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Improvement of Transit Systems in The Horn of Africa¹

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INTRODUCTION

There is only one landlocked country in the Horn of Africa - Ethiopia. This has been the case only since 1993, when Eritrea's decision to separate from Ethiopia effectively cut off the latter's access to the sea.

I. ETHIOPIA'S THREE MAIN ACCESS CORRIDORS TO THE SEA

Ethiopia's three main access corridors to the sea are the Assab (Eritrea), Djibouti (Djibouti) and Berbera (Somalia) corridors.

The region's other ports, namely Port Sudan (Sudan), Massawa (Eritrea) or Mombasa (Kenya), are too out of the way to be used regularly by Ethiopia and can not be considered as really competitive, although now and then Ethiopia has made attempts to use them for transiting some of its exports and imports. The same applies to the other Somali ports of Bosaso, Mogadishu and Kismayu.

ASSAB-ADDIS ABABA CORRIDOR

The port of Assab can accept large ships. It has seven deep-water wharves for general cargo which can handle vessels with a draught of 11 m, two RO-RO wharves, a cement wharf, a jetty to handle salt and an oil terminal. In 1997 this port was equipped with 18 fixed cranes (lifting capacity between 6 and 20 tonnes) and 7 mobile cranes (lifting capacity between 6 and 150 tonnes).

Assab's 280 000 m² of storage capacity can accommodate 280 000 tonnes, subdivided into enclosed warehouses (45 000 tonnes), sheds (20 000 tonnes) and yards (215 000 tonnes). In 1997, the port of Assab laid plans for the construction of two additional wharves able to handle 100 000 TEU of container goods.

The Assab - Addis Ababa corridor consists entirely of road. Its 882 km divide into two sections:

- Assab - Awash (659 km), built between 1969 and 1973. This section has fallen into serious disrepair owing to the high traffic levels of the 1990s and failure to maintain it thereafter;
- Awash - Addis Ababa (223 km), a well maintained asphalted road which also lies on one of the routes reaching Addis from Djibouti.

ADDIS ABABA - DJIBOUTI CORRIDOR

The port of Djibouti has 13 deep-water wharves:

- A container terminal with two 400 m deep-water wharves that can accept, respectively, vessels of 12 m and 9 m draught. Four gantries of 35 tonnes and 50 tonnes capacity are used for handling on the wharves, and the 14 ha of open yards can store 5 100 containers, or 120 000 per year.
- Four permanent berths with a depth of between 9 m and 12 m for general goods handling, capable of taking vessels with draughts of 9 m and 10 m. Ten
hectares of temporary open storage space is available, but their use involves additional portage.

- An oil terminal allowing the berthing of vessels having a draught from 11 m to 12 m. The three companies which operate at Djibouti - Shell, Mobil and Total - can store between them up to 200 000 m³ of oil destined for the national market and for Ethiopia.
- A permanent wharf area, 12 m deep, for bulk goods (fertilizers, cereals).

The port's 180 000 m² of storage space includes 47 300m² in 19 sheds, whose total annual capacity is 670 000 tonnes per year (for 45-day storage periods). A refrigerated warehouse with 9 cold stores, built in 1983, has a storage capacity of 2 300 m³.

Three corridors - two road and one rail - link Djibouti with Addis Ababa:

- The Djibouto-Ethiopian railway (CDE) is a metric-gauge line that runs for 781 km via Dire Dawa. Opened in 1897 and regarded at the time as essential to the opening up of Ethiopia, this line has lost its effectiveness owing to age, lack of maintenance and poor management. It carried only 200 000 tonnes in 2002.
- The 910 km road via Galafi, of which 217 km lies on Djiboutian territory. Galafi is the border post between Djibouti and Ethiopia. The road meets the Assab-Addis Ababa route at Dobi. This main route currently carries almost all the traffic into Djibouti. On the Djiboutian side, the work to repair the Dikhil-Galafi section is almost complete, except for 100 km still awaiting asphalt.
- This road extends for 844 km via Dawenlé; 100 km lies on Djiboutian territory. The road runs parallel to the railway as far as Dire-Dawa, where it meets the Assab-Addis Ababa road. The stretch in Djibouti is asphalted. From the border to Dire-Dawa, in Ethiopia, this is an earth road except for the 56 km surfaced section between Kulibì and Dire-Dawa. Using funding from the European Union, the entire road will be improved, including the asphalting of the earth stretches, by 2005.

BERBERA-ADDIS ABABA CORRIDOR

The port of Berbera has one 650 m wharf capable of accepting ships of up to 15 000 tonnes and a line of seven wharves, including one for RO-RO. The "Russian" wharves (400 m) were built in 1960, and the "American" ones (250 m) in 1986. There is also an oil terminal with a capacity of 30 000 tonnes, distributed among 22 tanks currently operated by Total. Storage capacity is 1 200 m³.

The Berbera-Addis Ababa corridor (854 km) is entirely road. It reaches Hargeysa, the Somali capital, after 160 km, and continues to Jijiga in Ethiopia (at 336 km); from there it runs via Harare, Dire Dawa (472 km) and Addis (854 km) to join the road that links Djibouti, Dewenle, Dire Dawa and Addis.

Between Berbera and Hrageysa, the road is asphalted but in poor condition. By contrast, its four bridges have just been rebuilt. Between Hrageysa and the Ethiopian border at Togotchale, the road is asphalted for 71 km as far as Kala-Baid (51 km Hrageysa-Gabile stretch surfaced by the Italians in 1981, 20 km from Gabiley to
Kala-Baid built by the Chinese in 1882). A further 20 km of earth road then extends to the border; it is difficult to use during heavy rain.

In October 1999, it was estimated that this road could be repaired at a cost of 20 million dollars if the work commenced promptly, and forty million dollars if the work was delayed. To date, the funding has not been forthcoming.

On the Ethiopian side, the Dire Dawa - Jijiga stretch is being rebuilt with money from the EU, which plans to go on to repair the Jijiga-Togotchale stretch.

For the moment, the Berbera-Togotchale-Jijiga road is difficult for trucks, especially those with a trailer, as is the case with most trucks coming from Ethiopia.

CURRENT ROLE OF THE THREE CORRIDORS IN SERVING ETHIOPIA

Although, prior to 1974, 60 per cent of Ethiopia's foreign trade transited via the port of Djibouti (around 300 000 tonnes per year), the Assab route became Ethiopia's main corridor. Its share of traffic grew from 700 000 tonnes in 1991 to over 2.7 million tonnes in 1995, an increase of 400 per cent in five years. By then, Ethiopian traffic accounted for 90 per cent of imports and over 50 per cent of exports transiting the port of Assab. The number of return truck journeys increased from 15 000 in 1991 to 45 000 in 1995.

However, the outbreak of hostilities between Ethiopia and Eritrea in May 1998 brought the closure of the Assab-Addis Ababa corridor, and the situation is still unchanged.

Djibouti thus became the main port for Ethiopia. Traffic increased from 1.7 million tonnes in 1997 to 3.1 million tonnes in 1998, and 4.2 million in 2002. The latter includes Djiboutian foreign trade (450 000 tonnes), transit traffic towards Ethiopia (3.2 million tones in 2002, or around 80% of port traffic), and "end of line" transhipment activities between Europe and the Far East and the Arabian Peninsula.

Ethiopian transit via Berbera has increased strongly in recent years. A large proportion of the traffic unloaded at Berbera is destined for Ethiopia, either as transit goods or, more often, as "baggage", which is the term used to cover all kinds of consumer products that come and go more or less fraudulently through the Harticek trading area in Ethiopia, a sort of free zone situated 72 km from Jijiga.

For the moment, the Berbera corridor remains less an alternative route than an additional one, especially for Region V, the so-called Ethiopian-Somalian regional state in the context of Ethiopia's new federal arrangement.

The Djibuti corridor is thus the one mainly used by Ethiopia, while hopes remain that the process of subregional development will start soon. Accordingly, this paper will concentrate on the Djibouti-Ethiopia corridor.

The purpose of writing about this corridor is to try to clarify the type of conditions needed to create a corridor that will permit reliable and rapid transport of goods at competitive rates, by means of services that ensure quality and safety.
This exercise also highlights the gap that exists between Ethiopia's current level of imports and the levels it hopes to achieve in the not too distant future. Currently, these stand at around 40 million tonnes for a population of 70 million. In 1999, the World Bank estimated that, on average, the imports of the landlocked West African countries were equivalent to one tonne per inhabitant.

II. EVALUATION OF THE DJIBOUTI-ADDIS ABABA CORRIDOR

The experience gained from the Djibouti-Addis Ababa corridor illustrates the factors that condition good operations:

a) The political will to establish an effective corridor on the part of the landlocked and the transit countries, and the capacity of their governments to create a favourable institutional climate;

b) Transport infrastructures in good condition, from the port facilities at one end of the chain to the terminal on arrival, including the relevant road or railway;

c) Infrastructural management (software) that enables the corridor to function effectively and minimizes regulatory and other non-physical constraints so that transit transport is not penalized.

A. POLITICAL WILL AND GOOD GOVERNANCE

The success of the Djibouti-Addis Ababa corridor is primarily the result of the political will shown by the Ethiopian and Djiboutian governments.

This commitment is illustrated by the signing, in April 2002, of an "Agreement on port utilization and the transit of goods towards Ethiopia", which has since been ratified by both parliaments.

This agreement, which is based on the major United Nations conventions and the principles of free access (and transit) to the sea for landlocked countries, covers the various aspects of transit transport: port entry, customs, documentation, land transport, security along the corridor, facilities maintenance, approval procedures for public and private operators of both countries that use the corridor, and others.

The agreement also provides for the introduction of a consultation procedure/institutional planning framework; a joint expert committee meets every three months and a ministerial committee every six months.

This shared political will is explained by the fact that both countries have something to gain from developing the Djibouti-Addis Ababa corridor.

For Ethiopia, it was clear that, having lost access to the port of Assab, its survival depended on finding safe and competitive access to the sea. Djibouti offered such a route. In the event, all Ethiopian activity, including food aid, has been diverted to Djibouti.
For Djibouti, one of whose main assets is its geographical situation, the development of transit traffic towards Ethiopia offered a potential source of wealth, as Djibouti recognized even before the outbreak of hostilities between Ethiopia and Eritrea when it attempted to attract traffic in transit to Ethiopia during the period 1993-97. Traffic towards Ethiopia represents 80 per cent of the traffic through Djibouti and 70 per cent of the port's income. Ethiopia is thus in prime position as the logical and favoured partner.

This does not mean that misunderstandings between the two countries and operational problems do not arise, but at least the authorities on both sides are aware of the obstacles and have decided to work together to solve them in a spirit of mutual understanding.

To that end, official consultation mechanisms have been set up and are working well. In particular, a joint Djibouto-Ethiopian ministerial committee meets regularly; following discussions, often prepared by a joint follow-up committee, it adopts recommendations, sets guidelines and commissions studies. Moreover, many disputes are settled after being heard at ministerial level.

Lastly, mention must be made of the highly favourable commercial climate that has existed at Djibouti for decades: a class of merchants and businessmen with excellent contacts with Africa, the Arabian Peninsula and the Indian subcontinent has taken up permanent residence there and established flourishing businesses.

All the services involved in marine transport (shipping records, insurance, resupply, etc.) and transit and customs operations exist at Djibouti. The storage facilities are extensive: the "Magasins Généraux" operated by the Djibouti International Chamber of Commerce and Industry (CICID), which has great expertise in guarding and handling goods; transit warehouses; bonded warehouses for approved operators, and others.

B. TRANSPORT INFRASTRUCTURES UNDERGOING REPAIR

It is clear that the absence of an adequate infrastructure makes transit transport much more difficult.

PORT OF DJIBOUTI

Located at the crossing point of maritime routes from Europe, the Far East, the Persian Gulf and Africa, at the mouth of the Red Sea, Djibouti occupies a privileged position. Nevertheless, the port authorities have had to take radical steps not to be left behind by competition from Aden, in Yemen, which has been operating a large private port since 1999 under Singaporean management (PSA Corporation), and from Salalah, in Oman, which is operated by the shipping company Maersk-Sealand. Both of these ports are equipped to receive the latest container ships and other vessels with a draught up to 16 m.

In May 2000, the Djibouti Government signed an agreement under which a licence to manage PAID (Djibouti Autonomous International Port) was granted to a private operator, Dubai Port International, a subsidiary of the Dubai Port Authority. In
addition to the guarantees it offers financial backers, the Dubai Port Authority will enable PAID to serve Ethiopian interests better while also developing its port transit and other commercial activities.

PAID's convenient facilities and space are readily appreciable: its wharves are directly accessible to deep-sea vessels and can easily be extended, the open storage area behind the wharves is currently undergoing development work designed to increase goods movements and speed up handling and, above all, the large area of land available for development in the immediate vicinity of the port does not interfere with the urbanization process in the capital, which means there is no obstacle to the planning of new storage and trading areas.

In addition to building the Djibouti Free Zone, managed by Djebel Ali Free Zone, PAID is engaged in a number of development projects:

a) Construction of a bulk terminal to handle large ore tankers, together with two 80 000 tonne silos. The target for the privately operated terminal is to unload 1.2 million tonnes per year;

b) Construction of a new port at Doralé, 7 km from the city of Djibouti, comprising: i) an oil and gas terminal; ii) a deep-water container port; and iii) a free-trade area. The estimated cost of 300 million dollars will be met from private funds. Phase 1 - a feasibility study on the oil terminal - is underway. The appointed authority is the Port of Dubai.

ROAD AND RAIL LINKS

From the port of Djibouti, Ethiopia can be reached by either road or rail.

As stated earlier, the main road passes through Galafi, which has felt the effects of the greatly increased numbers of trucks, often overloaded, that drive through now that Ethiopian traffic has switched to Djibouti.

Although the Galafi-Addis Ababa section on the Ethiopian side has been repaired under the 1997-2007 Road Sector Development Programme, which is intended to rehabilitate 22 000 km, on the Djibouti side the story is different: out of 217 km between the port and the border post at Galafi, half has been repaired at a cost of 18 million dollars, and the remaining half still has to be resurfaced. The funding for the later has been provided by the EU.

By 2005, it is expected that the two main roads will be capable of ensuring rapid and safe truck links between Djibouti and Ethiopia.

These two main roads are often saturated, but the regional road network is not capable of siphoning off the traffic safely and effectively towards outlying areas.

There remains the railway, which is, however, the weakest link in the corridor:

An initial programme called "Rail safety work" has been launched with 32 million dollars provided by the EU. The bidding invitations have been finalised and are undergoing approval; the work is expected to start in mid-2005.
A study on the procedure for granting a licence will begin in May 2003.

However, the efforts at renewal are meeting opposition from the Ethiopian side, which appears to favour the road option.

Djibouti, which does not have to deal with a road lobby as well organized as that in Ethiopia, is convinced that rail has an economically viable future.

According to a recent preliminary study conducted by a South African research consultancy, a minimal investment would enable the railway immediately to carry one million tonnes per year, whereas a more substantial repair programme would raise that level to four million tonnes. A full investment programme over 25 years would cost 250 million dollars.

C. MANAGEMENT OF TRANSIT TRANSPORT

PORT OF DJIBOUTI

Ethiopia benefits from preferential tariffs at the port of Djibouti. Although the "port duty on goods" is 10 dollars per tonne on goods intended for the Djibouti market, the duty varies between 1 and 3 dollars per tonne on goods destined for Ethiopia.

The period of grace, or exemption from storage fees, on imports bound for Ethiopia is 30 days, compared with 10 days for goods exported via Djibouti; likewise the period applicable to exports coming from Ethiopia is 60 days, compared with 10 days for goods exported via Djibouti.

In 2001 the Djibouti Dry Port (DDP) was commissioned as an extension to the port located on the road leading to Ethiopia (route de Venise) and intended for long-term storage. This modern, secure, complex offers facilities not only for goods storage (through appropriate customs arrangements) but also the marketing of goods, domestic appliances, vehicles, and equipment for use in industry, civil engineering and agriculture.

Thus, at least 300 km from the Ethiopian border and a few dozen metres from Yemen's shores, Ethiopian, Somali and Arab traders will have an enormous showroom, banking facilities and the latest goods available, within a short distance of the end-users. To finance the storage, warranty arrangements and supplier credits would have to be set up. It is also important to guarantee delivery dates and cut carriage costs; this is the stage at which facilitation measures and administrative reforms are needed.

TRUCK MOVEMENTS

An agreement on free movement of trucks between the two countries has been signed by Ethiopia's Road Transport Authority (RTA) and the Djibouti Ministry of Transport.
Drivers and their assistants may enter the other country with only a photo-pass provided by the two authorities. The pass means that the vehicle has been found to be in order in its own country and is thus acceptable in the other country.

Each country recognizes the other's driving licences.

Following an agreement signed in 1999 and introduced in February 2000, loaded trucks in transit on Djiboutian territory must pay a road tax of 15 dollars, regardless of tonnage carried. This tax replaces the charge of 0.5 dollars per tonne that previously applied. The majority of trucks on the road carry 30 tonnes. The $15 tax is lower than that recommended by COMESA (Common Market for Southern and Eastern Africa): $10 dollars per 100 km on the outward and return journeys, for loaded and unloaded trucks.

The new tax contributes to Djibouti's road maintenance fund, but is not applicable to the Djibouti-Ethiopia corridor.

The trucks take on fuel in Ethiopia, as diesel is two-thirds cheaper there.

With regard to vehicle insurance, Djibouti and Ethiopia use COMESA's "Carte Jaune" for inter-state transport. The document is issued by the Ethiopia Insurance Corporation, which acts as Ethiopia's national office, and by a national office representing AMERGA (Red Sea and Arabian Gulf Insurance Companies) and AGF of France.

The agreement has established legislation relating to truck insurance. In theory, all trucks carrying goods between Djibouti and Ethiopia must be insured; however, as this is not compulsory for trucks carrying goods inside Ethiopia, many uninsured vehicles arrive in Djibouti.

TRAIN MOVEMENTS

The administrative complications presented by the Ethiopian authorities affect rail traffic to a far greater extent than road traffic. On the roads, one comes across hardly any road blocks, also called "clothed body checks"; on the trains, the police, gendarmerie and customs authorities, as well as the army, are constantly appearing and causing, at the very least, damaging delays.

Although the drivers of Ethiopian trucks are issued with an entry visa for Djibouti, the same does not apply to railway employees.

Trucks can complete the trip from Djibouti to Addis Ababa in two or three days, but a CDE train takes around ten.

REVIEWING THE FUNCTIONING OF THE CORRIDOR

The administrative flexibility shown on the Djiboutian side contrasts strongly with the torments inflicted by the Ethiopian administration. The improvements that could result from the rehabilitation of the transport network could count for nothing unless
both sets of public services, but especially those of Ethiopia, rethink their approach to transit transport.

CUSTOMS PROCEDURES

The carriage of goods to Ethiopia comes up against non-physical obstacles, mostly relating to customs and documentation matters and mostly involving the Ethiopian authorities. The resulting delays and additional costs are penalizing transit transport.

Supposedly carried out to ensure payment of taxes and customs duties, these procedures are long, bureaucratic and the source of endless red tape.

There is no coordination between the two countries' customs procedures: the Ethiopian customs office installed in Djibouti works in parallel, not in tandem, with its Djiboutian equivalent.

Under the Djiboutian system, all goods recorded on a manifest are unloaded, after which they become subject to either (i) a declaration of availability for local consumption, (ii) a declaration of transit towards Ethiopia, or (iii) a customs declaration.

The customs service in Djibouti fills in its own forms, which are not compatible with those of Ethiopia. The transit declaration issued by the Djiboutian customs service is verified by customs at Djibouti on exit from the territory and the document is sent to the Djiboutian port authority. Djiboutian customs does not require any security on goods in transit. However, as Djiboutian customs does not recognize a customs transit system other than that applicable to goods bound for Ethiopia, goods in transit via Djibouti are held to be headed for final destination in Ethiopia, and are thus documented by the Ethiopian customs as if they were intended for Ethiopia. Moreover, it is the Ethiopian customs service that applies the seals to trucks at Djibouti before they leave for Ethiopia.

In this sense, the COMESA recommendation for a single customs declaration to be used along the Kenya-Uganda-Rwanda corridor and the Burundi Transit Transport Corridor is not being applied in the Djibouti-Ethiopia corridor.

The Ethiopian system is far more complicated.

PROCEDURES AFFECTING ETHIOPIAN EXTERNAL TRADE: A SINGULAR CASE

Ethiopian importers must accept the following formalities:

- they are required to purchase foreign currency in advance, at the rate and on the terms set by the national monetary authorities;
- they must leave a deposit beforehand in an Ethiopian bank;
- in making sea-freight reservations, they are encouraged to give preference to Ethiopian Shipping Lines (ESL), the national flag-carrier serving certain European and Asian ports;
- the imports are subject to inspection before loading, which is accompanied by prior checking of the bills provided by foreign suppliers in order to verify the genuineness of the information they contain; after checking, each bill must have a label attached to it by the affiliated representative (located in the exporting country) of the company authorised for the task, which in such cases is the Société Générale de Surveillance (SCS);
- the procedures for taking goods through customs and placing them under customs authority are carried out, on a preferential basis, by the Ethiopian company MTS, which has offices in Ethiopia and Djibouti;
- goods intended for import into Ethiopia must be recorded on a customs declaration submitted in advance to an Ethiopian customs office and containing the information relating to the advance deposit. Taxes, duties and deposits must be paid;
- even though they have been checked by Djiboutian officials concerned with indirect taxation, goods unloaded and bound for Ethiopia are checked by the Ethiopian customs service operating within the port of Djibouti;
- goods travelling by road must have seals applied by Ethiopian customs (cargoes taken by rail do not have to be sealed, but are frequently the subject of private security arrangements as the CDE does provide cover against theft or wear and tear);
- Ethiopian customs makes checks all along the land route (at the Djibouti-Ethiopia border and at the approaches to every Ethiopian town). Checks at railway stations are even more common, and cause frequent incidents because of the delays involved;
- the marketing of products in Ethiopia is subject to even more checks, and to the imposition of additional taxes and duties should the initial customs declarations differ from the accompanying documents (especially the observations on customs value made by the SCS) or the customs service report;
- Once taxes and duties are paid and the collection slip issued, the customs declarations are examined by banks and by the Ethiopian Central Bank (for reasons of currency control). This process can take months, leading to delays in payment among the forwarding agents (since the operation is not complete);
- the above-mentioned conditions depart radically from the requirements of the WTO and the WCO. They make no provision for placing imported goods under customs transit arrangements. They thus heavily penalise the Ethiopian importers, who must bear the financial costs of the different systems and, ultimately, are forced to maintain the bureaucratic pile-up.

THROUGH BILL OF LADING

The introduction of a through bill of lading, which the Ethiopians have requested as the complement to the establishment of an ICD (inland customs depot), has been refused by Djibouti. The latter wishes to prevent Ethiopian Shipping Lines, which already monopolizes goods transport to Ethiopia, from issuing the bill of lading and becoming the only multimodal operator able to function in the corridor, thus also gaining sole control of the land route in addition to the sea routes.
For Djibouti, the through bill of lading and multimodal transport can only function, and are only acceptable, in the context of open competition.

RECOMMENDATIONS OF THE SEMINAR ON TRANSPORT FACILITATION

The recommendations of the seminar on transport facilitation in the Djibouti-Ethiopia corridor, held in March 2000, comprise a list of the objectives that must be achieved in order to enhance the corridor's efficiency:

a) Strengthening of coordination between public and private operators, including the establishment of a body responsible for constantly reviewing users' complaints with a view to finding practical solutions;

b) Adoption of certain international conventions in order to achieve legal stability and sound integration into international trade; the accession process must not delay rapid implementation of the most urgently needed regulations, namely the convention on multimodal transport and COMESA agreements, especially in the insurance sphere;

c) In these areas, it will be important to ensure that the rules applied in Ethiopia and in Djibouti are compatible, and that the international rules and standards on information processing and exchange are a constant feature of the practical solutions taken;

d) Design of a single customs document covering the transit of goods through the corridor;

e) Encouragement of electronic data transmission as the alternative to paper-based communication and records, beginning with the flows already being computerized (manifests) and taking in the computerization of customs clearance procedures, with simultaneous application;

f) Prior deposit of the manifest with the organization responsible for port logistics;

g) Ensuring that the assets of the port of Djibouti are retained, by further developing its capacity to store constantly marketable commodities;

h) Provision of additional storage capacity as part of a regional distribution system and on a competitive basis;

i) Allowing both countries' road hauliers to operate under conditions of equality;

j) Provision of awareness and information campaigns and training, so that all operators have equal opportunities to become established in their markets.