed by a provincial committee. The framework is set up but not yet adopted.
7	There was little political support and commitment to technical assistance activities and this has manifested in reduced TA support to national PFM reform	NA	No support was provided by the EU for sector PFM.
8	Information overload on SPSP and SBS inhibited accessibility and take-up of lessons learned by EUDs	NA	

EQ-3: To what extent has EU institutional support and capacity building resulted in enhanced transport sector management in Africa

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Adequate institutional resources and capacities ensure that network conditions will continue to be maintained or improve;	-	Before the 2009 crisis, the EU hired 4 individual experts: one for the FER and three for the ARM. The TA with the FER was clearly marginalised by the FER's Chief Executive Officer. The propositions and tools delivered by TAs seconded to the ARM were partly implemented. They made a significant contribution to improving road project management, but had a more limited output for the national roads maintenance system by mere lack of resources with the FER after 2009. TA to the MPW to support its refocus on its core functions was planned under EDF-10 but did not materialise due to the suspension of NIP resources after the 2009 crisis, which lasted up to 2014.
2	There are realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);	-	The MPW is in charge of the maintenance of rural roads, mainly through its regional and provincial services. These services are poorly staffed and equipped, with no funding for maintenance works from the government budget. The FER is statutorily supposed to dedicate 10% of its resources to local roads (rural and urban), but during the period under evaluation, FER did not actually finance rural roads' maintenance, because the GoM has set the national roads as the top priority and the few available funds were utilised for allegedly emergency works.
3	Management decisions are based on technical appreciation of base data of improving quality;	-	The road database and the related road inventory and programming software and equipment (bump integrator mainly) were purchased by the ARM with EU funds (part of the Devis Programme) and the staff having to use that software and equipment were trained by EU funded TAs. A traffic count campaign was financed in 2010. Since then, ARM was unable to finance and raise funds for updating the road inventory and the traffic counts. ARM has never completed the elaboration of an annual program, which is any how not in demand by the MPW and the ARM. (MPW is responsible for maintaining 46% of the national roads network and ARM for the other 64%). Since 2010, the level of resources available at the level of the FER is too low to allow to implement an effective maintenance strategy.
4	Continuing EU support	-	EDF resources are focused on road infrastructure apart

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	accommodates and supports changing land transport structures and realities (e.g. rail developments);		from small interventions to repair the FCE, a short railway line in the South-East, a tourist spot. The EIB supported the concessionning process of the Northern railway linking Antananarivo to the port of Toamasina by financing the upgrading of equipment and the rail track (€150 million).
5	National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;	- -	The last sector policy and strategy dates from 2003, of which the EU has financed the formulation of the master plan. The document no longer reflects the current sector situation that considerably worsened with the 2009 economic and political crisis. Most resources proposed in the master plan for investment in transport infrastructure did not materialise. The EU had planned a major contribution for upgrading major road links.
6	Transaction costs are reducing;	-	No evidence was found that transaction costs have been reduced during the reference period. However, such evidence could also not be expected because EU and WB institutional aid stopped in 2009 (only emergency interventions took place, mainly to answer cyclonic damages to the road network).
7	Anti-corruption measures are being actively pursued in the transport sector together with appropriate monitoring and control measures;	-	The GoM has not recognised corruption in the transport infrastructure sector as a key obstacle for development. An anti-corruption strategy has not yet been formulated.
8	Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector	+	Cross-cutting issues are systematically addressed in EU programming and contractual documents, and mainstreaming is called for. In EU road projects, based on Environmental and Social Impact Assessments, social and environmental accompanying measures being part of the RN6 and RN7 projects were implemented by 2 local NGOs. The approach did not abide to a strict understanding of cross-cutting issues but made notable contributions for maximising the benefits of road paving and prospects of increased traffic for the local communities (markets places, parking lots, school classes, boreholes, etc.).

EQ-4: To what extent has EU sector support contributed to sustainable and affordable transport infrastructure in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);	- +	Resources planned for road maintenance, to be collected by the FRE (which is a 2nd generation road fund), initially increased to a level close to the full coverage of maintenance needs (90% in 2009). Payment of the fuel levy to FER by fuel importers ceased when the GoM established a fixed retail price and failed to pay promised compensation to the importers. Since 2014, the GoM and fuel companies periodically negotiate upon the level and rhythm of payment of the arrears to the FER, without significant progress or improvement. The only such payment agreed had to be paid (by the petroleum companies) to the Treasury rather than to the FER, with no prospects of the money being allocated to road maintenance. For 5 years, no resources were therefore available for road maintenance and prospects are bleak to restore liberalised fuel retail prices (election prospects in September and change issues), which could make a step forwards in solving the problem of the fuel importers refusing to release the fuel levy revenues.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
2	National records are available that systematically record road service levels/ conditions linked to records of maintenance interventions (routine and periodic)	-	Maintenance of the national roads network is shared 46/54 by ARM and MPW (though it was supposed to be entirely delegated to the ARM). ARM enters the outcome of the construction and maintenance operations it conducts, into the road database but is not able to register the MPW operations because information is not transmitted.
3	Adequacy of fuel levy contributions are systematically and regularly reviewed (eg annually) and mechanisms exist for periodic adjustments of such levies;	-	Due to the blockage of fuel levy payment, the FER intends to commission a study on diversifying its sources of revenue, particularly by installing a toll system on newly upgraded roads.
4	Regular technical and financial audits of national sector PFM, procurement and contract cycle management demonstrate probity	-	Donors were not entitled to conduct regular technical and financial audits of national sector PFM, procurement and contract cycle management during the 5 years period of suspension of development aid. Probity is questioned by many, but it is yet not evidence-based.
5	Institutional capacity needs are regularly assessed and systems are in place to match capacities and resources to sector management needs	-	EU and subsequently the WB kept financing financial audits of the ARM although without a highly needed technical and organisation audit. The latter will be considered under EDF-11. The WB is conducting a study on perennial sources for financing the functioning of the ARM, in view of the absence of funding by the FER and donors since many years.
6	Transport regulators are functional and effective and rulings are enforced without undue political interference	-	Transport regulators were established for air and road transport following the 2003 master plan recommendations. The road transport regulator (AATT) is however unable to collect user charges on freight and faces therefore since its inception shortage of staff, equipment and capacity. The AATT did not play its regulatory role, leaving haulers' cartel control the market, particularly for fuel transport. At several occurrences, interviewees acknowledged a strong link between politicians and the main haulers controlling freight between Toamasina port and Antananarivo. The political elite is reportedly investing in freight transport, particularly fuel transport activities.

EQ-5: To what extent has EU support to the transport sector in Africa contributed to sustainable social and economic development?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.	+/-	Rural roads adjacent to upgraded national roads were initially considered to be rehabilitated by the EU funded national roads projects, notably the RN6 project. This initial design was also utilised for the economic feasibility studies (benefits of rural roads compensated partly for the overall low traffic volumes at the time of programming). However that design was later on abandoned because of increases in unit costs or technical difficulties that appeared during execution. EU included a labour based rural roads component in its project supporting rural communities in the South-East of the island (ACORDS). Labour-based methods are also used in the on-going 50 M€ HIMO project of national road maintenance. In view of the very poor condition of the national road network and the lack of alternatives for using the EDF resources during the evaluation period, it is difficult to say whether or not the balance should have been more in favour of rural roads. The dilemma continues to exist with EDF-11 programming.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
2	Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and efficient transport services.	-	Cartelization of haulers for Toamasina freight is not recognised as a problem by the GoM. Donors themselves are relatively timid on this issue, likely by lack of factual evidence and ideas about the scope of the issue.
3	Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.	-	The latest traffic count at national level dates back to 2010. Transport data other than purely administrative data have not been updated since 2003, when data were collected for the EU-financed transport master plan.
4	Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.	-	Quite some progress on road safety have been made until 2009, but was limited to the regulatory and institutional organisation. Enforcement was more than limited at the time, and has not improved afterwards.
5	Adoption of a regional approach to traffic safety would pay dividends in terms of ensuring that best practice is disseminated.	+	
6	The role of the EU has been recognized by sector stakeholders.	+	The role of the EU is unanimously recognised by stakeholders in the public sector and among the few NGOs active in the sector. Contractors benefitted from theoretical trainings and acknowledge the EU role as donor and leader in the sector reform process.
7	Development activities have taken place that would not have occurred without EU funding	+	Increase in traffic flows between 27% to 50% in the Centre and the South-East. Decrease of real transport costs by 20% to 30% as a result of EU funded major road upgrading projects (see evaluation studies conducted in 2012). Related increases in economic activities were kept as assumption as they were not monitored by any of the EU projects (unless by the NGO Lalanna for the accompanying measures implemented on behalf of the EU with communities along RN6).
8	EU is reluctant to engage in support to urban transport in SSA	+/-	Use of EDF resources for urban transport has been minimal. Only a road in Antananarivo intended to release congestion in the centre, has been funded. Further circumstantial and limited interventions were financed recently, still in the capital. These investments tend to be left to the EIB. Under EDF-11 a contribution will be made to financing the Rocade of Antananarivo

EQ-6: To what extent do EU transport sector support policies, strategies and interventions contribute explicitly to poverty reduction in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EU programming and project intervention design do not take into account lessons learned from an expanding body of research on factors influencing poverty impact	+/-	The ACORDS project, in the South-East, has a rural road component using Labour Based methods and an elaborated approach for strengthening decentralised planning and programming. The 50 M€ labour-based road maintenance project (under EDF-11) will also target poverty alleviation. Similarly, a project about to start, will focus on governance, including governance in the transport sector. Most EU initiatives during the aid suspension period focused on road and bridge repairs after cyclones, which had strong effects on Eastern rural communities' distress and poverty factors. The EU in Madagascar has therefore demonstrated an openness for innovations and rural poverty, which can be related to the suspension of aid: not being allowed to fund major road upgrading projects, the EUD had to find

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			alternatives.
2	Targeting of the poorest and most vulnerable people and equity considerations were not actually identified or intended by EU sector policy and programming documents.	-	In Madagascar, considering the extent of degradation of most of the national roads, several regions can be seen as landlocked (Tolagnara in the South, Antsiranana in the North, large areas of the West and the East between the few existing links). Levels of poverty and vulnerability are high in these regions, particularly in the Southern regions. It is therefore difficult to address spatial inequity issues until the core network is upgraded.
3	EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.	+	
4	Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs were marginalised (or dropped altogether) during construction phases	-	For the EU and the GoM, ESIAs are more than formalities due to the wealth and specificity of Madagascar's fauna, flora and environment. Interviewees did not indicate a specific case where ESMPs guidance was dropped.
5	No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors	+	The priority given to the national roads network was not questioned by the EU – nor by the GoM. On the contrary, the favourable cost effectiveness of support to transport infrastructure compared with EU support to other sectors was key in initial EDF-11 programming. It was eventually decided that restoring connectivity at national level should preclude refocusing EU activities on other sectors.

EQ-7: To what extent has EU cooperation at regional levels resulted in better facilitation of movement of people and freight?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The lessons learnt on regional transport facilitation and corridor management in East Africa were disseminated with EUDs in other African regions;	NA	
2	The performance monitoring systems set in place with EU support along all regional corridors allow an appropriate measure of outputs/outcomes of EU interventions (traffic volumes, export development, job creation, regional integration, integration into the world economy);	NA	
3	RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;	-	Madagascar's NIPs were formulated to a large extent independently from the RIPs. Both being an island and the state of impoverishment of the population create a gap between the focus and orientations of the RIPs and the NIPs. A closer connection is made under EDF-11 where funds from the RIP have been identified and requested for strategic regional infrastructures
4	The tools available to EUDs (policy dialogue, joint programming) were appropriate to ensure translation into national legislations of agreements acted by RECs	-	The EUD did not included regional agreements in its policy dialogue agenda with the GoM. National and sector issues are sufficient.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
5	The change introduced by EDF11 programming regarding the EU strategy for the transport sector was resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition	NA	

EQ-8: Were selection, planning and prioritisation procedures for EU transport sector support interventions in Africa appropriate?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values;	+	
2	That feasibility studies do not consider options for EU support to the transport sector, only the limited feasibility and viability of a pre-determined transport sector intervention;	+	
3	Time and cost over-runs have become systematic but in a range shared for similar projects by other sector FDIs (World Bank and AfDB);	NA	The EU has not implemented large road upgrading projects since 2009. Hence, it is difficult to confirm this hypothesis. The EUD developed however innovative contractual tools (framework contracts) in the context of Madagascar for road emergency works and technical/financial audits to address time over-runs linked to procurement procedures.
4	The specific dis-enabling environment of Africa for works in transport infrastructure is insufficiently addressed by EU procurement regulations and contract management procedures	NA	The ARM was established in order to provide a safer environment for donor investments in the road sector. To maximise the chance of ensuring professional ethics and efficiency, ARM staff was, for the management, recruited among a former EU project management unit in the MPW, which has acknowledged records for several years. Feedbacks from local contractors tend to demonstrate that donors' expected result – a scrupulous and efficient structure, has been defeated by corruption within ARM staff against significant advantages in terms of salary schemes and several benefits (car, mobile phone, working environment).
5	Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs	+/- -	The level of expertise required for rural/urban roads taking from a longstanding experience in civil engineering is easily achievable for EUD staff. The Infrastructure section's staff has an experience from other countries that is likely to have covered similar issues.
6	EDF11 programming is changing the focus from trunk to rural roads	-	The orientation of EDF-11 was kept on upgrading the national road network but with a focus on three regions (Antananarivo, North and South-East).

EQ-9: To what extent were EU aid modalities, cooperation frameworks and implementation mechanisms, and legal instruments appropriate for support to the transport sector of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership;	NA	In Madagascar, the project approach stayed unchallenged.
2	Governments' capacity to adjust to newly introduced preferred aid modalities with technical assistance support funded by the EU that did not anticipate the move, was not proportionated to actual needs and unable to treat root causes of capacity shortcomings (civil service reform, PFM…);	NA	
3	Adjustments of EU approaches and use of mix of instruments were more in response to emergencies (conflicts, civil unrest) rather than focused on capacity shortcomings;	+	The suspension of EU development aid between 2009 and 2013 - apart from funding activities addressing emergencies or implemented by NGOs/CSOs - did not allow to use the mix of modalities usually available for post-conflict or instable countries. Even with this constraints, EUD developed innovative initiatives to address post-cyclone damages and emergency works.
4	Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.	NA	

EQ-10: To what extent were EU procedures and resources appropriate for support to the transport sectors of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EUDs have adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities;	+ -	The staffing of Madagascar EUD is not an issue as the country is attractive for EC staff and contractual agents as well. The real question is about the number and skills of staff in the EUD. The focus on major road upgrading projects and then the suspension of most EU interventions in the transport sector limited the workload (in 2010 and 2011), which was therefore manageable. The expertise available within the Infrastructure Section is adjusted to the needs of the EU projects in the sector. Trainings at HQ are available to familiarise with the basics of new financing modalities for EUD staff. However, the lack of a helpdesk and backstopping from HQ for the practical aspects of managing a given aid modality is often regretted, for example nowadays for blending.
2	Operations budgets (of EUDs and EU HQ) are ~~(in)~~sufficient to permit necessary travel of technical staff to support interventions;	+	Available budgets for field and on-site missions is definitely a limiting factor, and EUD staff are attending site meetings on a regular basis when a contract is on-going. The key constraint is the workload associated with contract administration, reporting and increasingly to EEAS requirements.
3	Measures for dissemination of relevant lessons learned and technical support to EUDs are	-	The chronic state of emergency in Madagascar and the weaknesses of the partnership with the GoM in the transport sector did not allow EUD staff to be in strong

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	adequate;		demand for lessons learnt from SWAp, SPSP, etc. The knowledge is made available by HQ through annual meetings of Africa's infrastructure sections, collaborative website (capacity4dev.org) and the Unit C5 desk officer.
4	Capacity needs for responsibilities and activities involved in sector support portfolios have not been assessed and are not reviewed on a programme-by-programme basis;	+	EUD staff recruitment procedures do not allow to manage human resources on a programme-by-programme basis. When a vacancy is publicised, a brief overview of the portfolio that the candidates have to manage is provided. The candidate is afterwards selected after an interview that allows a better assessment of the match between capacity and portfolio needs. In Madagascar, the profile of the Head of Section is adequate for the foreseen large investment programme in trunk roads, as is the one of the staff member responsible for contracts.
5	There is consistency between the staffing strategies of different directorates	?	

6.6 Conclusions

EU national roads upgrading projects funded by EDF-9 brought considerable improvements for road users, communities and regions, compared to the previous state of degradation of the roads being essential for regional and local development. Thanks to the upgrading, traffic increased between 20% and 50%, while travel time was reduced. Transport costs expressed in constant prices (thus corrected for inflation) for passengers decreased by 20 to 30%, with current prices more or less stable in a highly inflationary context. Current freight prices increased unevenly according to travel routes, but that is not an important issue because haulage is limited on the roads rehabilitated with EU funding (in comparison with the RN2 between Toamasina port and Antananarivo, upgraded with WB funds).

On the RN7, a relatively heavily used upgraded road linking the South of Madagascar with Antananarivo, improvements brought by the EU support under EDF-9 did not last long. Works faced technical constraints during execution (availability of good materials) and were by purpose designed as a temporary relief for road users. A similar thing happened on a section of the RN6 leading to the North where the soil constraints (clay) could not be addressed due to budget limitations (against prices hikes); the rest of the upgraded road is in good condition, also helped by the lack of increase of freight traffic (which however compromises economic returns).

EU played an important role in promoting reform of the road sector, which was finally adopted in 2002-2004. Supporting the National Transport Master Plan was instrumental for advocating an institutional restructuring, including the establishment of a Road Fund and a Road Agency. Both were supported by EU financed Technical Assistants, three seconded to ARM and one to FER, but no TA for the MPW to accompany its transition towards its new role.

The new institutional framework left the maintenance of the rural roads network with the MPW, leaving it fully operational and oriented towards execution of works. This situation created a competition between the staff of the two institutions in charge of the road network to capture a maximum of funds, while the MPW is not performing well as project manager (lack of practical experience, high overheads, poor professional ethic). The issue was aggravated by the fact that ARM staff was not recruited among the MPW staff in general but rather by hiring staff of a former EDF project unit within the MPW. These issues created a

conflictual situation between the ARM and the MPW that blocked the reform until very recently. EU missed at the time the opportunity to learn from the experience in other African countries how phased and comprehensive approach of institutional restructuring could take into account social and governance issues in a balanced way.

Since 2009 and the suspension of EU's development aid, the EU focused on post-cyclonic repairs (and more recently labour-based maintenance works under EDF-11). Mobilisation of EU projects under EDF proved to be relatively steady due to flexible procedures adopted for Madagascar and initiatives of the EUD to utilise innovative approaches for contract management.

With the resumption of the support from the EU and other donors in 2014, EDF-11 programming is on-going. The road sector is part of the infrastructure focal sector, meant to support economic development of priority regions in Madagascar through the upgrading of basic infrastructures. A significant amount is allocated to the roads sector, because of the state of disrepair of most national roads, and particularly those in the concentration areas (the North around Diego, the Centre around Antananarivo and the South around Tolagnara) foreseen for EDF-11. The design phase is almost completed. It is expected that conditions of future Financing Agreements will bring breakthroughs and improvements in the operationalisation of the road management system. However, for the moment, the GoM did not deliver much positive signals about its will and capacity to overcome critical issues in financing and implementing road maintenance within the agreed institutional framework.

The 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. However, the issue of how to finance in future the maintenance by the FER of the roads to be upgraded under EDF11 is not yet resolved.

7. DRC case study

Table of Content

7.1. Introduction

The purpose of the Country Note

The objective of the DRC Country Case Study, being part of the evaluation of the EU support to the transport sector in Africa during the years 2005-2013, is to continue and complete the collection of information and to test and investigate findings, preliminary assessments and hypotheses, formulated during the desk phase, at the level of the DRC. The assessment concentrated on the policy and strategy issues of the EU transport sector programmes in the DRC. Individual interventions were reviewed and analysed as examples of practical implementation, procedural aspects and achievements of EU transport sector support.

This Country Note respects the mandatory structure of all Country Notes (see table of content above). The checklist with desk phase hypotheses - made for all country case studies - has been used as guidance for this case study. The assessment of those hypotheses is presented in section 7.5 of this Note. A couple of sector level conclusions are presented in chapter 7.6.

DRC as a case study country

Among the 10 countries selected for a case studies, DRC is:

- one of the 2 Central African countries (with Cameroon);
- one of the 3 countries considered as fragile (with Madagascar and Uganda), DRC is presently in fact in the state rebuilding phase after 10 years of conflict;
- a country where a financial blending transport project is allegedly under study (a rail-road bridge between Kinshasa and Brazzaville in which the EU's Africa Infrastructure Trust Fund will be involved).

Moreover, DRC is an informative case study for a continental thematic evaluation because the country has significant *national* integration challenges after the armed internal conflicts which ended in 2000, while *regional* integration is only a second rank priority. However, on the regional integration agenda of the African Union, the DRC is the missing link in three major continental corridors, particularly the north-south corridors.

7.2. Data collection methods used

Data collection comprised compilation of exhaustive documentation (see Annex 3) on projects and sector reviews availed at the EUD (among which evaluations of individual road projects and a recent country-level evaluation covering the transport sector as well), briefing and debriefing with the EUD (using the results of the on-line questionnaire), interviews with sector partners (Ministère des Transports, Office des Routes, …), senior officials previously in charge of EU projects, NAO, donors (including EU Member States involved in the sector) and other stakeholders (Bandundu Region authorities, transporters), and a field visit focused on the RN1 in the Eastern part of the country. In total about 20 persons (see annex 2) have been interviewed from 27th May to 5th June 2015.

Three interventions have been reviewed in detail and project fiches have been prepared for them (see annex 4). They cover 71% of the total amount disbursed for transport sector projects during the years 2005-2013. These three interventions are (see also table 3.1):

- PARAU - Projet d'entretien et réhabilitation des infrastructures routières; gravel roads rehabilitation and maintenance;
- PAREST – Projet d'Appui à la Réhabilitation de l'Est: Gravel roads rehabilitation and maintenance;
- PANAV - River Congo waterways upgrading .

Limitations and constraints

The main limitation was the limited number and quality of the interviews in the short span of time available for the mission, which reflect shortcomings in capacity of the administration as well as the high concentration of decision power making it difficult to get useful information from ordinary senior staff. More in-depth analysis inside the Office des Routes and Ministries of Infrastructure and Transport would have been useful to triangulate some assertions of the senior staff. Release of documentation was difficult, narrowing the collection of evidences to relatively formal interviews. Finally, it was not possible to organise a focus group involving beneficiaries due to the nature of the projects and the timing of the field visit.

7.3. EU interventions in the transport sector in the DRC

The NIP 2003-2007 (EDF-9[66]) was focused on three priority areas/sectors: (i) health in a 'Linking Relief, Rehabilitation and Development (LRRD) perspective, (ii) institutional support and capacity development for the transition towards democracy, and (iii) macro-economic support. The transport sector was not mentioned in the NIP. The continued support to the Programme d'Appui à la Réhabilitation des routes (FED/2002/015-990) PAR II with a total amount contracted and paid of about € 78 million) was only mentioned in the main text of the NIP, while the road rehabilitation component of the LRRD project in the East was not specified at all. The budget of the NIP 2003-2007 amounted € 171 million (envelope A only). Later on, after the NIP mid-term review, an amount of €80 -100 million was allocated to the transport infrastructure in an addendum of the NIP.

The A-envelope of the NIP 2008-2013 (EDF-10) amounted to €514 million. It was envisioned to allocate 50% of that envelope to the transport sector, mainly to the road subsector. The main projects were planned to be: (i) the rehabilitation of a section of the RN1 (between Batshamba and Kananga, on the road to Lubumbashi), (ii) the continued support to road gravelling and re-opening and maintenance of roads (Kinshasa, Bandundu, Equateur, Kasaï Occidental, and may be in North and South Kivu). Providing support to some Office des Routes (OdR) force account units was considered as well as a contribution to the recently established road fund (FONER). Finally, a significant financial contribution was planned to be allocated to improving waterways along the Congo River and its tributaries, as well as ferries on Lake Kivu in the East.

An overview of EU's transport sector projects active in the DRC during the years 2005-2013 is provided in table 7.1 (see below). The total contracted amount of those projects was € 252.6 million of which € 181.3 million had actually been disbursed up to the end of 2013. The disbursement rate of the EDF-9 transport sector projects was excellent (101% of contracted amount actually disbursed), but the disbursement rate of the EDF-10 projects was only 71% up to the end of 2013. This was mainly caused by delays with implementing the upgrading of a large section of the road between Kinshasa and the South (notably Lubumbashi) and the Copper Belt as well as delays with upgrading the River Congo waterways.

A singularity of the EU transport portfolio in the DRC is the EU's support to water transport, in particular the project FED/2009/021-536 with a budget of €60 million project (but very little

[66] Following ten years of suspension of EU Aid (January 1992 – January 2002.

contracted and disbursed so far) aimed at improving the navigability of the Congo River and connected waterways that would improve the connexion with the Northern and Eastern regions of the country. All the other transport sector projects are related to the roads sub-sector.

Another characteristic of EU's transport sector in the DRC is that a large part of the funds were/are dedicated to one project and its successor, respectively PAR-II under EDF-9 (€78 million contracted, which is 70% of the total contracted amount of EDF-9 for the transport sector) and PARAU under EDF-10 (€ 21 million contracted, which is 15% of the total contracted amount of EDF-10 for the transport sector). Both projects are aiming to rehabilitate and maintain the road network (2,000 km) of the hinterland of Kinshasa (Bandundu and Equateur Regions). Another major EU contribution under EDF-9 targeted the Eastern regions (FED/2006/020-696; total contracted value about €30 million) based on a "Linking Relief, Rehabilitation and Development" (LRRD) approach. That project was implemented by international NGOs during the years following the 2000-2005 internal conflict. The largest transport sector project under EDF-10 was FED/2011/022-739 (€83 million contracted so far), aimed at upgrading the national road towards Lubumbashi.

Table 7.1. EU funded transport sector projects in the DRC 2005-2013 (in '000 of €)

Decision code	Decision title	Alloca-ted	Contract ed	Paid
EDF-9				
FED/2002/015-990	Programme d'appui à la Réhabilitation (PAR II)	128,563	77,737	78,350
FED/2006/020-696	Réhabilitation et réintégration socio-économique dans les régions de L'Est de la RDC (LRRD)	75,000	30,643	31,326
FED/2007/019-673	Facilité de Coopération Technique	5,274	2,773	2,773
FED/2004/017-373	Facilité de Coopération Technique	2,822	434	434
	Total EDF-9	211,659	**111,587**	**112,883**
EDF 10				
FED/2009/021-535	Projet d'entretien et réhabilitation des infrastructures routières en RDC et amélioration de l'assainissement urbain à Kinshasa (PARAU)	99,410	21,413	24,843
FED/2009/021-536	Programme d'appui à la navigabilité des voies fluviales et lacustres en RDC (PANAV).	60,000	8,048	5,860
FED/2009/021-694	Facilité de Coopération Technique (TCF)	2,939	436	423
FED/2010/022-551	Projet d'appui à la stabilisation et reconstruction de l'Est de la RDC (PAREST)	20,620	13,599	11,242
FED/2011/022-739	Réhabilitation de la RN1 entre Batschamba et Tschikapa et études pour la réhabilitation de l'axe Goma - Kisangani	113,700	83,406	21,223
FED/2011/022-915	Facilité de Coopération Technique - TCF IV	6,551	198	156
FED/2010/021-767	Programme de Relance de la CEPGL (Burundi, RDC, Rwanda)	45,000	13,939	3,654
	Total EDF-10	**348,220**	**141,039**	**67,402**
TOTAL 2005-2013		**559,879**	**252,626**	**180,285**

Source: CRIS, June 2014.

The EUD chaired the transport sector donor coordination group up to 2013 (in which the Government did not participate)m but was not involved in a transport sector policy dialogue with the Government. The dialogue between the EUD and the Government was limited to

projects. The EU has also funded not funded technical assistance or studies related to policy analysis and formulation and/or management of the sector. The World Bank was in charge of conducting the policy dialogue, in particular regarding the inefficiencies in sector management, major financial and human resources shortages for maintenance, and the degradation of transport infrastructures (applies to all transport modes).

7.4. Description of the sector

The Democratic Republic of Congo (DRC) has fewer all-weather paved highways than any country of its size and population number in Africa — a total of 2,250 km, of which only 1,226 km is in good condition (see below). The figure of 2,250 km implies that the DRC has 35 km of paved road per one million of inhabitants, which is very low compared to for instance 721km in Zambia and 3,427km in Botswana. To put the figure of 2,250 km further into 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's 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.

The total road network of 171,250 km (in 2005) consisted of:

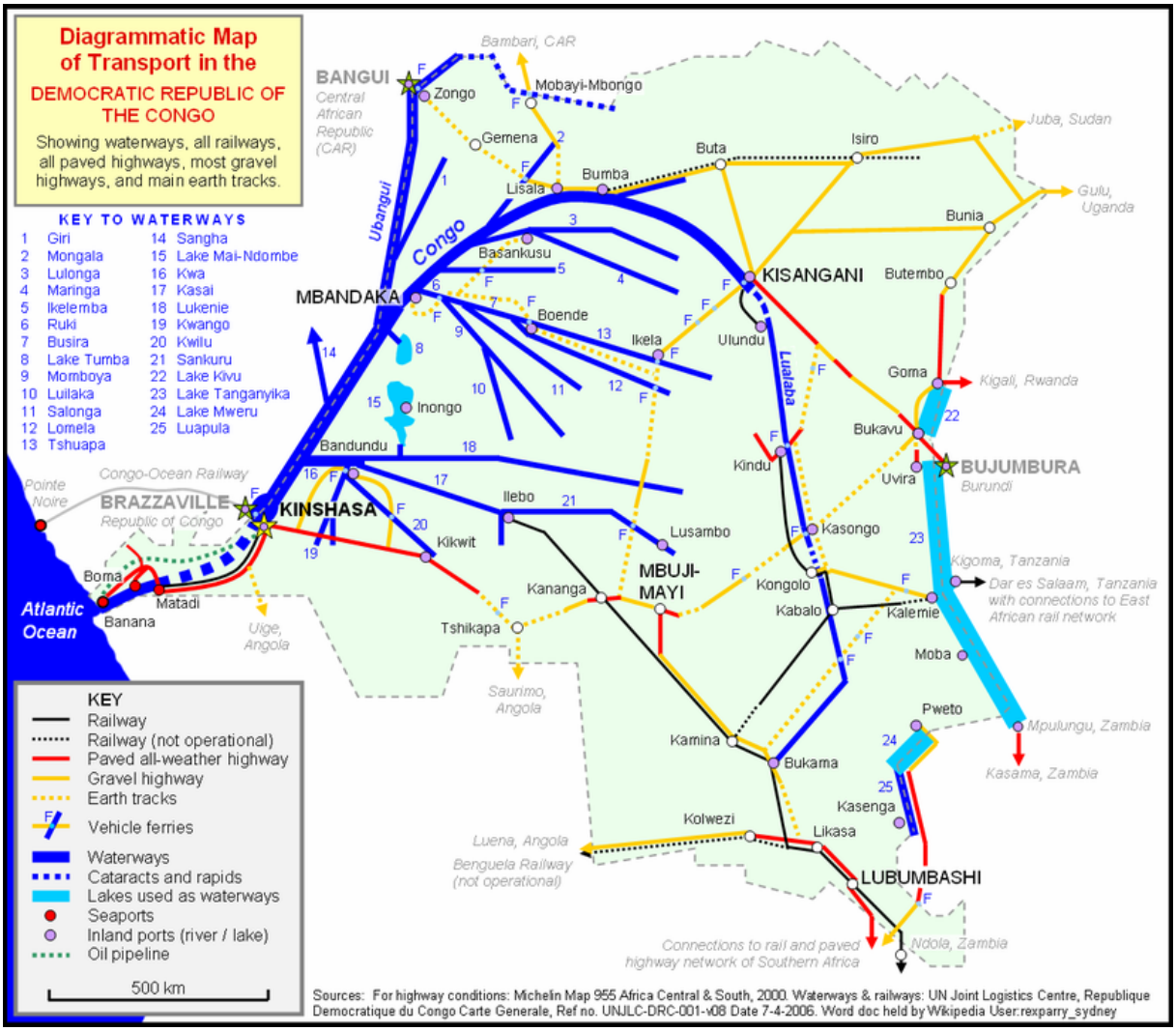
- *paved roads:* 2,250 km
- *unpaved roads:* 15,000 km
- *tracks:* 43,000 km
- *country roads:* 21,000 km
- *local roads or footpaths:* 90,000 km

The 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, its 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. For the hundreds of passengers and traders these tugs and barges function like small floating towns. Rather than mooring at riverside communities along the route, traders come out by canoes and small boats alongside the river barges and transfer goods on the move.

Most waterway routes do not operate according to regular schedules. It is common for an operator to moor a barge at a riverside town and collect freight and passengers over a period of weeks before hiring a river tug to tow or push the barge to its destination.

The following map (dated 2006) illustrates the challenge of the multimodal transport network in the DRC.



The 5,033 km of railway lines consist of four un-connected networks (but networks are generally connected by river transport) not having the same gauge. Only 858 km are electrified (in Southern Katanga, used for transport of copper). Rail transport in the Democratic Republic of the Congo is provided by the National Railway Company of Congo (Société Nationale des Chemins de Fer du Congo), the Office National des Transports du Congo (ONATRA) and the Office of the Uele Railways (Office des Chemins de Fer des Ueles, (CFU).

The railway infrastructure is increasingly dilapidated due to lack of maintenance. Locomotives and other equipment have also reached an appalling level of decay. Reform of the railway sector is being supported by the World Bank with the Multimodal Transport Project, however so far with limited results.

All domestic passenger airlines operating in the DRC are presently blacklisted by the EU. CAA is nowadays the main airline company in the DRC. It provides regular services between Kinshasa and a dozen of domestic destinations. The DRC has 24 airports with paved runways and another 205 airstrips with an unpaved runway.

Sector management responsibilities are shared by the Ministry of Public Works (MPW – Ministère des Infrastructures et des Travaux Publics) and the Ministry of Transport. Both ministries are only dealing with policy, planning and regulation. They are weak compared to the national agencies and government-owned transport companies that have to ensure the

implementation of the policy, such as the Office des Routes (OdR) for road construction, maintenance and exploitation of ferries, the Régie des Voies Fluviales (RVF; with similar competency than the OdR but for waterways), and the ONATRA, a monopolistic maritime and waterways public undertaking. Since early 2000, the ministries have actually stopped providing policy orientations or contributing to due sector management through planning or programming exercises. Agencies are on their own, with only direct contact with the government, at the highest level.

For the road subsector, a road fund (FONER – Fonds National d'Entretien Routier) was established in 2009 as a conditionality of the donors. Fuel levy and tolls are collected but are insufficient for coping with the huge road maintenance backlog. A large share of the available revenues are allocated without any programming and often for projects that have more to do with rehabilitation than with maintenance.

The waterways transport subsector does not have a similar financing mechanism for the maintenance of waterways.

The latest sector policy document dates back from 2001, formulated with the help of funding from the World Bank. It was finally not approved by the Council of Ministers. Since then, the Government and the donors are missing a shared policy document and a platform for a constructive dialogue and sector reform is at a standstill.

7.5. Findings on the transport sector

EQ-1: To what extent have changing policies and strategies for EU support been responsive to the evolving needs of the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	National policies were drafted in compliance with donor policies rather than the contrary;	-	RDC is one of the rare cases where the government has not come to a transport or even road sector policy. Donors (notably World Bank and AfDB) recurrently supported studies for the preparation of sector or sub-sector strategies. The latest all transport modes planning exercise dates from 2001 (WB financed). AfDB is about to recruit a team for a similar exercise (with a duration of 18 months). In the road subsector, AfDB financed a study in 2013. The Government did not pursue any of the above studies by adopting a formal policy letter. For more than 10 years, development aid was stopped due to armed conflicts, but the so-called transition period now lasts already 15 years. Since 2014, consultations within the Government (Ministry of Infrastructure and Public Works and the Ministry of Planning) about the conclusions and recommendations of the WB-financed study on road subsector reform. Their prime concern is the alignment with the Constitution and the decentralization process. The intention is to come to a balance between donor views (particularly from the World Bank and the Government's main options.
2	National priorities were respected (or subordinated by 'imposition' of national sector policies by sector donors)	+	National priorities for land transport services and infrastructure management are contradicting international best practices: up-keep of large state-owned firms in transport services, state agencies utilizing force account units transport infrastructure maintenance, etc. This applies to both road transport and waterways transport. The road network is for example managed by the Office des Routes, with limited road maintenance programming and large recourse to making use of Force Account

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			Units. This option was supported by the EU, irrespective of its sector policy principles agreed in all other parts of the continent, to the extent that heavy equipment was purchased with EDF funds for undertaking road maintenance works by three Office des Routes in the east of the DRC, along with technical assistance and trainings (Goma, Bukavu, Béni). A reform path more or less aligned with donors' shared principles was agreed with the Ministry of Transport (but not formally adopted by the Council of Minister) in 2001, notably in the road subsector. However, the Government diverted from that reform path afterwards, and reform prospects were given up, until now.
3	Existence of clear national interest or prioritisation for corridor development and regional connectivity;	-	The RDC is facing critical challenges as regards promoting national integration through construction of an interconnected road network between Kinshasa and the South (where the economic capital Lubumbashi is located), the North (using also waterways) and the East. All those regions are not yet connected and, considering the size of the territory, links of national importance are also regional corridors for RDC's neighbours. The key project for regional connectivity is the rail-road bridge over the Congo River, linking Kinshasa to Brazzaville (and northwards to Gabon, Cameroon and West Africa). The project is under study (Ministry of Planning) and is a candidate for financial blending arrangements with EU's Africa Infrastructure Trust fund. The Government's reservations as regards this project is reported to be due to the fear that the Matadi port will decline when faced to competition of the Pointe-Noire port.
4	Clear 'ownership' of regional institutional priorities, policies and strategies;	-	The RDC is to a very large extent exceeding the scope of regional institutions' priorities due to its size. The country is member of three RECs (SADEG, COMESA andf EAC), with limited pro-activity in its involvement in transport sector management issues, unless for getting additional funding for infrastructure. The provisional list of regional projects of the RIP of EDF11 does not comprise any DRC project.
5	Existence of convergence and complementarity between sector policies and strategies at country and regional levels and with EU sector and development policies;	- -	Within the transport sector, the RDC is almost exclusively focused on rebuilding its transport infrastructure. Concerns about axle load controls compared to neighbouring countries are just becoming to attract some attention. FONER purchased mobile weight control devices and is about to organise controls. The Government is managing the transport sector on the basis of its own principles, but tries to take the donors' sector policy expectations into account, such as: private sector involvement, creation of a road fund (FONER), maintenance programming… Up to now, convergences did not yet materialize. For instance road works are still undertaken by the Force Account Units of the Office des Routes. The reform prospects are improving since 2014. AfDB and the World Bank have identified opportunities for reform in the road subsector and are about to launch the formulation of a transport master plan (AfDB) to provide a broad sector framework, while the WB is financing a similar study as regards reform of road sector management. The Infrastructure Unit (donor funded) in the Ministry of Public Works (MPW) is positive about the political will to go ahead.
6	EU competencies actually have led to added value of EU sector support in comparison to other sector donors	-	The EUD in Kinshasa has demonstrated limited interest in and capacity for policy dialogue, leaving the leadership of sector reforms to the WB and the AfDB. The EUD has

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	and if so, whether changing EU policies continue to leverage such added value;	NA	not contributed to the policy dialogue by any type of Technical Assistance or support to a sector study or planning exercise. EUD's participation in donors thematic group meetings (which take place in principle twice a year, but often less like in 2014) are seen as having not brought value to the dialogue, as said by some ministries. The EUD is perceived as working with the NAO support unit (COFED) only, while there was no cooperation with line ministries, and limited cooperation with other donors. The EU key projects in road infrastructure reflect and contribute to this perception of an EUD under siege, threatened by corrupt and inefficient public agencies . PAR-II was centrally managed, with a PMU fully external from the road administration. PARAU, PASTAR and PAREST, though under decentralised management, had to limit to the strict minimum the links with the Ministry and the Offices des Routes to get operations running, using the NAO services as a shield. The road projects continued to fuel the Office des Routes Force Account Units by supplying heavy equipment, irrespective of lessons learnt in the recent past in the DRC or elsewhere. The WB Pro-Routes project (initially identified by the EU) promoted SMEs for road construction and provided more added-value than the EU road projects to get sector reform going. The PANAV project in the waterways subsector faced a disenabling institutional environment and shortcomings with Technical Assistance such that only 8 million of the allocated 60 million could be contracted, and that the added value of the project was limited. For all EU transport sector projects, sustainability is a problem, which was foreseeable right from their identification. State-owned agencies for roads and waterways do not have access to funds for maintaining infrastructure and equipment. Sector stakeholders do not have a positive opinion about the competencies of the EU staff competencies and their ability to influence project designs. DRC, being a fragile state, is one the rare cases where EU involvement in the transport sector will be continued under EDF-11. In pursuance of EDF-10, the next programming period will concentrate on upgrading the RN1 towards Lumbumbashi (up to Chikapa).The EUD had however anticipated EU's exit from the transport sector by passing the leadership of the thematic group to the AfDB and is intending to pursue its withdrawal by solely focusing on managing the RN1 upgrading project. EUD staff is overworked by the remaining administrative tasks induced by centrally managed huge projects such as PARAU and is hardly able to devote time to policy dialogue. The shortcomings in the partnering approach of the Government is another disincentive.
7	EU competencies offer reduced 'added value' in current and future sector support and if so, why?	NA	See above.
8	Perceived comparative disadvantages are a continuing and/or reducing problem and to what extent such perceptions are in fact borne out in terms of constraints to implementation of EU support at national and regional levels;	~	EU programmes in the transport sector are concentrated on major road projects, for which in-house competencies are a less sensitive matter for staff with mainly an engineer's background.
9	Consultation processes are adequate to achieve desired levels	-	The scope of consultation processes is limited in the RDC due to the concentration of decision-making power

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	of coherence: at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders;	-	at the top of the Government, the limited number of experienced and competent senior staff in the administration, and the absence of representation of the civil society. This specificity drove the EUD not to involve itself in transport sector consultation processes unless at high level, however with limited results regarding coherence with regional policies or EU requirements on cross-cutting issues or sector policy principles. The EUD has led the transport sector thematic group until recently (2013). The "Infrastructure Unit" within the Ministry of Public Works was initiated by the EU prior to aid suspension in 1992, to which the EU provided also financial support. It was joined by other donors as well (WB, AfDB, JICA). The Unit in in charge of managing donors' construction projects in the sector (notably PRO-ROUTES financed by the WB and DFID) and of the donor coordination. The EU withdrew its support to the Infrastructure Unit after suspension of decentralised management in 1992. The EUD's only involvement in policy dialogue was within the thematic group, as centralised management and extensive use of the B-envelop for the infrastructure sector did not allow to discuss conditionalities in financing agreements. Since EDF-10 and the progressive resumption of decentralised cooperation in the sector (EU funded transport sector projects managed by the EUD), EU interventions are coherent with the shared effort of the EU, the WB and AfDB to rebuild the link between Kinshasa and the South (RN1).
10	Capacities at regional institutional and national government levels are adequate to manage sector consultation and coordination processes	-	Capacities are weak in the Ministries of Public Works (infrastructure) and Transport as well as in the key subsector agencies (Office des Routes, Régie des Voies Fluviales-RVF) in charge of management of the sector. The only agency where capacity has improved is the Road Fund (FONER), created in 2008. The Government has only a very limited commitment to donor coordination and consultation, and prefers bilateral relationships. The ministries, agencies and state-owned firms in the sector are overly conservative, with vested interests in maintaining the status quo. Trade Unions are also vocal and reluctant to reform unless significant financial compensations ("plans sociaux") are foreseen. The scope for consultation is limited.
11	Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.	?	In the DRC, the EU did not organise a transport sector review. The added-value of evaluations for programming new projects or engaging in several successive phases or extensions (PAR, PAREST) is hard to prove. In the case of the evaluations of the LLRD project (2007) and the country-level evaluation (2014), operational recommendations were not taken into consideration.

EQ-2: Did the change from project-based approach to a sector-wide approach and budget support (SBS and GBS) meet expectations regarding outcomes for EU support to the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary	NA	The preconditions for providing GBS, SBS or a /SPSP are not satisfied, notably the scores as regarding PFM, governance and existence of a sector policy are not good.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	there is commitment to the principles of SBS, but not to the attached performance conditionalities);		
2	There has been a loosening of PFM eligibility conditionality for SBS (and/or increased diplomatic use of macro-economic statistics by IMF);	NA	
3	Choice of aid modality impacted upon PFM quality;	NA	
4	The transport sector was especially vulnerable to PFM frailties (due to the elevated value of infrastructure provision and operation);	+	Governance weaknesses and corruption issues do frequently come to the surface at the level of transport sector agencies and state-owned companies. By lack of external auditing, the alleged frailties are not evidenced.
5	Wider governance issues (especially electioneering) threatened transport sector due process and management;	+	Transport sector due processes and management are not yet in place in the DRC. Political governance issues combined with the slow process of restoring the rule of law and rebuilding the state, are key blockades for due processes and management. Arbitrariness is a key tool for the Government, politicians and decision-makers to rule the country. Since decentralisation was set in place (in 2002), sector governance issues increased as 40% of FONER's revenue is transferred to provincial governments without having road maintenance programs and due checks and balances.
6	Engineering judgement and professional ethics were not robust enough to resist subversion of quality assurance and contractual due process in infrastructure provision;	+	For works undertaken by the Offices des Routes with Force Account Units, the whole set of contractual safeguards against corruption and collusion does not exist. Corruption and nepotism prevail openly and are continued by lack of reform and restructuring of the agency. Works contracted to the private sector are subject to a similar system of corruption by lack of professional ethics. SMEs get very few contracts from the Offices des Routes. The only contractors of any importance are Chinese firms. The situation is different for EU funded road construction projects being part of PAR-II under EDF-9 and extended by PARAU under EDF10: the entire process of feasibility studies and execution of works was ensured by the Technical Assistance provided by the project, while construction equipment was also purchased by the project (using the "Devis-Programme" approach). Being cut-off from the local context, issues regarding ethics did not arose. Also in the case of upgrading bridges on the RN1, works and supervision were internationally procured, while contractual management and inspection was given to the TAs of PARAU to compensate for the weakness and presumed corruption of the Offices des Routes.
7	There was little political support and commitment to technical assistance activities and this has manifested in reduced TA support to national PFM reform	-	On the contrary, in the RDC the EU relied heavily on TA (cf. above) to overcome the weakness of human resources in the administration and of the institutional structures themselves. This option was made possible by the suspension of EU's decentralised cooperation modality (during the years of internal conflict) . PAR II and PARAU did in fact operate as alternative road administration in areas covered by those projects and hired on a temporary basis the best staff members of the Offices des Routes. In the East, EU projects in the road sector made a similar utilisation of TA. Earlier, with the LLRD projects, road re-construction projects were managed by international NGOs on a similar basis as with PAR-II. With PAREST, the EU supplied construction equipment to the three Office des Routes units (Béni, Goma, Bukavu) worth €12m part of the €20m of the PAREST I & II, with two TAs for each unit: one in charge of programming and controlling operations, the other for equipment maintenance. Release of fuel and spare parts

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			was also controlled by the TAs. In these various configurations, there were no expectations from the EU side that political support and commitment was critical for ownership and transfer of technical know-how. Hired staff from the Office des Routes and working for the EU funded road projects generally acknowledged that they individually gained qualifications, experience and work discipline. Some of them were promoted within Office des Routes structure.
8	Information overload on SPSP and SBS inhibited accessibility and take-up of lessons learned by EUDs	NA	

EQ-3: To what extent has EU institutional support and capacity building resulted in enhanced transport sector management in Africa

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Adequate institutional resources and capacities ensure that network conditions will continue to be maintained or improve;	-	Resources available within the FONER are insufficient (US$100 million in 2013 and US$118m in 2014), though increasing annually at a rate of about 10%. Most of those revenues are derived from the fuel levy. The remainder originates from tolls installed on all upgraded roads. FONER revenues are compromised by fuel smuggling, corruption in customs departments and various arbitrary exemptions awarded to traders and importers. Coverage of road maintenance needs, i.e. for roads re-opened or upgraded only, is 50%. Most of the maintainable network is gravelled, which means that 2-3 years of maintenance default will cause a large deterioration limiting traffic volumes and requiring costly periodic maintenance operations. Resources transferred to the Offices des Routes (OdR) by FONER are most generally used for urgent repairs and rehabilitation rather than for current maintenance operations, as should be done according to their mandate. According to the FONER, differences between periodic maintenance and rehabilitation are said to be unclear in case of gravel roads. In 2014, the total amount transferred to the OdR was as low as US$5 million. By the end of May 2015, FONER indicated having already transferred $11million to the OdR for the year 2015. The state of degradation of the network is such that as long as the maintenance backlog is not made up it is difficult to make annual maintenance programs. Moreover the OdR is reluctant to elaborate such programs, looking rather for untargeted budget allocation. Human resources in the OdR are limited and the construction equipment is old and dilapidated by two decades of idleness and corruption. Most of the staff are lacking practical experience and updated knowledge, notably as regards management of contracts with the private sector. A reform was elaborated in 2001 but not adopted by the Government. Since then, Government initiatives in the sector are erratic. The AfDB and the WB expressed the feeling that the situation is possibly about to change (WB study on road management reform). The situation is somehow worse for the waterways subsector where neither the WB multimodal transport project nor the EU project could come to a reform agenda approved by the Government. The key blockade for the

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			time being is the transfer by FONER of the share of fuel levies linked to waterways activities to a Waterways fund still to be created. The same applies to railways. Actual revenues available for road maintenance might at any time be further reduced when this policy for financing maintenance of waterways and railways is adopted by the Government.
2	There are realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);	-	The Government is already challenged by having to restore basic national and regional connectivity, while no resource are left for rural roads. The competency as regards the non-national road network was transferred to the 11 regions (foreseen to increase to 27 regions) without sufficient financial transfers. A global 40% share of FONER revenue was allocated to the regions, without a normative breakdown per region. . The EU funded PAR-II and PARAU projects were/are actually focused on re-opening and maintaining a network of rural roads in the neighbouring regions of Kinshasa and in Eastern DRC, of which many are classified as national roads.
3	Management decisions are based on technical appreciation of base data of improving quality;	-	Decisions for annual maintenance programmes are based on emergencies identified on the basis of technical appreciation mixed with political interference. Donors (WB, and AfDB) are supporting road data collection, centralisation and treatment within the "Cellule Infrastructure" but programming is victim of the insufficient resources made available by FONER and the multiplication of disruptions in a hugely vast road network. The EU project addressing waterways (PANAV) intended to rehabilitate and supply tools for collecting basic data and update them on a regular basis. However there are no results yet and they unlikely to be produced before the end of the project. The subsector agency is anyhow deprived of sufficient revenues and budget allocations to keep the equipment running.
4	Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments);	-	The EU interventions in the transport sector were solely focussed on infrastructure. The limited policy dialogue was devoted to axle load control and the use of rain barriers (the latter in particular a concern evoked by the EU funded gravelled road rehabilitation and maintenance activities). PARAU installed 20 such barriers on the road to Bandundu city. However the OdR eventually did not operate them. A mega rail project (US$5 billion) towards the South and East of the country is supposedly under way with funding from China, while the WB is preparing reform of the subsector within its Multimodal Transport Project. The EU is not associated with this initiative but financed an important waterways project on the river Congo under EDF-0 (€60 million) that is key for national connectivity.
5	National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;	- -	The Government has not yet issued a transport sector strategy. A document was prepared in 2013 for the road subsector, financed by the AfDB but was not adopted by the Government. The same happened to the 2001 transport master plan financed by the WB. The Government has not made any kind of roadmap for sector reform yet.
6	Transaction costs are reducing;	-	The lack of coordination between donors and with the Government did not allow making any significant gains regarding transaction costs. The Paris Declaration did not make a visible difference in aid management in the DRC, apart from sections and annexes of the NIPs dedicated to the Paris Declaration principles. Coordination and division of labour issues are discussed during biannual supervision missions of the WB and the AfDB, but is hard to track

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			down in project preparation and implementation. In the road subsector, Pro-Routes, PARAU and PAREST are following contradicting principles and paths. In the waterways subsector, initial coordination between the WB funded Multimodal transport Project and PANAV has faded away with the problems faced by the EU-funded TA implementing the €60 million PANAV project..
7	Anti-corruption measures are being actively pursued in the transport sector together with appropriate monitoring and control measures;	-	Governance and corruption issues in the transport sector are not specifically recognised by the Government. The EU is supporting governance in general (rule of the law, police, Justice…) but did not consider dealing specifically with these issues in the transport sector.
8	Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector	-	Cross-cutting issues are selectively promoted (solely environment for the RN1) and not mainstreamed. Most other projects (PAR II, PARAU, PAREST, PASTAR…) do neither specifically address environmental safeguards nor VIH-SIDA or Gender, which are the most usual crosscutting issues of transport projects, and in particular road projects.

EQ-4: To what extent has EU sector support contributed to sustainable and affordable transport infrastructure in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);	- -	The importance of the funding gap of maintenance needs by the FONER is still too high (50%) for identifying such a trend. FONER revenues increased annually by 10% during 2010-2014 but the maintainable road network is also increasing with projects financed by donors (Pro-routes, RN1 and recent EU projects such PASTAR and PAREST). PAREST alone re-opened some 500 km in Eastern DRC that it is now to FONER to finance maintenance. The OdR is disorganised and poorly equipped for disbursing timely the funds availed by FONER. A recent WB study on sector expenditures review concluded that OdR costs are high, as including running costs. A large share of those resources are dedicated to rehabilitation and repairs. FONER has set a monitoring and auditing system to check effective realisation of OdR works, and consistency with technical specification. The overall assessment of FONER is that funds allocated to OdR are actually disbursed in a reasonable time frame. This is however not documented specifically. A technical and organisational audit will be conducted by the WB-financed study on OdR reform.
2	National records are available that systematically record road service levels/ conditions linked to records of maintenance interventions (routine and periodic)	-	National records are embryonic, generally supported by donors' TA. The OdR centralises data collected by regional bureaus ("brigades") on a monthly basis. The extent they are based on updates following specific road inspection is doubtful. Often with force account units, such monthly tables are limited to a desk work using secondary sources.
3	Adequacy of fuel levy contributions are systematically and regularly reviewed (eg annually) and mechanisms exist for periodic adjustments of such levies;	-	The fuel levy is the main source of revenue of FONER. Their level is limited to 1 US$ cent per litre and adjustments are not considered yet. FONER identify several shortcomings in fuel levy collection, from corruption in Customs services (the volume that escapes taxation would be as high as 50%), and fuel smuggling with neighbouring countries. A study was commissioned in 2013 to adjust FONER revenues but did not lead to significant changes. FONER is rather focused on fighting against leakages in fuel levy.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
4	Regular technical and financial audits of national sector PFM, procurement and contract cycle management demonstrate probity	-	OdR is ensuring contractual management when procuring to the private sector rather than undertaking force account road works. Management practices are opaque. Actually none of the organisations managing the sector were subjected to external audits, financial and technical alike. Internal auditing and GoC supervising departments are claimed to be a sufficient guaranty for effectiveness and efficiency.
5	Institutional capacity needs are regularly assessed and systems are in place to match capacities and resources to sector management needs	-	A reform was under study in 2013 but during the whole period under review, the sector institutions were left to cope with existing (lack of) capacity, ageing technical and management staff, and bureaus that have lost sound administrative routine. Since the major restructuring of OdR in 2000 that led to downsizing the staff from 9,000 employees to 2,500, institutional assessment is a red flag for the management and the unions alike. The EU project in support to three Eastern OdR bureaus did not succeeded to reverse the trend: capacity failed to be sustainably developed and heavy equipment purchased was partly dilapidated even if unevenly according to each bureaus. In Goma, 30% of the machines are no more repairable, and 50% is not functional by lack of spare pieces or tyres. The remaining 20% was hardly utilised after the closure of EU project by lack of budget for fuel. Improvement in technical capacity was not sustained by lack of budget allocation. EU involvement in capacity development activities with OdR was kept marginal, unless on-the-job training for OdR staff temporarily working with PAR II and PARAU. Many issues were faced to simply construct (completed) and equip (on-going) a training centre for OdR in Kikwit. Training activities by PAREST, the next generation after PARAU of EU road rehabilitation projects, were also limited and poorly evaluated by participants.
6	Transport regulators are functional and effective and rulings are enforced without undue political interference	-	Transport services were not targeted by EU interventions, unless for waterways transport with the rehabilitation of a few ONATRA boats. Road haulage is left to an unregulated market functioning, most operators being trapped in the informal sector. The Government established regulators during the early 2000s but they did not succeed in fulfilling their mission by lack of rule of the law and arbitrariness of the political power in providing exemptions. The elite, political and military, are reportedly owners of trucks, bus, etc. and are reluctant to adopt and enforce regulations restricting their own benefits.

EQ-5: To what extent has EU support to the transport sector in Africa contributed to sustainable social and economic development?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.	-	As the PAR II and PARAU projects can be seen as rural roads projects even if many of the roads reopened and maintained are classified as national roads, it can be assessed that the EU had a well-balanced strategy in this respect. Moreover, in the state of degradation and disruption of the trunk road network, a greater focus on rural roads would not have make a lot of sense.
2	Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and	-	EU interventions did not targeted road haulage cartels besides advocating for axle load control in thematic group fora.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	efficient transport services.		
3	Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.	-	Even data on traffic volumes are not available in a systematic and periodic way. A few data on traffic can be found punctually in donors' funded feasibility studies.
4	Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.	-	None of the EU projects encompassed a significant road safety component. In DRC, the safety standards' issue would come too early in the improvement of sector management. Imperatives related to national integration and peace are yet too strong to spreading over EU messages.
5	Adoption of a regional approach to traffic safety would pay dividends in terms of ensuring that best practice is disseminated.	-	In DRC, the regional transit traffic is marginal and a regional approach is premature, though 3 continental corridors are supposed to ensure freight transit. In East DRC, linked to Eastern African ports by the Northern and Central corridors, GoC in participating actively in coordination.
6	The role of the EU has been recognized by sector stakeholders.	-	The contribution of the EU in rebuilding the road network is highly appreciated by the Government that actively debated the EDF11 option to quit the sector. However, EU role is hardly recognised by the Government interviewees beyond its financial contribution to infrastructure i.e. on policy dialogue on sector reform. Donors met during the mission acknowledge UE role in leading the policy dialogue until 2013, with a dynamic and constructive vision, well relayed by the TA in support to the NAO. This view is not shared by sector line ministries and the Planning Ministry. EU passed the leadership of the sector working group to AfDB in 2014.
7	Development activities have taken place that would not have occurred without EU funding	+	Roads re-opening for 2,000 km in regions surrounding Kinshasa by the PAR I&II, the PARAU and more recently upgrading of a section of the RN1 had demonstrated impacts on the local economy and in feeding the capital. After road openings, benefits are the strongest for developing agriculture, retail activities and restarting basic services (health particularly but also education). These impacts were acknowledged by all stakeholders met during the field visit to Bandundu region, and confirmed by PARAU impact indicators.
8	EU is reluctant to engage in support to urban transport in SSA	+	In the DRC, the EU has recently started on urban roads project in Goma (30 km) but rather as a one-shot decision motivated by the appalling condition of the network after the eruption of the Nyamuragira than a strategy.

EQ-6: To what extent do EU transport sector support policies, strategies and interventions contribute explicitly to poverty reduction in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EU programming and project intervention design do not take into account lessons learned from an expanding body of research on factors influencing poverty impact	+/-	In the DRC, between periods of armed conflict and progressive restoration of the rule of law and administration, the EU strategy in such a fragile state departed from poverty reduction as such in the transport sector. The key targeted issue was first feeding Kinshasa during conflict periods, and then contributing to national integration by rebuilding most sensitive major regional links (roads and waterways). The body of international research was of limited use in these circumstances, which have more to do with diplomacy than technical reasoning. Programing of EU interventions in DRC was during most of the evaluation period guided at high level by HQ, with recurrent interventions that left little room for technical and

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			economic reasoning. Technical annexes of financing agreements were often ex-post rationalisation by the EUD staff of commitments taken in higher spheres.
2	Targeting of the poorest and most vulnerable people and equity considerations were not actually identified or intended by EU sector policy and programming documents.	+	Cf. above.
3	EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.	+	Transport services were included as a side-line activity of the main thrust of the policy dialogue of the EU with Government in the road subsector. The main focus was axle load control (and rain barriers in the context of EU projects almost exclusively targeting gravelled roads), still linked to infrastructure management. With its project supporting waterways transport and river Congo navigability, the EU took on board more consideration to transport services through improving the fleet of ONATRA, the state-owned firm in charge of transport on Congo River and other waterways and lakes (among many other things). In PAR/PARAU areas, the EU project took over the management and operation of river ferries ("bacs"), due to the failure to OdR to operate them after being rehabilitated by the project.
4	Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs were marginalised (or dropped altogether) during construction phases	+/-	In the case of PAR II / PARAU, the project worked first (PAR I) in a context of emergency (reopening roads to feed the capital) that justified to by-pass ESIAs (and social safeguards. The project and staff were continued with PAR II and PARAU, with the same lack of ESIAs. The same applies to the roads rehabilitated in the East by the LRRD project and then the PAREST and PASTAR. For RN1 upgrading project and the resume of a decentralised management of EU aid, however, ESIA and social accompanying measures were reintroduced.
5	No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors	+	The state of disruption of the national transport network and of the sector administrative management was almost a "force majeure" situation for programming EU support to the transport infrastructure sector. EU did not make an attempt to evaluate the cost effectiveness of its strategic options. The pressing demand from Government in that respect was not a strong incentive for a comparative approach, and the direct dialogue between Kinshasa and Brussels further limited the scope for rationalization of EU initiatives.

EQ-7: To what extent has EU cooperation at regional levels resulted in better facilitation of movement of people and freight?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The lessons learnt on regional transport facilitation and corridor management in East Africa were disseminated with EUDs in other African regions;	+	Eastern regions of DRC are connected to East Africa's regional corridors and GoC is participant of the transit facilitation committees. GoC benefitted from lessons learnt.
2	The performance monitoring systems set in place with EU support along all regional corridors allow an appropriate measure of outputs/outcomes of EU interventions (traffic volumes, export development, job creation, regional integration, integration into the world economy);	-	In DRC territory, regional corridors are still under construction. The usefulness of impact monitoring is not felt by the Government: past and recent experiences had strongly evidenced positive impacts, to such an extent that decision-makers do not need measuring them.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
3	RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;	-	As member of COMESA/SADEG/EAC, DRC is not benefitting from much support to rebuild its transport infrastructure network. RIP has little grip on key issues faced by GoC and complementarity did not materialise. The volume of funds available through RIP are hardly proportionate to DRC needs, and the Government has until now prioritised bilateral support (notably with China in recent years, through a dedicated department "Direction Générale des Grands travaux" under the Prime Minister).
4	The tools available to EUDs (policy dialogue, joint programming) were appropriate to ensure translation into national legislations of agreements acted by RECs	+	The main issue regarding translation into national legislation of regional agreements is the limited interest of the Government and for DRC economy of regional transit. DRC is by its size a region by itself, with only limited exchanges with neighbouring countries. With this background, the EUD rightly did not engage in policy dialogue and joint programming initiatives.
5	The change introduced by EDF11 programming regarding the EU strategy for the transport sector was resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition	+	The Government fought successfully, allegedly with influential MS support, against the change initially considered for EDF-11 programming. Its fragile state status contributed to postpone the application of the orientations of the Agenda for change; the decision was taken after a visit in Kinshasa of the then Commissioner.

EQ-8: Were selection, planning and prioritisation procedures for EU transport sector support interventions in Africa appropriate?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values;	+	For the main EU interventions in the road sector in DRC (PAR II, PARAU, LRRD), the key justification was rehabilitation after an armed conflict, thus with no reference with NPV and with low construction standards. The feasibility study and technical designs' phases were skipped. This option was continued with the PARAU, PAREST, PASTAR generation of projects, though based on the experience of unit costs acquired with PAR I&II. Financial envelops fell systematically short. For the RN1 upgrading project, recent feasibility studies were available prior to programming and with reference to similar works financed on the same link by the WB and the AfDB, applying the same standards. Hence, in the DRC case, the financial envelope did not interfere with technical specifications.
2	That feasibility studies do not consider options for EU support to the transport sector, only the limited feasibility and viability of a pre-determined transport sector intervention;	+	In the RN1 project, due to its inscription in a multi-donors initiative, the engineering design and the economic analysis were not expected to provide alternatives to the agreed design. The other projects in EU road subsector portfolio were driven by the will to answer to post-conflict infrastructure rebuilding and restoring basic interurban connectivity with gravelled roads. Financial envelops for PAR II, PARAU, PAREST and PASTAR were set without technical and economic feasibility studies, only based on financial engineering among various financial instruments at hand. During implementation, rule of the thumb estimates fell short to supply heavy equipment adjusted to local conditions (rule of origin under EDF9/10), sufficient spare pieces and fuel for achieving the expected results. The Navigability project (EDF10, €60m) illustrates another issue in the project preparation phase, leading to overly ambitious and complicated design, with unclear institutional set-up, multiple operators and absence of association with an overall subsector reform agenda. The mere fact that the

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			project passed HQ QSGs questions the weight of DEVCO hierarchy and politics in decision-making.
3	Time and cost over-runs have become systematic but in a range shared for similar projects by other sector FDIs (World Bank and AfDB);		Time over-runs are exceeding the usual range for EU projects in other countries of the continent but admittedly similar to projects of other donors in the DRC. Logistic issues are numerous for mobilisation of works and the capacity weaknesses impacted decision-making at all levels equally for all donors' projects in the sector. For the road re-opening and maintenance projects (PAR II, PARAU, PASTAR, PAREST), the issue is not cost over-runs as such, but rather lack of technical studies (see above). If PARAU achieved to a large extent its quantified objectives (coming after PAR I & II on almost the same network), PAREST realised only on average 50% of the expected length of road rehabilitation with the allocated budget.
4	The specific dis-enabling environment of Africa for works in transport infrastructure is insufficiently addressed by EU procurement regulations and contract management procedures	-	The PAR/PARAU is a unique case of an EU sector project pragmatically taking into account the state of affairs in the road sector at the time: disorganised OdR with extensive corrupt practices, losses of know-how in road work execution, and an emergency to transport sufficient food to the population of the capital. This option was allowed by article 96. The same flexible approach can be found in the East with the LRRD project. Following the LRRD projects and with the resume of decentralised management, PAREST understated the governance situation and over-valued EUD/COFED capacity to manage on the long run the supply of heavy equipment to three Eastern bureaus of OdR, with accompanying TA and capacity development activities. The initial idea was to slightly deviate from the PAR framework: a close control by TAs on resources but implementation of works by OdR force account units. Results are uneven between bureaus but on average 50% of works were realised at the cost of 50% of the heavy equipment supplied (€12 million in 5 years; PAREST 1 and 2) already out of order after roughly 1.5 year of utilisation.
5	Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs	-	The EU financed a transport waterways and fluvial ports rehabilitation project (EDF10, €60m) in an intermodal perspective. The Government expressed a strong demand for this project that will connect the northern (Kisangani) and Eastern regions to the capital. Rural and urban roads projects were not considered as the Government wants to concentrate on rebuilding the road/waterways national network. Lately, a 30 km urban roads project is under implementation in Goma (Eastern DRC).
6	EDF11 programming is changing the focus from trunk to rural roads	-	EU and GoC kept the same focus for EDF11 as EDF10: rehabilitation of the national road between Kinshasa and the Southern region of Katanga, with the economic capital of Lubumbashi (part of the cupper belt, thus looking more towards Lusaka or Mombasa than Kinshasa). The RN1 is also the road link to Eastern DRC (crossing at Mbuji Mayi).

EQ-9: To what extent were EU aid modalities, cooperation frameworks and implementation mechanisms, and legal instruments appropriate for support to the transport sector of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Changes from one preferred aid modality to the next over the evaluation period were too quick and	NA	SWAp and SBS were not introduced in DRC during the reference period.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	insufficiently bottom-up to facilitate government partners' ownership;		
2	Governments' capacity to adjust to newly introduced preferred aid modalities with technical assistance support funded by the EU that did not anticipate the move, was not proportionated to actual needs and unable to treat root causes of capacity shortcomings (civil service reform, PFM…);	NA	
3	Adjustments of EU approaches and use of mix of instruments were more in response to emergencies (conflicts, civil unrest) rather than focused on capacity shortcomings;	+	DRC is a good example of a flexible use of EU mix of instruments and aid modalities when faced with unconventional environments. An extensive range of structures was mobilised to build and maintain roads: international NGOs (in the East), UNOPS, self-contained projects centrally managed (PAR/PARAU), supply-oriented projects (PAREST), internationally procured road upgrading (RN1, with supervision by PARAU). However, in the RRD (relief-rehabilitation-development) contiguum, the EU managed successfully the shift from relief (PAR I & LLRD) to rehabilitation (PAR II, PARAU, PAREST…) with developing a project approach but failed to make the next step towards developmental approach by managing to shift from project to programme (sector management and policy dialogue). GoC inertia and vested interests in sector management on one hand, and limited capacity in EUD for policy dialogue on the other hand, prevailed.
4	Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.	-	For the time being, the EUD is not involved in AITF portfolio management, notably the Kinshasa rail-road bridge. It is not clear to the EUD which role they are expected to play in preparing and managing operations financed through a financial blending operation. Moreover, with the level of work overload of the section (all non-technical sections and projects are relying on the "infrastructure" section for their technical components), financial blending operations instigated by EU-HQ and other institutions are not of high priority for the EUD . If it is about managing contracts as now for similar or other purposes, provided that Infrastructure Section' staff is not further reduced, there is no reason for EUDs to be short in competencies. The same applies for policy dialogue and design studies.

EQ-10: To what extent were EU procedures and resources appropriate for support to the transport sectors of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EUDs have ~~(in)~~adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities;	-	EU projects in the road sector were managed through programme estimates when EU support was centrally managed (Article 96). The work load induced by this procedure overcame the management capacity of the EU: all sector projects suffered from long delays during implementation phase regarding recruitment of TA teams, procurement of works and supplies, and a lengthy decision-taking procedures shared between NAO support unit (COFED), EUD and HQ. Road construction and maintenance requiring hundreds of decisions generally at short notice (some 2,000 maintenance contracts with CSOs for PARAU only) Programme Estimates evidenced their limitations in the

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
			sector. The PAR II-PARAU-PASTAR PMU identifies major delays with COFED. Moreover, with the level of work overload of the section (all non-technical sections/projects relying on the "infrastructure" section for their technical components). If the ratio between HR and workload was evaluated by an HQ internal audit at 227% for the EUD as a whole, it is felt to be unequally distributed among sections with a strong pressure on the Infrastructure section. Another factor emphasised by the EUD is the high number of HQ / HQ supported missions in Kinshasa, DRC coming out almost systematically as case study (as for the present evaluation). Last, DRC EUD is not known as attractive for EU functionaries and contract agents alike, thus with shortcomings in filling vacancies and very high turnover (rotations periods are 3 years in DRC compared to 6 years in "normal" situations).
2	Operations budgets (of EUDs and EU HQ) are sufficient to permit necessary travel of technical staff to support interventions;	-	The key issue for a follow-up extended at field level of EU projects in the road sector were more restrictions of movements for security reasons, poor condition of the roads, blacklisting of commercial air companies, size of the country, and administrative overload than budget. Any field visits outside Kinshasa takes more easily a week than a day, during which time files are piling up.
3	Measures for dissemination of relevant lessons learned and technical support to EUDs are ~~(in)~~adequate;	-	The EUD largely adjusted on its own initiative, without guidance and backing from HQ corresponding to DRC specificities. Heads of cooperation were left with little autonomy to instruct projects due to frequent interferences by the then Commissioner, with decisions that did not take into account of lessons learnt in other post-conflict environments. The whole quality control system proved to be useless with this high level interference. PAREST is a good example that inadequate projects can go through EU quality control process and procedures for fragile states: the overall feeling is that each individual country case is highly specific, however they contradict lessons learnt and rationale.
4	Capacity needs for responsibilities and activities involved in sector support portfolios have not been assessed and are not reviewed on a programme-by-programme basis;	+	RDC is not an attractive EUD for EC functionaries and contractual agents. A review of capacity needs would have made little meaning with such constraint on recruitments.
5	There is consistency between the staffing strategies of different directorates	?	

7.6. Conclusions

EU's transport sector interventions were highly relevant in the early part of the evaluation period (2005 and a few years thereafter) when set in the perspective of the needs of the DRC after a period with several armed conflicts and social unrest that lasted 10 years or so. The road and waterways network was disappearing in almost all regions by lack of maintenance and rehabilitation. The decay of transport infrastructures had started even before 2005, among others because of insufficient funding of growingly inefficient and costly force account units of the Office des Routes. Many regions were isolated, threatening further the DRC's fragile national integration. Faced with that situation, the EU strategy focused on road rehabilitation and spreading interventions according to emergencies identified by the Government: such as transporting sufficient food to Kinshasa by re-opening roads in its immediate hinterland and contributing to restoring security in the eastern regions by

rehabilitating the main road network. That rationale was unchallenged up to the end of EDF-10, during some 10-15 years.

EU interventions in the transport/road sector in the DRC are atypical in several ways. They demonstrate a flexibility in utilising EDF resources to adjust to unstable environments and a capacity of the EUD and EU procedures to adapt to post-conflict situations where the rule of law is limited. PAR/PARAU is a good positive example in this respect. PAREST is a counter-example where the de facto autonomy given to the EUD in adjusting programmes/projects led to poor results.

In the post-conflict period and subsequently the state rebuilding period, the EU interventions in the transport sector were geared towards matters of urgency and high importance for national integration, such as re-opening the critical sections of the national roads network (in particular in the east and the south of the DRC, connections to Matadi Port), and connecting Kinshasa to its hinterland (northwards and eastwards). The envisaged results were achieved: traffic increased on upgraded and re-opened roads, economic activities started redeveloping (for instance in Bandundu Region) and secondary cities showed an increase in commercial activities and a resumption of public services (health and education). Thus, in the Linking-Relief-Rehabilitation and Development (LRRD) approach the EU successfully focussed on the relief challenge, though at high cost for limited and unsustainable results – but with high impact. For instance a road re-opening project allows people to go back home by improving dramatically security and access to market, regardless if the road will be maintained or not; conversely, a road rehabilitation reduces travel time and transport prices but is limited to stimulating the local economy during the times the improved road condition last.

The rehabilitation phase of the LRRD approach was also successful, including the difficult transition from the relief project approach under centralised EU-HQ management to the the rehabilitation phase. The generation of PARAU – PAREST - PASTAR projects did rehabilitate dilapidated main roads in Kinshasa's hinterland (maintaining and extending the PAR network) and in the eastern regions (following the LLRD project). The hiring of the PAR TA team (individual contracts) for PARAU contributed to the operational efficiency of the project but blocked the evolution towards a programme approach and ownership by the Government of the know-how and lessons learnt.

For PAREST, the institutional framework was a too simplistic replication of EU's centralised management approach to allow for operational efficiency and ownership. This generation of projects (with PASTAR, and PARAU to a lesser extent) failed: rehabilitation and maintenance works are not sustained by the Government, standards and labour-based technics are rejected by the OdR, while the heavy equipment is already largely dilapidated and unused by the OdR. The last step of the RRD link, namely the change from rehabilitation activities to development cooperation, was and is still missing.

Being fully focused on road re-opening and upgrading, the EU was not involve in reforming the road management system, which was plagued by inefficiencies related to OdR's reliance on dilapidated Force Account Units and regional bureaus. Resources for road maintenance are collected by FONER but do not yet cover the needs of the maintainable national road network. Maintenance of rural roads is a remote perspective.

The scope for policy dialogue is limited due to lack of demand for support in this respect from the Government, which also did not demonstrate much interest in lessons learnt in other countries of the continent. A very systematic statement of the Government (and donors alike) is that the DRC is unique (in size, diversity, etc.), and that solutions must be tailored without reference to the outside world. This auto-proclaimed isolation explains to some extent the survival of out-dated policy options like OdR Force Account Units and monopolistic state-owned transport companies. Governance weaknesses and vested interests prevail in the

management of the transport sector. On the EUD side, the uneasiness in conducting a policy dialogue and the heavy work load contributed to the EUD operating in isolation from the Government, focused solely on managing projects. The partnership dimension of the EU was limited to the NAO, and more in particular its support unit, the COFED, with again a focus on daily and routine management of bids, contracts, and invoices.

However, projects faced many hurdles in achieving results on the ground and sustaining them. Moreover the EU procedures demonstrated strong limits: the combination of the rule of origin and the lowest bidder led to supply of low quality heavy equipment that broke down rapidly and frequently. Lack of attractiveness of the DRC and again the lowest bidder principle limited EU projects' capacity to hire qualified TA (unless utilising costly individual contracts), and the decentralised contractual management by EUD/COFED caused considerable time overruns due to the need to multiple controls using the Devis-programme modality. The DRC illustrates as well the EUD frailties in rationalising project identification and quality control when high level interferences prevail over normal procedures, which is an issue shared with other fragile states.

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8. Cameroon case study

Sommaire

Abréviations

ACP	Pays d'Afrique, des Caraïbes et du Pacifique
AFD	Agence Française de Développement
AO	Appel d'offres
AT	Assistance technique
BAD	Banque Africaine de Développement
BEI	Banque Européenne d'Investissement
BET	Bureau d'Etude de contrôle de Travaux
BM	Banque Mondiale
CA	Conseil d'Administration
CAON	Cellule d'Appui à l'Ordonnateur National
CDMT	Cadre des Dépenses à Moyen Terme
DAO	Dossier d 'Appel d'Offres
DIER	Direction des Investissements et de l'Entretien Routier
DSCE	Document de Stratégie pour la Croissance et l'Emploi
DSRP	Document de Stratégie de Réduction de la Pauvreté
CEEAC	Communauté Economique des Etats de l'Afrique Centrale
CEMAC	Communauté Economique et Monétaire de l'Afrique Centrale
DTA	Disposition Techniques et Administratives
DUE	Délégation de l'Union Européenne
FED	Fonds Européen de Développement
MinFIN	Ministère des finances
MinMAP	Ministère des marchés publics
MinTP	Ministère des Travaux Publics
MoU	Memorandum of understanding
PDR	Plan Directeur Routier
PME	Petite et Moyenne Entreprise
PIB	Produit Intérieur Brut
PIN	Programme Indicatif National
PIR	Programme Indicatif Régional
PTF	Partenaire Technique et Financier
RCA	République Centrafricaine
RN	Routes Nationales
UE	Union Européenne

8.1. Introduction

But de la note sur le pays

L'étude de cas du Cameroun, effectué dans le cadre de la l'évaluation de l'appui de l'UE au secteur de transport en Afrique 2005-201, prolonge et complète la collecte des données (documents, entretiens et visites) sur les projets financés par le FED au Cameroun et mis en œuvre durant la période 2005 et 2013 ainsi que sur le secteur de transport du pays. Les projets significatifs ont été sélectionnés, avec le concours de la DUE et de l'administration, puis renseignés dans les fiches projets.

Les informations collectées permettent de décrire succinctement le secteur de transport du Cameroun, de mettre en évidences les principales constatations (*findings*) sur le secteur, de renseigner les fiches projets/programmes significatifs sélectionnés, de rejeter ou d'accepter les hypothèses formulées dans le Rapport documentaire de cette évaluation et d'évaluer les interventions de l'UE sur la période 2005 et 2013.

Le Cameroun comme étude de cas

Le Cameroun est un pays de l'Afrique centrale situé dans le Golfe de Guinée. Il est limité à l'Ouest par le Nigeria, à l'Est et au Nord par la République Centrafricaine (RCA) et le Tchad, et au Sud par le Gabon, le Congo et la Guinée Equatoriale. Cette position géographique fait du Cameroun un pays de transit, ainsi qu'une « locomotive » du commerce sous régional en Afrique centrale.

L'intégration régionale a toujours été identifiée par le Cameroun comme une question d'importance stratégique pour son développement. Le port autonome de Douala sert de point d'accès aux opérateurs des pays voisins enclavés (Tchad et République Centrafricaine (RCA)). Les politiques de développement des transports du Cameroun sont liées à celles des deux organisations d'intégration régionales, à savoir La Communauté Economique et Monétaire de l'Afrique Centrale (CEMAC) et la Communauté Economique des Etats d'Afrique Centrale (CEEAC). Dans ce contexte l'appui de l'UE, tant au niveau régional que national, a fortement contribué au développement du réseau routier camerounais. Les axes routiers réalisés avec l'appui de l'UE sont des routes de désenclavement pour le Tchad et la RCA et ils contribuent également au développement des échanges interrégionaux au sein du Cameroun.

Le système camerounais de transport est relativement diversifié. Le pays dispose des principaux modes courants (routier, aérien, maritime, fluvial et ferroviaire). Le transport routier constitue le principal mode de transport du pays. La route assure environ 90% de la demande intérieure de transport de personnes et près de 75% de la demande de transport de marchandises. C'est dans ce secteur routier que se concentrent les interventions de l'UE.

Le Cameroun continue de bénéficier d'une relative stabilité politique malgré le contexte régional de crise politique et sécuritaire.

8.2. Méthodologie de collecte des données

La méthodologie de collecte des données s'appuie sur l'analyse des documents et les entretiens individuels ou en groupe et des visites de sites. La collecte des documents et les entretiens ont été réalisés auprès des principaux acteurs et organismes ci-après : Délégation de l'UE à Yaoundé (DUE); Cellule d'Appui à l'Ordonnateur National (CAON), Directions du Ministère des Travaux Publics (MinTP) et du Ministère des Transports ; Associations des Petites et Moyennes Entreprises (PME) d'entretien routier ; Associations des bureaux d'études locaux (BET) ; transporteurs et leur syndicat ; organisations non gouvernementales (ONG) et autres bailleurs de fonds du pays.

La mission d'évaluation :

- La mission au Cameroun s'est déroulée du 4 au 12 mai 2015 ;
- La mission a été effectuée par Basile KEITA (chef de mission) et Henri GWET (expert local en matière du secteur de transport).

Types de documents collectés:

- documents de politique de développement générale;
- documents de stratégie de développement du secteur de transport ;
- documents de stratégie de coopération de l'UE au Cameroun;
- documents contractuels (convention de financement, contrats de marchés, etc.) ;
- rapports d'évaluations des interventions de l'UE ;
- rapports d'études et de statistiques ;
- rapports et documents d'autres bailleurs de fonds ;

Les entretiens:

La mission a eu des entretiens avec :

- les responsables de la DUE et de la Cellule d'Appui à l'Ordonnateur National ;
- les responsables des administrations impliquées dans les projets financés par l'UE ;
- les représentants des autres bailleurs de fonds;
- les associations des petites et moyennes entreprises d'entretien routier, des bureaux d'études locaux (BET) et des transporteurs et leur syndicat (focus group), des organisations non gouvernementales ;
- les responsables des grandes entreprises de travaux ;

Visite de terrain:

- La mission a visité la station de pesage de Nomayos sur le corridor Douala-N'Djamena.

Modalités de traitement de l'information :

- Les principaux entretiens ont été retranscrits, pour une meilleure exploitation ;
- Les projets significatifs ont été sélectionnés puis renseignés dans les Fiches Projets..

Limites et contraintes:

- La recherche d'informations sur la gestion des activités a été facilitée par l'existence de documents et rapports à la DUE Yaoundé et auprès des services de l'administration.
- La collecte des données sectorielles au niveau du pays a été difficile du fait de la faiblesse du système de suivi-évaluation des structures en charge des projets.
- L'autre difficulté était d'isoler la contribution de l'UE de celle des autres interventions dans le secteur routier.

8.3. L'appui de l'UE au secteur de transport au Cameroun

La stratégie de coopération de l'UE développée dans le Programme indicatif national du 9ème FED (2001-2007) avait deux domaines de concentration : (i) le secteur de transports, notamment le transport routier et la réhabilitation du réseau des routes régionales structurant (entre 50 et 60 % de l'enveloppe A), et (ii) le soutien macro-économique et institutionnel à la mise en œuvre de la stratégie de réduction de la pauvreté. Concernant le secteur routier, les fonds mis à disposition du pays étaient consacrés, de manière prioritaire, à la réfection et réhabilitation des axes principaux du réseau routier régional structurant, à travers un nombre extrêmement réduit d'actions. Les principales activités du programme du FED-9 étaient les suivantes :

- travaux de réhabilitation et renforcement des chaussées sur l'axe Garoua - Yaoundé ;
- travaux de sécurisation routière (Douala – Yaoundé) ;
- appui institutionnel au Ministère des Travaux Publics (assistance technique, formation, transfert d'expertise).

La stratégie de coopération de l'UE développée dans le PIN du 10ème FED (2008-2013) avait aussi deux domaines de concentration, à savoir : (i) la gouvernance (35% à 45 % de l'enveloppe indicative) et (ii) le commerce et l'intégration régionale (66 à 70% de l'enveloppe indicative) y compris le secteur de transport. Les interventions de l'UE du PIN 10ème FED s'inscrivait dans la continuité de celles du 9ème FED: (i) la poursuite des opérations de réhabilitation du réseau prioritaire bitumé, éventuellement accompagnées par un appui à l'entretien périodique ou lourd; (ii) la poursuite de l'appui institutionnel au Ministère des Travaux Publics (MINTP) démarré avec les ressources du 9e FED, pour en développer la technicité et permettre la pérennisation des actions; (iii) l'achèvement du corridor régional de désenclavement du Tchad qui relie Douala à N'Djamena en collaboration avec d'autres bailleurs de fonds et grâce à un cofinancement éventuel du 10e FED (PIN et PIR). Ces interventions étaient en cohérence avec le Plan Directeur Routier (PDR) et avec le Document de stratégie du Bâtiment et Travaux Publics du MINTP. Le programme initial du 10ème FED (première tranche, € 87 million) prévoyait les activités suivantes :

- aménagement de la route Garoua Boulai- Nandéké ;
- réalisation des études techniques de la route Kumba-Mamfé ;
- travaux de sécurisation routière sur l'axe lourd Douala-Yaoundé
- réhabilitation d'un tronçon de l'axe Figuil vers Maroua;
- appui institutionnel au Ministère des Travaux Publics (assistance technique, formation, transfert d'expertise).

La stratégie de coopération de l'UE développée dans le PIN du 11ème FED (2014-2020) a deux domaines de concentration, à savoir : (i) la gouvernance : améliorer la gouvernance publique et renforcer l'Etat de droit, et (ii) le développement rural : promouvoir un développement territorial durable et équilibré ainsi qu'une croissance économique inclusive, y compris le financement de la construction et de l'entretien des routes/pistes rurales[67].

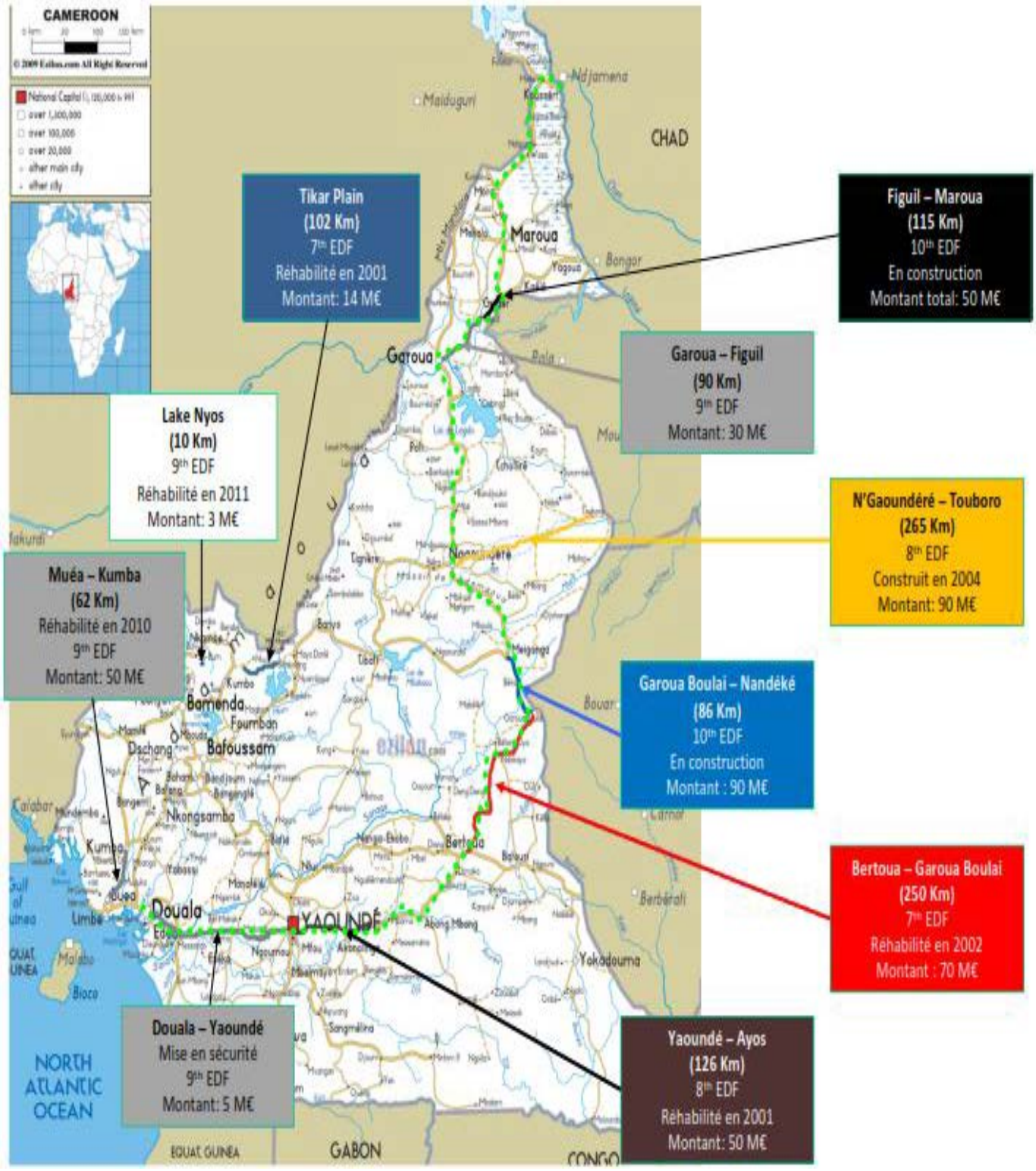
Les projets appuyés financièrement par l'UE pendant les années 2005-2013 sont listés dans le tableau 8.1. Un montant total d'environ € 234 million a été contracté et un montant total de € 219 million effectivement payé pendant ces années pour une dizaine de projets et programmes. La localisation des principales interventions financés par l'UE est montré sur une carte géographique présentée après le tableau.

[67] Un Projet d'amélioration des infrastructures de transport rural au Cameroun est en cours de préparation dans le cadre du 11ème FED. L'objectif principal du projet est de mettre en place des systèmes et structures pour la planification et mise en œuvre des plans multi annuels de facilitation de l'accès aux marchés et services productifs pour les populations rurales.

Tableau 8.1. Montants contractés et payés des projets de transport financés par l'UE au Cameroun de 2005 à 2013 (en milliers de €)

Code de la Décision	Titre de la Décision	Allo-cation	Contracté	Payé
FED 8				
FED/2000/015-229	Projet NTEM : Aménagement de la région des trois frontières	16.920	1.000	1.000
Total FED-8			**1.000**	**1.000**
FED 9				
FED/1998/014-017	Appui à l'intégration économique dans la région de l'Afrique centrale, volet infrastructure.	137.670	35.692	35.692
FED/2007/018-942	Aménagement des voies d'accès au Lac Nyos	2.096	2.066	2.080
FED/2007/019-071	Programme routier FED-9	81.046	80.951	81.303
FED/2007/020-789	Facilité de coopération technique II	1.271	358	369
Total FED-9			**119.067**	**119.444**
FED 10				
FED/2008/020-905	Programme routier FED-10	87.000	79.563	77.397
FED/2008/020-927	Facilité de coopération technique 2008-2011	2.000	107	29
FED/2009/021-538	Programme Routier FED-10, deuxième tranche	52.100	33.429	20.895
Total FED-10			**113.099**	**98.322**
			Banana support programme	
BAN/2001/003-109	Cameroun 2001, Banana support programme	5.404	330	330
BAN/2002/003-439	Cameroun 2002, Programme d'assistance technique et financier au secteur bananier 2002	4.545	144	144
Total BAN			474	474
Total 2005-2013			**233.640**	**219.240**

Source : CRIS, Juin 2014.



Source : ALAnet (2012). Evaluation ex post du 9ème FED, à mi-parcours du 10ème FED et finale du projet de renforcement de la RN 11 et route d'accès au lac Nyos

8.4. Brève analyse du secteur de transport du Cameroun

8.1.1 Le contexte stratégique

La politique nationale de développement du Cameroun a été définie successivement dans le Document de Stratégie de Réduction de la Pauvreté (DSRP 2003-2007) et le Document de Stratégie pour la Croissance et l'Emploi (DSCE 2010-2020). Cette politique s'articule autour de l'accélération de la croissance économique et la réduction de la pauvreté. En cohérence avec les orientations de la politique du Gouvernement, les interventions de l'UE sont concentrées dans le secteur routier durant la période concernée par la présente évaluation (2005-2013).

8.1.2. Le transport routier

En 2006, la longueur totale du réseau routier s'élevait à 49 598 km dont 4 830 km bitumées, 16 468 km de routes en terre classées et 28 300 km de routes rurales. En 2013 la longueur totale du réseau routier camerounais s'élevait à 100 730 km, dont 5 701 km de routes bitumées (5,6% du réseau) ; 15 415 km de routes en terre et 79 614 km des routes rurales non classées. La longueur des routes bitumées est ainsi passée de 4 830 km en 2006 à 5 701 km en 2013[68], soit 871 km de routes bitumées supplémentaires. De 2006 à 2013, l'appui de l'UE a fortement contribué au développement de ce réseau de routes bitumées, avec la construction/réhabilitation de 364 km de routes bitumées (9ème et 10ème FED), soit 41,8% des routes nouvellement bitumées durant la période. L'évolution du réseau routier est présenté dans le tableau ci-dessous.

Tableau 8.2. Evolution de la longueur du réseau routier 2006-2013

Routes	**2006 (1)**			**2013 (2)**		
Classe	**Routes bitumées en km**	**Routes en terre en km**	**Total**	**Routes bitumées en km**	**Routes en terre en km**	**Total**
Nationales	3 344	3 853	**7 197**	4 061	3 046	**7 107**
Provinciales	835	5 109	**5 943**	846	4 849	**5 695**
Départementales	652	7 506	**8 458**	407	7 460	**7 867**
Routes en cours de classement	-	-	**-**	386	440	**826**
Rurales (non classées)		28 300	**28 300**	NS	79 614	**79 614**
Total	**4 830**	**44 678**	**49 598**	**5 701**	**95 029**	**100 730**

Sources: (1) Plan directeur routier du Cameroun, Document de synthèse, Février 2006
(2) MINTP/MINDUH MINTP/MINDUH cité par la Revue des dépenses publiques dans le secteur des transports – BAD – septembre 2013 ;
Mission d'Assistance technique du 10ème FED au MinTP (Sofreco), Rapport semestriel N°4, octobre 2014

Les interventions de réhabilitation et de construction des routes bitumées, financées par l'UE, ont porté principalement sur les routes nationales ou à vocation d'intégration régionale. En tant que pays de transit, le Cameroun dispose sur son territoire d'un réseau structurant à vocation régionale d'environ 6 080 km comportant des itinéraires tant sur le réseau bitumé que sur le réseau en terre classé. Ces itinéraires canalisent un important flux

[68] Selon les différentes sources disponibles, depuis 2006 (données du Plan Directeur Routier), les linéaires des routes existantes diffèrent. Les données routières sont en cours de mise à jour dans le cadre de l'appui institutionnel du 10ème FED au Ministère des Travaux Publics (MinTP). Aussi la mission d'évaluation a-t-elle choisi de retenir, pour le réseau de 2013, les données du Groupe de travail « nouvelle classification routière ». La nécessité d'une nouvelle classification avait été démontrée au début de la mission d'assistance technique 10ème FED. A l'initiative de M. le Ministre, un « Groupe de travail » a été mis en place sous la présidence du chef de division des études, des normes et de la planification (DENP) pour préparer un décret présidentiel qui consacrera la nouvelle classification et la nouvelle nomenclature routière du Cameroun.

d'échanges de marchandises à destination et en provenance des pays enclavés que sont le Tchad et la République Centrafricaine (RCA).

Le réseau routier camerounais est développé, mais insuffisamment entretenu. L'état du réseau routier ***prioritaire***[69] (20% du réseau drainant 80% du trafic total) sur lequel est axé les efforts d'entretien, a connu une forte détérioration ces dernières années. La part de ce réseau routier *prioritaire* en mauvais état est passée de 40% à 54% de 2008 à 2012. Un audit de la Cour des comptes européenne a observé une dégradation de l'état d'entretien plus ou moins pareille pour le réseau de routes ***entier*** : en 2000, 21% du réseau étaient jugés en bon état, 22% en état moyen et 56% en mauvais état, tandis qu'en 2011, 14 % du réseau étaient en bon état, 28% en état moyen et 58% en mauvais état.[70]

La Revue des dépenses publique de 2013 a publié des données en ce qui concerne l''état du réseau routier ***classé,*** qui sont résumées dans le tableau ci-après. Ces données montrent que seulement 22% du réseau était en bon état, 33% en état moyen et 45% en mauvais état.

Tableau 8.3. Etat du réseau routier classé à charge du MinTP en 2013

	Linéaire			Etat du réseau		
Classement	**Routes bitumés**	**Routes en terre**	**Total**	**Bon**	**Moyen**	**Mauvais**
Routes Nationales	4061	3045	**7107**	38%	36%	26%
Routes Provinciales	846	4849	**5695**	17%	40%	43%
Routes départementales	340	7521	**7861**	11%	22%	67%
Routes en cours de classement	386	440	**826**	33%	38%	29%
Total	**5634**	**15855**	**21495**	**22,4%**	**32,4%**	**45,3%**

(2) MINTP/MINDUH MINTP/MINDUH cité par la Revue des dépenses publiques dans le secteur des transports – BAD – septembre 2013 ; Mission d'Assistance technique du 10ème FED au MinTP (Sofreco), Rapport semestriel N°4, octobre 2014

Le Gouvernement du Cameroun a mis en place un Fonds routier en 1997[71], avec l'appui de l'UE et d'autres bailleurs de fonds, afin d'assurer un apport régulier de capitaux pour l'entretien des routes. Ce Fonds routier fonctionnait bien et était considéré comme une référence en matière de financement de l'entretien routier. Il assurait le financement et le paiement des prestations réalisées à l'entreprise relative à l'entretien courant et périodique du réseau routier prioritaire, la prévention et la sécurité routière et la protection du patrimoine routier national. Cependant, depuis 2011 le Fonds routier et le système d'entretien routier sont confrontés à des problèmes importants d'insuffisances institutionnelles et financières, dont les plus importants sont les suivants : (i) l'insuffisance des ressources financières pour l'entretien routier; (ii) le décalage entre les ressources mobilisées et leur utilisation pour l'entretien routier; (iii) la suppression de la collecte directe de la redevance d'usage de la route par le Fonds routier ; (iv) l 'insuffisance de la gestion des marchés d'entretien routier par le Ministère des marchés publics (MinMAP) et (v) la mauvaise performance des Petits et Moyens Entreprises (PME) actuellement engagées dans les travaux d'entretien routiers. Tous ces facteurs conjugués ont contribué au « blocage » actuel du fonctionnement du Fonds routier et du système d'entretien des routes au Cameroun. D'où cette détérioration inquiétante du réseau routier.

[69] En raison de l'insuffisance des ressources pour entretenir l'ensemble du réseau des routes, un réseau prioritaire de 28 000 km, canalisant près de 80% du trafic, a été défini.
[70] Cour des comptes européenne "Audit of the EDF contribution to a sustainable African Road Network – findings related to the mission to Cameroon from 7 to 19 October", 2011. P. 8
[71] Le Fonds routier a institué par la Loi 096/07 du 08 avril 1996 portant protection du patrimoine routier national.

Des efforts importants ont été consentis par le Gouvernement, avec l'appui de l'UE, pour mettre en place un système efficace de pesage. Afin de pérenniser les investissements en matière d'infrastructures de transport, le Cameroun a adopté la Loi 096/07 du 08 avril 1996 portant protection du patrimoine routier national[72]. Les charges maximales autorisées sont les suivantes : 13 tonnes pour l'essieu simple ; 21 tonnes pour l'essieu tandem ; 27 tonnes pour l'essieu tridem et 50 tonnes pour le poids total. Par rapport à ces charges autorisées, une tolérance d'une (1) tonne est acceptée. Les surcharges sont assujetties au paiement d'une amende[73], avec application systématique du délestage des charges supplémentaires. Le MinTP est investi de la mission de protection du patrimoine routier, alors que Le Comité Interministériel de Suivi des Opérations de Pesage Routier (CISOP) assure le suivi et la coordination des activités de pesage. Des prestataires privés, recrutés par le MinTP sur appels d'offre, assurent les opérations de pesage et la gestion des installations de pesage. Le Gouvernement du Cameroun, avec l'appui de l'UE et des autres bailleurs de fonds, a mis en œuvre à partir de 2004 des réformes politiques visant à améliorer le contrôle de la surcharge. Les opérations de contrôle des charges ont entraîné une baisse significative du taux moyen national de véhicules en surcharge qui est passé de 89% en mai 2007 (démarrage du pesage) à 84% en 2008, ensuite à 13% en 2011 puis à 6,8 % en 2013 (voir tableau ci-dessous). L'extrême surcharge varie d'une année à l'autre, mais son niveau reste très haut.

Après une hausse consécutive de 2009 à 2011, le montant des amendes[74] émises s'est stabilisé avec une légère baisse en 2013. Ceci traduit une baisse des surcharges sur les routes camerounaises. Le taux de pourcentage des véhicules délestés est plus faible (soit 28%) que les véhicules non délestés (72%).

Tableau 8.4. Evolution de certains paramètres du contrôle des charges, autres que les camions citernes[75].

	2009	2010	2011	2012	2013
Nombre stations de pesage	13	14	17	17	17
Nombre véhicules pesés	486 108	606 574	1 178 821	1 544 218	1 944 974
Nombre véhicules en surcharge	58 769	74 381	152 483	142 882	132 217
% des véhicules en surcharge	12,1%	12,3%	12,9%	9,3%	6,8%
% véhicules en surcharge inférieur à 5 tonnes	98,3%	98,1%	98,8%	99,1%	99,0%
Véhicules en extrême surcharge >20 tonnes	81	36	64	17	59
Amendes en milliard des FCFA	1 745	2 059	3 517	3 459	3 044

Source : Pesage routier au Cameroun – Rapport Bilan 2010, 2011, 2012 et 2013

Les camions citernes sont un cas particulier du transport routier camerounais. Dès l'institution du contrôle des charges, un moratoire de deux ans avait été accordé aux transporteurs exerçant dans le transport des produits pétroliers pour se conformer aux normes requises. Cette mesure a été interprétée comme une disposition visant à réduire la capacité des véhicules. Malgré les deux coupes qui ont ramené les volumes des citernes de

[72] Loi n°096/07 du 08 avril 1996 portant protection du patrimoine routier, modifiée et complétée par la Loi N°2004/021 du 22 juillet 2004. A ce dispositif camerounais, s'ajoute le Code communautaire révisé de la Route CEMAC, adopté à Bangui le 03 août 2011.

[73] Les amendes appliquées : F CFA 25 000 par tonne supplémentaire pour les surcharges inférieures à 5 tonnes ; F CFA 50 000 par tonne supplémentaire pour les surcharges comprises entre 5 et 10 tonnes ; F CFA 75 000 par tonne supplémentaire pour les surcharges supérieures à 10 tonnes.

[74] Les amendes appliquées : F CFA 25 000 par tonne supplémentaire pour les surcharges inférieures à 5 tonnes ; F CFA 50 000 par tonne supplémentaire pour les surcharges comprises entre 5 et 10 tonnes ; F CFA 75 000 par tonne supplémentaire pour les surcharges supérieures à 10 tonnes.

[75] Les camions citernes sont un cas particulier du transport routier camerounais : certains ne sont pas pesés ; ils ont droit à une tolérance à l'essieu et au Poids Total en Charge de 3 tonnes et les amendes ne sont pas recouvrées.

40m^3 à 36 m^3, des fortes surcharges continuent d'être enregistrées sur les principaux axes routiers équipés de stations de pesage. Actuellement, les camions citernes sont soumis au contrôle de charges, mais sans que la surcharge éventuelle constatée donne lieu au paiement de l'amende. La contribution des camions citernes aux infractions de surcharge est ainsi très élevée. Le taux de surcharge des camions citernes évalué à 76% en 2010, est passé à 83% en 2011, puis à 59,8% en 2012 ; il est de 74,2% en 2013. Il y aura lieu de mettre un terme au moratoire accordé par le Gouvernement aux camions citernes qui doivent se conformer aux normes requises.

Le parc automobile camerounais comptait 673 895 véhicules en 2014, dont 516 283 fonctionnant à l'essence super (76,6%) et 143 027 véhicules utilisant le gazole (21,2%) qui sont essentiellement des véhicules poids lourds. Ce parc automobile est jugé d'être **est très vétuste[76],** comme constaté lors des nouvelles immatriculations : les véhicules de plus de 10 ans constituent 75% du nombre total des véhicules nouvellement immatriculés, et 83,4% du nombre des véhicules ré-immatriculés entre 2006 et 2014. En ce qui concerne la première mise en circulation au Cameroun depuis 1996, l'âge moyen des véhicules varie entre 10 et 20 ans et plus pour la majorité des véhicules.

En matière de l'amélioration de la **sécurité routière**, les résultats obtenus, avec l'appui de l'UE, sont positifs (voir tableau ci-dessous). Entre 2005 et 2013, le nombre d'accidents a baissé, passant de 4 079 en 2005 à 3 071 en 2013. Au cours de la même période, le nombre de blessés a baissé, passant de 6 631 à 4 630. De 2011 à 2013, il est observé une baisse du nombre de morts de 1 588 en 2011 à 1 170 en 2013. L'appui de l'UE a contribué à l'atteinte de ces bons résultats dans le cadre de son programme de « sécurisation routière Yaoundé – Douala » (9ème et 10ème FED). Sur ce corridor de transit international le plus circulé du pays, l'appui de l'UE a permis la réalisation des panneaux de signalisation routière (verticale comme horizontale), de construire trois sections à 2x2 voies pour faciliter les dépassements dans de meilleures conditions de sécurité, la formation (gendarmes, policiers et conducteurs routiers) et l'implication des organisations non gouvernementales (ONG) en matière de sensibilisation de proximité.

Tableau 8.5. Evolution des indicateurs liés à la sécurité routière

Indicateurs	2005	2006	2007	2008	2009	2010	2011	2012	2013
Nombre d'accidents	4079	3726	3317	3781	3502	3639	3522	3398	3071
Nombre de blessés	6631	6149	5016	5608	5038	5038	4980	4284	4630
Nombre de tués	1150	1085	1018	1253	1189	1206	1588	1058	1170

Source: Ministère des transports "Transtat 2014 – Annuaire Statistique des Transports" 2014

8.1.3. Le transport ferroviaire

Le Cameroun dispose d'un réseau ferroviaire de 1.016 km avec un écartement métrique des rails. Ce linéaire se compose de Transcam1 (Douala – Yaoundé : 294 km), de Transcam 2 (Yaoundé-N'Gaoundéré : 619 km) et la ligne Ouest (Douala – Mbanga – Kumba : 103 km). La capacité totale de ces infrastructures est estimée à 2,5 millions de tonnes de marchandises par an et 4,2 millions de voyageurs par an.

Depuis 1999, l'exploitation des services de transport ferroviaire est concédée à Camrail (Cameroon Railways Corporation) du Groupe Bolloré. Le réseau ferroviaire est principalement dédié au fret ; le transport de voyageurs étant opéré essentiellement entre Douala - Yaoundé et Yaoundé - N'Gaoundéré. Le volume de marchandises (en tonnage

[76] République du Cameroun-Ministère des Transports « Transtat 2014 – Annuaire Statistique des Transports » Edition officielle 2014

taxé en millier) a connu une augmentation, entre 2008 et 2013, passant de 1 583,3 tonnes à 1 664,1 tonnes. Cependant, cette augmentation s'est faite en dent de scie[77]. La CAMRAIL n'a pu atteindre la capacité totale des infrastructures ferroviaires. Le trafic ferroviaire stagne ou diminue depuis plusieurs années, tandis que le trafic du Port de Douala ne cesse d'augmenter. Ceci signifie que de plus en plus de marchandises sont transportées par la route.

8.1.4. Les ports et le transport maritime

Le Cameroun dispose d'une façade maritime sur l'Océan Atlantique d'environ 250 km. Le pays dispose de 4 ports dont trois ports maritimes (Douala, Kribi et Limbé) et un port fluvial sur le fleuve Bénoué à Garoua. Le port de Douala constitue la principale plateforme portuaire du pays, avec un traitement de 95 % du trafic national et 98% des échanges extérieurs du Cameroun. Il constitue le principal port de transit de la sous-région, notamment pour les importations et exportations des pays enclavés (Tchad et la République Centrafricaine). Entre 2000 et 2013, le trafic maritime du port de Douala a doublé, passant de 5 503 623 tonnes en 2000 à 10 564 280 tonnes en 2013. Une analyse de quelques indicateurs de rendement du port de Douala montre que : (i) la durée moyenne de séjour à quai a augmenté, passant de 3,5 jours en 2001 à 4,1 jours en 2013 ; (ii) le taux global d'occupation des quais a connu une amélioration, passant de 57,5% en 2000 à 72,8% en 2013 ; (iii) le délai moyen de séjour des conteneurs au terminal a diminué, passant de 28 jours en 2005 à 20 jours en 2013.

8.1.5. Le transport aérien

Le Cameroun dispose de 15 aérodromes dont trois aéroports internationaux (Douala, Yaoundé et Garoua) et deux aéroports principaux (Maroua et N'Gaoundéré). L'essentiel du trafic aérien régulier est assuré notamment par les aéroports de Douala et Yaoundé. Entre 2006 et 2013, en nombre de vols, l'on constate que 96% des vols sont effectués dans les trois aéroports internationaux, à savoir Douala (72%), Yaoundé (20%) et Garoua (4%).

8.5. Constatations concernant le développement du secteur et les questions d'évaluation

8.5.1. Le développement du secteur de transport

L'extension du réseau des routes bitumées, notamment les routes nationales et à vocation d'intégration régionale de 2005 à 2013, a été une priorité depuis 2006. La longueur des routes bitumées est ainsi passée de 4 830 km en 2006 à 5 701 km en 2013, soit 871 km de routes bitumées supplémentaires. De 2006 à 2013, l'appui de l'UE a fortement contribué au développement de ce réseau de routes bitumées, avec la construction/réhabilitation de 364 km de routes bitumées (9ème et 10ème FED), soit 41,8% des routes bitumées durant la période. Il s'agit des axes routiers déjà terminés ou en cours : Muea-Kumba (62,8 km) ; Garoua-Figuil (90 km) ; route d'accès au Lac Nyos (2,8 km) ; Garoua Boulaoi – Nandéké (86 km), Figuil – Moulvouda vers Maroua (50 km) ; Figuil-Magada (50 km) et Magada + (22 km). Ces actions de construction et réhabilitation des routes ont contribué au développement du réseau routier bitumé national et à l'amélioration des corridors régionaux (Douala-NDjaména et Douala-Bangui). Le volume de trafics a augmenté sur les routes aménagés : le taux d'accroissement annuel moyen du trafic sur la route Garoua-Figuil a été de 4,2% entre 2009 et 2012, et de 19,8% sur la route Muea-Kumba entre 2005 et 2010[78]. Les délais de transport y sont réduits de même que les coûts

[77] République du Cameroun-Ministère des Transports « Transtat 2014 – Annuaire Statistique des Transports » Edition officielle 2014
[78] Rapport d'évaluation P. 46

d'exploitation des véhicules au kilomètre : baisse de la consommation de carburant, diminution des pannes récurrentes, économies réalisées sur les pneus et augmentation de la vitesse commerciale (accroissement du nombre de rotations des camions). Dans le contexte d'exploitation des véhicules au Cameroun, ces postes de coûts (carburant, pneumatique, entretien et réparation) représentent en effet les 2/3 des coûts d'exploitation des véhicules.

Les efforts du Gouvernement en matière d'entretien du réseau routier sont très insuffisants. Le pourcentage du réseau routier en bon état, selon les sources disponibles, varie entre 10% et 22%. Le Fonds routier et le système d'entretien, qui fonctionnaient bien, sont confrontés depuis 2011 à des problèmes importants d'organisation et de fonctionnement dont les plus importants sont développés ci-après :

- ***Insuffisance des ressources affectées à l'entretien routier.*** Les ressources du Fonds d'entretien routier sont constituées principalement de la redevance d'usage de la route, soit plus de 80 % des recettes (voir tableau ci-dessous). Les autres recettes sont les suivants : le droit de péage routier, les dotations budgétaires, la taxe à l'essieu, la taxe de transit et les amendes routières. Pour les besoins d'entretien du réseau prioritaire, la Loi de finance a plafonné les recettes du Fonds routier à FCFA 45 milliards par an (€ 68,7 millions) entre 2005 et 2010 à FCFA 55 milliards par an (€ 84,0 millions) entre 2010 et 2014 et à F CFA 60 milliards (€ 91,6 millions) en 2015, au moment où les besoins d'entretien routier sont sans cesse croissants. Ces montants sont insuffisants au regard des besoins d'entretien du réseau prioritaire, estimés à 100 à 120 millions d'Euros par an. Par ailleurs, il existe un décalage entre les ressources mobilisées et leur utilisation au titre des paiements pour l'entretien routier, notamment depuis 2011, dépendant du montant reversé par le Trésor dans le compte du Fonds routier (voir dernière ligne du tableau ci-dessous). Tous ces éléments impactent négativement sur les délais de paiement des entreprises et des bureaux d'études.

Tableau 8.6 : Evolution des recettes prévues et mobilisées du Fonds routier, en milliards de FCFA

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Recettes totales collectées	33,0	42,3	43,9	61,3	61,04	59,29	64,2	63,2	64,1	64,6
Montant de la redevance d'usage de la route (RUR)	nd	35,0	37,2	53,0	59,5	55,0	55,0	55,0	55,0	55,0
Recettes reversées au Fonds routier	33,0	40	44,179	61,3	61,04	59,29	33,54	1,39	34,0	47,5

Source : Fonds routier. La situation anormale de l'année 2012 s'explique par l'application du principe de l'unité de caisse appliqué par le Gouvernement en 2011 : les recettes provenant de la taxe spéciale sur les produits pétroliers (TSPP) ne sont plus versées directement dans le compte du Fonds routier ; elles transitent par le Trésor public. En 2012, le Fonds routier n'a reçu qu'une infime partie ; mais le Fonds routier disposait déjà des fonds suffisant pour subvenir aux besoins en trésorerie pour l'exercice 2012.

- ***Les recettes du Fonds routier transitent par le trésor au niveau du Ministère des finances.*** Le Fonds routier collectait directement la redevance d'usage de la route auprès des distributeurs pétroliers. Cependant, depuis 2011, le Gouvernement, en se fondant sur le principe de l'unicité de caisse, a supprimé la collecte directe de la redevance d'usage de la route par le Fonds routier[79]. Les ressources du Fonds routier ainsi mobilisées par le

[79] Les nouvelles dispositions adoptées dans le cadre de la Loi de finances 2011 et dont les modalités d'application ont été définies par l'instruction n°00073/MINFI/SSG/DGTCF/DT du 06 juin 2011 relative à la comptabilisation des recettes et des dépenses du Fonds routier-Guichet Entretien. Selon les termes de cette instruction, la procédure d'encaissement des ressources prévoit le transit par un compte de centralisation ouvert à la paierie générale du Trésor. L'alimentation du Compte

Trésor ne sont ni suffisamment reversées ni reversées à temps opportun dans le compte du Fonds routier. Ces dispositions ont entraîné des retards importants dans les paiements des entreprises (entre 4 et 6 mois, au lieu d'une dizaine de jours) et l'arrêt d'activités de chantiers par les entreprises faute de trésorerie suffisante. D'où le niveau faible des recettes reversées au Fonds routier en 2012.

- ***Des retards dus au Ministère des marchés publics (MinMAP).*** Le MinMAP a été créé en 2011 avec pour objectif : (i) une plus grande rapidité dans la passation des marchés et (ii) une meilleure qualité de sélection des entreprises, fournisseurs et prestataires de service. Depuis 2011, tous les marchés d'entretien routier et de construction des routes sont organisés par le MinMAP qui a du mal à gérer toutes ces passations de marchés. La création du MinMAP n'a pas été précédé d'une répartition claire des responsabilités et des tâches à mener, entre le MinTP et le MinMAP, d'où les problèmes actuels d'engorgement du MinMAP : allongement des délais d'approbation et de validation des décomptes (4 à 5 mois) des entreprises, avant leur introduction dans les circuits de paiement. En octobre 2013[80], aucun nouveau contrat d'entretien du programme 2013 n'at encore été transmis par le MinMAP au MinTp (alors que les Dossiers d'appel d'offres ont été transmis depuis janvier 2013), tandis que le visa du MinMAP, rendu obligatoire depuis le 2ème semestre 2013 sur tous les décomptes des entreprises, alourdit et ralentit considérablement la chaîne des paiements, tant pour les travaux d'entretien que les travaux neufs. La création du Ministère des Marchés Publics a ainsi désorganisé davantage le système d'entretien routier. La situation financière des petites et moyennes entreprises (PME) est ainsi fragilisée par les retards répétitifs des paiements.
- ***Le manque de performance des PME d'entretien routier.*** L'entretien routier est confié à des entreprises privées locales d'entretien routier. Avec l'appui de l'UE et dans le cadre des 7e, 8e et 9e FED, les PME de travaux publics avaient été montées et encadrées par le MinTP. Beaucoup de ces PME (environ 80%) ont disparu en l'espace de 5 ou 9 ans et il y a actuellement peu de PME viables. Il est observé une mauvaise performance des PME actuellement engagées dans les travaux d'entretien routiers : personnel qualifié et équipements insuffisants ou inadéquats et faibles capacités financières du fait des retards de paiements répétitifs.

L'ensemble des facteurs conjugués ont contribué au « blocage » actuel du fonctionnement du Fonds routier, du système de passation des marchés et du système d'entretien des routes au Cameroun. C'est dans ce contexte que les bailleurs de fonds (UE, Banque Africaine de Développement, Banque Mondiale, Agence Française de Développement, Agence Japonaise de Coopération Internationale) ont pris des initiatives auprès du Gouvernement pour la mise en place d'un Fonds routier de 2ème génération opérationnel au courant de l'année 2015[81]. Il faudrait envisager également un dispositif de passation des marchés de l'entretien routier de qualité, efficace et rapide.

Le Cameroun a mis en place, avec l'appui de l'UE, un dispositif efficace de contrôle des charges des véhicules poids lourds, le pesage étant respecté et opérationnel. La surcharge est l'une des causes majeures de la dégradation prématurée des infrastructures routières. Les dépenses d'entretien seront d'autant plus réduites que le patrimoine routier sera protégé contre les surcharges des véhicules poids lourds. Des efforts importants ont été réalisés par le Ministère des Travaux Publics (MinTP), avec l'appui de l'UE, pour mettre en place un système efficace de pesage. Celui-ci peut être considérée comme étant une référence pour l'Afrique Centrale et de l'Ouest. Le Gouvernement du Cameroun, avec l'appui de l'UE et des autres bailleurs de fonds, a mis en œuvre à partir de 2004 des réformes politiques visant à améliorer le contrôle de la surcharge. Le dialogue s'est avéré efficace,

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ouvert à la Banque Centrale est opérée par le prélèvement sur le compte à partir d'un ordre de virement émis par le Fonds routier.

[80] Assistance technique 10ème FED (SOFRECO) « Rapport Semestriel n° 2 –avril-septembre 2013 », P. 6

[81] Lettre de « Soutien à la mise en place urgente d'un Fonds routier de 2ème Génération », Union Européenne, Banque Africaine de Développement, Banque Mondiale, Agence Française de Développement, Agence Japonaise de coopération internationale, du 04 mars 2015,

notamment en ce qui concerne l'extension de l'infrastructure de contrôle, l'amélioration de la collecte des données et les campagnes de sensibilisation. Les opérations de contrôle des charges ont entraîné une baisse du taux moyen national de véhicules en surcharge qui est passé de 84% en 1998 à 13% en 2011 puis à 6,8 % en 2013. Les enseignements à tirer de cette performance sont les suivants : une volonté forte du Gouvernement, un appui conséquent de l'UE et des autres bailleurs de fonds (équipement du réseau en stations de pesage, dialogue politique), une forte sensibilisation des acteurs (transporteurs et chargeurs) et l'adhésion de ces derniers.

Le Cameroun dispose d'un bon réseau des stations de pesage avec 17 stations fixes opérationnels en 2013, contre 13 stations en 2009. En 2014, le nombre de stations de pesage s'élève à 21 stations de pesage fixes et 4 stations de pesage mobiles. L'engagement pris par le Gouvernement dans le cadre du *Memorandum of Understanding* de 2006 est de couvrir l'ensemble du réseau bitumé à l'horizon 2015 en disposant de 25 stations de pesage. Cet objectif est en phase d'être atteint.

La singularité des camions citernes dans le dispositif est préoccupante. Dès l'institution du contrôle des charges en 2007, un moratoire de deux ans avait été accordé aux transporteurs exerçant dans le transport des produits pétroliers pour se conformer aux normes requises. Ce moratoire n'est toujours pas supprimé. Actuellement, les camions citernes sont soumis au contrôle de charges sans que la surcharge éventuelle constatée donne lieu au paiement de l'amende. Le taux de surcharge des camions citernes évalué à 76% en 2010, est passé à 83% en 2011, puis à 59,8% en 2012 et 74,2% en 2013.

Pour un contrôle des charges encore plus performant, il faut : (i) mettre un terme au moratoire accordé par le Gouvernement aux camions citernes qui échappent au paiement d'amendes; (ii) appliquer le délestage aux véhicules poids lourds en transit des pays enclavés (Tchad et RCA) et de ce fait (iii) mettre en place une politique régionale en matière de contrôle de la charge à l'essieu.

Des progrès significatifs en matière de sécurité routière, avec l'appui de l'UE. Le nombre d'accidents a baissé de 4 079 à 3 071, et le nombre de blessés de 6 631 à 4 630 entre 2005 en 2013. Le nombre de morts a baissé de 1 588 en 20111 à 1 170 en 2013. L'appui de l'UE a fortement contribué à l'atteinte de ces bons résultats dans le cadre de son programme de « sécurisation routière Yaoundé – Douala » (9ème et 10ème FED), comme développé plus haut. L'objectif du Ministère des transports est la réduction de 50% du taux d'accidents sur les routes. Les actions menées pour atteindre ces résultats sont la formation à la conduite automobile, la sensibilisation, le contrôle routier, la répression et l'amélioration du contrôle technique automobile.

Il existe une bonne coopération entre les bailleurs du secteur de transport avec un cadre formel de coordination. Après le leadership de l'UE, c'est la BAD qui est actuellement le chef de file des bailleurs de fonds. Les principaux bailleurs de fonds sont la Banque Mondiale, l'Union Européenne, la Banque Africaine de Développement, l'Agence Française de Développement, l'Agence Japonaise de Coopération Internationale. Il y a une réunion formelle deux fois par an. Il y a moins de dispersion de l'aide de l'UE et des autres bailleurs de fonds au Cameroun et dont l'essentiel est concentré sur la route (construction/réhabilitation, entretien et appui institutionnel). L'arrivée de la Coopération chinoise, à travers les banques chinoises, a fait baisser le poids des bailleurs de fonds traditionnels.

Dans ce contexte de bonne coopération entre bailleurs de fonds, des montages de « blending » sont en cours. Le projet le plus avancé est le financement du projet de réhabilitation de l'Accès Est de Douala : un prêt de l'AFD de € 60 million au Gouvernement du Cameroun et une bonification du taux d'intérêt par les subventions de l'UE (Africa

Infrastructure Trust Fund) et de la Banque Européenne d'investissement de l'ordre de € 5,7 million.

8.5.2. Eléments confirmant ou réfutant les hypothèses de la Phase Documentaire

Les observations présentées ci-dessous concernent les hypothèses applicables au cas du Cameroun.

QE1. Dans quelle mesure l'évolution des politiques de coopération et des stratégies d'intervention de l'UE a-t-elle répondu à l'évolution des besoins du secteur de transport en Afrique?

- *National policies were drafted in compliance with donor policies rather than the contrary.*
  - Les politiques d'interventions de l'UE et des autres bailleurs de fonds dans le secteur de transport s'inscrivent dans les objectifs du Document de Stratégie pour la Croissance et l'Emploi (DSCE 2010-20), et pas le contraire.
- *Whether national priorities were respected or subordinated by 'imposition' of national sector policies by sector donors.*
  - Les besoins et priorités des politiques et stratégies de développement du Cameroun sont respectés et pris en compte par les politiques d'intervention des bailleurs dans le secteur de transport.
- *Existence of clear national interest or prioritisation for corridor development and regional connectivity. Clear 'ownership' of regional institutional priorities, policies and strategies.*
  - Il existe clairement un intérêt du Cameroun pour le développement des corridors de développement et d'interconnexion régionale. L'intégration régionale a toujours été identifiée comme une question d'importance stratégique pour le développement du Cameroun pour mettre à profit sa position de pays de transit et pour tirer des avantages de la position charnière de l'Afrique Centrale. Le port autonome de Douala sert de point d'accès aux opérateurs des pays voisins enclavés (le Tchad et la RCA). Le développement des corridors Douala-NDjaména et Douala-Bangui constitue un enjeu majeur pour le Cameroun et la région Afrique Centrale. A travers la réalisation des différents projets routiers, l'UE a joué un rôle déterminant dans le développement de ces corridors (programme de facilitation, investissements routiers, construction de postes uniques aux frontières, assistance technique).
- *Clear 'ownership' of regional institutional priorities, policies and strategies.*
  - Le Cameroun inscrit sa politique de développement dans les stratégies et priorités des organisations d'intégration de la sous-région, à savoir la Communauté Economique et Monétaire de l'Afrique Central (CEMAC) et la Communauté Economique des Etats d'Afrique Centrale (CEEAC). Il constitue l'un des pays le plus important de ces organisations d'intégration régionale.
- *EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value.*
  - Les ressources humaines actuelles de la DUE contribuent à la valeur ajoutée, avec un effectif suffisant au niveau de la DUE.
- *Consultation processes are (in) adequate to achieve desired levels of coherence at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders.*
  - Les interventions de l'UE sont concentrées au niveau du secteur routier qui est la priorité du pays en matière de développement du secteur de transport. Les résultats

des processus de consultations (dialogue sur la politique et stratégie sectorielle) ont été adéquats pour assurer la cohérence entre les interventions de l'UE et les objectifs de développement du pays (investissements routiers, entretien routier, appui institutionnel) Il y a des complémentarités entre les actions de l'UE et celle des autres bailleurs de fonds, entre lesquels il y a une bonne coopération.

- *Capacities at regional institutional and national government levels are (in)adequate to manage sector consultation and coordination processes.*
  - Les administrations partenaires camerounaises impliquées dans les projets de l'UE présentent des cadres en nombre suffisant et compétents pour la gestion correcte de l'expertise.
- *Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.*
  - Il existe des évaluations réalisées sur le secteur qui ont une valeur pratique. Ces évaluations ont fait des propositions concrètes à mettre en œuvre : Fonds routier, renforcement des PME, nouvelle classification routière, etc.

QE2. Est-ce que le passage de l'approche projet à l'approche-sectorielle et d'appui budgétaire sectoriel (ABS[82] et ABG[83]) a répondu aux attentes concernant les résultats de l'appui de l'UE au secteur de transport en Afrique?

- *Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);*
  - Les autorités camerounaises estiment que l'UE veut les « pousser à l'appui budgétaire », à cause de la concentration des moyens. Le Gouvernement estime que ce sera la seule modalité pour dépenser les fonds du PIN, dans la mesure où il n'y a pas d'investissements routiers. Les interventions au niveau des pistes rurales ne seront pas suffisantes pour consommer les fonds du 11ème FED. L'appui budgétaire sectoriel devrait être mis en œuvre avec beaucoup de précautions : examiner la capacité du système bancaire et éviter des cas de corruption.

QE3. Dans quelle mesure l'appui institutionnel et le renforcement des capacités fournis par l'UE ont-ils abouti à une meilleure gestion du secteur de transport en Afrique?

- *Adequate institutional resources and capacities ensure that network conditions will (or will not) continue to be maintained or improve;*
  - Le cadre institutionnel actuel et le système d'entretien actuel ne permettent pas d'assurer l'entretien routier. Le système d'entretien routier est confronté à de nombreux problèmes traités dans le texte de ce rapport.
- *There are (or are not) realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);*
  - Pendant la période concernée par la présente évaluation, les interventions de l'UE sont concentrées sur la réhabilitation et construction des grands axes routiers. Les questions des routes rurales seront abordées dans le cadre du PIN 11ème FED.
- *Management decisions are (or are not) based on technical appreciation of base data of improving quality.*

[82] Appui Budgétaire Sectoriel
[83] Appui Budgétaire Général

- Les décisions en matière de gestion du secteur sont basées sur des données relativement fiables. Le système d'information sur le secteur de transport est relativement bien développé.

- *Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments);*
  - L'UE intervient peu dans les autres modes de transport; presqu'exclusivement dans le sous-secteur des routes.

- *National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;*
  - Il n'y a pas une bonne adéquation entre les stratégies de développement des infrastructures de transports du Cameroun et les ressources disponibles du pays. Le Cameroun, cependant, a commencé à réaliser des investissements sur budget propre. Il y a également des nouveaux organismes de financements qui arrivent, en plus des bailleurs de fonds traditionnels (UE, BAD, AFD). Il s'agit entre autres de la Banque de Développement des Etats de l'Afrique Centrale (BDEAC), et le partenariat Cameroun-Chine dans le domaine des routes, ce qui tend à affaiblir l'influence des bailleurs de fonds traditionnels.

Transaction costs are reducing;

- Les couts de transaction de la DUE et du Cameroun pour mobiliser l'aide sont considérés comme élevés ; les procédures étant très longues et complexes et onc coûteuses. Les camerounais pensent qu'ils n'ont pas tellement de choix, parce que les procédures sont imposées par l'UE.

- *Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector.*
  - Tous les projets de construction et de réhabilitation des routes financées par l'UE au Cameroun ont fait l'objet d'une prise en compte marquée de l'environnement et du SIDA/VIH. Les questions de sécurité routière sont de plus en plus considérées. En matière de construction routière, les droits de l'homme et de genre n'ont pas fait l'objet d'une attention particulière.

QE4. Dans quelle mesure l'appui de l'UE au secteur a-t-il contribué à la mise en place d'infrastructures de transport pérennes et abordables en Afrique?

- *Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);*
  - L'appui de l'UE à l'entretien routier a permis, durant la période 2005 à 2013, de mettre en place un bon dispositif de contrôle des charges des véhicules poids lourds, mais il n'a pas encore permis la mise en place d'un système d'entretien routier adéquat. La durabilité du patrimoine routier n'est pas garantie sans un entretien régulier du réseau routier. Le Fonds routier actuel ne fonctionne pas bien, le système de passation des marchés d'entretien routier est défaillant et les PME ne sont pas performantes.

- *Transport regulators are functional and effective and rulings are enforced without undue political interference.*
  - Il n'y a pas d'Autorité de régulation des transports au Cameroun.

QE5. Dans quelle mesure l'appui de l'UE au secteur de transport en Afrique a-t-il contribué au développement social et économique durable?

- *Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.*

- Les interventions de l'UE en matière des routes et pistes rurales sont envisagées dans le cadre du 11ème FED.

- *Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and efficient transport services.*
  - Les prix de transport routier en Afrique Central ne sont pas compétitifs. Le monopole d'un syndicat de transporteurs sur le trafic camerounais empruntant le corridor régional crée des distorsions sur les prix. Le Syndicat national des transports routiers (SNTR) du Cameroun contrôle le Bureau de Gestion du Fret (BGFT) à Douala, qui négocie les prix avec les transitaires et les camionneurs. Il existe des liens avec un syndicat tchadien et centrafricain qui contrôlent chacun une structure équivalente dans leur pays respectifs (Bureau National du Fret à N'Djamena). Les conditions d'une concurrence sur les prix n'existent pas, ce qui participe au fait que les prix de transport ne sont pas compétitifs. Il n'y a actuellement aucune politique mise en place en Afrique Centrale pour réduire l'impact des cartels sur les prix de transport.

- *Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.*
  - Le système d'information sur le secteur de transport du Cameroun est assez développé.

- *Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.*
  - La sécurité routière a bénéficié d'un appui conséquent de l'UE au Cameroun et les résultats ont été positifs avec des réductions significatives du nombre d'accidents, de blessés et de morts (voir chapitres précédents).

- *The role of the EU has been recognised by sector stakeholders.*
  - Le rôle de l'UE est reconnu par les décideurs du secteur de transport au Cameroun.

QE6. Dans quelle mesure les politiques, les stratégies et les interventions de l'UE au secteur de transport ont-elles contribué de manière explicite à la réduction de la pauvreté en Afrique?

- *EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.*
  - La politique d'intervention de l'UE au secteur de transport du Cameroun est centrée sur le secteur routier avec comme priorité, la réhabilitation et la construction des routes structurantes. Il n'y a pas eu, comme dans d'autres pays, des interventions en matière de réforme du secteur de transport.

- *Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs were marginalised (or dropped altogether) during construction phases.*
  - Les projets de construction et de réhabilitation des routes prennent largement en compte l'environnement et la sensibilisation au VIH/SIDA, mais moins les questions des droits de l'homme et de genre.

- *No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors.*
  - Il n'y a pas eu d'effort pour évaluer l'efficacité de l'appui de l'UE en termes de réduction de la pauvreté au Cameroun.

QE7. Dans quelle mesure la coopération régionale de l'UE a-t-elle facilité la circulation des personnes et des marchandises?

- *RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;*
  - Les interventions de l'UE au Cameroun dans les PINs sont complémentaires de celles des PIRs, tant au niveau de la programmation que de la mise en œuvre.
- *The change introduced by EDF11 programming regarding the EU strategy for the transport sector was resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition.*
  - Ce changement est bien ressenti par les autorités camerounaises, lesquelles espèrent revoir cette position lors de la revue à mi-parcours du 11ème FED. Le sentiment est que les interventions dans le seul secteur des routes/pistes rurales ne seront pas suffisantes pour consommer les fonds du PIN 11ème FED. Les priorités du Gouvernement sont orientées vers la construction et la réhabilitation des routes structurantes.

QE8. Est-ce que les procédures de sélection, de planification et de priorisation des interventions de l'UE au secteur de transport en Afrique ont été adéquates?

- *The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values.*
  - Des études techniques ont été réalisées pour tous les investissements routiers. Ces études sont souvent jugées fragiles.
- *Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs;*
  - Ce n'est pas une question de compétences au niveau de la DUE ni une absence de demande du Cameroun. Il existe une bonne coopération des bailleurs de fond au Cameroun. Les autres bailleurs de fonds, en complémentarité avec les interventions de l'UE, couvrent les autres modes de transport, notamment ferroviaire et urbain. Mais le secteur routier reste dominant dans toutes les interventions.

QE9. Dans quelle mesure les modalités d'appui, les cadres de coopération et les mécanismes de mise en œuvre de la coopération de l'UE, ainsi que les instruments juridiques ont-ils été appropriés pour soutenir le secteur de transport des pays partenaires?

- *Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership;*
  - C'est la lourdeur et complexité des procédures FED qui est ressentie par les cadres camerounais.
- *Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.*
  - La question de « blending » est de plus en plus à l'ordre du jour au Cameroun. Le projet le plus avancé est le projet de réhabilitation de l'Accès Est de Douala pour un prêt au Cameroun de € 60 million et la bonification du taux d'intérêt avec les subventions de l'African Infrastructure Trust Fund de l'ordre de € 5,7 million.

QE10. Dans quelle mesure les procédures et les ressources de l'UE ont-elles été appropriées pour soutenir le secteur de transport des pays partenaires?

- *EUDs have (in)adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities;*
  - Comme indiqué plus haut, la DUE dispose des ressources suffisantes pour suivre ses interventions dans le secteur.

8.6. Conclusions

De 2005 à 2013, les interventions de l'UE dans le secteur de transport du Cameroun ont été importantes et étaient concentrées dans le secteur routier (construction et réhabilitation des routes, entretien routier, appui institutionnel et sécurité routière) en cohérence avec la politique de développement économique générale et du secteur de transport du pays. Elles viennent en complément des interventions de l'UE au niveau régional (notamment sur les corridors Douala-NDjaména et Douala-Bangui). Le réseau des routes bitumées s'est fortement développé durant les dix dernières années, notamment avec l'appui de l'UE et d'autres bailleurs de fonds. La longueur des routes bitumées est ainsi passée de 4 830 km en 2006 à 5 701 km en 2013, soit 871 km de routes bitumées supplémentaires. De 2006 à 2013, l'appui de l'UE a fortement contribué au développement de ce réseau de routes bitumées, avec la construction/réhabilitation de 364 km de routes bitumées (9ème et 10ème FED), soit 41,8% des routes bitumées durant la période

Le développement des infrastructures routières ne s'est pas accompagné de la mise en place par le Gouvernement d'un système d'entretien routier adéquat, malgré l'appui de l'UE et des autres bailleurs de fonds. Le pourcentage du réseau routier en bon état, selon les sources, varie entre 10% et 22%. Depuis 2011, le système d'entretien routier du Cameroun est confronté aux problèmes suivants : (i) l'insuffisance des ressources pour l'entretien routier, la priorité du Gouvernement étant la réhabilitation et la modernisation du réseau routier ; (ii) le décalage entre les ressources mobilisées et leur utilisation pour l'entretien routier du fait de la suppression de la collecte directe de la redevance d'usage de la route par le Fonds routier ; (iii) la mauvaise gestion des marchés d'entretien routier par le Ministère des marchés publics (MinMAP), et ; (iv) le manque de performance des PME d'entretien routiers. Il y a lieu de mettre en place, dans les meilleurs délais, un Fonds routier de 2ème génération et d'envisager le retour des passations de marchés de l'entretien routier au Ministère des Travaux Publics. L'ensemble des facteurs conjugués ont contribué au « blocage » actuel du fonctionnement du Fonds routier, du système de passation des marchés et du système d'entretien des routes au Cameroun.

Un dispositif efficace de contrôle de la charge des véhicules poids lourds, avec l'appui de l'UE, est en place. La surcharge est l'une des causes majeures de la dégradation prématurée des infrastructures routières. Des efforts importants ont été consentis par le Ministère des Travaux Publics (MinTP), avec l'appui de l'UE, pour mettre en place un système efficace de pesage sur le réseau routier. Celui-ci peut être considéré comme étant une référence pour l'Afrique Centrale et de l'Ouest. Pour un contrôle des charges encore plus performant, il faudrait: (i) mettre un terme au moratoire accordé par la Gouvernement aux camions citernes; (ii) délester les véhicules poids lourds en transit des pays enclavés (Tchad et République Centrafricaine), et (iii) résoudre les quelques différences de pesées entre les stations de pesage.

Des résultats probants en matière de sécurité routière ont été réalisés avec l'appui de l'UE. Le nombre d'accidents a baissé de 4 079 à 3 071, et le nombre de blessés de 6 631 à 4 630 entre 2005 en 2013. Le nombre de morts a baissé de 1 588 en 2011 à 1 170 en 2013. L'appui de l'UE a fortement contribué à l'atteinte de ces bons résultats dans le cadre de son programme de « sécurisation routière Yaoundé – Douala » (9ème et 10ème FED) : réalisation des panneaux de signalisation routière (verticale comme horizontale), construction de trois

sections à 2x2 voies pour faciliter les dépassements dans de meilleures conditions de sécurité, la formation des gendarmes et policiers camerounais ainsi que des conducteurs routiers, l'appui de l'UE aux organisations non gouvernementales (ONG) pour réaliser des activités de sensibilisation avec des affiches, des banderoles, des panneaux et des spots (SECUROUTE, Groupe Haut Niveau Transport Sécurité Routière CEMAC, etc.).

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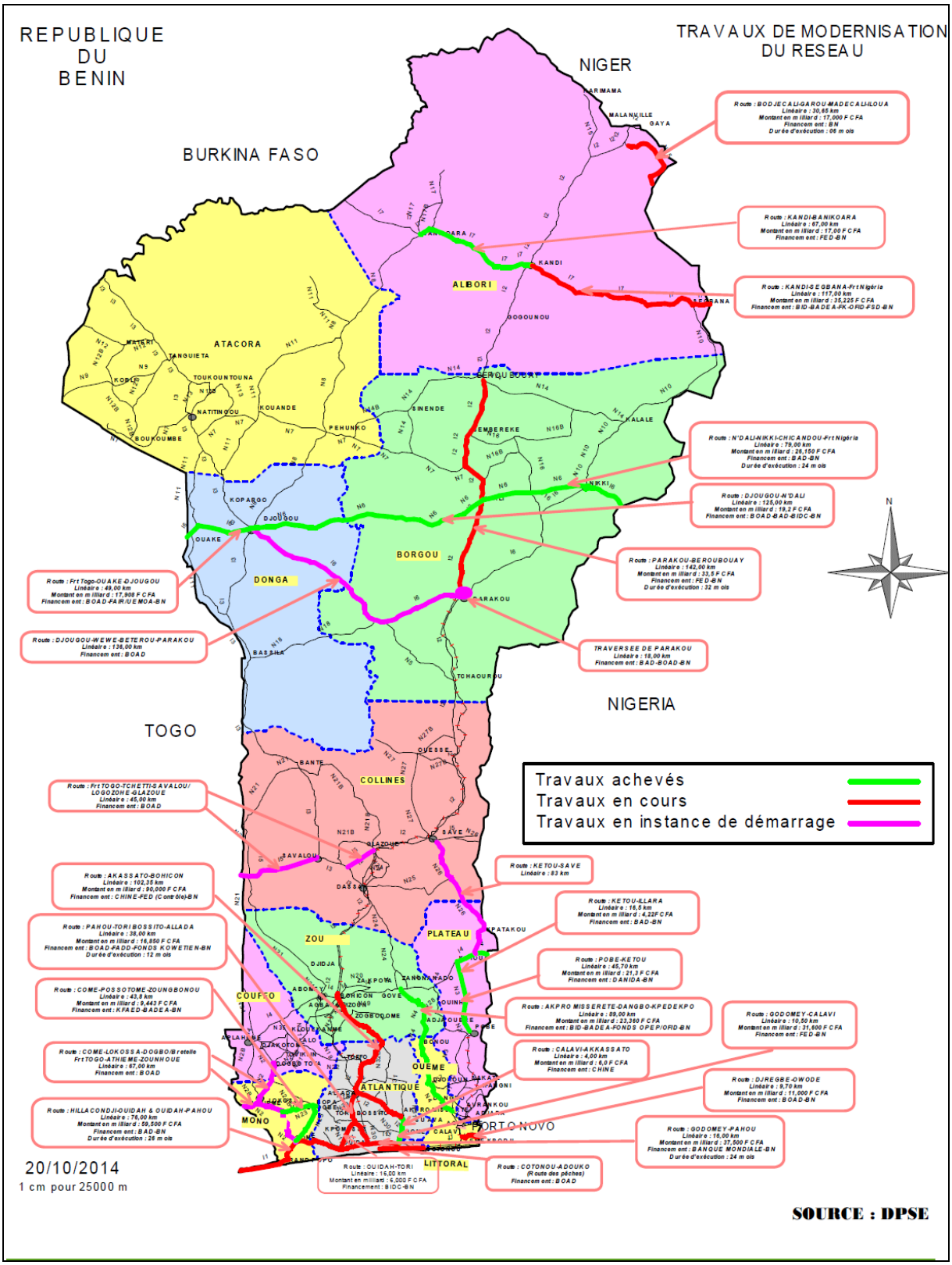
9. Benin case study

Table of Content

Abbreviations

AfDB	African Development Bank
BOAD	Banque Ouest Africaine de Développement
EDF	European Development Fund
EEAS	European External Action Service
ERR	Economic rate of return
EU	European Union
EUD	EU Delegation
FED	Fonds Européen de Développement
GBS	General budget support
GDP	Gross domestic product
GoB	Government of Benin
GVW	Gross Vehicle Weight
HDM	Highway design model
MPW	Ministry of Public Works
NAO	National authorising officer
NIP	National indicative programme
NPV	Net present value
OCBN	Organisation commune Bénin-Niger des Chemins de fer et des Transports
RF	Road Fund
SBS	Sector budget support
SME	Small and medium enterprises
SPSP	Sector policy support programme
TA	Technical assistance
TSE	Transport sector evaluation
VAT	Value added tax


REPUBLIQUE DU BENIN
TRAVAUX DE MODERNISATION DU RESEAU
NIGER
BURKINA FASO
NIGERIA
TOGO
ALIBORI
ATACORA
BORGOU
DONGA
COLLINES
ZOU
PLATEAU
COUFFO
OUEME
ATLANTIQUE
MONO
LITTORAL
PORTO NOVO
Travaux achevés
Travaux en cours
Travaux en instance de démarrage
20/10/2014
1 cm pour 25000 m
SOURCE : DPSE

9.1 Introduction

Purpose of the Country Note

The objective of the Benin Country Case Study, being part of the evaluation of the EU support to the transport sector in Africa during the years 2005-2013, is to continue and complete the collection of information and to test/investigate hypotheses at the level of Benin, in order to validate or refute the hypotheses, findings and preliminary assessments formulated during the desk study phase. The assessment concentrated on the policy and strategy issues of the EU transport sector programmes in Benin. Individual interventions were reviewed and analysed as examples of practical implementation, procedural aspects and achievements of EU transport sector support.

This Country Note respects the mandatory structure of all Country Notes (see table of content above). The checklist with desk phase hypotheses - made for all country case studies - has been used as guidance for this case study. The assessment of those hypotheses is presented in section 9.5 of this Note. A couple of sector level conclusions are presented in section 9.6.

Benin as a case study country

In the sample of 10 country case studies, Benin was selected as:

- one of the 3 West African countries (with Senegal and Mauritania);
- one of the 3 countries that utilised the sector budget support modality (with Ethiopia and Mozambique) and the sole francophone country where this financing modality was employed – though as earmarked sector budget support to finance periodic maintenance through the Road Fund rather than the SPSP.

Even if not considered initially, two other characteristics make Benin an informative case study for a continental thematic evaluation: (i) the port of Cotonou as end-terminal of road/rail regional corridors to Niger and Burkina Faso and (ii) the existence of a national rural transport strategy supported by the EU.

9.2 Data collection methods used

Seven transport sector interventions have been reviewed during this mission, which cover in total about 96% of the EU contributions to the transport sector in Benin under EDF 8, 9 and 10 (see table hereunder.).

Table 9.1. List of reviewed projects (amount in millions of €)

Code	Project	Contracted amounts
FED/2003/016-374	Appui à l'entretien périodique du réseau classé	36.7
FED/2004/016-914	Appui au ministère des transports et des travaux publics	0.9
FED/2005/017-868	Aménagement de la route Banikoara-Kandi	22.8
FED/2007/018-795	Aménagement de la sortie nord-ouest de Cotonou	37.9
FED/2008/020-956	Programme d'appui au secteur des transports (PAST), volets A & B	60.1
FED/2009/021-544	Programme d'appui au secteur des transports (PAST), Volet C	24.5
FED/2010/021-956	Pistes rurales / désenclavement	9.7
	Total of reviewed projects	**192.6**
	Total of contracted amount under EDF 8+9+10	200.7

Project fiches have been prepared of the three main projects of the sample, namely:

- Improvement of the Kandi-Banikoara road;
- Improvement of the Cotonou-Calavi (suburban) road (aménagement de la sortie Nord-Ouest de Cotonou), and;
- SBS for periodic maintenance (Programme d'appui au secteur des transport volet C).

Data collection comprised compilation of the exhaustive documentation of project and sector reviews provided by the EUD including the draft report of an on-going evaluation covering the three roads projects, briefing and debriefing with the EUD (using the results of the on-line questionnaire), interviews with the sector partners (Ministry of Public Works, Road Fund, etc.) senior officials in charge of EU projects (now and/or in the past), the NAO, donors (including the EU Member States involved in the sector) and stakeholders (transporters), and a field visit focused on the rural transport programme and the Cotonou-Calavi road. In total 19 persons have been interviewed during the period 5-15 March 2015.

Limits and constraints

The main limit was the inability to visit the Kandi-Banikoara road, being too far from Cotonou for the short span of time available for the mission. The number and quality of the interviews was satisfying, though indeed more in-depth analysis inside the Ministry of Public Works would have been useful to triangulate some assertions of the heads of department. Finally, it was not possible to organise a focus group involving beneficiaries due to the nature of the projects physically reachable during the mission.

9.3 EU support to the transport sector in Benin

EU interventions in the road sector since the 60s contributed to upgrading 1,547 km of roads at a costs of about €332 million (see table 9.2). During EDF 8, 9 and 10, the EU funded the upgrading of about 100 km of roads per year on average[84]. In addition to trunk road upgrading projects, the EU interventions covered the 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.

An overview of EU's funding of the transport sector in Benin during the years 2005-2013 is provided in table 9.3. The total contracted amount was € 200,7 million, while € 181,million had actually been disbursed up to the end of 2013. 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.

Table 9.2. List of upgraded road sections funded by the EU in the years 1965-2013.

Road link	EDF	Year	Km	€ million
Cotonou – Porto-Novo		1965	30	0.8
Comé – Dogbo		1967	61	2.4
Cotonou – Hillacondji		1970	97	4.2
Porto-Novo – Yoko – Pobè		1975	70	5.0
Bohicon – Savalou et accès Tanguiéta		1982	117	18.5
Dassa – Savè	5	1985	65	17.4
Bohicon – Dassa – Savalou	6	1988	107	3.8
Comè – Lokossa – Dogbo	6	1990	61	6.9

[84] An average of 110 km per year under EDF 8; 79 km per year under EDF 9 and 130 km per year under EDF 10.

Parakou – Malanville	6	1992	150	14.9
Godomey – Bohicon	6	1994	119	16.3
Béroubouay – Malanville	7	1999	167	24.0
Parakou – Djougou Lot 1B	7	1997	72	9.3
Cotonou – Hillacondji	7	2002	99	17.0
Sèmè – Porto-Novo	7	2003	13	20.0
Natitingou – Porga	8	2004	102	27.5
Accès Traversée de Cotonou	8	2004	8	22.8
Banikoara – Kandi	9	2010	68.7	23.0
Godomey – Abomey-Calavi	9	2010	10.3	40.0
Parakou-Béroubouay	10	?	130	58.7
Total			**1547**	**332.5**

Table 9.3. EU funded transport sector projects in Benin: contracted and paid amounts over the years 2005-2013 in millions of Euros.

	EU allocation	Contracted	Paid
Total EDF-8	**7.7**	**6.6**	**6.6**
Programme de réhabilitation et d'entretien des pistes rurales	7.7	6.6	6.6
Total EDF-9	**100.1**	**98.6**	**98.4**
Aménagement de la route Banikoara-Kandi	23.0	22.8	22.6
Aménagement de la Sortie Nord-Ouest de Cotonou	37.9	37.9	37.9
Appui au ministere des transports et des travaux publics	0.9	0.9	0.9
Facilité de coopération technique	1.6	0.3	0.3
Appui à l'entretien périodique du réseau classé	36.7	36.7	36.7
Total EDF-10	**105.0**	**95.5**	**76.1**
1er Facilité de coopération technique 10ème FED	2.0	0.6	0.5
2ème Facilité de coopération technique 10ème FED	3.0	0.7	0.5
Pistes Rurales / Désenclavement	10.0	9.7	9.4
Programme d'Appui au Secteur des Transports (PAST), Volet C	25.0	24.5	22.0
Programme d'Appui au Secteur des Transports (PAST), Volets A & B	65.0	60.1	43.7
Grand Total	**212.8**	**200.7**	**181.1**

Source: CRIS, June 2014
Note: Figures EDF-8 include only the projects still active in the period 2005-2013.

Disbursement rates of the transport sector projects of the three EDF programmes during the evaluation period were excellent:

- EDF 8: 85% of the allocations have been contracted and 100% of the contracted amount has actually been paid (includes only the project still active in 2005-2013);
- EDF 9: 99% of the allocations have been contracted and nearly 100% of the contracted amount has actually been paid;
- EDF 10: 91% of the allocations have been contracted and 73% of the contracted amount has actually been paid so far (some projects are not yet closed).

All EU transport projects in Benin have been or are being evaluated. The evaluations of three projects/programmes are on-going: Cotonou-Calavi road construction, Kandi-Banikoara road construction and the provision of budget support to the Road Fund. Evaluation of the rural transport project is about to start.

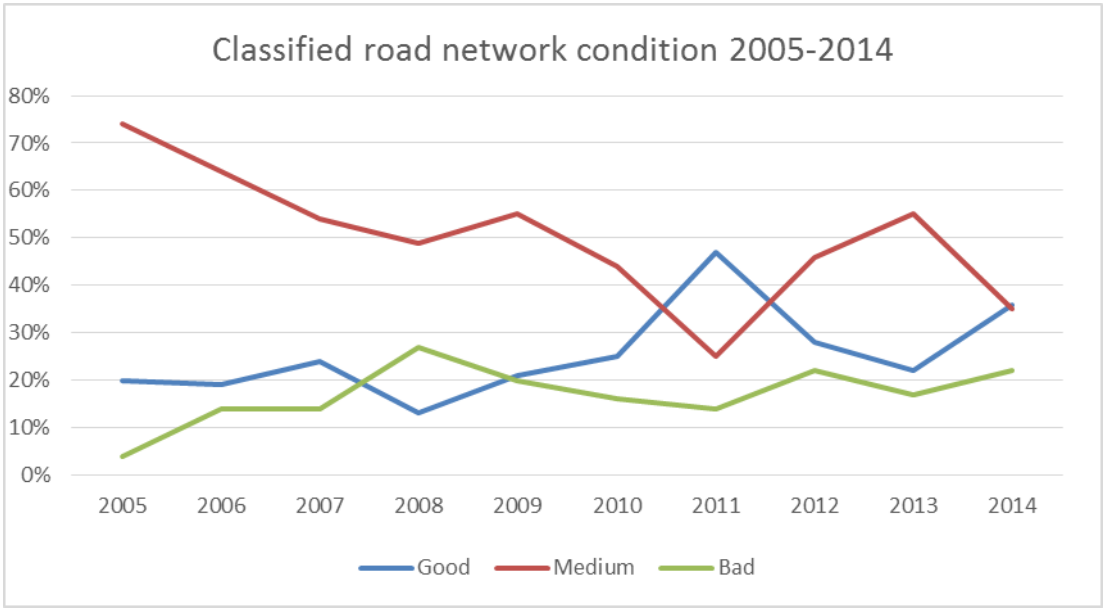
9.4 Description of the transport sector in Benin

A key characteristic of the transport sector in Benin is that two north-south road corridors and one east-west coastal corridor (plus the would-be northern parallel at Kandi) 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).

A north-south railway complement the road network, which could link the port of Cotonou with the two northern neighbours (Niger and Burkina Faso). However, the share of railways in land transport had 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. Cumbersome administrative management of the OCBN and chronic maintenance neglect contributed to that decline, as well as the unregulated competition with international road haulage. Recently (in 2014) the railway line was given under concession to the Bolloré Group, which has resumed railway operations.

The total road network comprises now 6,076 km of classified roads[85], 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. Accessibility is almost everywhere ensured by the road network except for a few agricultural areas in the north.

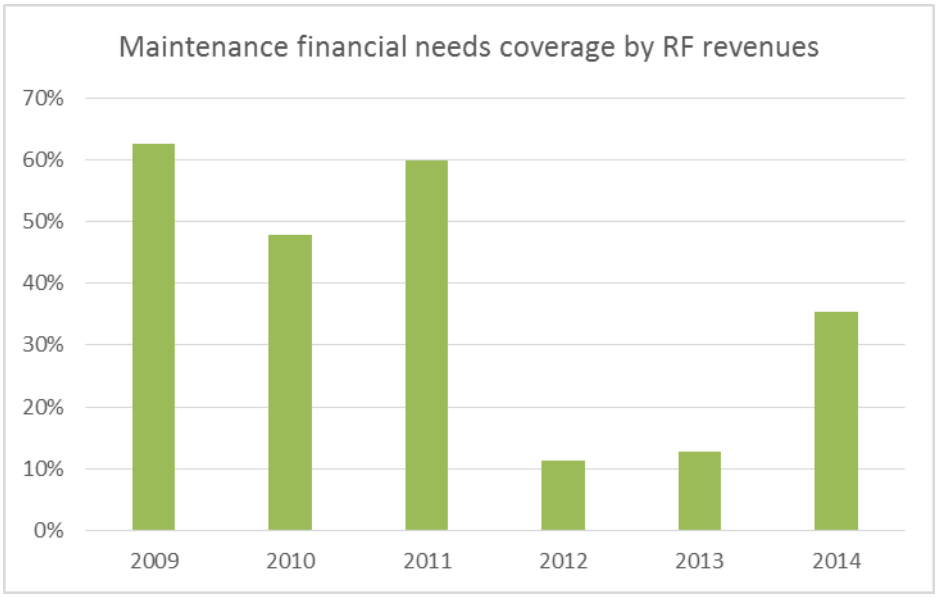
The condition of the classified network is presented in the figure shown below: 35% of the network is in good condition, another 35% in medium condition and 22% in bad condition. The remainder (8%) is ranging from bad to very bad. The share of the network in bad condition has been increasing over the last ten years.



Source: Ministry of Public Works

[85] In 2000, the classified network was limited to 3,425 km. That figure has now almost doubled in order to adjust to regional corridors prioritisation by ECOWAS.

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 from part of its revenues. Other resources were mobilized to supplement the limited fuel levy income, such as part of the VAT, an urban roads tax, transit fees and tolls. Annual allocations from the Government budget represent 0.4% of the resources of the Road Fund. The Road Fund covers presently an estimated 30% of the maintenance needs, while it was formally rated at 60% (in 2009). It was as low as 10% in 2012 and 2013 (see figure hereunder).



Source: Road Fund

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

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. Hauliers' union claims that roadblocks, road conditions, long waiting times at the Cotonou port and at destination, and systematic empty returns are cutting down their benefits to 200,000 FCFA (€ 305) per round trip (small scale haulers make on average 2 round trips per month). Overloading is common practice: about 80% of the trucks is overloaded.

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. A "pedagogic" approach was agreed with the haulers' union, postponing the enforcement of the national legislation. Gross Vehicle Weight (GVW) control was passed to the port, who implements it loosely (breakdown of weighting equipment, only two gates out of three equipped with a weighbridge).

9.5. Findings on the transport sector and the Evaluation Questions

Evaluation Question 1: To what extent have changing policies and strategies for EU support been responsive to the evolving needs of the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	National policies were drafted in compliance with donor policies rather than the contrary;	+++	National transport policy was drafted with World Bank support/guidance, while rural transport policy was drafted with DANIDA support. The general level of policy ownership was low. The high turn-over in leading positions in the MPW prevented a reform champion to arise. Most General Directors were anyhow reform-reluctant. Later in the reference period, the EU tried to support the update of the road master plan. Disagreement between the MPW and the consultant led to cancellation of the contract.
2	Whether national priorities were respected or subordinated by 'imposition' of national sector policies by sector donors;	+/-	In Benin, national priorities aligned with regional integration priorities. A 2nd generation road fund was created under donor pressure. The MPW successfully resisted the creation of a Road Agency.
3	Existence of clear national interest or prioritisation for corridor development and regional connectivity;	+++	Port activity and international road transit take a major share of the GDP. There existed a clear national interest/prioritization for corridor development and regional connectivity in Benin.
4	Clear 'ownership' of regional institutional priorities, policies and strategies;	-	Not beyond regional corridors. Axle-load control was not enforced: attempts were systematically and quickly withdrawn under pressure of the road transport lobby (view expressed by both the EUD and the Benin Administration) or were meant to serve the vested interest of the MPW top civil servants (view expressed by the haulers' union). The rail link was in decay and finally abandoned, but recently conceded to the Bolloré Group.
5	Existence of convergence and complementarity between sector policies and strategies at country and regional levels and with EU sector and development policies;	+	Coherence and complementarities are formally emphasized in sector policies and strategies. It is however hard to identify how this has materialised in the execution of plans. EU interventions in the transport sector can be related to regional integration in the early period (regional corridor), as well as to rural development (support to cotton areas under EDF 8 and more recently to rural transport under EDF 10). However the transport portfolio was not managed in the perspective of optimising convergence and complementarity with other EU policies.
6	EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value;	-	EU competencies are not particularly valued in the sector. There has been a relatively high turn-over within the infrastructure section, with one long period of vacancies. Some positions were held by junior staff with limited sector experience, undergoing on the job apprenticeship. On the government side, to the contrary, the senior civil servants were experienced with excellent training background. EU Member State bilateral cooperation is more valued in terms of competencies, flexibilities and ability to recruit relevant expertise.
7	EU competencies offer reduced 'added value' in current and future sector support and if so, why?	?	
8	Perceived comparative disadvantages are a continuing and/or reducing problem and to what extent such perceptions are in fact borne out in terms of constraints to		Unclear

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	implementation of EU support at national and regional levels;		
9	Consultation processes are (in) adequate to achieve desired levels of coherence at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders;		Consultation processes were systematically organized but are perceived as essentially formal by both the EUD and other participating stakeholders. Consultation activities are usually undertaken quite in advance of the drafting of internal EU documents, which have to be structured according to EU headquarters guidelines. There is only limited scope for coherence between national and regional programming, generally due to time gaps between the two processes. In EDF 9 and 10, the links with other sectors than transport are subsumed by the transversal role of transport in development. EU Member States intervening in the same sector perceive that EU is looking for niches (or areas) where there's no duplication and where the EUD can act independently (rather than looking for operational complementarities).
10	Capacities at regional institutional and national government levels are (in)adequate to manage sector consultation and coordination processes	+++	The Government of Benin is not in a position to manage sector consultation and coordination. On the one hand, capacities are low due to high turn-over of ministries as well as top officials in the MPW; on the other hand, national authorities lack a vision on sector policies and strategies: over the reference period, they had to follow the changing views and priorities of the donors, and particularly the EU which was leading the sector coordination group. The partnership is perceived as so unbalanced that agreeing on proposed principles was the only way for accessing financial support to modernize and maintain the road network.
11	Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.	---	Most of the issues faced during the period under review were foreseen by the 2004 country level evaluation, whose recommendations have been ignored. However practical experience of issues faced in implementing road projects under EDF 8 and 9 (Kandi-Banikoara) were taken into consideration in executing EDF10 projects (Parakou-Béroubouay). Issues related to EU identification and formulation processes (width of paving) or structural weaknesses of the road maintenance strategy (road fund, contractual management and corruption) were left largely unattended.

Evaluation Question 2. Did the change from project-based approach to a sector-wide approach and budget support (SBS and GBS) meet expectations regarding outcomes for EU support to the transport sector in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);	+	The sector budget support instrument was used to provide additional resources to the Road Fund, with most of the tranche indicators linked to the execution of selected operations of periodic maintenance. It was not a SPSP as such. Principles sustaining the Budget Support were not really endorsed by the Government of Benin. EU is also providing General Budget Support to the Government of Benin.
2	There has been a loosening of PFM eligibility conditionality for SBS (and/or increased diplomatic use of macro-economic statistics	N/A	

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	by IMF);		
3	Choice of aid modality impacted upon PFM quality;	N/A	
4	The transport sector was especially vulnerable to PFM frailties (due to the elevated value of infrastructure provision and operation);	+	All infrastructure sectors using donor and public money are plagued by corruption.
5	Wider governance issues (especially electioneering) threatened transport sector due process and management;	+++	Quality of governance (political clientelism and corruption) is a major factor of concern over the whole reference period and long before. It is hardly analysed or presented in EU documents (part from the 2004 country level evaluation).
6	Engineering judgement and professional ethics were not robust enough to resist subversion of quality assurance and contractual due process in infrastructure provision;	+++	Lack of professional ethics is a well-known weakness in public works in Benin. It is common knowledge that decision makers rate their signature at 10%, though the lack of formal data about (the fight against) corruption does not allow documenting anything. The EUD succeeded to ensure the respect of technical specifications of EU financed road projects, except for the Parakou-Béronbouay road. When the insufficient quality of that road came to be known, drastic measures were taken (with support from the Government of Benin) and arbitration was sought.
7	There was little political support and commitment to technical assistance activities and this has manifested in reduced TA support to national PFM reform	N/A	
8	Information overload on SPSP and SBS inhibited accessibility and take-up of lessons learned by EUDs	N/A	

Evaluation Question 3: To what extent has EU institutional support and capacity building resulted in enhanced transport sector management in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Adequate institutional resources and capacities ensure that network conditions will continue to be maintained or improve;	-	EU Technical Assistance (TA) did not succeed to change significantly the capacity of the MPW. Tools and knowledge provided for maintenance prioritisation are underutilised due to staff turn-over and lack of budget provision (for traffic counts notably).
2	There are realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);	+++	The EU supported under EDF10 a Danida-sponsored rural road programme that focuses on maintenance and improvement of rural roads. The framework is comprehensive and provide secured resources and practical guidelines for the local authorities (communes). It is strongly anchored in the decentralization process pursued by the Government of Benin.
3	Management decisions are based on technical appreciation of base data of improving quality;	+/-	The information base for annual programming of road maintenance was improved with the TA and associated funding of the EU. That support, along with the financial support provided to the Road Fund strengthening its position vis-à-vis the MPW, improved the decision-making process. However, the solely technical approach to road classification and priorisation hinders the optimisation of the budget available through the Road Fund.
4	Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments);	-	Only very recently and through one exploratory study on rail development, the EU diversified its support to the transport sector (by paying thus also attention to the railways).
5	National (and regional) sector policies and strategies reflect current	++	National sector policies (transport and rural transport) are based on a good level of knowledge of the situation in the

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	and future sector situations and are accompanied by adequately resourced provision for sector investments and management;	-	transport sector. However sector governance issues and professional ethics are not well addressed. Funding of the implementation of the policies and strategies is not embedded in a Medium Term Expenditure Framework (MTEF). Funding depends on annual budgetary arbitrations. Usually only part of the proposed development and maintenance programmes are funded.
6	Transaction costs are reducing;	-	No evidence gathered that could sustain the point.
7	Anti-corruption measures are being actively pursued in the transport sector together with appropriate monitoring and control measures;	--	Anti-corruption measures are not being considered by the GoB nor explicitly advocated for in EU documents.
8	Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector	-	Cross-cutting issues are selectively taken on board in EU road projects. Engineering and related budgetary issues minimize the scope for taking measures as regards crosscutting measures. Mainstreaming has not been considered.

Evaluation question 4: To what extent has EU sector support contributed to sustainable and affordable transport infrastructure in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);	-	The structural deficit of the Road Fund is increasing due to insufficient revenues from the fuel levy. Sector Budget Support provided by the EU BS relieved temporarily (3 years) the gap but at the same time the Government decreased its own budgetary allocations to the Road Fund.
2	National records are available that systematically record road service levels/ conditions linked to records of maintenance interventions (routine and periodic)	+	Work in progress, initially with financial and TA support from the EU.
3	Adequacy of fuel levy contributions are systematically and regularly reviewed (eg annually) and mechanisms exist for periodic adjustments of such levies;	N/A	
4	Regular technical and financial audits of national sector PFM, procurement and contract cycle management demonstrate probity;	-	Audits are realised under the GBS umbrella.
5	Institutional capacity needs are regularly assessed and systems are in place to match capacities and resources to sector management needs	-	Such assessment was never undertaken in Benin.
6	Transport regulators are functional and effective and rulings are enforced without undue political interference	N/A	No transport regulators in Benin.

Evaluation question 5: To what extent has EU support to the transport sector in Africa contributed to sustainable social and economic development?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Given the claimed linkage between rural transport, accessibility and	-	The underlying economic modelling was translated by engineers in approximations that are misleading (reduced

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	poverty reduction, the EU should have done more to focus resources on rural transport.		cost of transport = reduced price). The economic analyses justifying road projects were contributing to messy justifications by introducing false reasoning and inappropriate tools (Highway Design Model), subsumed to the imperative to justify an already chosen and budgeted project.
2	Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and efficient transport services.	-	The situation in Benin might be exactly the opposite with the establishment in 2014 of a haulers' union representing some 95% of the transporters. Fixation of a (high) reference tariff is high on the policy agenda of the union and is already enforced by its members. Their view is that with many road blocks, empty returns and long waiting times at port and destinations, high prices are necessary. The national administration (not supported by the EU) is unable to provide data that could allow negotiation with the union. Several interviewees indicated that many members of the political and administrative elite are truck owners and are therefore not proactive in introducing price regulations and axle-load controls.
3	Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.	+++	Transport-specific data are limited to those collected at port gates. Most other data are collected from haulers and drivers declarations.
4	Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.	-	Mainstreaming safety does not appear to be a priority for stakeholders and development partners in Benin.
5	Adoption of a regional approach to traffic safety would pay dividends in terms of ensuring that best practice is disseminated.	+	
6	The role of the EU has been recognized by sector stakeholders.	-	Not beyond road projects.
7	Development activities have taken place that would not have occurred without EU funding	+++	Indeed, even if it is not documented.
8	EU is reluctant to engage in support to urban transport in SSA	-	The 9 km 2x2 lanes road between Cotonou (centre) and Calavi is mainly urban, even if it is supposed to carry also regional transit traffic. This project is a continuation of another one financed under a previous EDF.

Evaluation question 6: To what extent do EU transport sector support policies, strategies and interventions contribute explicitly to poverty reduction in Africa?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EU programming and project intervention design do not take into account lessons learned from an expanding body of research on factors influencing poverty impact	+++	Projects and programmes are mainly designed by EUD staff with limited knowledge of the transport sector in Benin and not having time to familiarize with the results of research on factors influencing poverty impact. External expertise was mobilized but had limited power to change the initial design. Most expertise mobilised had an engineering or an unspecified economic background. In general the programming process was innovation-reluctant.
2	Targeting of the poorest and most vulnerable people and equity considerations were not actually identified or intended by EU sector	+++	Apart from labour based methods, most of the possible benefits for the poorest are expected to be the result of trickle-down effects of transport sector improvements. Road projects were not supported by accompanying

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	policy and programming documents.		measures focussed on socioeconomic development of communities neighbouring transport sector investments.
3	EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.	+++	
4	Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs were marginalised (or dropped altogether) during construction phases	+++	
5	No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors	+++	

Evaluation question 7: To what extent has EU cooperation at regional levels resulted in better facilitation of movement of people and freight?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The lessons learnt on regional transport facilitation and corridor management in East Africa were disseminated with EUDs in other African regions;	-	Enforcement of key regional agreements is still pending in Benin, in particular axle-load control and GVW. On the other hand, regional corridors planning agreed at regional level was utilized by the MPW to plan for doubling the length of the classified road network, irrespective of the financing capacity of the Road fund. This plan was supported by EU-NIP funding by providing funds for the modernization of the Kandi-Banikoara road (€25m for 68 km), which is supposed to provide a secondary link between Burkina and Nigeria but having no good connections in those two countries for the moment (10 years after identification).
2	The performance monitoring systems set in place with EU support along all regional corridors allow an appropriate measure of outputs/outcomes of EU interventions (traffic volumes, export development, job creation, regional integration, integration into the world economy);	-	This information is not available in Benin.
3	RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;	-	NIPs are loosely referring to regional programmes, implementation of which is very limited.
4	The tools available to EUDs (policy dialogue, joint programming) were appropriate to ensure translation into national legislations of agreements acted by RECs	-	The EUD policy dialogue with the GoB at national level contributed to the translation of regional agreements into national legislation but was not able to enhance their enforcement.
5	The change introduced by EDF11 programming regarding the EU strategy for the transport sector was	+++	

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition		

Evaluation question 8: Were selection, planning and prioritisation procedures for EU transport sector support interventions in Africa appropriate?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values;	+++	All EU funded road projects in Benin are characterized by technical shortcomings associated with lowering construction standards in order to fit the project in the available budget (during NIP programming and then establishment of the Action fiche). The initially determined length (number of km) is generally not negotiable due to high level political commitment vis-à-vis the population of the area. The best example in Benin is the Parakou – Bérongué road that quickly deteriorated due to the insufficient thickness of the pavement (with additionally major supervision shortcomings). Similar concerns are arising as regards the more recent Kandi – Banikoara (on-going evaluation). The suburban Cotonou-Calvati road is almost exempt of these issues apart from its drainage system. The assessment of the Net Present Value with the Highway Design Model has to be based on unrealistic hypotheses regarding lifetime of pavement under technical options retained (5 cm asphalt concrete for overloaded regional transit) and implementation of the maintenance cycle in order to reach the 'golden' 12% for Economic Rate of Return (ERR). Traffic forecast are far from being achieved for Kandi-Banikoara but were underestimated in the case of Cotonou- Calavi. The EU provided €25 million earmarked sector budget support to the Road Fund for periodic maintenance works, which were however not prioritized on the basis of economic criteria (NPV or multi criteria analysis).
2	That feasibility studies do not consider options for EU support to the transport sector, only the limited feasibility and viability of a pre-determined transport sector intervention;	+++	
3	Time and cost over-runs have become systematic but in a range shared for similar projects by other sector FDIs (World Bank and AfDB);	+/-	
4	The specific dis-enabling environment of Africa for works in transport infrastructure is insufficiently addressed by EU procurement regulations and contract management procedures	+++	The EUD did not anticipated on the widely acknowledged weakness of the MPW in contract management and follow-up of supervision missions, and sector governance issues. The use of technical audits came late in the process of adjustment of the alleged weaknesses of the technical design by the contractor. Early degradations for Kandi-Banikoara and for the on-going Parakou-Béroubaye are testimony of a recurrent mismatch between the institutional environment and EU procedures in Benin.
5	Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs	-	EDF 8 and 9 financed a suburban road project. EDF10 financed a rural transport programme.

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
6	EDF11 programming is changing the focus from trunk to rural roads	+	Yes in principle (evaluation/formulation on-going)

Evaluation question 9: To what extent were EU aid modalities, cooperation frameworks and implementation mechanisms, and legal instruments appropriate for support to the transport sector of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership;	-	In Benin a mix of aid modalities is used. There is no clear shift from a project approach to a programme approach and an earmarked sector budget support approach. The GoB was/is satisfied with the existing mix and the absence of a clear shift because its allows postponing sector reform.
2	Governments' capacity to adjust to newly introduced preferred aid modalities with technical assistance support funded by the EU that did not anticipate the move, was not proportionated to actual needs and unable to treat root causes of capacity shortcomings (civil service reform, PFM…);	++	The issue is not so much capacity but rather ability. For the budget support provided to the Road Fund, the key issues were speeding-up procurement, reinforcing supervision/quality control and developing SMEs capacity for worksite management. Speeding-up procurement does not depend on the MPW but on the procurement agency/commission, which was not directly involved in the preparation of the project or programme. EU technical assistance did not target supervision of SMEs but rather maintenance programming and general management of MPW. The point here is that financing agreements are signed by the GoB (NAO) but do not commit all government departments, only the one targeted.
3	Adjustments of EU approaches and use of mix of instruments were more in response to emergencies (conflicts, civil unrest) rather than focused on capacity shortcomings;	N/A	The mix of road projects and provisions of Budget Support to the Road Fund was more strategic than a response to an emergency. Earmarked sector Budget Support was the only way for the EU (and other donors) to contribute to periodic maintenance, thus to anticipate on rehabilitation and provide incentives to the MPW for undertaking current maintenance. The EU (and other donors as well) consider periodic maintenance as recurrent costs, which have to be funded through the national budget (which is not the case in Benin: periodic maintenance is in the investment budget).
4	Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.	N/A	No blending projects in the pipeline in Benin.

Evaluation question 10. To what extent were EU procedures and resources appropriate for support to the transport sectors of partner countries?

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
1	EUDs have adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of	-	EUD infrastructure section's human resources have significantly increased during the evaluation period, as a result of EU's decentralization process. EU staff feels that human resources are sufficient to manage the sector portfolio according to prevailing guidelines and regulations. However, EU contract management guidelines and regulations aim at minimizing human resources needs

	Hypotheses	AGREE	Situation in-country was different – as elaborated below
	innovative financing modalities;		within EUDs, assuming normal management conditions, which do not exist in Benin. The present EU contract management guidelines and regulations are inadequate in the aggressive environment of implementing grant projects in Benin. Most procurement and contract management rules are fit for competitive environments with an efficient administration, but they have demonstrated to be poorly appropriate to address systemic dumping, corruption and unfaithful commitments. Constraints on EUD human resources are also largely driving the choice of financing modalities and explain the shift from the relatively effective programme estimates approach (devis-programme) having a high administrative burden, to budget support which has a much lower administrative burden. EUD staff was also directed to spend less time on programme management and more on reporting and, more recently, on EEAS related affairs (estimated at 20% of technical staff time). Similarly, limited time is available for the day-to-day policy dialogue, which now tends to be reduced to key events (sector reviews, national forum…). Vacancies proved to last up to 6 months in the EUD Infrastructure section in Benin. The loss of institutional memory was perceived as detrimental in programme management by sector partners. Some capacity shortcomings relate to the lack of experience of new staff posted at the EUD, without adequate training, availability of back-up at the level of the HQ and counselling. Staff weaknesses are more pronounced for conducting the policy dialogue than for programme management.
2	Operations budgets (of EUDs and EU HQ) are sufficient to permit necessary travel of technical staff to support interventions;	+	EUD staff indicated that operational budgets are sufficient.
3	Measures for dissemination of relevant lessons learned and technical support to EUDs are adequate;	+++	EUD staff are relatively satisfied by the level of dissemination of relevant lessons learned through documentation provided by the internal website and annual seminars for the Infrastructure Sections of EUDs in Africa. Technical support is seen as widely inadequate. In facing the claims and arbitration issues following the Parakou-Béroubouay project, no support was received from headquarters. The lack of a helpdesk or specialists requires reinventing the wheel, with considerable uncertainties.
4	Capacity needs for responsibilities and activities involved in sector support portfolios have not been assessed and are not reviewed on a programme-by-programme basis;		Capacity needs are assessed according to the portfolio of projects and contracts with international and local agents/firms. The rotation of staff is based on specific profile for the positions concerned. At the level of the EUD in Benin there have been a few mismatches as regards profiles and positions, which are seen as hardly avoidable in an administration.
5	There is consistency between the staffing strategies of different directorates	?	No information available in Benin.

9.6 Conclusions

The Road Fund will not be viable as a 2nd generation Fund because of insufficient revenues from fuel levies and toll rates; the former due to fuel smuggling with Nigeria and the latter due to the difficulty to increase the toll rates - unchanged since the 1980s – because of the low level of service offered. Typically in the African continent, fuel levies represent 90% of Road Fund revenues and can't be replaced by road user charges. Transfers from the national budget are far from compensating the revenue losses of the Road Fund, which demonstrates a poor commitment to road maintenance.

Irrespective of the content of the sector policy documents and of the Road Fund revenue limits, the successive governments have been promoting the modernization and extension of the road network with the support of the 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.

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. Bidding for standard maintenance works takes a minimum of 6 months and more often one year or so. The quality of the design studies and the feasibility of the designs is acknowledged as being poor.

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, which is a serious obstacle for purchasing equipment. Furthermore, most of them have little or no professional experience and extensively utilize false certificates to access public contracts. Hiring equipment is common among SMEs. Supervision contracts are often awarded to relatively inexperienced engineering small firms, utilizing under-paid young professionals.

Transport regulation is embryonic. Haulage is fully left to a jungle like free market. The absence of regulations and a regulatory authority was an opportunity for unions to federate and claim for a fixed price for international transport, likely bargained against an agreement on the respect of axle-load limitations.

Corruption and political governance 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. Against multiple formal safeguards during procurement processes, corruption finds its way before, during and after the bidding, resulting in short economic lifetime of the newly constructed and maintained roads.

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10. Senegal case study

Table of Content

Glossary of acronyms

AfDB	African Development Bank
ASECNA	Agence pour la Sécurité de la Navigation Aérienne en Afrique et à Madagascar.
BOAD	Banque Ouest Africaine de Développement
COSEC	Conseil des chargeurs
CV	Curriculum vitae
ECOWAS	Economic Commission of West African States
EDF	European Development Fund
EIB	European Investment Bank
ESIA	Environmental and Social Impact Assessment
ESMP	Environmental and Social Management Plan
EU	European Union
EUD	EU Delegation
FA	Financing agreement
FCFA	Franc de la Communauté Financière de l'Afrique
FED	Fonds Européen de Développement
FERA	Fonds d'Entretien Routier Autonome
GBS	General Budget Support
GOS	Government of Senegal
HIMO	Haut intensité de main d'œuvre
HQ	Headquarters
IMF	International Monetary Fund
MIT	Ministère de l'Infrastructure et du Transport
NAO	National authorising officer
NIP	National indicative programme
PFM	Public finance management
PRAESC	Programme de rehabilitation des routes d'accès aux zones agricoles en Casamance
REC	Regional Economic Community
RF	Road Fund
RIP	Regional Indicative Programme
RN	Route nationale
SBS	Sector Budget Support
SME	Small & Medium Enterprises
SPSP	Sector policy support programme
TA	Technical Assistance
ToR	Terms of Reference
TSE	Transport sector evaluation
UE	Union européenne
WB	World Bank

Exchange rate: 1 € = 656 FCFA.

10.1. Introduction

The purpose of the Country Note

The objective of the Senegal Country Case Study, being part of the evaluation of the EU support to the transport sector in Africa during the years 2005-2013, is to continue and complete the collection of information and to test/investigate hypotheses at the level of Senegal, in order to validate or refute those hypotheses, findings and preliminary assessments formulated during the desk study phase. The assessment concentrated on the policy and strategy issues of the EU transport sector programmes in Senegal. Individual interventions were reviewed and analysed as examples of practical implementation, procedural aspects and achievements of EU transport sector support.

This Country Note respects the mandatory structure of all Country Notes (see table of content above). The checklist with desk phase hypotheses - made for all country case studies - has been used as guidance for this case study. The assessment of those hypotheses is presented in section 10.5 of this Note. A couple of sector level conclusions are presented in section 10.6.

Senegal as a case study country

In the global sample of 10 country case studies, Senegal was selected replacing Mali which could not be visited due to security circumstances in the country. Characteristics making Senegal an informative case study for this Transport Sector Evaluation in Africa:

- a country where EU cooperation was focused on major road projects;
- port location (Dakar) as end-terminal of a road/rail regional corridor (to Mali), becoming increasingly important and replacing Abidjan;
- a mix of trunk, rural and urban roads supported by the EU;
- one of the 3 West African countries being studied (with Benin and Mauritania).

The EU did not provide SBS to the transport sector in Senegal. Almost all EU funded projects have been evaluated ex-post; the urban road project being the only exception.

10.2 Data collection methods used

The interventions listed in table 10.1 have been assessed during the mission. They cover 54% of the total amount paid under EDF-9 and EDF-10 for transport sector projects in Senegal (up to the end of 2013).

Table 10.1. EU funded transport sector projects assessed during the mission (in '000 of €)

Decision code	Decision title	EU allocation	Contracted 2005-2013	Paid 2005-2013
EDF 9				
FED/2005/017-867	Réhabilitation de la route Mbirkélane-Tambacounda	62,000	66,053	65,054
FED/2006/018-644	Réhabilitation de la route Kaolack-Mbirkélane	14,000	13,871	13,870
FED/2006/018-674	Réhabilitation des routes d`accès aux zones agricoles en Casamance (PRAESC)	6,851	6,851	6,851
EDF 10				
FED/2005/017-867	Réhabilitation de la route Mbirkélane-Tambacounda	16,500	11,320	10,112
FED/2006/018-570	Programme spécial des voiries urbaines avec haute intensité de main d'œuvre	33,262	5,148	5,115

Data source: CRIS, June 2014.

Note: FED/2005/017-867 got a first allocation under EDF-9 and a topping up under EDF-10. Total allocation amounted to € 78.5 million.

Data collection comprised compilation of the exhaustive documentation on projects and sector reviews availed at the EUD (among which the draft report of an on-going evaluation covering three road projects), briefing and debriefing with the EUD (using the result of the on-line questionnaire), interviews with the sector partners (Ministère des travaux publics, Fonds Routier, etc.), senior officials in charge in the past of EU projects, NAO, donors (including the EU Member States involved in the sector) and stakeholders (transporters), and a field visit focused on the Kaolack-Tambacounda corridor and related rural roads. In total 30 persons were interviewed between the 16th and 25th of March 2015.

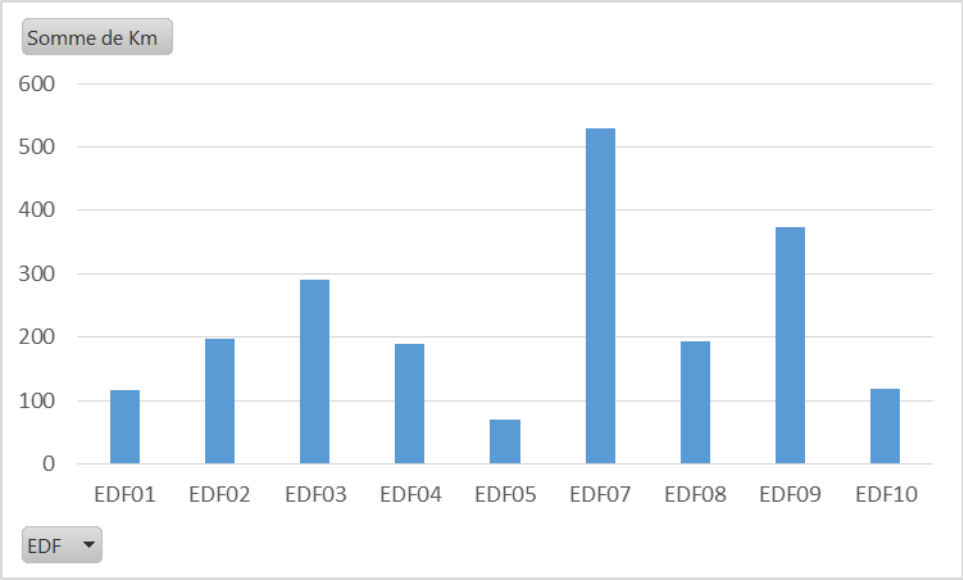
Project fiches have been prepared for the three main projects of the sample, namely:

- MBirkélane – Tambacounda regional corridor (FED/2005/017-867);
- Rural roads in Casamance (PRAESC; FED/2006/018-674);
- Urban roads through labour-based methods in Ziguinchor and Dakar (FED/2006/018-570).

The mission was unable to visit the St Louis-Rosso trunk road because of lack of time and too long distance. The number and quality of the interviews was satisfying, though indeed more in-depth analysis inside the Ageroute and Ministry of Public Work would have been useful to triangulate some assertions of the Heads of Department. Organising focus group involving beneficiaries did not appear to be useful and/or feasible due to the nature of the projects (regional corridors).

10.3 EU support to the transport sector in Senegal

EU interventions in the road sector since the 1960s contributed to the pavement and upgrading of 2,078 km (see next figure). EDF-9 financed the upgrading of 380 km of roads and EDF- 10 funded the upgrading of another 110 km.



Source: Ageroute

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 (air transport) 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 (Kaolack-Tambacounda) and Mauritania (St Louis-Rosso), 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 (under the 9th EDF, € 6.8 million was spent in Casamance) as well as urban roads (labour-based in Ziguinchor and Dakar; € 5.1million). In Senegal the EU has not been engaged in a specific technical assistance project supporting sector policy and management.

An overview of EU's funding of the transport sector in Senegal under EDF-9 and 10 during the years 2005-2013 is provided in table 10.2. The total allocated amount was € 257.9 million, while € 190.1 million has actually been contracted and € 185.8 million actually disbursed up to the end of 2013. Disbursement rates of the transport sector projects of EDF-9 and EDF-10 were excellent; respectively 99% and 96% (paid amount as % of contracted amounts). From the total paid amount, 92.4% concerned payments for works, 7.2% payments for services and 0.5% payment for supplies. From the payment for services, 89.2% was linked to road works (supervision, technical audits and technical services) and only 10.8% (€ 1.4 million) linked to "public sector policy and administrative management", showing that EU technical assistance not linked to specific road projects was mobilised only to a very limited extent in Senegal.

Table 10.2. EU funded transport sector projects in Senegal 2005-2013 (in '000 of €)

Decision code	Decision title	EU allocation	Contracted 2005-2013	Paid 2005-2013
EDF 9				
FED/2005/017-867	Réhabilitation de la route Mbirkélane-Tambacounda	62,000	66,053	65,054
FED/2005/017-445	Réhabilitation de la R20 et de la RN4	26,000	25,709	25,621
FED/2006/018-644	Réhabilitation de la route Kaolack-Mbirkélane	14,000	13,871	13,870
FED/2006/018-674	Réhabilitation des routes d`accès aux zones agricoles en Casamance (PRAESC)	6,851	6,851	6,851
FED/2003/016-280	Appui au programme de formation de l'ASECNA	14,200	3,360	3,360
FED/2003/016-519	Facilité de coopération technique I	5,648	835	835
FED/2007/020-756	Facilité de coopération technique II	4,000	550	550
	Total EDF-9	132,699	117,229	116,141
EDF 10				
FED/2008/020-934	Réhabilitation de la route Saint Louis- Rosso	56,000	55,657	53,988
FED/2005/017-867	Réhabilitation de la route Mbirkélane-Tambacounda	16,500	11,320	10,112
FED/2006/018-570	Programme spécial des voiries urbaines avec haute intensité de main d'œuvre	33,262	5,148	5,115
FED/2009/021-521	Soutien à la mise en œuvre de la coopération communautaire prévue par les Accords de Cotonou	4,400	525	345
FED/2011/022-547	Réhabilitation de la route Passi Sokone	15,000	223	134
	Total EDF-10	125,162	**72,872**	**69,693**
TOTAL 2005-2013		**257,861**	**190,101**	**185,834**

Source: CRIS, June 2014.

Note: FED/2005/017-867 got a first allocation under EDF-9 and a topping up under EDF-10. Total allocation amounted to € 78.5 million.

Table 10.3. Break down of total paid amount per category of expenditures (in '000 of €)

Nature of contracts (CRIS)	Contracts			
Projects	Supplies	Works	Services	Total
Réhabilitation de la route Mbirkélane-Tambacounda	236	71,148	3,782	75,165
Réhabilitation de la route Saint Louis-Rosso		50,003	3,985	53,988
Réhabiliation de la R20 et de la RN4		23,612	2,009	25,621
Réhabilitation de la route Kaolack-Mbirkélane		12,925	946	13,870
Réhabilitation des routes d'accès aux zones agricoles en Casamance (PRAESC)		6,471	380	6,851
Programme spécial des voiries urbaines avec HIMO	404	4,381	331	5,115
Appui au programme de formation de l'ASECNA	223	3,137		3,360
Facilité de coopération technique I			835	835
Facilité de coopération technique II			550	550
Soutien à la mise en œoeuvre de la coopération UE			345	345
Réhabilitation de la route Passi-Sokone			134	134
Total	**862**	**171,676**	**13,296**	**185,834**
	0.5%	92.4%	7.2%	100%

Source: CRIS, June 2014.

10.4 Description of the sector

About 95% of all transport activities in Senegal is carried out by road. Senegal is having only one railway line linking Dakar port with Bamako (Mali) with 400 km on Senegalese territory. Rail transport takes a declining share of all transit transport to Mali and eventually Burkina Faso. Waterways transport is marginal.

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 gravel roads to paved roads. Conditions of the paved roads improved as well: about 73% of the paved roads is 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. In 2004, the commercial transport fleet was estimated at 30,000 vehicles (including lorries, vans and bus). Most of the 6,400 haulers are single truck owners. There are a few haulage firms with a fleet of 5-10 trucks, generally operating in niche markets (e.g. fuel). Own-account road transport has developed among wholesalers and groundnut traders.

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. Senegalese haulers are not using their full quota of transit freight from Dakar port to Bamako agreed between the two governments (Senegal and Mali) by lack of capacity and insufficient reliability of their fleet. Moreover, prices on the competitive transit freight market are far less attractive (on average 34 FCFA/ton.km) than on the domestic transport market (from 100 to 400 FCFA/ton.km). Thus, avoiding the regional corridor is in fact also a commercial strategy of the Senegalese transporters.

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's NIPs funds for both Senegal and Mali) and the Ivory Coast conflict. Moreover, the increase of Dakar port activities is closely linked with the increase of Malinese imports, with only a small contribution of transhipments from Europe to other West African ports.

During the period under review (2005-2013), the national transport policy was spelled out in two sector policy letters, elaborated 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.

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 2nd 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.

During the years 2005-2013, about 800 kilometres of classified roads have been rehabilitated in the context of the road network modernization programme, mostly national and regional integration links. Most projects were financed by external donors (EU, AfDB). Since the first EDF, the EU has contributed to improving a total road length of roads of about 2,000 km all being part of the main national road network. Road maintenance needs was 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 the years prior to 2014, financial resources needed for the maintenance of the classified road network were estimated at about FCFA 50 billion (€ 76 million) per year. 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 (and nowadays) FERA has 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 needs were covered for about 100% but in 2014 only for 71% (in view of the new needs estimate). FERA intends to diversify its sources of revenues but a recent study did not find easy solutions at hand. Additional indirect taxes or application of the user-pay principle are under scrutiny of the political opposition, while the government is reluctant to confront the haulage lobby that demonstrated a real nuisance capacity (strikes, border blockage…) in the recent past.

Ageroute has clearly improved its contract management capacity compared to the Ministry of Infrastructure and Transport. However, it has recruited the most qualified and experienced staff previously working for the ministry. It has much higher salary schemes than the ministry and has renewed its organisational structure (with programme managers). Both the qualified and experienced staff and the organisational restructuring have contributed to an increase in efficiency in the recent past. However, there is nowadays a largely shared feeling that the performance of Ageroute is decreasing due to lack of commitment of the middle management, increasing routine contract management and recruitment of inexperienced programme managers. The need to renovate the organisation and reinforce capacity is felt by the management which has commanded to update guidelines but without carrying out a due organisational and technical audit.

10.5 Findings on the transport sector and the Evaluation Questions

This chapter is devoted to checking (confirming or refuting) desk phase hypotheses and to filling information gaps. The hypotheses, gaps and additional information are presented per Evaluation Question.

EQ. 1: To what extent have changing policies and strategies for EU support been responsive to the evolving needs of the transport sector in Africa?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	National policies were drafted in compliance with donor policies rather than the contrary;	+/-	In Senegal, the overall and sector governance does not allow the government to come to structural reforms or even a shared vision of an institutional restructuring leading to a significant improvement of the efficiency of administrative management of the road sector. Change of ministers, followed by replacement of politicised senior management in the infrastructure ministry prevent development of a long-term vision and consistent policy implementation. Unions are also powerful and engaged in a fight to sustain

	Hypotheses	Agree	Situation in-country was different – as elaborated below
			advantages that are not clearly related to actual workloads and professional ethics of the civil servants. The rules applied to civil servants (low salaries for low workload and lack of responsibility) at large do not provide adequate incentives and barriers to corruption. Since the 2000s, the Government of Senegal (GOS) chose the option to establish agencies for strategic functions in sectors management. The same applies lately to the transport sector. The preliminary observation formulated during the Desk Phase focuses on the formal elaboration of a sector policy document, often made by international consultants paid by donors. That is also the case in Senegal but here this option can be seen as a choice of national decision-makers to overcome the internal feuds by utilizing a third person to propose changes. The EUD presents its policy dialogue strategy as pushing measures and dynamics that have already been identified and are already being implemented by the Government (establishment of FERA, axle-load control's tolerance…).
2	National priorities were respected (or subordinated by 'imposition' of national sector policies by sector donors)	+	Selected major works responded to expressed national needs: development of regional corridors towards Mali (Kaolack – Tambacounda, 300km) and Mauritania (St Louis – Rosso), rural roads (in Casamance and along rehabilitated trunk roads), urban roads. Beside regional corridors, which constitute a clear need for regional integration, the prioritization of Casamance in several projects is a contribution to national integration, another clearly expressed need of the GOS.
3	Existence of clear national interest or prioritisation for corridor development and regional connectivity;	+	Regional corridors are clearly prioritized by the GOS to sustain the economic returns of Dakar port and to promote it as a leading port on the African west coast. The government is considering diversifying regional links to Bamako to improve its competitive position vis-à-vis Abidjan. A south link is already paved, starting from Tambacounda (thus using the road sections improved under EDF-9 and 10).
4	Clear 'ownership' of regional institutional priorities, policies and strategies;	+	GOS is clearly supporting the regional corridor (almost entirely funded with donor support) and axle load control following CEDAO agreement 14.
5	Existence of convergence and complementarity between sector policies and strategies at country and regional levels	+	Cf. above
	and with EU sector and development policies;	+	EU has pushed for reforms and their actual enforcement by developing incentives (conditionalities) to increase convergence between GOS sector policy and management, and the EU vision on good practices. Complementarity is more a matter of fact, the EU complementing in Senegal investments (periodic maintenance) and current maintenance done with Road Fund resources or the national budget.
6	EU competencies actually have led to added value of EU sector support in comparison to other sector donors	+	EU added value is acknowledged by its sector partners, not necessarily based on a high level of technical competencies (or international experience) but rather on commitment, perseverance, and systematic implementation of a methodical management. This judgement is not made in comparison to other sector

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	and if so, whether changing EU policies continue to leverage such added value;	+	donors (ie the World Bank). The EU added-value being not about technics but rather about methods and organisation, the same can be expected under the next focal sectors of EDF-11.
7	EU competencies offer reduced 'added value' in current and future sector support and if so, why?	+	Cf. above
8	Perceived comparative disadvantages are a continuing and/or reducing problem and to what extent such perceptions are in fact borne out in terms of constraints to implementation of EU support at national and regional levels;	?	
9	Consultation processes are adequate to achieve desired levels of coherence: at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders;	? ? +	Even if neither the GOS nor donors pushed for establishing a donor coordination group for the transport sector, coordination is perceived as excellent between the two main donors (EU and World Bank) for contribution to structural reforms. Opinions are fully congruent regarding the main issues such as: Road Fund, Road Agency, axle-load control.
10	Capacities at regional institutional and national government levels are ~~(in)~~adequate to manage sector consultation and coordination processes	+	In Senegal, nevertheless systemic inefficiencies in sector management, the capacity of government institutions is generally high, with brilliant senior officials and a respectable number of reform champions. Consultations with donors are taking place, not necessarily in formal settings such as forums, national workshops etc., but rather through joint elaboration of sector strategy documents and practical collaboration on project management, notably on identification and implementation of conditionalities for signing EU's Financing Agreements or launching procurement.
11	Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.	+/-	The EUD has utilised reviews and evaluations when formulating country programming and projects documents. Dialogue with external evaluators and auditors has been fruitful and without conflictions.

EQ.2 : Did the change from project-based approach to a sector-wide approach and budget support (SBS and GBS) meet expectations regarding outcomes for EU support to the transport sector in Africa?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector	N/A	

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);		
2	There has been a loosening of PFM eligibility conditionality for SBS (and/or increased diplomatic use of macro-economic statistics by IMF);	N/A	
3	Choice of aid modality impacted upon PFM quality;	N/A	
4	The transport sector was especially vulnerable to PFM frailties (due to the elevated value of infrastructure provision and operation);	N/A	
5	Wider governance issues (especially electioneering) threatened transport sector due process and management;	+/-	May be less than in other West African countries, Senegal sector management is characterised by a high level of politisation of senior positions in the administration and relatively fast turn-over of ministers. It is also widely acknowledged that there are attempts of political interferences in road works, particularly maintenance. The general Governance situation does not provide for an enabling environment to improvement sector due process and management. However, the extent of corruption in the sector is perceived to be more under control than in other countries in the region, may be due to the presence of a vivid media and civil society organisations, supported by the rising urban middle class.
6	Engineering judgement and professional ethics were not robust enough to resist subversion of quality assurance and contractual due process in infrastructure provision;	-	EU's major road projects under EDF-9 and 10 tend to confirm that quality assurance and contractual due process in infrastructure provision are widely unsatisfactory. Closer analysis of the several technical audits and experts' audits of contractors' claims does not show specifically weaknesses in the management of the contracts by the administration (Ageroute). Audits assessed that contractors and supervising engineers (both financed by the EU) bear equal responsibility for the defaults.
7	There was little political support and commitment to technical assistance activities and this has manifested in reduced TA support to national PFM reform	N/A	
8	Information overload on SPSP and SBS inhibited accessibility and take-up of lessons learned by EUDs	N/A	

EQ. 3 To what extent has EU institutional support and capacity building resulted in enhanced transport sector management in Africa?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	Adequate institutional resources and capacities ensure that network conditions will continue to be maintained or improve;	+	The Road Fund (FERA) as well as the Road Agency (Ageroute) are adequately staffed with a respectable level of technical and administrative capacities. The key weaknesses are quality control and organisation but not at a level that would hinder proper programming and execution of the maintenance programmes. The EU supported the road management system of Ageroute. The system is now running without external support and provides timely the expected products.

	Hypotheses	Agree	Situation in-country was different – as elaborated below
2	There are realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);	-	Maintenance of rural roads was passed to local authorities in line with the decentralisation strategy of the Government, however without the corresponding financial transfers. The strategy is therefore not realistic.
3	Management decisions are based on technical appreciation of base data of improving quality;	+/-	
4	Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments);	-	Though initially considered, support to the regional rail corridor (to Bamako) and rural roads was abandoned during EDF-11 programming, because the sector focus will be shifted towards energy.
5	National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;	- -	In contradiction with what is written in the sector policy document, the GOS is now announcing huge investments (highways, airports…) that were not prioritised in programming. The availability of funding from China causes abandoning the discipline of economic justification and long-term planning. Available resources or borrowing capacity is utilized for mega projects with high political visibility rather than for projects being part of the financial framework of the sector plans.
6	Transaction costs are reducing;	-	In Senegal, sector donors did not create a coordination group, nor push for joint missions and reporting. The transaction costs are stable but are not specifically denounced by the GOS.
7	Anti-corruption measures are being actively pursued in the transport sector together with appropriate monitoring and control measures;	-	Anti-corruption measures are not specifically pursued. Corruption is not viewed as prevalent in sector management or at least it is not a key issue.
8	Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector	-	Cross-cutting issues are selectively promoted (mainly environment) and not mainstreamed.

EQ.4. To what extent has EU sector support contributed to sustainable and affordable transport infrastructure in Africa?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs		Allocations to maintenance funding increased with the establishment of FERA (2nd generation Road Fund), promoted by the EU and the World Bank. Its operationalisation was the main object of the conditions before signing the Financing agreement of the EDF-9 road project. However, the level of the fuel levy is still too low to cover maintenance needs. Half of the total annual budget of 50 billion FCFA is sourced from the national budget. The GOS demonstrated a firm commitment to provide funds regularly to FERA, and those contributions were indeed on the increase over the years. The coverage of periodic and current maintenance needs of the classified network is achieved at 70%. The maintenance of the rural network was transferred to the local communities without corresponding financial transfers. The share and extent of the paved classified

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	(and all available funding is actually disbursed);		network is steadily increasing, with an ambitious highways programme. However no increase of FERA resources to maintain the extended network – partly financed by multilateral donors and increasingly by bilaterals – is foreseen. Tolls are not installed on major paved roads, only on one new highway (suburban, towards the new Dakar airport). Maintenance is implemented by Ageroute, a road agency. Funding available for maintenance has actually been disbursed in full.
2	National records are available that systematically record road service levels/ conditions linked to records of maintenance interventions (routine and periodic)	+/-	Ageroute is progressively setting up a road data management system. During the evaluation period, a road inventory (done every 3 years) was outsourced twice to a private engineering firm. An annual update was carried out by the regional departments based on visual inspection of the (classified) network. Ageroute is planning to further internalise the process and purchase a bump integrator to systematise the recording of physical degradations. Automation of traffic counts is also on-going.
3	Adequacy of fuel levy contributions are systematically and regularly reviewed (eg annually) and mechanisms exist for periodic adjustments of such levies;	-	Fuel levy has not been adjusted since it was establishment as the sole FERA revenue in 2006. GOS has demonstrated high sensitivity to socio-political pressures and haulers' lobbying. Recourse to getting funds from the general taxation system is more comfortable in this regard. An AGEROUTE study on adjusting the FERA revenue system has considered diversifying the sources of revenues. Although the amount of revenue from other sources might be marginal, the option of exploring alternative revenues is preferred rather than adjusting fuel levies that is feared to be unpopular.
4	Regular technical and financial audits of national sector PFM, procurement and contract cycle management demonstrate probity	-	Technical and financial audits are still funded by donors, particularly by the EU funded projects. Probity of the national PFM system in general and procurement and contract cycle management in particular is not explicitly demonstrated by targeted audits, but there is no major suspicion of corruption. Apart from that, inefficiencies are acknowledged by all.
5	Institutional capacity needs are regularly assessed and systems are in place to match capacities and resources to sector management needs	-	Since the establishment of FERA (in 2005) and Ageroute (in 2010), the donors had the impression that a major capacity increase had taken place compared to the period when the Ministry of Infrastructure and Transport. Neither the EU nor the World Bank undertook a technical and organisational audit despite problems faced during execution of road projects (tough the EUD shared its comments and recommendations with Ageroute). Local capacity deficits (procurement, programming) were addressed by the EU supported by a limited number of TA missions. Wider organisational inefficiencies were not addressed, notably the fact that the agency was still to a large extent run as a ministry – with salaries increased by 300%.
6	Transport regulators are functional and effective and rulings are enforced without undue political interference	-	Axle load controls are not monitored by the transport regulator (Direction des Transports de Marchandises) but by the road department (Direction des routes) in the same ministry. Axle load monitoring was given under concession to a private firm (Afrique Pesage), which is however implementing the monitoring in a favourable way for the haulers: accepting +20% of authorized weight, reducing penalties by 80% and not enforcing to discharge overloaded trucks. The EU imposed conditions as regards control of overloading before signing the latest road project under EDF-10 (Passy-Sokone). Roughly 60% to 80% of the trucks linking Dakar and Bamako are overloaded.

EQ. 5. To what extent has EU support to the transport sector in Africa contributed to sustainable social and economic development?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.	+	GoS considers the Dakar – Bamako corridor as a growth pole and its development is thus a high priority. A shift from a focus on improving regional transport networks to rural roads is therefore not likely. On the other hand, rehabilitation of main roads was – to a limited extent – accompanied by development of the adjoining feeder roads, which is a more balanced approach than an unique focus on regional corridors. Some so-called "regional corridors" do not have sufficient traffic justifying the rehabilitations funded by the EU (for example Saint-Louis – Rosso – Richard Toll, for which the EU contributed € 54million under EDF-10). The same amount utilised for the rural roads network would have produced more impact (provided the maintenance bottleneck would have been settled)
2	Improvements are taking place, especially in West and Central Africa, to reduce the impact of cartels that have inhibited competition and efficient transport services.	-	Reducing the impact of cartelization was not considered by the EU support to the transport sector. Price cuts after trunk roads rehabilitations have not been identified. The EUD financed lately a study on road haulage (2013) covering sector governance, vehicle operating costs and transport prices but the study did not assess the level of cartelization and its incidence on transport prices. Comparison of Vehicle Operating Costs (VOC) and prices of freight transport on the Dakar – Bamako corridor concluded however that prices (average of 34 FCFA/ton.km = 0.05€ per ton.km) were close to "apparent" VOCs (ranging from 20 to 30 FCFA per ton.km depending on the extent of overloading). Apparent VOCs do not take into account amortization nor major repairs. Integrating all actual costs indicates that most haulage operations are at a loss. This assessment, confirmed in several countries of West Africa (Mauritania, Ivory Coast…) explains the lack of reactivity of haulage prices when roads are improved and explains also the systematic overloading. In Senegal moreover, Malian and Senegalese haulers are in open competition, and both are in competition with rail transport. Cartelization is thus not an issue in the road haulage sector in Senegal.
3	Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.	+	Only limited data is available on transport services. All data collected relate to infrastructure management rather than transport regulation. Capacities in this regard have not been developed and the Department for Transport in the Ministry of infrastructure and transport (MIT) is weak. It is mainly focus on issuing licences and, when coming to address transport regulation, usually merely reflects the views of transporters' unions.
4	Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.	+	The EU introduced, for the first time in Senegal, road safety audits in its latest road projects. Safety signalling is minimal.
5	Adoption of a regional approach to traffic safety would pay dividends in	?	

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	terms of ensuring that best practice is disseminated.		
6	The role of the EU has been recognized by sector stakeholders.	+++	
7	Development activities have taken place that would not have occurred without EU funding	+++	It is widely recognised that all EU's transport sector interventions (projects and policy dialogue) were critical for development activities as well as for institutional restructuring and capacity building. This conclusion is shared by the national partners and the other donors and observers interviewed.
8	EU is reluctant to engage in support to urban transport in SSA	+/-	An EU project (EDF-10, € 5 million) supported paving of urban roads in Ziguinchor (Casamance) and Dakar. The project utilised labour-based methods and concrete pavement. The project was only focussed on improving infrastructure. The urban transport itself (Bus rapid Transit or other) was not considered.

EQ. 6. To what extent do EU transport sector support policies, strategies and interventions contribute explicitly to poverty reduction in Africa?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	EU programming and project intervention design do not take into account lessons learned from an expanding body of research on factors influencing poverty impact	+	The identification and formulation process and joint informal pre-identification stages with national partners and GOS high level decision makers do not leave much room for consulting the most recent body of research on poverty. Moreover in Senegal, the government was regularly involved in political election processes where constructing of new main roads was of much higher interest than rural roads. Local authorities and/or the civil society are potentially much more interested in rural and urban roads, but they are not directly involved in EU programming: the EUD deals primarily with national authorities.
2	Targeting of the poorest and most vulnerable people and equity considerations were not actually identified or intended by EU sector policy and programming documents.	+	In addition to the above, EU sector policy and programming procedures and processes do not favour targeting the poorest and most vulnerable people. The policy dialogue targets were kept unchanged since the 90s, long before poverty reduction and equity considerations arose as the key rationale of aid. Effects of transport sector projects were implicitly expected to trickle-down to the vulnerable groups.
3	EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.	+	EU support focused on infrastructure preservation, notably by addressing the axle load control problem at regional (ECOWAS Règlement 14) and national level (conditionality for the Passy-Sokone road, EDF-10, €15 million). The overloading problem could probably have been addressed more effectively in a package addressing more transport services weaknesses, among which the organisation of the haulers which behaves like a cartel (particularly on prices). A more comprehensive approach might have been more effective and less confrontational.
4	Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs	-	Environmental and social assessments were consistently undertaken during the preparation of the major EU funded road projects in Senegal (notably Kaolack-Tambacounda). The ToR of the ESIAs were however not requiring to

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	were marginalised (or dropped altogether) during construction phases		explore specifically the needs of the vulnerable groups. For the Kaolack-Tambacounda project, the two main recommendations for contributing to socio-economic development were improvement of neighbouring rural roads and construction of bus stations and truck parking lots in 3 cities. If the link with vulnerable groups can be evidenced to some extent for rural roads, it is hard to do it for the other projects.
5	No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors	+	The EU focus on road transport existed already before the poverty alleviation focus of the EU aid. The initial focus on poverty alleviation was preserved with cosmetic formulations in the logical frameworks of the transport projects. In Senegal, the GOS continued to request to allocate most EDF funds to road network modernization in the framework of its vision on economic development. The balance within the sector between trunk, rural and urban roads could have been adjusted based on impact and cost effectiveness, as demonstrated in the context of EDF-10 in Senegal.

EQ. 7. To what extent has EU cooperation at regional levels resulted in better facilitation of movement of people and freight?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	The lessons learnt on regional transport facilitation and corridor management in East Africa were disseminated with EUDs in other African regions;	-	Transport facilitation and corridor management are victims of the institutional weaknesses of the Department of road transport in the Ministry of Infrastructure and Transport. Moreover, the Department is very occupied with managing haulers' strikes or threats of strikes and has therefore limited time and capacity to deal with regional transport facilitation.
2	The performance monitoring systems set in place with EU support along all regional corridors allow an appropriate measure of outputs/outcomes of EU interventions (traffic volumes, export development, job creation, regional integration, integration into the world economy);		The EU did not support setting up a performance monitoring system in Senegal. The COSEC (Conseil des Chargeurs) is leading an unilateral initiative to establish such a system along the Dakar – Bamako corridor, with limited effective development. Performance is defined by COSEC relatively narrowly (transit time, waiting time...).
3	RIPs and NIPs were kept complementary, synergetic and synchronized by EUDs (regional/national) at programming as well as at implementation phases;		The NIPs in Senegal evolved independently to RIPs, with major road corridor projects harmonized to regional plans. RIPs provide at best an overall framework, to a large extent limited to a broad objective to contribute to developing regional corridors. The other aspects of transport facilitation, of some importance for effective regional integration, were not supported on NIP. Even axle-load harmonized controls, a regional agreement dated back to 2004, provides a broad framework, with significant flexibilities in enforcing regulations translated into the national legislation.
4	The tools available to EUDs (policy dialogue, joint programming) were appropriate to ensure translation into national legislations of agreements acted by RECs	+	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 the Senegalese legislations of the axle load controls. The inclusive preparation of FAs and then the postponement of their signature until effectively

	Hypotheses	Agree	Situation in-country was different – as elaborated below
			implemented, was 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. A policy dialogue on one single mega road project or SBS would not have had the same gains.
5	The change introduced by EDF11 programming regarding the EU strategy for the transport sector was resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition	+	The shift is resented as a unilateral action by the EU, based on an arbitrary decision of the then Commissioner rather than a rational evolution prepared by an exit strategy. Sector partners are considering other options for external support (AfDB, World Bank and bilateral programmes, in particular with China).

EQ. 8. Were selection, planning and prioritisation procedures for EU transport sector support interventions in Africa appropriate?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values;	+	Financial envelops defined during NIP programming determine the design and implementation of road projects. The initial envelop is generally not based on recent or updated design studies but on rough estimates. With the signature of the financing agreement, the realisation of a transport link between two locations becomes a political commitment. Subsequently, the available financial envelope strongly influences the technical specfications. Technical specifications have to be adjusted downward in order to fit the budget. Technical specifications are reduced to minimum requirements, justified by theoretical hypotheses about the level and nature of traffic (no overloading) and the capacity of the GoS to maintain the road. Economic studies estimated Internal Rates of Return of about 12% (Kaolack – Tambacounda), which is generally seen as the bottom line.
2	That feasibility studies do not consider options for EU support to the transport sector, only the limited feasibility and viability of a pre-determined transport sector intervention;	+	Road projects were pre-identified in initial dialogues with the Government of Senegal on EDF programming. Only projects formulated towards the end of EDF periods, often using balances of funds to be re-allocated after the mid-term reviews of NIPs, could be used in a more targeted and pragmatic way.
3	Time and cost over-runs have become systematic but in a range comparable to other similar projects funded by other donors (e.g. World Bank and AfDB).	+	
4	The specific dis-enabling environment of Africa for works in transport infrastructure is insufficiently addressed by EU procurement	+++	In almost all the major EDF-9 and 10 road projects, the selected contractors and supervising engineers failed to provide the required level of services. Medium (Kaolack-Mbirkelane) to severe (Mbirkelane-Tambacounda) rapid

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	regulations and contract management procedures		degradations occurred leading to costly claims, arbitration and court cases. The key problems with the hired international contractors were technical in nature (breakdowns of major equipment). For supervising engineers, the replacement of CVs utilized to win the bid by experts having a lower profiles and/or missing the required authority (but with a good CV) reduced significantly their capacity to manage the execution of works. The EUD was unable to sort out the issues faced, trapped in the role of observer as stipulated by the EU regulations under EDF-10. Moreover Ageroute has not demonstrated to have a strong management capacity, and was often under pressure of the Government which was engaged in election campaigns. Similar shortcomings are identified with mobilising adequate expertise through framework contracts. The EUD tried to mitigate the expertise mismatches of false CVs by establishing contacts with EUDs having worked recently with the experts. Avoiding a too short time recruitment schedule was another solution for attracting qualified expertise, usually already engaged in other assignments for several weeks or months. Notwithstanding the above shortcomings on processes and results, resources allocated to contract management in the EUD are steadily decreasing, increasing the gap between input requirements linked to poor sector governance and capacity to delivery targeted and timely support and control.
5	Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs	+	GOS demands focused on the trunk roads network. EU projects associated the rehabilitation and/or construction of some rural or feeder roads to trunk road upgrading. The EU funded also a rural roads project in Casamance that was linked with a request from the GOS to contribute to pacification of the region. The urban roads project in Dakar and Ziguinchor is another example of the on-going diversification of the EU transport sector portfolio under EDF-10. There is no shortage of competencies in the EUD for rural or urban roads. It is relatively easy to extend the know-how acquired with trunk roads to other kinds of road.
6	EDF11 programming is changing the focus from trunk to rural roads	+	Change foreseen but not yet confirmed.

EQ. 9. To what extent were EU aid modalities, cooperation frameworks and implementation mechanisms, and legal instruments appropriate for support to the transport sectors of partner countries?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership;	N/A	SBS was contemplated for some time but then abandoned.
2	Governments' capacity to adjust to newly introduced preferred aid modalities with technical assistance	N/A	

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	support funded by the EU that did not anticipate the move, was not proportionated to actual needs and unable to treat root causes of capacity shortcomings (civil service reform, PFM…);		
3	Adjustments of EU approaches and use of mix of instruments were more in response to emergencies (conflicts, civil unrest) rather than focused on capacity shortcomings;	N/A	
4	Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.		The only blending project pre-identified by the EUD in collaboration with the EIB is the Rosso bridge linking Senegal to Mauritania. Preparation has not yet started. The EUD does not have concern about its capacity in project implementation in the infrastructure sector, whatever the financial plan.

EQ. 10. To what extent were EU procedures and resources appropriate for support to the transport sectors of partner countries?

	Hypotheses	Agree	Situation in-country was different – as elaborated below
1	EUDs have (in)adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities;	+	In Senegal, only the project approach was used. Staff of the EUD does not have shortage of human resources to manage Financing Agreements and ensure periodic site visits.
2	Operations budgets (of EUDs and EU HQ) are sufficient to permit necessary travel of technical staff to support interventions;	+	Operational budgets of the EUD in Dakar are sufficient to ensure proper follow-up of EU projects on-site. Other tasks such as policy dialogue and coordination take place in Dakar itself.
3	Measures for dissemination of relevant lessons learned and technical support to EUDs are adequate;	+	Much is left to the initiative of each programme manager. Most of the documentation on evaluations and lessons learnt is either readily available on intranet or easily shared between delegations. Proactive sharing of information by the Headquarters generally takes place during project preparation (usually before review by the Quality Support Group) and during annual meetings of the infrastructure sections. During most of the evaluation period, the policy framework and best practices pushed for by Unit 6, were rather clear. Since EU's abrupt exit of the transport sector, the leadership has considerably scaled down.
4	Capacity needs for responsibilities and activities involved in sector support portfolios have not been assessed and are not reviewed on a programme-by-programme basis;		Capacity needs for road projects are not that diverse and the EUD staff in Dakar was remarkably stable during most of the years 2005-2013. The EU procedures and requirements are well managed by an experienced staff.
5	There is consistency between the staffing strategies of different	?	No information available at country level.

	Hypotheses	Agree	Situation in-country was different – as elaborated below
	directorates		

10.6 Conclusions

The EUD seized the opportunity of the presence of a group of reformers in the road sector administration, and made cleverly use of the possibility to impose conditions identified in draft Financing Agreements of road projects of regional and national importance, to contribute to significant sector reforms (establishment and operationalisation of the Road Fund and the Road Agency, axle-load controls). The key success factor was a step by step approach, based on existing dynamics already activated by reform champions within the government. Another key factor was setting the (start of) implementation of the government's commitments as a condition, before the Financing Agreement could be signed, to be followed later on by launching procurement.

The largest share of the EU contribution to the transport sector under EDF-9 and 10 (and before) was allocated to major national transport links, having in addition also a regional function. Although the political turmoil in Ivory Coast was the main factor diverting regional transit towards Dakar, the EU road upgrading projects contributed clearly to facilitating the development of the freight traffic between Dakar Port and Mali.

The incidence of the EU funded transport projects on development of domestic freight across the country is often not sufficiently valued but might have a longer term effect on economic development in Senegal. That impact may become even more important than the regional impact, . considering the increasingly harsh competition between several regional corridors financed by donors in the sub-region (notably the Bamako-Abidjan corridor).

Another strength demonstrated by the EU in Senegal was the coverage of both rural and urban road transport infrastructure, with sizeable achievements in terms of impacts, notably as regards the rural roads.

EU road projects under EDF-9 faced major problems during implementation with the contractors, particularly in the Kaolack-Tambacounda project. The problems were fixed by agreement with two of the three contractors, but there has been a court case with the third contractor. Apart from technical arguments, the main problem was the weakness of contract management by Ageroute, notwithstanding repeated warnings by the EUD that followed closely the works as observer. The EU supported the government to settle the disputes by hiring several technical audits. However, the EU has limited in-house capacity to manage such situations (having court cases), which is becoming increasingly common (cf. Benin).

11. Mauretania case study

Sommaire

Abréviations

AO	Appel d'offres
AROTR	Autorité de Régulation et d'Organisation des Transports Routiers
BDR	Base des données routières
BGR	Bureau de gestion routière
BID	Banque islamique de développement
BM	Banque mondiale
BNT	Bureau National des Transports
CA	Conseil d'Administration
CAON	Cellule d'Appui à l'Ordonnateur National
CDMT	Cadre des Dépenses à Moyen Terme
CE	Commission européenne
CPMPSI	Commission de Passation des Marchés Publics, Secteur des Infrastructures
CSLP	Cadre Stratégique de Lutte contre la Pauvreté
DAO	Dossier d 'Appel d'Offres
DEPC	Direction des Etudes, de la Planification et de la Coordination au MET
DGTT	Direction Générale des Transports Terrestres
DIT	Direction des Infrastructures des Transports
DUE	Délégation de l'Union européenne
DP	Devis-programmes
ENER	Etablissement National de l'Entretien Routier
FADES	Fonds Arabe pour le Développement Economique et Social
FSER	Fonds de Sécurité et d'Entretien Routier
FED	Fonds Européen de Développement
LNTP	Laboratoire National des Travaux Publics
MAED	Ministère des Affaires Economiques et du Développement
MET	Ministère de l'Equipement et des Transports
ON	Ordonnateur National
PAIST	Programme d'appui institutionnel au secteur des transports
PIB	Produit Intérieur Brut
PIN	Programme Indicatif National
PME	Petites et moyennes entreprise
PNT	Plan National des Transports
PST	Plan Sectoriel des Transports
QE	Question d'Evaluation
RIM	République Islamique de Mauritanie
SNIM	Société Nationale Industrielle et Minières
SSTR	Sous-secteur des Transports Routiers
TdRs	Termes de Références
UE	Union Européenne
UM	Unité Monétaire Mauritanienne (Ouguiya)

Taux de change : 1 Euro = 350 UM (11.05.2015)

11.1. Introduction

But de la note sur le pays

L'étude du cas de la Mauritanie prolonge et complète la collecte des données (documents et entretiens) sur les appuis de l'UE au secteur de transport durant la période 2005-2013 ainsi que sur le secteur lui-même. Les projets significatifs ont été sélectionnés pour des analyses plus détaillées, avec le concours de la DUE et de l'administration, pour une analyse détaillée puis renseignés dans les Fiches Projet.

Les informations collectées permettent de valider ou non les hypothèses formulées dans le Rapport Documentaire de cette évaluation, d'analyser les politiques et stratégies de transport en Mauritanie et les politiques et stratégies de coopération de l'UE en Mauritanie, de mettre en évidence les principales constatations (*findings*) sur le secteur de transport, de renseigner les Fiches Projets/programmes significatifs et d'évaluer les interventions de l'UE sur la période 2005-2013.

La Mauritanie comme étude de cas

La République Islamique de Mauritanie (RIM) est un pays désertique, semi-aride et doté d'une longue façade marine très poissonneuse. Au plan régional, la RIM est située entre le Maghreb et l'Afrique subsaharienne. Ainsi, en matière de transport, les axes de transit routier international sont orientés vers les pays de la CEDEAO (le Sénégal et le Mali spécifiquement) et vers les pays de l'Union du Maghreb Arabe (UMA).

Depuis l'indépendance, la Mauritanie entreprend de grands efforts pour développer son infrastructure de transport. Des investissements routiers ont été réalisés. Une voie ferrée dans le nord relie les mines de fer de Zouérate au port minéralier de Nouadhibou. Un port en eau profonde a été créé à Nouakchott et des investissements importants ont été réalisés dans le domaine aéroportuaire. Une politique active de désenclavement est menée.

L'UE est le principal bailleur dans le secteur de transport. L'ensemble des projets routiers de l'UE, depuis le début de la coopération Mauritano – Européenne, représente 35% des routes bitumées du pays. Avec l'appui de l'UE, l'entretien routier a été réorganisé et confié à un organisme parapublic indépendant, l'Etablissement National d'Entretien Routier (ENER), avec des financements sécurisés.

11.2. Méthodologie de collecte des données

La méthodologie de collecte des données s'appuyait sur l'analyse des documents et les entretiens individuels ou en groupe. La collecte des documents et les entretiens ont été réalisés auprès des principaux acteurs et organismes ci-après : la Délégation de l'UE en Mauritanie; les différentes directions du Ministère de l'Equipement et des Transports impliquées dans les projets/programmes de l'UE ; les fédérations des transporteurs routiers ; les bureaux de contrôle et surveillance et la Banque Mondiale.

Mission d'évaluation :

- la mission en Mauritanie s'est déroulée du 04 au 13 avril 2015 ;
- La mission était composée de M. Basile KEITA (chef mission) et M. Abdeljelil Mohamed Abdellahi (expert transport local).

Types de documents collectés:

- documents de politiques et de stratégies de développement du secteur de transports ;

- documents de stratégies de coopération de l'UE en Mauritanie ;
- documents contractuels (convention de financement, contrats de marchés, etc.) ;
- rapports d'évaluation des interventions de l'UE ;
- rapports d'études et de statistiques ;
- rapports et documents d'autres bailleurs de fonds ;

Les entretiens :
La mission a eu des entretiens avec :
- les responsables de la DUE et de la Cellule d'Appui à l'Ordonnateur National ;
- les responsables des administrations mauritaniennes impliquées dans les projets financés par l'UE ;
- les organismes parapublics : Etablissement National d'Entretien Routier (ENER) et l'Autorité de Régulation et d'Organisation des Transports Routiers;
- le représentant de la Banque Mondiale.

Modalités de traitement de l'information :
- Les principaux entretiens ont été retranscrits pour une meilleure exploitation.
- Les projets significatifs ont été sélectionnés puis renseignés dans les Fiches Projets.

Limites et contraintes:
- problème de « mémoire » au niveau des organismes : les personnalités ayant conçu ou mis en œuvre les projets de l'UE, tant au niveau de la DUE qu'au niveau de l'administration, étaient soit absentes (mutations) ou affectées à d'autres fonctions. Les documents de suivi et d'évaluation permettent de combler cette insuffisance ;
- la Mauritanie souffre d'un manque général de données statistiques sur le secteur de transport (réseau routier, statistiques transport).

11.3. L'appui de l'UE au secteur de transport en Maurétanie

La stratégie d'intervention de l'UE dans le ***8ème FED (1997-2000)*** s'était concentrée sur trois secteurs : (i) le secteur rural et la préservation de l'environnement, (ii) les infrastructures, l'aménagement du territoire et la décentralisation, et (iii) le renforcement des capacités de gestion de l'économie.

En matière de l'infrastructure, l'aménagement du territoire et la décentralisation, les objectifs des interventions de l'UE étaient les suivants :
- faciliter le développement économique et social du pays par l'amélioration des **infrastructures de transport** et de communication et d'autre part par le renforcement de l'infrastructure sociale et les services en zone rurale et semi urbaine ;
- **garantir la pérennité des infrastructures réalisée** du point de vue de l'entretien et de la viabilité environnementale ;
- accompagner le développement des structures de gouvernement local surtout en matière de planification et de gestion.

Dans la stratégie d'intervention du ***9ème FED (2001-2007)***, il y avait deux secteurs de concentration : (i) l'infrastructure et le transport et (ii) le renforcement des capacités. En matière d'infrastructure et de transport, les objectifs de la stratégie de coopération étaient les suivants :
- une meilleure intégration du territoire national, par la complémentarité et la spécialisation des régions ;
- la diversification de l'économie par le développement des activités agricoles et d'élevage en facilitant l'évacuation des produits du cru et en améliorant l'accès aux marchés

urbains, favorisant ainsi la lutte contre la pauvreté qui est surtout présente en milieu rural ;
- le développement des échanges, entraînant une réduction des coûts d'approvisionnement des centres urbains ;
- un allégement des coûts des facteurs de production ;
- un meilleur accès aux services sociaux, en particulier pour les femmes ;
- une sécurité alimentaire améliorée ;
- une intégration régionale effective aussi bien vers les pays de la CEDEAO que vers les pays de l'UMA ;
- intervention au niveau du port minéralier de Nouhadibou (Sysmin) et au niveau du port de commerce de Nouakchott (fonds Stabex).

Les mesures principales à prendre par le Gouvernement en matière de la politique du secteur de transport étaient :
- mieux organiser le secteur en définissant des normes (charge à l'essieu, adaptation du code de la route) et des procédures (réorganisation du service des cartes grises) ;
- rendre le secteur plus efficace en favorisant la concurrence ;
- améliorer l'entretien routier par le redressement de l'Etablissement National d'Entretien Routier (ENER) et la mise en œuvre du Bureau de Gestion routière (BGR).

L'objectif de la stratégie de coopération de l'UE du ***10ème FED (2008-2013)*** était d'appuyer la mise en œuvre de la stratégie de lutte contre la pauvreté du gouvernement mauritanien par (i) un appui renforcé à la gouvernance, (ii) des interventions ciblées dans le domaine de l'intégration régionale et des transports et (iii) une contribution dans les secteurs jugés vitaux pour le pays (OMD, sécurité alimentaire).

En matière d'intégration régionale et des transports, les interventions s'inscrivent en continuité avec les appuis apportés jusqu'ici par l'UE au secteur de transport depuis les années 1990. Les objectifs du 10ème FED en matière de l'intégration régionale et des transports sont les suivants :
- appui à la programmation d'actions de l'Etat prévues dans le cadre du PST ;
- contribution au développement des axes d'intégration régionale ;
- appui à l'amélioration de la gestion des routes (planification, entretien, sécurité) ;
- contribution à la réduction des coûts du transport, qui facilitera la mobilité des personnes et des biens ;
- accompagnement de l'exécution de la stratégie définie par le PST 2007-2012 pour sa partie transports terrestres.

Les principaux engagements du Gouvernement en la matière sont :
- développement et maintenance d'infrastructures routières fiables, susceptibles de contribuer à la lutte contre la pauvreté
- appréciation environnemental appropriée (étude sectorielles ou études d'impact).

Dans le Programme Indicatif National du ***11ème FED (2014-2020)***, il y a trois secteurs de concentration : (i) sécurité alimentaire et agriculture durable; (ii) état de droit et (iii) santé. Le secteur de l'infrastructure et du transport n'est donc plus un secteur de concentration, mais des appuis ponctuels dans le domaine de l'infrastructure et du transport peuvent être fournis dans le cadre du premier secteur de concentration (sécurité alimentaire et agriculture durable).

Les projets de transport appuyés financièrement par l'UE pendant les années 2005-2013 sont listés dans le tableau 11.1. Un montant total d'environ € 193 million a été contracté et un montant total de € 149 million effectivement payé pendant ces années pour une dizaine de projets et programmes.

Tableau 11.1. Montants contractés et payés des projets de transport financés par l'UE en Maurétanie de 2005 à 2013 (en milliers de €)

Code de la Décision	Titre de la Décision	Alloué	Contracté	Payé
FED 8				
FED/2002/015-994	Renouvellement du port minéralier à Nuaoadhibou	37.093	37.038	36.295
Total FED 8		**37.093**	**37.038**	**36.295**
FED 9				
FED/2003/016-250	Route Rosso-Boghe, Lot 1, Rosso-Lexeiba II	37.652	37.652	37.652
FED/2004/016-610	Facilité de coopération technique (FCT)	3.355	862	861.916
FED/2005/020-662	Assistance technique auprès du MET et du ENER ADONIS N.19412	2.022	2.022	2.022
FED/2007/018-769	Appui à la réforme du sous-secteur du transport terrestre en Mauritanie	2.200	1.105	674
FED/2007/018-976	Construction de la route Kaédi-Gouraye	66.600	66.225	65.569
FED/2007/020-787	Facilité de coopération technique (FCT) - II	2.011	542	542
Total FED 9		**113.840**	**108.407**	**107.320**
FED 10				
FED/2010/022-386	Programme d'Appui à la Mise en œuvre du 10ème FED	9.000	459	459
FED/2011/022-437	Reconstruction de la route Nouakchott Rosso, premier allotissement	52.816	47.017	4.840
FED/2012/023-257	Appui Institutionnel au Secteur des Transports	6.000	156	118
Total FED 10		**67.816**	**47.633**	**5.417**
TOTAL 2005-2013		**218.749**	**193.078**	**149.032**

Source : CRIS, juin 2014.
Note 1 : Les projets du FED-8 et FED-9 mentionnés dans ce tableau ne concernent que les projets toujours en cours d'exécution dans la période 2005-2013.

11.4. Description brève du secteur de transport de la Maurétanie

Le contexte stratégique

La politique de développement et de lutte contre la pauvreté de la Mauritanie est définie dans le Document Cadre Stratégique de Lutte contre la Pauvreté (DCSLP) pour la période 2001-2015. Les politiques et stratégie de développement des transports du pays s'inscrit dans le cadre des orientations du DCSLP. Durant la période 2005 à 2013, les axes des stratégies d'intervention de coopération de l'UE en Mauritanie, pour les 8ème FED, 9ème FED, 10ème FED et 11ème FED, s'inscrivent dans les orientations du DCSLP et des politiques de transports.

Le système de transport de la Mauritanie comprend tous les modes de transport (maritime, fluvial, aérien, ferroviaire et routier). Au sein de l'ensemble du système de transport, le mode dominant reste le transport routier, sur lequel a porté l'essentiel des interventions de l'UE durant la période 2000-2013. Les autres modes ont encore un rôle marginal et devraient le rester dans les années à venir. Les actions de l'UE dans le domaine portuaire se situent à Nouadhibou au niveau du port commercial et du port minéralier ; celui-ci s'intègre plus dans

la stratégie industrielle de la Société Nationale Industrielle et Minière (SNIM)[86] que dans la politique de transport du pays.

Le transport routier

La longueur du **réseau routier** s'élevait à 9189 km en 2005, dont 2813 km de routes bitumées, soit 30% du réseau. En 2010, le réseau routier répertorié totalisait 11047 km, dont 3069 km (28%) de routes revêtues, 1134 km (10%) de routes non revêtues (routes en terre améliorées et pistes aménagées) et 6844 km (62%) de pistes ordinaires[87].

En 2015, le réseau routier bitumé a un linéaire totalisant 5303 km et la longueur du réseau de routes non revêtues s'élève à 1134 km. Le développement du réseau des routes bitumées a été important entre 2010 et 2015 (tableau ci-après). La longueur des routes bitumées a presque doublé entre 2006 et 2015.

Tableau 11.2: Evolution du réseau des routes bitumées et en terre

Type de route	Longueur en km			
	2005	2006	2010	2015
Route bitumée	2 813	2 844	3 069	5 303
Route en terre	nd	994	1 134	1 134
Total	**nd**	**3 838**	**4 203**	**6 437**

Sources : Actualisation du PST en 2006, DIT 2015, ENER 2015

Les principales routes revêtues convergent vers la ville de Nouakchott (capitale du pays) qui polarise les principaux flux de transport de voyageurs et de marchandises. A l'exception de la ville de Zouerate dont la desserte est assurée par le chemin de fer minéralier, tous les chefs-lieux de régions (Wilaya) sont reliés à Nouakchott par des routes revêtues.

Depuis 1996 **l'entretien du réseau routier** est assuré par l'Etablissement National d'Entretien Routier (ENER), créé en 1994 avec l'appui de l'UE[88]. Le tableau ci-après présente l'évolution de la longueur du réseau routier affecté à l'ENER en matière d'entretien. On observe une augmentation soutenu du réseau affecté à l'ENER, mais rapporté au réseau des routes bitumées et en terre, son pourcentage a baissé. En 2015, le réseau routier affecté à l'ENER représente 64% du réseau total, contre 79% en 2006.

Tableau 11.3 : Evolution du réseau routier affecté à l'ENER en matière d'entretien, en km

Type de route	Contrat-Programme			
	2001-2003	2004-2006	2010-2012	2013-2015
Route bitumée	2 070	2 077	2 933	3 074
Route en terre	875	968	937	1 024
Total	**2 945**	**3 045**	**3 869**	**4 098**

Source : ENER 2015

[86] Le projet de «Renouvellement du Port Minéralier de Nouadhibou» de l'UE (8 ACP MAU 46), a été conçu pour appuyer le Programme de Développement et Modernisation (PDM) de la Société Nationale Industrielle et Minière (SNIM), plus précisément la deuxième composante de ce projet relative au port minéralier.

[87] Il n'y a pas de données disponibles sur la longueur de l'ensemble du réseau depuis 2010. La DIT/MET ne dispose de données que sur les routes bitumées et en terre.

[88] L'intervention de l'UE a contribué à la création de l'Etablissement Nationale d'Entretien Routier (ENER) en 1994, dans le cadre du « Deuxième programme Routier, 7 ACP MAU 018 » ayant pour objectif la réorganisation du système d'entretien routier en Mauritanie.

L'organisation financière de l'entretien routier en Mauritanie, mise en place avec l'appui de l'UE, est originale. Depuis 2000, l'entretien du réseau routier est financé conjointement par le budget de l'Etat de l'ordre de 800 millions d'UM par an (soit environ € 2,3 million) et l'UE dans le cadre du SYSMIN (voir encadré 11.1)[89].

ENCADRE 11.1 : CADRE LEGAL DU SYSTEME SYSMIN

Le SYSMIN provient d'un accord signé le 26 juillet 1995, entre la République Islamique de Mauritanie et la Commission européenne, relatif à la subvention de 58 millions d'euros accordée à l'Etat destinée au financement du projet de réhabilitation et de rationalisation de la Société Nationale Industrielle et Minière (SNIM). Les fonds de la convention rétrocédés à la SNIM, sous la forme d'un prêt dont les remboursements, y compris les intérêts (3% l'an), sont affectés exclusivement au programme national d'entretien routier. Les modalités d'utilisation du fonds d'entretien routier se font par Devis Programmes annuels approuvés par le Gouvernement et l'UE.

Les modalités de mobilisation des financements de l'UE (SYSMIN) pour l'exécution des travaux d'entretien et de désensablement se font dans le cadre de contrats-programmes de trois ans entre l'Etat et l'ENER et par devis-programmes annuels. Depuis 2001, quatre contrats-programmes ont ainsi été réalisés (2001-2003, 2004-2006, 2007-2009 et 2010-2012) et le cinquième et dernier (2013-2015) est en cours d'exécution. Ces contrats-programmes sont ensuite déclinés en devis-programmes annuels approuvés par le Gouvernement et l'UE. Le versement du fonds SYSMIN se fait dans un compte ouvert à cet effet auprès de la Banque Centrale de Mauritanie au nom de l'Ordonnateur National et intitulé « Fonds d'Entretien Routier – Contreparties SYSMIN Lomé IV » en faveur de l'ENER. Le tableau ci-après récapitule l'évolution du chiffre d'affaire de l'ENER financé par le budget de l'Etat et par le SYSMIN.

Tableau 11.4 : Part du SYSMIN dans le chiffre d'affaire de l'ENER (en million d'UM ; 350 Um = 1 Euro)

Désignation	2008	2009	2010	2011	31/08/12
Devis-programme SYSMIN	988	571	941	1 975	1 496
Devis-Programme Etat	2 267	1 646	1 858	2 074	1 656
Chiffre d'affaire total	5 581	3 109	4 218	6 182	7 031
Part du SYSMIN en %	18	18	22	32	21

Source : ENER

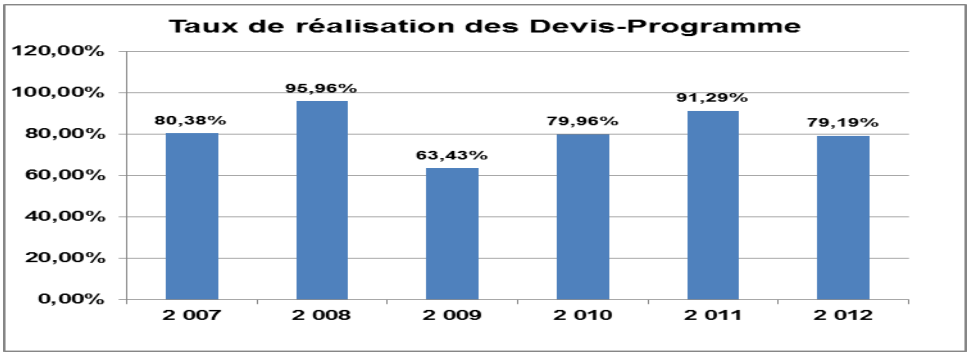
Il n'a pas été possible, à partir des données recueillies, de préciser à quels travaux les chiffres d'affaires provenant du SYSMIN correspondent précisément. A partir de 2016, cependant, la DUE ne participera plus financièrement à l'entretien routier à travers le SYSMIN. D'où la question de la durabilité des investissements routiers après cette date, dans la mesure où le Fonds Routier ne sera pas opérationnel.

Les travaux d'entretien routier exécutés par l'ENER sont les suivants : entretien d'urgence (dégagement des dunes, désensablement de la chaussée), entretien courant (en régie ou par sous-traitance) et entretien périodique. Les activités sont concentrées sur les deux premiers. Les performances de l'entretien routier, dans le cas particulier de la Mauritanie, sont appréciées par deux indicateurs globaux : (i) le nombre de jours d'interruption de trafics

[89] Appui de l'UE à l'entretien routier : au terme d'un accord tripartite (Gouvernement, Union Européenne, SNIM), il a été conclu que le remboursement d'un financement pour la SNIM d'un montant de 58 millions d'euros se ferait dans un compte ouvert à cet effet auprès de la Banque Centrale de Mauritanie au nom de l'Ordonnateur National et intitulé « Fonds d'Entretien Routier – Contreparties SYSMIN Lomé IV »[89] en faveur de l'ENER.

dû à l'ensablement sur l'ensemble du réseau ENER ; (ii) le taux d'exécution des devis-programmes.

Depuis 2001, l'ENER assure correctement le désensablement et l'entretien courant du réseau routier qui lui est affecté: il n'y a pas eu de jour d'interruption de trafics dû à l'ensablement sur l'ensemble du réseau ENER[90]. Les activités sont principalement concentrées sur les travaux d'entretien d'urgence de désensablement et d'entretien courant[91]. Par ailleurs, les niveaux de réalisations des devis-programmes annuels sont en progression comme l'indique le graphique ci-dessous.



Source : ENER

Mais l'ENER ne remplit pas efficacement sa mission d'encadrement et de développement des petites et moyennes entreprises (PME) de travaux d'entretien routier. Il ressort des entretiens menés que la sous-traitance aux entreprises privées a du mal à se développer en raison de la taille réduite des chantiers proposés et de leur dispersion géographique sur le territoire.

Le contrôle de la charge à l'essieu des véhicules poids lourds, sous la responsabilité du Bureau du Contrôle Routier (BCR) au sein de la Direction Générale des Transports Terrestres (DGTT), **n'est pas effectué en Mauritanie**, notamment par manque d'équipements de pesage sur le réseau routier. Il n'y a pas à ce jour de poste de pesage fixe ou de pont bascule installé sur le réseau routier pour assurer le contrôle des tonnages transportés par les véhicules poids lourds. De ce fait, les pratiques de surcharge des camions sont l'une des causes majeures de la dégradation prématurée des routes mauritaniennes.

L'état réel de l'ensemble du réseau n'est pas connu car le Bureau de Gestion Routière (BGR), organisme chargé des relevés des dégradations routières, n'est pas opérationnel. Des relevés sommaires des dégradations sont cependant réalisés par l'ENER sur le réseau qui lui est affecté en vue de l'élaboration des devis-programmes annuels.

Le trafic routier n'est pas bien connu, faute de comptages routiers réguliers. La dernière campagne de comptage sur l'ensemble du réseau routier a été réalisée en 2005. Le trafic annuel moyen journalier maximum sur les routes interurbaines se situerait à 1600 véhicules, avec une moyenne de 16% de poids lourds sur la route Nouakchott- Boutilimit et 6,5% sur la route Nouakchott-Rosso.

[90] Voir également « Evaluation de la stratégie de coopération de la Commission en Mauritanie (1996-2006) », SOFRECO-ECORYS, Rapport final, Décembre 2006

[91] L'ensablement se manifeste sous la forme de zones de dépôt en nappe, de zones en dunes vives isolées et des zones mixtes. Les points d'ensablement se trouvent éparpillés tout au long du réseau routier mauritanien. La présence de dunes sur la route peut être la cause d'accidents mortels. En cas d'ensablement du réseau routier, une intervention rapide est nécessaire. Le dégagement du sable nécessite souvent des engins puissants et adaptés

Le parc automobile n'est pas non plus connu, faute de statistiques fiables. Selon une estimation grossière de la DGTT, le parc automobile serait passé d'une moyenne de 116.450 entre 1980 et 2004 à 169 574 en 2010, soit une augmentation de 53 124. Le parc automobile immatriculé dans la ville de Nouakchott représente à elle seule 119.454 véhicules, soit 80% du total du parc. Ce parc est composé surtout de véhicules acquis d'occasion[92].

Le transport ferroviaire

Le réseau ferroviaire, d'une longueur de 670 kilomètres, achemine essentiellement le minerai de fer depuis son lieu d'extraction (Zouerate) vers son lieu de transformation et d'exportation (port de Nouadhibou). Exploité par la Société Nationale Industrielle et Minière (SNIM), ce chemin de fer assure accessoirement le transport public de personnes et de marchandises entre la localité de Choum et Nouadhibou.

Les ports et le transport maritime

Les infrastructures sont constituées d'un port en eau profonde, d'un wharf, d'un poste pétrolier à Nouakchott et de quatre installations portuaires à Nouadhibou (un port de commerce et de pêche industrielle, un port de pêche artisanale et côtière, un terminal minéralier et un appontement pétrolier).

Le transport aérien

Le réseau aéroportuaire est composé de dix aéroports, dont cinq aéroports classés internationaux (Nouakchott, Nouadhibou, Atar, Néma et Zoueirat) et cinq aéroports régionaux (Tidjikja, Kiffa, Sélibaby, Aïoun El Atrouss et Kaédi).

Le transport fluvial

Le seul axe de communication naturel du pays est le fleuve Sénégal qui s'écoule dans le sens est-ouest sur 1790 km. Le transport fluvial n'existe pas véritablement ; il se réduit à des traversées de fleuve assurées par des bacs et des pirogues. Les régions mauritaniennes concernées par la navigation fluviale sont Rosso, Boghé, Kaédi et Gouraye. Actuellement, le fleuve Sénégal n'est navigable que pendant la période de hautes eaux. L'infrastructure et les équipements fluviaux, constitués d'appontement d'accostage, d'un slipway, d'un atelier de réparation et de deux bacs de 80 tonnes, sont concentrés au niveau de la ville de Rosso.

11.5. Constatations concernant le développement du secteur et les questions d'évaluation

Le développement du secteur de transport en Maurétanie

Les interventions de l'UE dans le secteur de transport en Mauritanie de 2005 à 2013 ont été concentrées sur trois domaines : (i) la réhabilitation/construction des routes ; (ii) l'entretien routier (organisation, financement, pérennisation) et (iii) la réforme du secteur de transport routier. Elles constituent des réponses aux priorités du pays en matière de développement des transports terrestres de la Mauritanie.

Le fort développement du réseau des routes bitumées. La longueur des routes bitumées a presque doublé durant les dix dernières années, passant de 2813 km en 2005 à 5303 km en 2015. L'UE a financé plus d'un tiers de ces routes nouvellement bitumées. Les projets de construction/réhabilitation des routes, financés par l'UE, ont fait l'objet d'une prise en compte

[92] « Conception d'un dispositif juridique, financier et institutionnel pour le renouvellement de la flotte – Plan d'action 2014-2018 », Rapport ARUP, 2012

systématique de l'environnement. Ces interventions, passées et en cours, ont fortement contribué au maillage du réseau routier national : interconnexion des principaux pôles économiques régionaux du pays (Nouakchott, Nouadhibou, région du fleuve Sénégal) par des routes bitumées ; désenclavement des régions isolées et des zones de production; amélioration de la coopération régionale avec les pays d'Afrique de l'Ouest (Mali, Sénégal) et les pays du Maghreb. Cependant, au regard de l'immensité du pays, la taille actuelle du réseau routier demeure insuffisante pour assurer le développement économique et social du pays.

Organisation originale de l'entretien du réseau routier, mais développement insuffisant des petites et moyennes entreprises (PME) d'entretien routier.
Depuis 2001, l'UE a assuré le financement annuel à hauteur d'environ 50% des travaux de maintenance du réseau routier mauritanien. Une organisation financière et des moyens considérables sont mis en place pour assurer et sécuriser le financement de l'entretien routier en Mauritanie sur la période couverte par la présente évaluation (2005-2013). Ils ont permis d'assurer l'entretien du réseau routier dans des conditions satisfaisantes. La situation des petites et moyennes entreprises (PME) active dans l'entretien routier a évolué favorablement depuis la création de l'ENER, mais leur développement reste insuffisante. La sous-traitance aux PME a du mal à se développer en raison de la taille réduite des chantiers proposés et de leur dispersion géographique sur le territoire. L'intervention des PME d'entretien routier au stade de l'entretien courant et périodique est cependant primordiale. Il y aura lieu de mettre en place un processus d'accompagnement de ces entreprises : gestion (comptable, juridique, …) ; compétences techniques ; gestion du matériel.

La durabilité des investissements routiers réalisés n'est pas *garantie.*
La durabilité des investissements routiers réalisés n'est pas garantie sur le long terme puisque le système de financement actuel n'est ni inscrit dans la continuité (le Fonds Routier, qui devait être mis en place[93] avant 2015, n'est toujours pas opérationnel), ni suffisant parce que :

- l'organisation financière actuelle est limitée dans le temps car, à partir de 2016, le SYSMIN ne participera plus financièrement à l'entretien routier ;
- les besoins d'entretien de l'ensemble du réseau routier de la Mauritanie sont importants. Le budget nécessaire pour assurer l'entretien courant de l'ensemble du réseau routier a été évalué à UM 9 milliards (soit environ € 25,7 millions) par an[94].

La prise de conscience de cette réalité/nécessité a conduit le Ministère de l'Equipement et des Transports (MET), avec l'appui de l'UE, à relancer le débat pour la mise en place du Fonds de Sécurité et d'Entretien Routier (FSER) dans les meilleurs délais sur la base de l'étude financée par l'UE.[95]

Des mesures de réformes importantes ont été mises en œuvre dans le secteur de transport terrestre.
Des mesures de réformes importantes ont été mises en œuvre dans le secteur de transport terrestre durant la période couverte par la présente évaluation (2005-2013). Depuis la fin des années 90 et surtout depuis 2005, la Mauritanie s'est engagée, avec l'appui de l'UE[96], dans la réforme de transport terrestre pour appuyer son développement économique et social. L'objectif de ces mesures de réforme est de fournir des services de transport terrestre de qualité, bâtis sur des critères de concurrence, de moindre coût, de fiabilité, de régularité, de

[93] Une étude de mise en place du Fonds routier a été financé par l'UE en 2011 « Fonds de Sécurité et d'Entretien Routier (FSER) », Alanet, Rapport –Synthèse, 2011
[94] Rapport de la Stratégie du Secteur des Transports (2011-2025)
[95] Le FSER est déjà formellement crée par l'article 32 la loi 031-2011. Un projet de décret définissant les modalités et mécanismes du Fonds est élaboré, et sera mis en circuit de validation et d'approbation.
[96] L'appui de l'UE à cette réforme se fait sous diverses formes : études, assistance technique, appui financier direct, dialogue politique

sécurité et de confort. Il ressort de l'exploitation des documents et des entretiens que les résultats obtenus à ce jour sont significatifs, à savoir :

- l'enrichissement et la modernisation du cadre juridique et règlementaire. Il couvre actuellement de manière satisfaisante les besoins d'un bon fonctionnement des transports routiers (divers textes, code de la route, permis de conduire, contrôle technique, etc.) ;
- des réformes institutionnelles importantes, notamment : la création de l'Etablissement National d'Entretien Routier (ENER), la transformation de la Direction des Transports Terrestres (DTT) en Direction Générale des Transports Terrestres (DGTT), et la création de l'Autorité de Régulation et d'Organisation des Transports Routiers (AROTR);
- la libéralisation et l'instauration de la libre concurrence: la suppression des activités du Bureau National de Transport (BNT), du « tour de rôle » et du système de « bon de sortie » dans les gares routières; l'émergence de nombreuses Fédérations de Transporteurs Routiers ; l'instauration de la liberté des prix et l'exercice du transport pour compte propre ;
- l'émergence et la création de nouvelles sociétés/entreprises de transport de voyageurs par minibus et autobus (plus d'une dizaine depuis 2008) ; avec pour effet un rajeunissement relatif du parc;
- l'amélioration de la qualité de service pour le transport de voyageurs, avec des horaires fixes et respectés et un bon niveau de confort ;
- la baisse des prix du transport de passagers sur la période, avec un gain moyen de 2,30 UM (€ 0,0065) par passager*kilomètre sur la période 2005-2012 ;
- la baisse du prix du fret, avec un gain moyen de 2,46 UM (€ 0,007) par tonne*km sur la période 2005-2012).

Cependant, malgré ces résultats significatifs, le transport routier reste largement informel et souffre de beaucoup d'insuffisances organisationnelles et d'inexistence de modes de financement adéquats pour le renouvellement des véhicules. Les mesures exécutoires des textes adoptés tardent à être mises en place faute d'infrastructures et de matériel adaptés et de capacités institutionnelles fortes. Le système d'information reste défaillant. Pour ces raisons, le processus de réforme du secteur de transport se poursuit toujours en Mauritanie. Contrairement au cas du Maroc, l'UE poursuit son soutien à la réforme du secteur en Mauritanie. Depuis 2013, l'UE a lancé un programme d'appui institutionnel (6 millions d'Euros) pour la période 2013-2016 avec pour objectif d'appuyer la Mauritanie à assurer la qualité et la pérennité du réseau routier, à améliorer le système d'entretien routier et la sécurité routière et à améliorer le recueil de statistiques fiables (système d'information).

L'absence d'un dispositif de contrôle de la charge à l'essieu et de poids des véhicules poids lourds se traduit par une détérioration prématurée du patrimoine routier.

L'absence d'un dispositif de contrôle de la charge à l'essieu et de poids des véhicules poids lourds (stations de pesage) entraîne, de fait, une détérioration prématurée du réseau routier mauritanien. Le besoin du pays en équipement de pesage pour assurer le maillage correct du réseau routier, est évalué à 8 stations de pesage. Avec l'appui de l'UE, l'acquisition d'une seule station de pesage est assurée. Une seconde station est prévue dans le cadre des travaux de la route Bombri-Nouakchott et une étude et un dossiers d'appel d'offres sont réalisés pour programmer les 8 stations de pesage.

L'expertise externe en Mauritanie a constitué un facteur de succès pour la réalisation des projets/programmes financés par le FED

Presque tous les projets de transport de l'UE en Mauritanie ont **bénéficié d'expertise externe** tant au niveau de la conception des études que de la mise en œuvre des projets. Lorsque sa mise en place est bien conçue, l'expertise externe en Mauritanie a constitué un facteur de succès pour la réalisation des projets/programmes FED.

Eléments confirmant ou réfutant les hypothèses de la phase documentaire

Les observations présentées ci-dessous concernent les hypothèses applicables au cas du Maurétanie.

QE1. Dans quelle mesure l'évolution des politiques de coopération et des stratégies d'intervention de l'UE a-t-elle répondu à l'évolution des besoins du secteur de transport en Afrique?

- *National policies were drafted in compliance with donor policies rather than the contrary.*
  - Les politiques d'interventions de l'UE et des bailleurs de fonds dans le secteur de transport s'inscrivent dans les objectifs de la politique nationale (Document CSLP) et des stratégies de transport de la Mauritanie, et pas le contraire.
- *Whether national priorities were respected or subordinated by 'imposition' of national sector policies by sector donors.*
  - Les besoins et priorités des politiques et stratégies de développement de la Mauritanie sont respectés et pris en compte par les politiques et stratégies d'intervention des bailleurs dans le secteur de transport.
- *Existence of clear national interest or prioritisation for corridor development and regional connectivity. Clear 'ownership' of regional institutional priorities, policies and strategies.*
  - Il existe clairement un intérêt de la Mauritanie pour le développement des corridors de développement et d'interconnexion régionale : (i) le corridor routier vers le Sénégal, la route Nouakchott – Rosso est en cours de réhabilitation/reconstruction avec financement de l'UE et le pont de Rosso sur le fleuve Sénégal est programmé dans le cadre du 11ème FED ; (ii) du corridor vers le Mali (« route de l'espoir ») et du corridor vers les pays du Maghreb.
- *Clear 'ownership' of regional institutional priorities, policies and strategies.*
  - En matière d'intégration régionale, il y a un vrai problème de positionnement du pays. La Mauritanie a quitté la Communauté Economique des Etats de l'Afrique de l'Ouest (CEDEAO), sans être vraiment dans l'Union du Maghreb Arabe (UMA) qui ne fonctionne pas.
- *EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value.*
  - Les ressources humaines actuelles de la DUE contribuent à la valeur ajoutée de l'UE, avec un effectif suffisant au niveau de la DUE. Il ne serait pas judicieux, comme envisagé actuellement, de réduire cet effectif.
- *Consultation processes are (in) adequate to achieve desired levels of coherence at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders.*
  - Les résultats des processus de consultations (dialogue sur la politique et stratégie sectorielle) ont été adéquats pour assurer la cohérence entre les interventions de l'UE et les objectifs de développement du pays (investissements routiers, appui institutionnel, entretien routier et renforcement des capacités). Il y a des complémentarités entre les actions de l'UE et celle de la Banque Mondiale (deuxième bailleur du secteur après l'UE).
- *Capacities at regional institutional and national government levels are (in)adequate to manage sector consultation and coordination processes.*
  - Les administrations partenaires mauritaniennes impliquées dans les projets de l'UE présentent des cadres insuffisants pour la gestion correcte de l'expertise.

- *Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.*
  - Il existe des évaluations réalisées sur le secteur qui ont une valeur pratique. Ces évaluations ont fait des propositions concrètes à mettre en œuvre (Banque de données routières, Fonds d'entretien routier, renforcement des PME, le système d'information du secteur).

QE2. Est-ce que le passage de l'approche projet à l'approche-sectorielle et d'appui budgétaire sectoriel (ABS[97] et ABG[98]) a répondu aux attentes concernant les résultats de l'appui de l'UE au secteur de transport en Afrique?

- *Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities).*
  - Il n'y a que l'approche projet en Mauritanie, pas d'appui budgétaire. Le secteur n'a pas été soumis au test d'éligibilité à l'appui budgétaire sectoriel transport. Le Gouvernement mauritanien ne sera probablement pas d'accord avec les objectifs et les conditions de l'appui budgétaire sectoriel du fait de la complexité de l'instrument. Le Gouvernement trouve déjà que les devis-programmes sont lourds à mettre en œuvre.

QE3. Dans quelle mesure l'appui institutionnel et le renforcement des capacités fournis par l'UE ont-ils abouti à une meilleure gestion du secteur de transport en Afrique?

- *Adequate institutional resources and capacities ensure that network conditions will (or will not) continue to be maintained or improve.*
  - Les capacités institutionnelles et les ressources ont été adéquates pour assurer l'entretien routier (financement croisé Etat-UE de l'entretien routier) durant la période sous-évaluation.
- *There are (or are not) realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads).*
  - Pendant la période concernée par l'évaluation, la stratégie d'entretien routier mise en place avec l'appui de l'UE, était réaliste et efficace (financement important et sécurisé). Le problème central est le désensablement du réseau routier qui requiert des moyens important et une organisation efficace. Cependant, cette stratégie ne concerne que les routes bitumées et en terre. Elle ne concerne pas les routes/pistes rurales.
- *Management decisions are (or are not) based on technical appreciation of base data of improving quality.*
  - Les décisions en matière de gestion du secteur ne sont pas basées sur des données relativement fiables : la Banque de Données Routières (BDR) n'est pas opérationnelle et le système d'information sur le secteur est défaillant.
- *Continuing EU support accommodates and supports changing land transport structures and realities (e.g. rail developments).*
  - L'UE intervient dans les chemins de fer au profit de la société SNIM pour assurer le transport du minerai de fer ; il s'agit d'une stratégie industrielle.

[97] Appui Budgétaire Sectoriel
[98] Appui Budgétaire Général

- *National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management.*
  - Il n'y a pas une bonne adéquation entre les stratégies de développement des infrastructures de transports de la Mauritanie et les ressources disponibles du pays, d'où les recherches de nouveaux financements. Il y a un début de partenariat Mauritanie-Chine dans le domaine des routes. Des conventions ont été signées avec des entreprises chinoises (COVEC, etc…) pour réaliser des routes à financer par des banques ou organismes chinois.
- *Transaction costs are reducing.*
  - Les couts de transaction de la DUE et de l'administration mauritanienne pour mobiliser l'aide sont considérés comme élevés ; les procédures étant très longues et complexes et donc coûteuses.
- *Cross cutting issues are consistently identified and mainstreamed where realistic and appropriate to EU support to the transport sector.*
  - Les projets de construction/réhabilitation des routes ont fait l'objet d'une prise en compte marquée de l'environnement et du SIDA/VIH (route Nouakchott-Rosso). Les questions des droits de l'homme et de genre n'ont pas fait l'objet d'une attention particulière.

QE4. Dans quelle mesure l'appui de l'UE au secteur a-t-il contribué à la mise en place d'infrastructures de transport pérennes et abordables en Afrique?

- *Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed).*
  - L'appui de l'UE à l'entretien routier, de 2000 à 2015, permet l'exécution correcte de l'entretien du réseau routier et la sécurisation de son financement. La durabilité du patrimoine routier n'est cependant pas garantie sur le long terme après 2015, car le Fonds routier n'est pas encore mis en place.
- *Transport regulators are functional and effective and rulings are enforced without undue political interference.*
  - L'Autorité de régulation des transports terrestres (régulation et organisation) en Mauritanie n'est pas indépendante des pouvoirs publics.

QE5. Dans quelle mesure l'appui de l'UE au secteur de transport en Afrique a-t-il contribué au développement social et économique durable?

- *Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.*
  - La construction des routes dans la vallée du fleuve Sénégal a eu des impacts positifs économiques et sociaux notables et a contribué à l'amélioration des conditions de vie des populations concernées (réduction des prix et du temps de trajet). Voir les Fiches projets
- *Some traffic volume and speed data do exist at national levels, but there is a broader problem with transport-specific data collection, analysis and management.*
  - Le système d'information sur le secteur de transport de la Mauritanie est peu développé : peu de statistiques exploitables, pas de données sur les trafics (absence de comptages réguliers) et peu de données sur l'état du réseau (pas de BGR opérationnel).
- *Given that transport safety standards have not improved, more should be done by the EU to mainstream safety, as part of EU support to the transport sector in Africa.*
  - La sécurité routière a bénéficié d'un appui conséquent de l'UE en Mauritanie, mais les résultats ne peuvent pas être appréciés faute de statistiques.

QE6. Dans quelle mesure les politiques, les stratégies et les interventions de l'UE au secteur de transport ont-elles contribué de manière explicite à la réduction de la pauvreté en Afrique?

- *EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.*
  - La politique nationale de la Mauritanie est centrée sur la réduction de la pauvreté qui est prise en compte dans les programmations de l'UE. L'appui de l'UE à la réforme du transport routier et aux investissements routiers a entrainé la réduction des prix de transport et du temps de trajet et le désenclavement des zones de production. Ces résultats contribuent à la réduction de la pauvreté. Voir les rapports suivants : L'évaluation de la Stratégie de Coopération de la Commission en Mauritanie (SOFRECO-ECORYS, 2006) ; (ii) L'étude de l'impact de la réforme sur le sous-secteur des transports terrestres (Parsons Brinckerhoff, 2012) et (iii) le Rapport de la Campagne d'information sur les effets de la réforme des transports terrestres des personnes et des marchandises (MET/DGTT, 2013).
- *EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.*
  - Les interventions de l'UE en Mauritanie concernent à la fois les constructions et réhabilitations des routes, l'entretien routier et l'appui institutionnel, notamment pour la réforme du secteur. Ces différentes orientations de l'UE se poursuivent.
- *Environmental and social safeguards were not taken seriously – ESIAs were undertaken simply to 'tick the box' of EDF support conditions whilst ESMPs were marginalised (or dropped altogether) during construction phases.*
  - Les projets de construction et réhabilitation des routes prennent largement en compte l'environnement et la sensibilisation au VIH (route Nouakchott-Rosso), mais moins les questions des droits de l'homme et de genre.
- *No effort has been made to evaluate the 'cost effectiveness' of EU sector support in terms of poverty impact or the relative 'cost effectiveness' of such support to transport compared with similar EU support to other sectors.*
  - L'UE a évalué l'impact de l'appui à la réforme du transport routier en Mauritanie. Voir chapitre « Constatations » ci-dessus.

QE7. Dans quelle mesure la coopération régionale de l'UE a-t-elle facilité la circulation des personnes et des marchandises?

- *The change introduced by EDF11 programming regarding the EU strategy for the transport sector was resented by stakeholders and insufficiently anticipated to allow a swift and smooth transition.*
  - Ce changement n'est pas bien ressenti par les autorités mauritaniennes, pour lesquelles l'Accord de pêche avec l'UE reste surdéterminant.
  - La réalisation des routes vers le Mali (route de l'espoir) et vers le Sénégal (Nouakchott-Rosso) contribuent à faciliter le déplacement de personnes et de marchandises entre la Mauritanie d'une part et le Mali et le Sénégal d'autre part.

QE8. Est-ce que les procédures de sélection, de planification et de priorisation des interventions de l'UE au secteur de transport en Afrique ont été adéquates?

- *The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values.*

- Des études techniques et de faisabilité ont été réalisées pour tous les investissements routiers. Ces études sont de qualité variable.

- *Other modes of transport as well as rural/urban roads were not covered by the EU due to lack of demand from partner government and limited related expertise within EUDs.*
  - En complémentarité avec les autres bailleurs de fonds, la Banque Mondiale intervient dans les transports urbains. Ce n'est pas une question de manque de compétences au niveau de la DUE ni une absence de demande de la Mauritanie.

QE9. Dans quelle mesure les modalités d'appui, les cadres de coopération et les mécanismes de mise en œuvre de la coopération de l'UE, ainsi que les instruments juridiques ont-ils été appropriés pour soutenir le secteur de transport des pays partenaires?

- *Changes from one preferred aid modality to the next over the evaluation period were too quick and insufficiently bottom-up to facilitate government partners' ownership.*
  - C'est la lourdeur/complexité des procédures FED qui est ressentie par les cadres mauritaniens, notamment les devis-programmes.

- *Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.*
  - L'UE et la Banque Mondiale financent ensemble la construction et réhabilitation de la route Nouakchott-Rosso, mais il s'agit dans les deux cas de « don ». La question de « blending » ne semble pas être à l'ordre du jour en Mauritanie.

QE10. Dans quelle mesure les procédures et les ressources de l'UE ont-elles été appropriées pour soutenir le secteur de transport des pays partenaires?

- *EUDs have (in)adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities.*
  - Comme indiqué plus haut, la DUE dispose des ressources suffisantes pour suivre ses interventions dans le secteur. Il n'est pas judicieux de réduire cet effectif.

11.6. Conclusion

Les documents de politique de développement (DCSLP) et de stratégie de transport sont de bonne qualité. Ils constituent des cadres références des bailleurs de fonds pour la définition de leurs stratégies d'interventions dans le secteur de transport.

Le réseau des routes bitumées a connu une croissance soutenue durant les dernières années, notamment grâce à l'appui de l'UE. La nécessaire poursuite de son développement demandera de nouveaux financements importants. La longueur du réseau des routes bitumées est ainsi passée de 2813 km en 2005 à 5303 km en 2015, soit une augmentation de près de 50%. L'ensemble des projets routiers financés par UE représente 35 % du réseau routier bitumé du pays. En tenant compte des constructions/réhabilitations des routes en cours et programmées pour les cinq ans à venir, le réseau routier devrait dépasser les 6000 km de routes revêtues vers 2017. Pour poursuivre le développement du réseau routier bitumé, il conviendra de rechercher de nouveaux financements, notamment en s'orientant vers des montages des partenariats avec les privés. Les banques chinoises, à travers des conventions Chine-Mauritanie, ont déjà financé des routes en Mauritanie (travaux exécutés par le personnel chinois) et ont signé d'autres conventions par lesquelles ils s'engagent à réaliser d'autres investissements routiers. Les détails de ces conventions ne sont pas connu.

Durant la période 2005-2013, l'appui de l'UE à l'entretien routier a permis la mise en place et le développement de l'Etablissement National de l'Entretien Routier (ENER) et le financement de l'entretien et l'exécution correcte des travaux d'entretien du réseau routier principal de la Mauritanie. Cependant, à défaut d'un fonds routier, la durabilité des investissements routiers n'est pas garantie sur le long terme. Il y aura lieu, avec l'appui institutionnel actuel de l'UE au secteur, de mettre en place, dans les meilleurs délais, le Fonds d'entretien routier pour assurer la pérennisation du financement de l'entretien routier. En complément, les petites et moyennes entreprises locales (PME) d'entretien routier contrôlées par des bureaux d'étude locaux (BET) doivent être développées. La sauvegarde du patrimoine routier du pays implique également la mise en place d'un dispositif de contrôle de la charge à l'essieu et du poids des véhicules poids lourds (stations de pesage) sur l'ensemble du réseau.

Le processus de réforme des transports terrestres de la Mauritanie, avec l'appui de l'UE, a obtenu des résultats significatifs du point de vue organisationnel, institutionnel et sécuritaire. Malgré les résultats encourageants obtenus, le transport routier souffre encore de beaucoup d'insuffisances organisationnelles, d'inexistence de modes de financement adéquats pour le renouvellement des véhicules, d'insécurité, des retards dans la mise en œuvre des textes (fonds routiers pas opérationnel), du manque des statistiques et données fiables sur le secteur. D'où l'intérêt de la poursuite des réformes du secteur, avec l'appui actuel de l'UE (6 millions d'Euros).

La réussite des réformes du transport terrestre de la Mauritanie s'explique par les principaux facteurs suivants : la volonté et l'engagement forts de l'UE dans le processus des réformes, la volonté politique des pouvoirs publics du pays et l'adhésion de la majorité des transporteurs (Fédérations des transporteurs) au processus de réforme.

L'expertise externe demeure une nécessité en Mauritanie. Elle constitue un facteur de succès pour la réalisation des projets dans le secteur de transport en Mauritanie.

12. Morocco case study

Sommaire

Abréviations

AA	Accord d'Association
ABG	Appui budgétaire général
ABS	Appui budgétaire sectoriel
ACP	Pays d'Afrique, des Caraïbes et du Pacifique
AMO	Assistance à Maîtrise d'Ouvrage
AFD	Agence Française de Développement
ANP	Agence Nationale des Ports
AO	Appel d'offres
BAD	Banque Africaine de Développement
BEI	Banque Européenne d'Investissement
BM	Banque Mondiale
CA	Conseil d'Administration
CFR	Caisse de financement Routier
CDMT	Cadre des Dépenses à Moyen Terme
COMANAV	Compagnie Marocaine de Navigation
DAO	Dossier d 'Appel d'Offres
DAC	Direction de l'Aviation Civile
DGAC	Direction Générale de l'Aviation Civile
Dh	Dirham marocain
DMM	Direction de la Marine Marchande
DR	Direction des Routes
DSPCT	Direction de la Stratégie, de la Planification et de la Coordination des Transports
DTA	Disposition Techniques et Administratives
DTA	Direction du Transport Aérien
DTRSR	Direction des transports Routiers et de la Sécurité Routière
DUE	Délégation de l'Union Européenne
DR	Direction des Routes
FED	Fonds Européen de Développement
FNTR	Fédération Nationale des Transporteurs Routiers
FSR	Fonds Spécial Routier
IEVP	Instrument Européen de Voisinage et Partenariat
INARR	Indice d'Accessibilité aux Routes Rurales
MEF	Ministère de l'Economie et des Finances
MET	Ministère de l'Équipement et des Transports
METL	Ministère de l'Équipement, des Transports et de la Logistique
ONDA	Office National des Aéroports
ONT	Office national des Transports
PARST	Programme d'Appui à la réforme du Secteur des Transports
PIB	Produit Intérieur Brut
PIN	Programme Indicatif National
PEV	Politique Européenne de Voisinage
PNRR	Programme National des Routes Rurales
PPP	Partenariat Public Privé
RAM	Royal Air Maroc
TdR	Termes de Références
UGP	Unité de Gestion du Projet
UE	Union Européenne

Taux de change : 1 Euro = 10,84 Dirham marocain (11.05.2015)

12.1. Introduction

But de la note sur le pays

L'étude de cas du Maroc prolonge et complète la collecte des données (documents et entretiens et visites) sur les projets financés et mis en œuvre durant la période 2005 - 2013 ainsi que sur le secteur de transport du pays. Les projets significatifs ont été sélectionnés, avec le concours de la DUE et de l'administration, puis renseignés dans les fiches projets. Les informations collectées permettent de valider ou non les hypothèses formulées dans le rapport de la phase documentaire de l'évaluation, d'analyser les politiques et stratégies de transport du Maroc et les stratégies de coopération de l'UE au Maroc, de mettre en évidences les principales constations (*findings*) sur le secteur de transport, de renseigner les fiches projets/programmes significatifs et d'évaluer les interventions de l'UE sur la période 2005 - 2013.

Le Maroc comme Etude de cas

Le Maroc n'appartient pas au groupe des pays ACP dont les relations avec l'UE sont régies par l'Accord de Partenariat ACP-CE de Cotonou (juin 2000). Au contraire le Maroc fait partie du groupe des pays étant l'objet de la politique de voisinage de l'UE. Le Partenariat entre l'Union Européenne et le Maroc est définie dans l'Accord d'Association, entré en vigueur en mars 2000[99] et renforcé par le Plan d'Action de la Politique Européenne de Voisinage de 2003. Ces documents constituent la base juridique des relations entre l'UE et le Maroc. De plus en 2008, l'UE et le Maroc ont adopté un document conjoint visant l'établissement du Statut Avancé du Maroc dans ses relations avec l'UE. En matière de transport et d'infrastructure, la stratégie du Plan d'Action du Statut Avancé vise à *« mettre en œuvre la politique nationale de transport et d'infrastructures à travers la mise en place d'un système de transport de qualité, performant, compétitif et durable »* dans l'optique d'accélérer le rapprochement du Maroc avec l'UE.

Le pays dispose de tous les modes de transport (routier, aérien, maritime et ferroviaire), à l'exception de la navigation fluviale. Le transport routier constitue le principal mode de transport du royaume (voir section 12.4 pour plus de détail).

12.2. Méthodologie de collecte des données

La méthodologie s'appuie sur l'analyse des documents et les entretiens individuels ou en groupe. La collecte des documents et les entretiens ont été réalisés auprès des principaux acteurs et organismes ci-après : Délégation de l'UE à Rabat ; les Directions du Ministère de l'Equipement, des Transports et de la Logistique (METL) ayant été impliquées dans les projets/programmes de l'UE et les autres bailleurs de fonds du pays.

Mission d'évaluation :

- La mission au Maroc s'est déroulée du 22 mars au 1 avril 2015 ;
- La mission était composée de M. Basile KEITA (chef de mission) et M. Abdeljalil DERJ (consultant local).

Types de documents collectés:

- documents de politiques et de stratégies de développement du secteur de transports ;

[99] Journal officiel des Communautés européennes « Accor Euro-Méditerranéen établissant une association entre les communautés européennes et leurs Etats membres, d'une part, et le Royaume du Maroc, d'autre parts » 18/03/2000.

- documents de stratégies de coopération de l'UE au Maroc ;
- documents contractuels (convention de financement, contrats de marchés, etc.) ;
- rapports d'évaluations à mi-parcours et finales des interventions de l'UE ;
- rapports d'évaluations des stratégies d'action du METL ;
- rapports d'études et de statistiques ;
- rapports et documents d'autres bailleurs de fonds.;

Les entretiens:

La mission a eu des entretiens avec :

- les responsables de la DUE ;
- des responsables des administrations marocaines impliquées dans les projets financés par l'UE ;
- les représentants des autres bailleurs de fonds ;

Modalités de traitement de l'information :

- Les principaux entretiens ont été retranscrits, pour une meilleure exploitation ;
- Les projets significatifs ont été sélectionnés puis renseignés dans les Fiches Projets.

Limites et contraintes:

- Problème de « mémoire » au niveau des organismes : les personnalités ayant conçu ou mis en œuvre les projets de l'UE, tant au niveau de la DUE qu'au niveau de l'administration, étaient soit absentes (mutations) ou affectées à d'autres fonctions. Les documents de suivi et d'évaluation permettent de combler cette insuffisance.
- Les autorités marocaines ont été tardivement informées de l'arrivée de la mission. La réactivité rapide des responsables du METL a cependant permis la réalisation efficace de la mission.

12.3. L'appui de l'UE au secteur de transport au Maroc

Les objectifs généraux de la coopération Maroc-UE sont déterminés par l'Accord d'Association signé par l'UE et le Royaume du Maroc en 1996 et le Plan d'Action adopté dans le cadre de la Politique Européenne de Voisinage, ainsi que par les documents résumés ci-dessous.

La stratégie de coopération de l'UE avec le Maroc développée dans le CSP 2005-2006 s'articule autour des priorités ci-après : (i) volet économique et commercial (développement des échanges/environnement économique des entreprises/mise à niveau) ; (ii) volet social, amélioration des conditions de vie des populations défavorisées, lutte contre la pauvreté et valorisation des ressources humaines ; (iii) protection de l'environnement. Les interventions dans le secteur de transport s'inscrivent dans le cadre de la deuxième priorité. Elles visent l'amélioration des conditions de vie par un rééquilibrage régional et une meilleure intégration interprovinciale : développement socio-économique des provinces du Nord ; désenclavement des zones rurales. La zone nord se caractérise en effet par son grand enclavement, aussi bien interrégional qu'intra-régional, conséquence du manque d'une articulaire territoriale adaptée. Le réseau d'infrastructures de transport présente des caractéristiques qui correspondent à une région périphérique : grande dispersion géographique pour une densité de population relativement élevée. Ces interventions s'inscrivent dans les priorités de la politique du gouvernement du Maroc visant à réduire les disparités existantes en matière de développement socio-économique entre les régions et entre les zones urbaines et les zones rurales.

La stratégie de coopération de l'UE avec le Maroc de 2007-2013 s'articule autour des priorités ci-après : le développement des politiques sociales (développement humain, alphabétisation, éducation, gouvernance médicale, santé) ; (ii) la modernisation économique;

(iii) l'appui institutionnel; (iv) la bonne gouvernance et les droits de l'homme) ; (v) la protection de l'environnement. ***Les interventions dans le secteur de transport*** s'inscrivent dans la modernisation économique. L'objectif est de désenclaver des zones côtières des provinces de Chefchaouen et Al Hoceima et favoriser leur intégration à l'espace économique régional et national grâce à la construction du des tronçons manquants de l'axe littoral est-ouest, notamment l'aménagement de la rocade méditerranéenne. Les interventions concernent aussi le désenclavement des populations rurales (notamment des zones isolées) et leur développement socio-économique par la construction, l'aménagement et la maintenance de routes et pistes rurales. Ce programme vise à assurer les dessertes en profondeur du pays et un désenclavement des populations pour leur permettre d'accéder au reste du réseau.

Les interventions de l'UE faisant partie de la programmation de **l'Instrument Européen de Voisinage (IEV)-Cadre Unique d'Appui pour l'appui de l'UE au Maroc (2014-2017)** visent à atteindre deux objectifs majeurs, à savoir:

- renforcer la démocratie et la gouvernance (politique, économique et sociale), et ;
- promouvoir une croissance durable et inclusive en faveur du développement humain.

Les principaux thèmes et secteurs d'intervention sont :

- accès équitable aux services de base ;
- promotion de la gouvernance démocratique, l'État de droit et la mobilité ;
- emploi, croissance durable et inclusive ;
- mesures en faveur de la société civile ;
- soutien à la mise en œuvre du Plan d'Action, à l'Accord de Libre-Echange Complet et Approfondi et au développement des capacités institutionnelles.

Le secteur de transport n'est donc plus un secteur prioritaire d'intervention de l'UE.

Les projets de transport appuyés financièrement par l'UE pendant les années 2005-2013 sont listés dans le tableau 12.1. Un montant total d'environ € 186 million a été contracté et un montant total de € 153 million effectivement payé pendant ces années pour huit projets of programmes. Le plus grand financement était l'appui budgétaire sectoriel (€ 93,3 millions) fournit dans le cadre du programme de réforme du secteur de transport de 2003 à 2010, qui fut géré avec beaucoup de réussite.

Tableau 12.1. Montants contractés et payés des projets de transport financés par l'UE au Maroc de 2005 à 2013 (en milliers d'€)

Code de la Décision	Titre de la Décision	Alloué	Contracté	Payé
Domaine MED				
MED/1999/003-327	Rocade Méditerranéenne	124.485	459	459
MED/2003/005-044	Programme d'appui Budgétaire à la réforme du secteur des Transports au Maroc (PAB Transports)	93.670	93.564	93.564
MED/2005/017-351	Développement des Provinces du Nord - infrastructures de désenclavement	19.634	19.442	17.842
MED/2005/017-523	MAROC - Programme d'appui à la mise en œuvre de l'Accord d'Association (PAAA II)	15.000	66	66
	Total MED	**252.789**	**113.530**	**111.930**
Domaine ENPI				
ENPI/2007/019-548	Community Budget contribution to the NIF - ENPI South Region	158.000	17.800	17.800
ENPI/2008/020-036	Allocation globale ENPI Coopération Sud 2008	18.000	111	111

ENPI/2008/019-685	Programme d'Appui au Plan d'Action (P3A III)	20.000	2.874	1.829
ENPI/2010/021-822	Programme d'appui au désenclavement des populations isolées	55.000	51.404	21.199
	Total ENPI	**251.000**	**72.190**	**40.940**
	Total MED plus ENPI	**503.789**	**185.720**	**152.870**

Source: CRIS Juin 2014.
Note : Les montants contracté et payé du projet "Rocade Méditerranéenne" mentionnés dans ce tableau –qui est basé sur les données disponible dans le CRIS – ne couvrent qu'une petite partie des montants totaux de ce projet. En fait, le montant total des décisions de financement de ce projet s'élève à €124,5 millions, tandis que le total des montants contractés s'élève à €115,4 millions et le total des montants payés à €108 millions. Apparemment, certains données des années avant 2009 manquent dans le CRIS (le CRIS a été mis en place en 2009, tandis que la première décision de financement de ce projet date de 1999). Cela peut être aussi le cas avec les projets 523 et 548.

12.4. Brève description du secteur de transport du Maroc

Le contexte stratégique

La politique nationale de développement du Maroc repose sur trois piliers distincts : (i) une évolution politique progressive vers l'établissement d'un régime démocratique et d'un état de droit ; (ii) l'obtention d'une croissance économique plus forte et plus stables, à même de créer des emplois, ainsi que la viabilité de ses finances publiques ; (iii) le renforcement de la cohésion sociale et la lutte contre la pauvreté. La stratégie de développement des transports du METL s'inscrit dans le cadre de cette politique. Par ailleurs, les objectifs généraux de la coopération Maroc-UE, déterminés par l'Accord d'Association (AA) et la Politique Européenne de Voisinage, s'inscrivent dans les orientations des politiques de développement et de transport au Maroc.

C'est dans ce contexte stratégique que les différents modes de transports se développent au Maroc. Le transport routier est le principal mode de transport du Royaume en assurant 90% du transport de personnes et 75% du transport de marchandises. Il sera plus élaboré dans les paragraphes suivantes que les autres modes.

Le transport routier

La longueur du réseau routier classé, à la charge de l'Etat, avoisine 57.334 km dont 41.431 km de routes revêtues ; le reste étant de routes non revêtues (15 903 km) et les routes rurales. Le réseau de voies express (routes à double voies) a atteint 736 km. L'évolution de la longueur du réseau routier revêtu de 2005 à 2013 est présentée dans le tableau ci-dessous.

Tableau 12.2 : Evolution de la longueur du réseau routier revêtu

Routes	**2005**		**2013**	
	Longueur en km	**Pourcentage (%)**	**Longueur en km**	**Pourcentage (%)**
Nationales	9 552	30	10 185	25
Régionales	8 520	26	9 510	23
Provinciales	14 014	44	21736	52
Total	**32 086**	**100**	**41 431**	**100**

Source: METL.

Le Maroc developpe un schéma d'armature autoroutière important. Le réseau autoroutier du pays, ouvert actuellement à la circulation, a atteint 1416 km et, celui en cours de construction s'élève à 352 km.

Les efforts engagés par le METL en matière de maintenance du réseau routier ont permis d'améliorer notablement le pourcentage du réseau routier dans un état bon à acceptable. Ce pourcentage est passé de 53,3 % en 1990 à 65% en 2004. L'état du réseau routier revêtu a connu cependant une forte détérioration entre 2006 et 2012. En effet, les résultats de la dernière campagne de mesure de l'ISU a montré que 53,5% du réseau routier est dans un état bon à moyen (voir tableau 12.3) alors que 46,5% du réseau se caractérise par un état mauvais nécessitant ainsi des interventions massives de maintenance.

Tableau 12.3 : Evolution de l'état du réseau routier

Etat	2000	2002	2004	2006	2008	2010	2012
Etat bon à moyen	66,0%	64,7%	64,5%	60,0%	55,0%	54,3%	53,5%

Source : METL.

Quant au parc des ouvrages d'art, il se caractérise par sa vétusté. La largeur de la chaussée de 3800 ouvrages ne dépasse pas 5,50 mètres, tandis que1000 sont submergés et 200 ont une charge utile limitée.

Le Fonds Spécial Routier (FSR), créé en 1989, était affecté exclusivement à la maintenance et l'exploitation du réseau routier classé. Actuellement, ce Fonds finance l'entretien courant et l'exploitation du réseau routier classé, mais aussi la construction et l'aménagement des routes rurales. Le FSR est alimenté principalement par la taxe sur les carburants (taxe intérieur sur les carburants – TIC), la taxe additionnelle à l'immatriculation des véhicules et la taxe à l'essieu des véhicules poids lourds. Les recettes du FSR ont augmenté de Dh 2584 millions en 2005 à Dh 3187 millions en 2013 (voir tableau 12.4).

Tableau 12.4 : Evolution des recettes du Fonds Spécial Routier, en millions de Dirham marocain (Dh)

	2005	2006	2007	2008	2009	2010	2011	2012	2013
Recettes	2584	2170	2616	2322	2656	3701	3070	2604	3187

Source : Fonds Spécial Routier

L'enveloppe budgétaire allouée à l'entretien du réseau routier et la réparation des ouvrages d'arts a atteint Dh 1.100 millions (34,5% du budget du FSR) en 2013. Elle a concerné le renforcement de 784 km de route et le revêtement de 903 km ainsi que la réparation de 91 ouvrages d'art. Cet effort devra être poursuivi. Ceci explique le programme de modernisation du réseau structurant portant sur 15.500 km (représentant 85%) des ouvrages d'art et l'élimination de points noirs ainsi que le programme de réhabilitation des routes à faible trafic. Le parc automobile en circulation connaît une croissance continue comme le montre le tableau ci-dessous.

Tableau 12.5 : Evolution du parc automobile en circulation

Parc automobile	2009	2010	2011	2012	2013
Motocyclettes	28 784	31 353	33 765	36 141	38 792
Véhicules de tourisme	1 864 805	1 976 172	2 083 710	2 202 743	2 314 826
Véhicules utilitaires	731269	783 479	836 598	885 518	932 803
Total	**2 624 858**	**2 791 004**	**2 954 073**	**3 124 402**	**3 286 421**

Source : METL.

Selon le plan quinquennal de transport 2000-2004, le parc automobile national utilisant le réseau routier s'élevait à environ 1.524.000 unités dont près de 1.100.000 véhicules de tourisme et plus de 400.000 véhicules utilitaires. Le parc de véhicules de transport public de marchandises était vétuste (âge moyen de l'ordre de 14 ans alors qu'il est de l'ordre de 7,7 ans dans les pays européens). Pour remédier à cette situation, le Gouvernement a décidé de la mise en place d'un programme de renouvellement du parc de transport routier (prime de renouvellement et primes à la casse). Trois programmes ont été exécuté (2006-2008, 2008-2010, 2011-2013) et le quatrième est en cours (2014-2016). La mise en œuvre de ces programmes a permis un rajeunissement sensible du parc de transport des marchandises. L'âge moyen qui était de l'ordre de 14 ans en 2006 est passé à 12 ans en 2013.

Le Maroc connaît un fort accroissement de l'insécurité routière, aussi bien en agglomération qu'en rase campagne (voir tableau 12.6). Bien que la sécurité routière soit une préoccupation déjà ancienne, les mesures prises en vue de renforcer celle-ci sont restées longtemps dispersées.

Tableau 12.6 : Evolution des indicateurs liés à la sécurité routière

Indicateurs	2000	2013
Nombre d'accidents	41 701	68 458
Nombre de tués	3 242	3 705
Nombre de blessés	62 722	101 150

Source: METL.

Le transport ferroviaire

Le réseau marocain compte 2.109 km de voies ferrées dont 1.284 km électrifiées (75% du réseau), 600 km à voies doubles (28% du réseau) et 471 passages à niveau. En 2000, le réseau marocain s'élevait à 1.907 km, dont 1.003 km sont électrifiés et 295 km sont à voie double. La densité du réseau s'élève à 63 km/million habitants/km².

Pour ce qui est du matériel roulant, l'Office National des Chemins de Fer (ONCF) a procédé à l'acquisition et à la réhabilitation d'un parc diversifié constitué de 229 locomotives et 529 véhicules de transport de voyageurs et 5.582 véhicules de transport de marchandises dont 1.504 consacrés aux phosphates.

Au cours de l'année 2012, l'activité des trafics voyageurs a enregistré 36 millions de voyageurs, soit un taux de croissance de 10% au cours de la dernière décennie. Le transport de phosphate constitue la principale activité de transport de marchandises (plus de 25 millions de tonnes par an).

Les ports et le transport maritime

Le littoral marocain avec ses deux façades maritimes qui s'étendent sur une longueur d'environ 3.500 km est ainsi doté de 38 ports dont 13 ports de commerce international, 10 ports de pêche à caractère régional et 9 ports de pêche à caractère local en plus de 6 ports de plaisance.

L'activité portuaire globale a enregistré, au titre de l'année 2013, un volume global de 100,7 millions de tonnes en hausse de 9% par rapport à l'année précédente. Le volume des importations traitées s'est chiffré à 46,8 millions de tonnes, soit une baisse de 4% et les exportations à 28,7 millions de tonnes, soit une hausse de 2%. Le transbordement est également important.

Le Maroc dispose actuellement de 24 aéroports dont 15 internationaux. En 2000, le Maroc ne disposait que de quinze aéroports ouverts au trafic commercial dont onze de dimension internationale. L'aéroport MOHAMMED V de Casablanca, principal aéroport, continue à renforcer sa position de Hub international, en l'occurrence entre l'Europe et l'Afrique à travers des vols à destination de 79 aéroports internationaux et 48 pays dans 4 continents.

Le nombre de transporteurs aériens desservant régulièrement Maroc est passé de 22 en 2003 à 44 en 2014. Parmi ces compagnies, il y a trois marocaines (RAM, RAM Express et Air Arabia Maroc) ; 29 des pays européens et 12 des pays non européens.

12.5. Constatations concernant le développement du secteur et les questions d'évaluation

Le développement du secteur de transport au Maroc.

Le Maroc élabore et adopte régulièrement des plans ou stratégies pour le développement du secteur de transport. Ceci donne de la visibilité et permet aux bailleurs de fonds d'identifier plus aisément les domaines de leurs interventions dans le secteur.

Le réseau actuel des infrastructures routières, en comparaison avec d'autres pays d'Afrique, est important et diversifié comme souligné plus haut avec 57.334 km de routes classées dont 41.431 km de routes revêtues. Il convient de noter la part très importantes des liaisons provinciales dans le réseau routier classé revêtu (52%) par rapport aux liaisons nationales (25%) et régionales (23%). Dans la plupart des pays d'Afrique, ce sont en général les routes nationales revêtues qui sont les plus importantes. Durant la période allant de 2005 à 2013, l'appui financier de l'UE a permis la réalisation de la rocade méditerranéenne (507 km), des pénétrantes de provinces du nord (71 km), ainsi que des routes rurales. De plus, la Banque européenne d'investissement (BEI) a fortement contribué à la réalisation du Schéma Directeur Autoroutier du Maroc au niveau de plusieurs tronçons, à travers des prêts au gouvernement marocain, représentant près de 25% des investissements. Le linéaire d'autoroute financé avec la contribution de la BEI au Maroc, de 1995 à 2015, s'élève à 1133 km.

Le mode de financement des autoroutes au Maroc repose principalement sur des emprunts et des dons. Pour le financement des investissements, la Société Nationale des Autoroutes du Maroc bénéficie de la garantie de l'Etat au moyen du Fonds Hassan II pour le Développement Economique et Social. Ce fonds apporte également au financement des projets par une contribution de 20% aux coûts d'investissement. Les 80% restants sont sollicités auprès des bailleurs de fonds (BEI, AFD, BAD, fonds arabes). Il convient de signaler que le METL a mis l'accent sur le développement du partenariat entre le secteur public et le secteur privé, notamment pour le financement, la réalisation et l'exploitation des infrastructures et services de transport.

Les efforts engagés par le METL en matière d'entretien du réseau routier ont permis d'améliorer notablement le pourcentage du réseau routier dans un état bon à acceptable, qui est passé de 53,3 % en 1990 à 65% en 2004**.** Cependant, **l'état du réseau routier connait une détérioration depuis 2006**, même si plus de 53% de l'état du réseau reste « bon à acceptable » (voir tableau 13.3). Deux raisons sont la cause de cette détérioration : (i) l'agrandissement du réseau routier à entretenir et (ii) la part importante des recettes du FSR réservée à la construction de nouvelles routes. Alors qu'il était prévu initialement que le FSR finance exclusivement l'entretien de routes classées (nationales et provinciales), le Fonds a été amenée à contribuer au financement de nouvelles routes rurales afin de répondre aux

objectifs de désenclavement des populations et de lutte contre la pauvreté du Gouvernement. Le FSR dispose en principe des capacités financières suffisantes à entretenir le réseau routier (voir tableau 13.4), mais il y a cependant nécessité à privilégier l'entretien routier du réseau dans les engagements du FSR.

Le Maroc a réalisé un important programme de réforme du secteur de transport avec l'appui de l'UE, sous forme d'appui budgétaire sectoriel entre 2003 et 2010. Les actions réalisées dans le cadre de l'appui budgétaire de l'UE portant sur les réformes du secteur de transport ont été un succès. La réussite de ce programme s'explique par les facteurs suivants : (i) une bonne maitrise de l'instrument « appui budgétaire par le Gouvernement du Maroc, (ii) un bon niveau de dialogue sectoriel entre la DUE et le METL (seul interlocuteur) et entre le METL et les professionnels, (iii) l'appropriation par le METL (conscience de la nécessité d'améliorer la qualité des services de transport), (iv) la volonté politique marocaine d'avancer dans le rapprochement des textes et normes avec ceux de l'UE et (v) l'adhésion des acteurs publics aux mécanismes de l'appui budgétaire. Les principales réalisations ainsi que leur situation actuelle, résultant de l'analyse des documents et des entretiens, sont décrites ci-après par mode de transport.

Dans le transport routier de marchandises, les résultats de la réforme sont importants, y compris: (i) la libéralisation effective (suppression de transports soumis à l'agrément, abolition du monopole d'affrètement de l'ONT, libéralisation des tarifs), (ii) la restructuration professionnelle (émergence de nouveaux métiers tels que les loueurs et les commissionnaires de transport); (iii) la création de 11.000 entreprises et 16.600 emplois, (iv) le rajeunissement du parc de transport des marchandises (l'âge moyen est passé de 14 à 12 ans), (v) l'adoption du code de la route et (vi) le rapprochement des textes réglementaires et normes entre ceux du Maroc et de l'Union Européenne est en marche. Malgré ces résultats significatifs, des difficultés et contraintes persistent encore dans le transport routier, telles que l'atomisation du secteur, l'âge moyen du parc automobile toujours trop élevé (d'où la poursuite du programme de renouvellement), l'encadrement insatisfaisant de la profession et la faible participation du pavillon marocain aux opérations de transport international. De plus, le Maroc connaît un fort accroissement de l'insécurité routière, aussi bien en agglomération qu'en rase campagne.

La libéralisation du transport aérien a abouti à l'*OPEN SKY* en 2006 avec l'Union Européenne. Ceci s'est traduit par une forte croissance du trafic aérien qui est passé de 5,3 millions de passagers en 2003 à 16,5 millions en 2013 et à 17 millions en 2014.

Tableau 12.7 : Evolution du trafic aérien entre 2005 et 2013 en millions de passagers

	2005	2006	2007	2008	2009	2010	2011	2012	2013
Trafic total	9,1	10,4	12,1	12,9	13,4	13,6	15,7	15,1	16,5
Variation en %		+13,1%	+16,7%	+6,1%	+3,8%	+15,1%	+2,0%	-3,6%	+9,1%
Trafic vers l'Europe			8,3	9,1	9,6	11,4	11,7	11,1	12,1

Source : DGAC.

Le nombre de vols hebdomadaire saison Eté est passé de : 560 vols/semaine en 2003 à environ 1300 vols/semaine en 2014, soit un taux d'accroissement interannuel moyen de presque 8%. Ces accroissements des trafics aériens se sont accompagnés par une maîtrise du prix des transports aériens. Par ailleurs, l'ouverture à la concurrence a entraîné l'apparition des compagnies charters et de *low cost* dans l'espace aérien marocain avec pour conséquence une baisse des coûts de transport pour les usagers.

Le Code de l'aviation civile du Maroc est élaboré, mais pas encore adopté. La lenteur du circuit administratif fait que l'adoption de ce Code connait des retards (procédures et traduction avec de nombreux termes techniques, lourdeur des circuits, etc.). Ce retard contribue au ralentissement du développement du transport aérien marocain.

Dans le transport maritime, il fut opéré la séparation entre la mission de régulation confiée à l'Agence Nationale Portuaire (ANP) et la mission de gestion portuaire confiée à Marsa Maroc. La libéralisation a entraîné des gains de productivité de la manutention, une baisse de l'ordre de 30% des coûts des passages portuaires et une réduction des attentes des navires. Le Code Maritime est élaboré, mais pas encore adopté. Le Maroc applique cependant les règles internationales relatives à la navigation de plaisance, aux agents maritimes à la sécurité maritime.

Le jumelage institutionnel constitue un nouvel horizon dans le domaine de la coopération Maroc-UE. Le Maroc, avec l'appui de l'UE, a développé des actions de jumelage institutionnel dans les domaines aériens (aviation civile), maritimes (sécurité et de la sureté maritime) et routiers (sécurité routière). Ces accords de jumelage, terminés ou en cours, contribuent fortement à renforcer les capacités institutionnelles du pays, à rapprocher les outils, modes de travail et cadre réglementaire du Maroc avec ceux de l'UE, et à mettre en place des liens étroits et durables entre les administrations des deux parties.

Depuis les années 90, le développement rural a constitué l'un des objectifs de la politique de proximité préconisée par le gouvernement marocain. **Le METL met en œuvre, avec l'appui de l'UE et d'autres bailleurs de fonds, le programme gouvernemental portant sur les routes rurales classées** (programme national de routes rurales ; PNRR). Le taux d'accessibilité ou l'indice national d'accessibilité aux routes rurales (INARR[100]) est passé de 54% en 2005 à 67,6% en 2009 pour atteindre 70,1% en 2010. De plus, dans son nouveau « programme d'appui à la politique de désenclavement des populations isolées (€ 55 millions), l'UE appui le Gouvernement marocain par la réalisation des routes rurales non classées (sous la responsabilité des Communes). Dans ce contexte, l'UE exige des clarifications sur la prise en charge nécessaire de l'entretien des routes rurales non classées pour la poursuite du projet. Actuellement, aucune décision n'est prise au niveau du Gouvernement pour la prise en charge de l'entretien de ces routes rurales non classées. Pour cette raison, la mise en œuvre de ce programme a été bloquée par l'UE. La multiplicité des intervenants et l'enchevêtrement de leurs compétences, ajouté au projet de régionalisation en perspective, expliquent cette absence de décision du Gouvernement sur l'entretien des routes rurales non classées.

Des potentialités importantes de *blending* existent au Maroc. Dans le domaine des transports urbains, il est intéressant de noter la participation de plusieurs bailleurs de fonds au financement de la réalisation de deux lignes de tramway entre Rabat et Salé. Le coût total du projet est estimé à Dh 3,8 milliards (€ 350 millions). Les entités européennes ayant contribué au financement de l'investissement du Tramway sont: l'Agence Française de Développement comme principal bailleur (€ 45 millions[101]), la Banque Européenne d'Investissement (€ 15 millions) et l'UE (€ 6 millions[102]). Les contributeurs du côté marocain sont : la Société du Tramway de Rabat-Salé (Dh 690 millions = € 64 million) et l'Agence pour l'Aménagement de la Vallée du Bourgreg (Dh 1.250 millions = € 115 millions). Par ailleurs, le METL a ouvert de nouveaux horizons spécifiques au financement des grandes

[100] INARR= population rurale desservie par le réseau revêtu + population rurale bien desservie par piste)/population rurale totale.
[101] Agence Française de Développement a financé, sur subvention, l'étude d'impact environnemental et social, puis a accordé un prêt de € 45 millions.
[102] Subvention de 8 millions (dont 6 millions ont été décaissés) au titre de la Facilité d'Investissement pour le Voisinage (FIV). L'AFD a géré cette subvention.

infrastructures, y compris le renforcement des partenariats avec le secteur privé dans le domaine de financement, de la réalisation, de l'exploitation de ces structures et des services connexes.

Il convient de noter que depuis 2010, le Maroc développe une politique de développement des services logistiques, avec l'adoption de « la stratégie nationale de développement de la compétitivité logistique, 2010 -2015 »[103]. Il s'agit de renforcer la compétitivité logistique de l'économie marocaine (zones logistiques, optimisation des flux de marchandises, développement des compétences).

La coordination des bailleurs de fonds au Maroc (multilatéraux et bilatéraux) est bien réalisée par le Ministère de l'Economie et des Finances et le Ministère des Affaires Etrangères et de la Coopération. En plus de l'UE, les bailleurs de fonds intervenant dans le secteur de transport sont les suivants : Banque Mondiale, Banque Africaine de Développement, Agence Française de développement et des fonds arabes. En complément de la coordination globale mentionnée plus haut, des concertations sectorielles existent entre l'UE et les autres bailleurs de fonds du secteur de transport, **mais il n'existe pas de structure formelle de coordination sectorielle.**

Eléments confirmant ou réfutant les hypothèses de la phase documentaire

Les observations présentées ci-dessous concernent les hypothèses applicables au cas du Maroc.

QE1. Dans quelle mesure l'évolution des politiques de coopération et des stratégies d'intervention de l'UE a-t-elle répondu à l'évolution des besoins du secteur de transport en Afrique?

- *National policies were drafted in compliance with donor policies rather than the contrary;*
  - Les politiques d'interventions des bailleurs de fonds dans le secteur de transport s'inscrivent dans les orientations des politiques et stratégies de développement et de transport du Maroc, et pas le contraire.
- *Whether national priorities were respected or subordinated by 'imposition' of national sector policies by sector donors;*
  - Les priorités des politiques et stratégies de développement national ont été respectées et prises en compte par les politiques et stratégies de l'appui au secteur de transport des bailleurs de fonds.
- *Existence of clear national interest or prioritisation for corridor development and regional connectivity. Clear 'ownership' of regional institutional priorities, policies and strategies;*
  - Il existe clairement un intérêt du Maroc pour le développement des corridors de développement et d'interconnexion régional (Autoroute maghrébine, train à grande vitesse) dans le cadre de l'Union du Maghreb Arabe (UMA. L'obstacle principal actuel est la persistance du conflit du Sahara entre le Maroc et l'Algérie. De ce fait l'UMA ne fonctionne pas. Il existe une claire appropriation des priorités régionales par le Maroc.
- *EU competencies actually have led to added value of EU sector support in comparison to other sector donors and if so, whether changing EU policies continue to leverage such added value;*
  - Les ressources humaines actuelles de la DUE sont très limitées : une seule personne pour le secteur des transports à la DUE de Rabat. Pour accroitre la valeur ajoutée

[103] Royaume du Maroc - Ministère de l'équipement et des transports « stratégie nationale de développement de la compétitivité logistique, 2010 - 2015 », avril 2010.

des appuis de l'UE dans le secteur, il y aura lieu d'étoffer l'effectif chargé de suivre les interventions de l'UE dans le secteur.

- *Consultation processes are (in) adequate to achieve desired levels of coherence at all levels (country, regional and regional intra-country), between development, cross-cutting or sectoral EU policies and between EU policies and those of other sector donors and stakeholders;*
  - Les résultats des processus de consultations (dialogue sur la politique et stratégie sectorielle) entre la DUE et le METL ont été excellents, notamment dans le cadre de la mise en œuvre de l'appui budgétaire au programme de réforme du secteur. Ils sont bien moins bons avec le Ministère de l'Intérieur pour la prise en charge de l'entretien des routes rurales non classées.
- *Capacities at regional institutional and national government levels are (in)adequate to manage sector consultation and coordination processes;*
  - Les administrations partenaires marocaines impliquées dans les projets de l'UE présentent des bons niveaux mais inégaux, en fonction du niveau de formation des cadres, de la performance des structures organisationnelles, et du nombre adéquat des ressources mises à leur disposition. De plus, les changements d'affectation des cadres au sein du METL sont fréquents, ce qui a un effet négatif sur la capacité de coordination et de dialogue sectoriel.
- *Findings/recommendations of reviews and evaluations of country and regional programmes have a practical value.*
  - Il existe des évaluations qui ont une valeur pratique. Le METL fait des évaluations de la mise en œuvre de ses « plans de transport » et « stratégies d'actions », en vue d'élaborer de nouveaux documents.
  - Les évaluations de l'UE établissent des recommandations pratiques en vue d'améliorer la programmation et la mise en œuvre de ses futures interventions.

QE2. Est-ce que le passage de l'approche projet à l'approche-sectorielle et d'appui budgétaire (ABS[104] et ABG[105]) a répondu aux attentes concernant les résultats de l'appui de l'UE au secteur de transport en Afrique?

- *Partner government commitment to the principles of SPSP were more a response to the quantum of EU sector support than to endorsement of the principles of SPSP or of EU sector policies or strategies (whilst on the contrary there is commitment to the principles of SBS, but not to the attached performance conditionalities);*
  - Le Gouvernement Marocain est d'accord autant avec le bien-fondé des objectifs et conditions de l'ABS que pour obtenir des financements. C'est dans ce contexte que l'appui budgétaire à la réforme du secteur de transport du Maroc a été un succès.

QE3. Dans quelle mesure l'appui institutionnel et le renforcement des capacités fournis par l'UE ont-ils abouti à une meilleure gestion du secteur de transport en Afrique?

- *Adequate institutional resources and capacities ensure that network conditions will (or will not) continue to be maintained or improve;*
  - Les interventions de l'UE ont permis de renforcer les ressources humaines du Maroc ainsi que de rapprocher les outils et modes de travail du Maroc avec ceux de l'Europe, notamment dans les transports routiers, aériens et maritimes.

[104] Appui Budgétaire Sectoriel.
[105] Appui Budgétaire Général.

- *There are (or are not) realistic strategies (with secured resources) for maintenance of continued improvement of rural access (including management of lower category rural roads);*
  - Le Maroc dispose d'un Fonds Spécial Routier créé en 1989, qui dispose des ressources importantes et sécurisées. Il est alimenté par les taxes sur les carburants, sur l'immatriculation des véhicules et la taxe à l'essieu des véhicules poids lourds. Le budget du Fonds a fluctué entre Dh 2,0 et 3,7 Milliard. Avec plus de 53% du réseau routier dans un état bon et acceptable, on peut indiquer que les routes en Maroc sont bien entretenues en comparaison avec la plupart des pays d'Afrique Sub-saharienne. Cependant, l'état du réseau routier revêtu connait une détérioration depuis 2006, même si plus de 53% de l'état du réseau reste « bon à acceptable ». Compte tenu de cette détérioration constatée depuis 2006, la priorité devra être donnée plus à l'entretien du réseau routier qu'aux des travaux d'aménagement.
- *Management decisions are (or are not) based on technical appreciation of base data of improving quality.*
  - Les décisions en matière de gestion du secteur sont donc basées sur des données relativement fiables.
- *National (and regional) sector policies and strategies reflect current and future sector situations and are accompanied by adequately resourced provision for sector investments and management;*
  - Il n'y a pas une bonne adéquation entre les ambitions du Maroc en matière de développement des infrastructures de transports et les ressources disponibles, d'où les recherches de « nouveaux horizons » pour le financement des infrastructures (partenariats public-privés, blending, etc.).
- *Transaction costs are reducing;*
  - les couts de transaction de la DUE et de l'administration marocaine pour mobiliser l'aide demeurent importants (longueur de procédures, coûts de préparation mobilisant des experts, coûts en cas d'appels d'offre infructueux, etc.).

QE4. Dans quelle mesure l'appui de l'UE au secteur a-t-il contribué à la mise en place d'infrastructures de transport pérennes et abordables en Afrique?

- *Trends at national levels show allocations of maintenance funding are increasingly corresponding to maintenance needs (and all available funding is actually disbursed);*
  - Le Maroc dispose d'un fonds routier, avec des ressources sécurisées, qui n'assure que l'entretien du réseau des routes classées (routes bitumées, en terre et rurale), sous la responsabilité du METL. Les routes rurales non classées dépendent des collectivités locales, sous la responsabilité du Ministère de l'Intérieur. Le Fonds routiers ne finance pas l'entretien de ces routes rurales non classées. Le problème se pose donc actuellement pour la prise en charge de l'entretien de ces routes rurales par les collectivités locales. Le Maroc, par ailleurs, contrôle systématiquement la charge à l'essieu des véhicules ; évitant ainsi des détériorations prématurées du patrimoine routier.

QE5. Dans quelle mesure l'appui de l'UE au secteur de transport en Afrique a-t-il contribué au développement social et économique durable?

- *Given the claimed linkage between rural transport, accessibility and poverty reduction, the EU should have done more to focus resources on rural transport.*
  - Durant la période allant de 2005 à 2013, l'UE est intervenue dans les réalisations des routes rurales. Ces constructions contribueront à l'amélioration générale de l'accessibilité des zones rurales et à la réduction de la pauvreté.

QE6. Dans quelle mesure les politiques, les stratégies et les interventions de l'UE au secteur de transport ont-elles contribué de manière explicite à la réduction de la pauvreté en Afrique?

- *EU sector support has paid little attention to addressing transport services weaknesses. It was concentrated almost entirely on physical infrastructure provision and preservation. This situation continues.*
  - Selon les différents Rapports d'évaluation du METL et de l'UE (évaluation finale de l'appui à la réforme) et des entretiens réalisés, l'appui de l'UE a concerné à la fois la réforme de l'ensemble du secteur et des investissements routiers (voir développement plus haut) qui ont contribué à la réduction de la pauvreté (réduction des prix, accessibilité des populations rurales aux services de base).

QE7. Dans quelle mesure la coopération régionale de l'UE a-t-elle facilité la circulation des personnes et des marchandises?

- La rocade méditerranéenne à laquelle a contribué le financement de l'UE a, entre autre, pour vocation de faire partie de la liaison régionale maghrébine. Elle doit en effet non seulement désenclaver les populations du nord du Maroc mais aussi permettre la circulation de personnes et de marchandises entre le Maroc et l'Algérie. La rocade jouera effectivement cette fonction une fois seulement que les frontières entre les deux pays seront ouvertes.

QE8. Est-ce que les procédures de sélection, de planification et de priorisation des interventions de l'UE au secteur de transport en Afrique ont été adéquates?

- *The pre-identified financial envelope of infrastructure projects are subsuming results of feasibility studies and technical designs, sometimes at the cost of standard technical specification and realistically positive Net Present Values.*
  - Le projet de rocade Méditerranéenne a connu des problèmes de mise en œuvre à cause de l'absence d'étude technique et de faisabilité. Il est toujours conseillé de lancer des travaux importants sur la base des études techniques et de faisabilité. L'Administration marocaine applique maintenant ce principe et tous les nouveaux projets sont basés sur des APD (Avant-Projet détaillé).

QE9. Dans quelle mesure les modalités d'appui, les cadres de coopération et les mécanismes de mise en œuvre de la coopération de l'UE, ainsi que les instruments juridiques ont-ils été appropriés pour soutenir le secteur de transport des pays partenaires?

- *Blending has demonstrated a high potential in the transport sector with ITF but there are concerns about EUDs' capacity to contribute to management of implementation and to ensure achievement of development outputs.*
  - Dans le domaine des transports urbains, plusieurs bailleurs de fonds ont contribué au financement de la réalisation de deux lignes de tramway entre Rabat et Salé. Par ailleurs, le Ministère vise le renforcement des partenariats avec le secteur privé dans le secteur. Le « blending » constitue donc ici un potentiel de développement important au Maroc.
  - Le Tramway appartient à la Société du Tramway de Rabat-Salé (STRS), filiale de l'Agence pour l'Aménagement de la Vallée du Bourgreg (AAVB), et dont l'actionnariat comprend également l'Etat ainsi que les communes urbaines de Rabat et de Salé. L'exploitation du Tramway est déléguée à un opérateur privé, Veolia Transdev, pour 6 ans, avant d'être reprise par une société publique créée par la commune urbaine.

QE10. Dans quelle mesure les procédures et les ressources de l'UE ont-elles été appropriées pour soutenir le secteur de transport des pays partenaires?

- *EUDs have (in)adequate human resources capacities (at country and regional levels) to adequately supervise and monitor the implementation of on-going and proposed programme and sector support including the use of innovative financing modalities;*
  - Comme indiqué plus haut, la DUE ne dispose pas actuellement de ressources humaines suffisantes pour suivre ses interventions.

12.6 Conclusions

Les documents de politique et de stratégie de transport dans le cadre desquels s'inscrivent les interventions des bailleurs de fonds sont de bonne qualité

Les interventions de l'UE dans le secteur de transport du Maroc ont été importantes, mais effectuées de manière dispersée. La mise en œuvre des investissements a connu de nombreux problèmes, alors que celle des mesures de réformes fut une réussite. La DUE au Maroc souhaite que l'UE n'intervienne plus dans les investissements physiques, laissant le soin à la BEI de s'occuper de ce domaine. Les interventions de l'UE devront être axées sur les réformes du secteur. De plus il existe des potentialités de financements croisés (*blending*) des infrastructures au Maroc.

Le réseau routier s'est fortement développé durant les dix dernières années tout en se diversifiant, notamment avec l'appui de l'UE et d'autres bailleurs de fonds. En 2005, la longueur du réseau des routes revêtues s'élevait à 32.086 km, contre 41.431 km en 2013, soit une augmentation de plus de 29%. Le réseau des voies express (routes à double voie) a atteint 736 km, et le réseau autoroutier a une longueur de 1.416 km.

Le développement des infrastructures routières ne s'est cependant pas accompagné d'un bon entrtien du reseau routier et d'une sécurité routière adéquate. L'état du réseau routier revêtu a connu une forte détérioration entre 2006 et 2012 et le parc des ouvrages d'art se caractérise par sa vétusté. En matière de l'insécurité routière, le Maroc connaît un fort accroissement, aussi bien en agglomération qu'en rase campagne.

L'appui de l'UE au programme de réforme du secteur de transport du Maroc fut une réussite, tant au niveau des résultats obtenus qu'au niveau de la maîtrise de l'instrument « appui budgétaire » par l'administration marocaine. **Au niveau institutionnel**, des mesures importantes sont effectives, avec l'appui de l'UE, notamment : (i) l'abolition du monopole d'affrètement de l'Office National de Transport (ONT), (ii) des contrats-programmes réguliers entre le METL et la Fédération National des Transports Routiers (FNTR) sur la modernisation du transport de marchandises, (iii) la séparation de la fonction de régulation et d'autorité portuaire de l'Agence Nationale Portuaire (ANP) de celle de gestion portuaire confiée à MARSA MAROC et (v) le renforcement des capacités de l'Etat pour exercer le pouvoir régalien et le contrôle des activités de transport aérien.

Le cadre réglementaire du secteur de transport a été enrichi dans l'optique de la convergence entre les réglementations marocaines et européennes, notamment: modification de nombreux aspects réglementaires ; préparation des différents codes en vue de leur adoption (code de la route, code du commerce maritime, code de l'aviation civile) ; signature de l'open Sky avec l'UE et textes sur la professionnalisation.

L'impact de la libéralisation du secteur a été très important en termes de baisse des prix/coûts de transport, de développement du trafic et de créations de nouvelles entreprises et d'emplois (voir fiche projet and annexe 4). La libéralisation du transport aérien a entraîné

l'émergence des compagnies charters et de *low cost* dans l'espace aérien marocain avec pour conséquence une baisse des coûts de transport pour les usagers. Le trafic aérien de passagers a connu un taux d'accroissement interannuel moyen de 11%. Dans le transport maritime la libéralisation a entraîné des gains de productivité de la manutention, une baisse de l'ordre de 30% des coûts des passages portuaires et la réduction des attentes des navires. La réforme a contribué à la création de 11.000 entreprises et 16.600 emplois dans le transport routier.

La réussite de l'appui de l'UE au programme de réforme du secteur de transport s'explique par les principaux facteurs suivants : la pertinence et la bonne conception du programme, la bonne coordination entre la DUE et le METL, l'adhésion des professionnels du secteur (FNTR), un financement suffisant et une bonne gestion budgétaire au niveau du Ministère des Finances.

Malgré des résultats significatifs obtenus par le programme, les réformes du secteur doivent être poursuivies. En effet, des difficultés et contraintes persistent, telles que l'atomicité (la majorité des transporteurs exploitant seulement un ou deux véhicules) et la gestion artisanale des entreprises de transport, l'encadrement insatisfaisant de la profession, la faible participation du pavillon marocain aux opérations de transport international et la non adoption des codes (maritime, aviation civile). De plus, les mesures d'accompagnement (limite du temps de travail et de repos des conducteurs, contrôle en temps réel de la vitesse (radars, terminaux), formation des transporteurs et des conducteurs, etc.) n'ont pas été réalisées.

Le développement des routes rurales constitue l'un des objectifs de la politique de proximité du Gouvernement marocain. Depuis les années 90, le Maroc met en œuvre avec réussite, avec l'appui financier de l'UE et d'autres bailleurs de fonds, le programme gouvernemental portant sur les infrastructures de base dans le monde rural (routes rurales). Le principal problème concerne la prise en charge de l'entretien des routes rurales non classées qui ne relève pas du METL, mais des collectivités locales dépendant du Ministère de l'intérieur.

Il n'y a pas de structure formelle de coordination des bailleurs de fonds (multilatéraux et bilatéraux) intervenant dans le secteur de transport au Maroc. La coordination globale des bailleurs revient au Ministère de l'Economie et des Finances et au Ministère des Affaires Etrangères et de la Coopération

Durant la période 2005 à 2015, la coopération de l'UE au Maroc dans le secteur de transport a été globalement une réussite. L'appui budgétaire sectoriel pour les réformes du secteur fut un succès, tant au niveau des résultats obtenus qu'au niveau du rapprochement des textes et normes entre ceux du Maroc et de l'UE. Les projets d'infrastructures ont été réalisés, même s'ils ont connu des problèmes lors de leur mise en œuvre.

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