

**37th SEETO STEERING COMMITTEE
MEETING
on
the Development of the SEETO
Comprehensive Network**

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1

**Regional Balkans Transport
Infrastructure Study (REBIS)
Update**

2

Study Objectives

- To support the further development of transport strategies in the region
- To better inform SEETO Regional participants of the priority transport investments in the region.

3

Expected Outcomes

- **A limited strategy update**
 - identification of physical and non-physical transport barriers on key routes on the SEETO Comprehensive Network.
- **A Priority Action Plan**
 - outlining investment priorities (soft and hard) for the Comprehensive SEETO transport network

Priority Action Plan will be used, in a second phase (beyond the scope of this proposal) to develop a detailed investment plan to serve as a basis for future prioritized transport investments.

4

Strong Endorsement of Project

- Project identified as one of the key priorities of SEETO
- Endorsed by Regional Participants in November 2011
- Forms an integral part of the *SEETO Strategic Work Program 2012-2014*.

5

Motivation for the Study

- EU commissioned REBIS in 2003 focused on:
 - Development of a regional Core Network (SEETO Comprehensive Network, which has become integrated into the TEN-T network)
 - Identification of projects suitable for international financing.
- No comprehensive review or update.

6

The REBIS Update in Perspective

Two ongoing initiatives:

- SEETIS III: Harmonization of data definitions and standards and Data Collection.
- SEETAC: Development of a comprehensive transport planning model for SEE that would help better link Europe to the Far East.

7

Scope of Study

1. Development of a transport demand model
2. Identification of the main corridors/routes on the SEETO Comprehensive Network
3. Analysis of the physical and non-physical barriers on the Network
4. Identification of potential efficiency-enhancing investments and measures; and
5. Development of a priority action plan for physical and non-physical improvements

8

Key Defining Features of the Update

- Not intended to address all topics covered in the original study and at the same level of detail.
- Will consider multi-modal transport
- Will consider linkages beyond the immediate Western Balkans region
- Will focus on *non-physical barriers* at border crossings

9

Proposed Approach for Study

1. Review Existing Regional and National Studies
 - TIRS (2002), REBIS (2003), Transport Network Development, WB (2005), SEETO MAP(s), National Transport Strategies,
2. Take stock of REBIS realization
 - What was achieved
 - what was not: in pipeline? no financing? changing priorities?....
3. Review/Analyze REBIS traffic projections (?) against actual (utilizing SEETIS)

10

Proposed Approach for Study (2)

4. Develop “simple” Freight/Passenger Transport **Demand** Model
 - Using trade data (CEFTA), intra & inter region
 - Income/economic data (GDP, GDP/capita, growth)
5. Develop/refine methodology for assessing “economic” benefits in a regional context
 - Regional perspective (broader economy)
 - Country economic perspective

11

Proposed Approach for Study (3)

6. Identify the main corridors/routes/links on the Network based on the EU TEN-T criteria
 - Bottleneck alleviation
 - Regional integration
 - Meeting social and economic criteria,
7. Assess the capacity (**supply**) of the Comprehensive Network to meet the projected traffic.
8. Identify impediments to seamless transport
 - Regulatory/institutional/procedural barriers (IFC study)
 - Physical bottlenecks
 - Current/Expected capacity constraints

12

Proposed Approach for Study (4)

9. Identify Investment Requirements
 - Cost and Financing Sources
10. Develop a limited regional transport strategy update addressing:
 - Demand, investment requirements, sector management issues, potential financing sources, regional, strategy for periodic monitoring/ updates
11. Develop a Priority Action Plan (based on a *pre* pre-FS)
 - Soft (non-physical) investments
 - Hard (physical) investments

13

Priority Action Plan

- Not Feasibility level or Pre-feasibility level
- Based on a preliminary level economic analysis
 - Benefits based on model traffic projections
 - Costs based on order of magnitude estimates of similar projects in the country/region
 - Analysis to take into account regional spillover benefits and country perspectives
 - Time-release type methodology for non-physical barriers

14

Project Timeline

Key Deliverables	Date
Consultant Mobilization	August 2013
Report 1: Inception Report-reviews (tasks 1-3), methodology & timeline	September 2013
Report 2: Demand model and regional benefits methodology (tasks 4-5)	November 2013
Report 3: Supply and impediment analysis and requirements (tasks 6-9), LIMITED STRATEGY UPDATE REPORT	January 2014
PRIORITY ACTION PLAN	March 2014
	April 2014

15

Project Management, duration and Cost

Implementation

- World Bank to lead the Project
- The SEETO Secretariat will work closely with the World Bank, the consultants and regional participants
- DG Move and SEETO Steering Committee will provide guidance and feedback on the project as it progresses.

Project Duration

- One year

Project Cost

- 600,000 Euros

16

Issues/questions

- *Limited update*--Resist the temptation to do everything and keep simple
- Role of SEETO Steering Committee and SEETO Secretariat
- How do the study outcomes *link to MAP and WBIF*
- Given the long-processing time for WBIF grants, when should Phase II start?

17

Thank you

18