

Logistics in the Mediterranean: Current Situation and Prospects

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Logistics constitutes a decisive factor for Euro-Mediterranean integration and is present in all value chains. Studies on Euro-Mediterranean trade and integration reveal the strategic importance of logistics. Optimisation of logistics chains is a component of competitive advantage in the Mediterranean Region. Based on appraisal of the situation, macro-logistic, meso-logistic and micro-logistic decisions have been taken and applied. It is in this dynamic that logistics policies have emerged in South Mediterranean countries to accompany those of their North Mediterranean counterparts. To grasp what is at stake with these policies and ascertain the perspectives of logistics in the Mediterranean, an appraisal of the state of affairs (in particular in south shore countries) is essential.

Overview of the Current State of Logistics in the Mediterranean

An Underdeveloped Sector

The Mediterranean Partner Countries (MPCs), particularly those in the South Mediterranean, display numerous logistics-transport weaknesses. The proximity to the European market of countries such as Morocco and Tunisia, well-integrated into Euro-Mediterranean trade, lends them a competitive advantage in responsiveness for time-sensitive sectors with respect to areas offering lower costs (low-cost countries) but that are farther away. This relatively competitive advantage is unfortunately hampered by

logistics underperformance on all levels (macro-logistics, meso-logistics and micro-logistics):

- An elevated logistics cost equivalent to 20% of the average GDP in South Mediterranean countries;
- Atomised road transport with a predominance of the informal sector despite the reforms under way, with a significant role still played by own-account transport, of below-standard quality, and international road transport dominated by European transport agents;
- Warehousing infrastructures underdeveloped or not developed at all, a dearth of logistics platform networks and skills networks throughout the global logistics chain; a weak supply of logistics services with little diversification, absence of real national logistics service providers, the presence of multinational operators together with the emergence of a few national operators, above all in Morocco;
- Railway freight transport monopolised by public enterprise, though accompanied by significant reforms and major investment;
- Maritime and port transport fully in process of restructuring: port reform with transfer of terminals management to private materials handlers, often multinationals; active private-public partnership with concession of materials handling to private operators, often multinationals (Tanger Med, Casablanca, Port of Bejaia, Algiers, etc.); fleet privatisation (Morocco) or its strengthening in the public sphere (Algeria, Tunisia, Libya, etc.).

Industrial and commercial agents generally prefer insourcing logistics activities. Only some out-source transport and warehousing operations. Logistics insourcing is due to the reluctance of these

operators to trust third parties with in-company business information.

Transport and warehousing represent a substantial share of the market for logistics service providers. Unfortunately, the level of services offered is relatively low in quality, with sub-standard technical conditions.

Logistics subcontracting of the 3PL type (Third-Party Logistics: warehousing, inventory management, order picking, organisation of physical distribution, information and value-added services) are provided primarily by foreign companies or companies oriented towards international trade, whereas Maghreb company offers only cover transport or simple warehousing.

The bureaucratic red tape and the competition of the informal sector in road transport and warehousing render the development of the formal sector and the maintenance of high quality standards difficult. Finally, institutions and often legislation are not adapted to the dynamics of logistics. Information systems are little or not at all developed for the real needs of the supply chain.

Conferences and events have taken place in a number of Mediterranean countries, organised by national governments, the European Union (UE), professional associations, study or research centres and universities. Trade fairs dedicated to logistics and transport have become meeting places for national and international logistics providers, both public and private, as well as other stakeholders. All of these gathering places and events have served as spaces for reflection, study and proposals regarding the development of the logistics sector in the MPCs.

Experience Exchange, Debate and Proposals on Logistics in the Mediterranean Region

A Euro-Mediterranean policy is taking form to build a Euro-Mediterranean logistics area of peace and growth. Numerous Euro-Mediterranean forums and other gatherings have taken place and projects have been developed since the announcement of this policy, which reflects the European Union's vision concerning development in the South Mediterranean:

- **Mediterranean Logistics and Transport Forum** (part of the International Logistics and Materials Handling Exhibition - SIL Barcelona): SIL Barcelona hosts the annual Mediterranean

Logistics and Transport Forum, a forum for debate on all issues relating to the global logistics chain. The 2008 edition bore the title "The Mediterranean in Movement." Debates primarily revolved around the following question: Will south shore countries be ready, from the logistics and transport perspective, to enter the Euro-Mediterranean free trade area in 2010? This question prompted the institutional representatives and operators present to assess the state of affairs and make recommendations for developing infrastructure and upgrading institutions. In 2009, debate concerned the creation of a Mediterranean logistics community. The forum allowed discussion of new policies in the logistics sector in Mediterranean countries; it was launched as part of the EU-funded Invest in Med project, among other participating projects. The 2010 edition of the Forum again took up the ports issue as a whole (infrastructures, institutions, crisis and financing, cooperation, etc.). The Forum has the advantage of proximity to the IEMed (European Institute of the Mediterranean), the Centre for Transportation Studies for the Western Mediterranean (CETMO), the European Investment Bank (EIB), the Marseille Center for Mediterranean Integration (CMI) and the Secretariat of the Union for the Mediterranean (UfM). Logistics is the vehicle par excellence of this Forum with a view to the development of the Euro-Mediterranean area. The Marseille Center for Mediterranean Integration has the mission of facilitating access to knowledge, strengthening sustainable development and making policies converge towards greater integration, and transport & logistics figures among its concerns.

- **Centre for Transportation Studies for the Western Mediterranean (CETMO):** This organisation was a pioneer and served as a catalyst in politics of rapprochement regarding transport and by extension logistics on both shores of the Mediterranean. Studies done by this centre constitute a significant contribution towards comprehending transport-logistics issues and how to deal with them in order to build the Euro-Mediterranean Region. The last study on the logistics sector in the western South Mediterranean is an appraisal of the state of affairs in a sector marred by numerous structural weaknesses. The study shows the unequal develop-

ment of logistics in countries of the Arab Maghreb Union (AMU). The sector is, however, on the move in certain countries of the Union: Morocco and Tunisia, but it is lagging behind to different degrees in the other three countries. The study proposes feasible solutions that should be integrated into the ensemble of solutions proposed by other institutions (WB, EIB, CMI, etc.).

Logistics and quality are linked: the quality of maritime transport is an essential factor for development and for the profitability of the logistics chain

- The **Institut Méditerranéen des Transports Maritimes (IMTM)**, based in Marseille, has contributed to discussions on Mediterranean logistics by organising a number of events. As early as 2002, the IMTM organised a colloquium on logistics platforms in the Mediterranean held in Malta. It analysed existing and projected port logistics platforms, identifying the problems existing between Mediterranean ports in fierce competition – the completed and projected logistics platforms being numerous, each port wanting “its own” platform, etc. By the same token, in 2007 the IMTM organised a colloquium in Alexandria on quality improvement in the Mediterranean Region, with logistics at the heart of the debate. Logistics and quality are linked: the quality of maritime transport is an essential factor for development and for the profitability of the logistics chain (need for a Mediterranean logistics community to define norms and constantly evaluate the quality of maritime logistics services through a will for a common Mediterranean policy). In 2008, a colloquium was held by the title of “Towards a Logistics Platform Network in the Mediterranean: Myth or Reality” organised by the IMTM and AMLOG in Tangier. The aim was to elucidate the notion of network and its economic, legal, institutional and informational aspects, and to take stock of the situation in countries of the Mediterranean Basin (strong and weak points on the levels of countries, regions, ports, professional organisations and institutions). This colloquium concluded that the logis-

tics platform network should be an organisation for cooperation and solidarity within a vision of an equitable Euro-Mediterranean region.

- **Projects for Integration of Logistics and Transport between Italy and South Mediterranean Countries (ItalMed), and Italy and the Balkans (ItalBalk):** On 14 and 15 July 2009, work began in Naples on the ItalMed and ItalBalk Integrated Interregional Cooperation Projects, dedicated to logistics and transport integration in Italy-South Mediterranean and Italy-Balkans relations.

The integrated projects, financed by the “Programme of Support to Regional Cooperation,” see the Campania Region as leader of a vast partnership involving eleven other Italian regions (Abruzzo, Apulia, Basilicata, Calabria, Emilia-Romagna, Friuli-Venezia Giulia, Lazio, Liguria, Sicily, Tuscany and Veneto) and seven partner countries: Algeria, Egypt, Morocco and Tunisia for the South Mediterranean project, and Albania, Serbia and Montenegro for the Balkan project. The two days were respectively dedicated to the conference presenting the projects and a visit to two top-level logistics hubs in the Campania Region.

The conference, which was held at the maritime station of the port of Naples, was actually the first major event to provide information on and promote the projects as well as an important opportunity for debate delving into the topics of transport and logistics in the Mediterranean area and the Balkans.

The event was coordinated by the EU Project Study and Management Section of the Campania Region insofar as the institutional part (plenary session), and by LOGICA - Agenzia Campania per la Promozione della Logistica e del Trasporto Merci (the Campania Agency for the Promotion of Logistics and Freight Transport) for the part concerning country workshops. Participants were: the above-stated LOGICA Campania Agency, institutional representatives of the Italian Foreign Affairs and Economic Development Ministries, representatives of the Transport Ministries of the six Partner Countries, i.e. Algeria, Egypt, Morocco and Tunisia for the South Mediterranean project, and Albania and Serbia for the Balkan project; representatives of the Italian regions involved in the projects and numerous operators and consultants in the sector.

The conference on the whole represented a significant opportunity for useful debate towards defining a roadmap for improving commercial traffic connections in the Mediterranean Region and the Balkans. By the same token, this first international-level event provided a strong boost to creating a climate favourable to collaboration and international cooperation between the institutions and technical operators of the different countries involved.

Thanks to the consolidation of the institutional partnership and the establishment of direct contacts between operators in the sector, a work platform was established by joint agreement that will structure the project activities programmed as part of ItalMed and ItalBalk and foster the emergence of joint entrepreneurial initiatives.

- **MedPorts** (3 May - 30 July 2010) – Development of groupings of Small and Medium-sized Enterprises (SMEs) in the port logistics services sector in the Mediterranean Basin – was a project cofinanced by the EU through the Invest in Med programme, designed to increase the volume and quality of Euro-Mediterranean investments and trade and contribute to the sustainable development of the region. MedPorts aimed to contribute to improving advanced port logistics services in European and South Mediterranean Countries and develop a system of integrated transport in the Mediterranean Basin. The main goal of the initiative was to provide support to SMEs and other organisations working in the port logistics and transport sector in the areas covered by the project (Tangier in Morocco, Radés in Tunisia, Port Said in Egypt, Cagliari in Italy) and foster relations among the transport-logistics SMEs of the countries involved.
- **LOGISMED Project:** The Euro-Mediterranean Network of Logistics Platforms (LOGISMED) is an “initiative launched by the European Investment Bank (EIB) to develop the logistics sector in Mediterranean Partner Countries (MPCs). It envisages the creation of a network of Euro-Mediterranean Logistic Platforms (EMLPs) with well-defined characteristics to support the modernization of a sector that is essential for the development of a Mediterranean free trade area.” This project, conducted by the EIB, is open to interested partners, the MPCs and technical and financial institutions. Among the

technical partners are the Institut des Sciences et des Techniques de l'Équipement et de l'Environnement pour le Développement (ISTED) and CETMO. An in-depth diagnosis of the state of logistics in South Mediterranean Countries by LOGISMED confirms that the logistics sector in the MPCs is not sufficiently developed for a number of reasons. The LOGISMED study results were validated by the MPCs at the EuroMed Transport Forum in January 2010. The LOGISMED project would be a way of re-launching the development of EMLPs by attributing a quality label to model platforms in each MPC. These labelled EMLPs would exercise a spillover effect on local, regional and airport or port logistics platforms. One of the aims of LOGISMED is to accompany these changes with logistics training on the Mediterranean level and also to establish common quality labels for training in this field. It is in this framework that the EIB and IEMed organised a high-level seminar on logistics training needs in Mediterranean Partner Countries in the context of the LOGISMED network, held on 23 and 24 November 2010 in Barcelona, which allowed exchange of opinions among experts on proposed models and recommendations. Insofar as training, the LOGISMED programme foresees the training of logisticians on different levels in the Mediterranean within the framework of a training network based on a shared programme, as well as the creation of a network of instructors and experts in the fields of transport and logistics to effect the necessary training, etc. LOGISMED strengthens such projects as the EuroMed 2003-2010 project, RTAP (Regional Transport Action Plan) 2007-2013, etc.

- **Mediterranean Logistics Conference (MEDLOG):** The Tanger Med Special Agency (TMSA) and its different partners, in particular those of the port community, decided to create a recurrent platform for exchange and debate, knowledge upgrading and preparation for the major changes in professions, a platform gathering and allowing comparison of the viewpoints of experts, consultants, professionals and operators and allowing debate among policymakers and entrepreneurs, from the largest multinationals to the smallest local businesses. It was in this spirit that MEDLOG, the Mediterranean Logistics Conference, was created in 2007.

Four conferences have taken place to date (in 2007, 2008, 2010 and 2011). The theme of the first conference was “The Mediterranean, a New Hub of World Trade,” and was attended by over 350 individuals involved in all activities of world trade (transport agents, carriers, port operators, equipment manufacturers, consultants, logistics professionals, etc.). They debated the matter of partnerships between countries along the Mediterranean and a number of related issues (free trade areas, the role of transshipment ports, development of logistics areas, ICT, etc.).

The second conference (2008) focussed on “Port Excellence: Integration of Global Logistics Chains and Hinterland Consolidation.” Over 430 participants from over twenty countries attended. The main points discussed were the role of the Strait of Gibraltar as a mega Atlantic platform, new initiatives, diversification of maritime routes and the challenges of consolidating access to the hinterland.

The 2010 conference emphasised debate on “International Food Trade and the Logistics Cold Chain.” Food supply security is a formidable international challenge. This security is even more important for perishable products, which need an integrated logistics cold chain. A number of aspects were studied (requirements, performance and changes), revealing the challenges of phytosanitary regulation and the organisation of fresh and frozen food logistics. Innovation constitutes a response to cold chain logistics requirements: energy, information systems, warehousing, vehicles, training, etc. Also discussed was the issue of attracting cold chain actors – both foreign and Moroccan – to Morocco to meet customer needs via adapted and progressive means. Then the case of Brazil was presented in the sphere of food trade, in particular transatlantic trade.

The conference in March 2011 was dedicated to the theme of “Green Logistics & Green Ports,” to debate the ecologic aspects of the logistics chain. The stakeholders in complex and/or globalised logistics chains presented their experiences regarding environmental constraint, which call for greater imagination and innovation in handling global logistics flows at the lowest logistics and social costs. Three panels discussed environmental issues: the American experience in environmental issues in the port sector, logis-

tics-related environmental issues, in particular the importance of the maritime dimension, and last-mile logistics.

- **Moroccan Fair on Trades, Transport and Logistics (LOGIMA):** This is the trade fair par excellence on logistics in Morocco. Its aim is to help companies acquire a logistics culture, allow companies to improve their performance, organise a place for information and experience sharing, take stock of logistics evolutions and trends on the national and international levels, offer products, services and know-how in the fields of transport & logistics to those interested and finally, federate the transport-logistics community annually around a platform for meetings, networking and business. Five editions have taken place, with a number of conferences on topical subjects in the world of transport & logistics.
- The **Salon international des Transports, des Infrastructures, des Équipements et de Logistique (SITIEL, International Transport, Infrastructure, Equipment and Logistics Trade Fair)** is another meeting place for logistics and transport chain stakeholders, this one in Algeria. It has already reached its 8th edition. This trade fair has gained international renown for combining operator and institutional stands with debates and workshops on highly topical issues in transport logistics. The trade fair’s success is due to the excellent organisation and not the logistics dynamic in Algeria. Logistics is the poor relative of macro-logistic policy in this country. KGN, the organiser, is the publisher of the best transport logistics journal in the Maghreb, *Le Phare*. The publisher organises numerous seminars and conferences throughout the year on all transport-logistics issues, inviting international experts and professionals
- The **Association Marocaine pour la Logistique (AMLOG, the Moroccan Association for Logistics):** AMLOG has actively organised, participated in and provided support for a number of events concerning all aspects of logistics: the seminar organised on 9 December 2009 in Casablanca for AMLOG members and partners, “Intermodality and Accompanied Combined Transport: Strengths and Weaknesses. Is There a Future in Morocco and Under What Conditions?” by Jean Louis Deyris; the conference held on 11 December 2009 in Agadir as part of the International Exhibition of the Fruit &

Vegetables Industry (SIFEL), about logistics platforms for the industry, which allowed strengths and weaknesses to be identified insofar as the logistics chain, from manufacturer to distributors, and propose solutions based on experiences in rival industries.

In Casablanca on 28 January 2010, AMLOG also organised a seminar on the Rotterdam Rules and their impact on the logistics chain, with the presentation of a comparative study between the contribution of these Rules in comparison with existing conventions (the Brussels Convention of 1924, the 1968 and 1979 Protocols, the Hamburg Rules, the Geneva Convention on Multimodal Transport of 1980, which never entered into force). The Rotterdam Rules are favourable to mega-carriers and large carriers as well as global logistics service providers. Small and medium-sized carriers as well as the ship-owners and transport agents from the MPCs are not in a good position to handle the risks of the Rotterdam Rules. The Rotterdam Rules also cover multimodal transport (Article 26). The problem will arise in cases of litigation. How will the judge interpret the term "international" in order to apply the CMR or CIM conventions¹ in the case of disputes regarding land transport? The same problem arises with pre and post overland transport in a national area: how will judges be able to apply the CMR or CIM conventions to the portion of transport effected locally instead of the law of the country in question?

The Conference on "Motorways of the Sea" was led by AMLOG's guest in November 2010. It allowed parallels to be drawn between the European approach on the one hand, with the contributions of Henri de Richemont (author of the report on the Motorways of the Sea) and Dominique Bussereau (French Secretary of State for Transport) and, on the other hand, the Moroccan approach of the MedaMos I Port of Agadir-Port Vendres Port Motorways of the Sea presented by the Moroccan Merchant Marine.

At this gathering and for the first time, strategies were discussed for collaboration of stakeholders across the Motorways of the Sea logistics chain. The conference clarified the debate on

Motorways of the Sea, allowing Morocco to take up a more constructive, measured and innovative position in the MedaMos II project.

These forums, trade fairs and projects have been key factors in the emergence of a real Euro-Mediterranean political will to develop the logistics sector in the Mediterranean Region, in particular in the MPCs

AMLOG was also the official partner for a number of conferences (LOGISTIQUA 2010, International Conference on Logistics by the theme of "Supply Chain Management: A Boost to Competitiveness in Times of Crisis," École Nationale de Commerce et de Gestion - ENCG Agadir, May 2010; El Jadida Conference on "Logistics: The Key to Competitive Business; Current Situation and Prospects," El Jadida Faculté Polydisciplinaire (FPJ), Chouaib Doukkali University, May 2010; the Hassan II Mohammedia University Conference on Logistics and Competitiveness of Foreign Trade, June 2010, etc.), in particular:

- The Third International Conference on Information Systems, Logistics and Supply Chain, (ILS 2010), held in Casablanca on 13-16 April. On this occasion, the President of AMLOG emphasised that information systems "interconnect public and private interests (i.e. local authorities and enterprise). They interrelate the long-term (territorial planning) and the short-term (market flexibility). They constitute social factors (territorial factors) beyond immediate markets. It is from this macro-logistics/micro-logistics perspective that we will discuss logistics platform issues in Morocco."
- At the ICHCA International Biennial Conference held in Casablanca on 26-27 April 2010, the President of AMLOG made a speech on the challenges of the maritime logistics chain (maritime transport, port and

¹ Convention on the Contract for the International Carriage of Goods by Road 1956 (CMR) and the Convention on the Contract for the International Carriage of Goods by Rail (CIM).

hinterland) regarding control of global logistics costs.

- Finally, a seminar was organised by AM-LOG on Incoterms 2010 in February 2011. It was led by Bernard Dreyer, who compared Incoterms 2010 to those in 2000 from the perspective of the international logistics chain.

In conclusion, these forums, trade fairs and projects have been key factors in the emergence of a real Euro-Mediterranean political will to develop the logistics sector in the Mediterranean Region, in particular in the MPCs. By the same token, these events raised awareness among MPC policymakers of the convenience of assigning a specific role to the logistics sector in the development of their economies.

Prospects

Logistics Policies

Commendable efforts are emerging to develop logistics in South Mediterranean Countries. A strong political will to develop a logistics sector in the case of Morocco finds expression in a programme contract, which constitutes a unique case in the Maghreb, between the State and private enterprise to consolidate logistics service and accompany the structuring of the domestic logistics market by creating a network of logistics platforms on the level of all the regions of Morocco, assisting in the development of Moroccan logistics operator activities, fostering skills on all levels and for all logistics activities and preparing administrative personnel to regulate the Moroccan logistics system. Similarly, in Tunisia there is a logistics strategy to create logistics platforms and foster the emergence of local operators and logistics training. In Algeria, no real logistics policy has yet been established but all data would indicate the forthcoming emergence of a logistics policy to accompany the reforms underway. In Egypt, the authorities are aware of the importance of the logistics sector in the national economy; indeed, measures and institutional reforms are underway to strengthen it.

Investment in infrastructure (roads, motorways, logistics areas, etc.) exists in the three Maghreb countries: major East-West motorway works, privatisation

of parts of port infrastructures and modernisation of rail transport in Algeria by concentrating on the improvement of port connections with their hinterland and potentially on opening up to the Greater Maghreb. A network of motorways and railways is under construction in Morocco (Tangier-Casablanca high-speed railway line 2015) and we are witnessing the emergence of an International Hub Port in Tangier (Tanger Med), and the privatisation of port materials handling is underway at Moroccan ports. Likewise, in Tunisia, motorways are being built and there is a project for a deep-water port in Enfidha.

Multinationals and global operators in transport and logistics are slowly appearing, except in Morocco, where they are already well present.

Towards the Creation of a Logistics Cluster and a Network of Euro-Mediterranean Logistics Platforms (EMLPs)

To ensure the development of the logistics sector in the MPCs, it seems necessary to accompany national logistics strategies by two essential measures:

- Upgrading the logistics environment by creating a Euro-Mediterranean logistics community in the form of a Mediterranean logistics cluster to provide support to national, regional and local clusters. The experience of North Mediterranean countries provides a wealth of knowledge (European Cluster Observatory site). In this regard, the proposals of the CETMO study (cf. "The Logistics Sector on the Southern Shores of the Western Mediterranean: Assessment and Proposals for Improving the Provision of Logistics Services") must be discussed and they will have to be implemented in an intelligent manner in order to strengthen logistics competitiveness in the MPCs;
- The creation of a network of EMLPs: creating such a network requires a global, integrated offer and a unified planning and infrastructure policy (roads and motorways, land supply at reasonable prices, specialised warehouses – refrigeration facilities, dangerous goods storage facilities – buildings for collective services and utilities, railway connections, transshipment points for containers, container parks, etc.).

Platforms of a Euro-Mediterranean dimension are often located in a logistics activity area adjacent to

OPTIMAL CONDITIONS FOR CREATING A NETWORK OF EMLPS

- Strategic geographic location;
- A dense, effective transport network;
- A pro-active policy on logistics issues at different government levels (regional government, local government, etc.) to attract actual and potential investors;
- The multi-modality of platforms is a strong criterion for promotion. It provides the advantage of offering more efficient interconnection hubs with multiple possible logistics combinations;
- Competitive infrastructures: road and motorway networks as well as a railway network connecting major cities;
- Maritime ports with efficient services, plus a series of airports;
- Development of combined transport to ensure sustainable development: by grouping together flows, combined transport diminishes fossil fuel consumption and reduces greenhouse gas emissions to a greater or lesser degree, depending on the transport mode (maritime, inland waterborne transport or rail). Combined transport likewise contributes to decongesting road infrastructures that are currently experiencing continuous increase in road traffic, a source of increased road insecurity;
- And finally, financial, land and training facilities are indispensable for establishing a functional network.

an area of multiform and multi-industry economic activity area not far from a port area. These platforms require a series of specific collective services (land, infrastructure, skills, finance, institutions, adapted regulations, etc.).

The model of the LOGISMED project should serve as a flagship for the logistics platform network and the Euro-Mediterranean logistics cluster.

Conclusion

Financial and skills issues will be decisive in creating a network of EMLPs.

The adequate solutions will have to be found for establishing a “private-public” Mediterranean partnership in order to facilitate the start of construction of this network of EMLPs, whose aim is to facilitate successful and fair integration of the interests of private and public operators on both shores of the Mediterranean. Solutions are possible (European Investment Bank, African Development Bank, World Bank, public and private funds, local and multinational funds, etc.). Financial, land and training innovations need to be sought and the creation of a

Euro-Mediterranean Logistics Community should be encouraged by these forums, trade fairs, projects and so on, in order to build a Euro-Mediterranean area of peace and progress.

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