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# Logistics Processes and Motorways of the Sea II

## Country Profile

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## TABLE OF CONTENTS

<b>1</b>	<b>INTRODUCTION .....</b>	<b>5</b>
<b>2</b>	<b>NATIONAL TRANSPORT POLICY .....</b>	<b>6</b>
<b>3</b>	<b>LEGAL ENVIRONMENT IN THE FIELD OF TRANSPORT .....</b>	<b>8</b>
<b>4</b>	<b>NATIONAL POLICY AND LEGISLATION IN TRADE AND TRANSIT .....</b>	<b>12</b>
<b>5</b>	<b>INVESTMENTS IN TRANSPORT AND LOGISTICS SECTOR IN ARMENIA .....</b>	<b>14</b>
<b>6</b>	<b>STRATEGIC CHALLENGES .....</b>	<b>15</b>
6.1	MARKET CHALLENGES .....	15
6.1.1	<i>National Trade: Exports and Imports .....</i>	<i>15</i>
6.1.2	<i>Regional TRACECA Trade .....</i>	<i>20</i>
6.2	INTERMODAL MARITIME BASED TRANSPORT CHALLENGES .....	25
6.2.1	<i>Port System and Maritime Links .....</i>	<i>25</i>
6.2.2	<i>Inland Transport Mode: Railways .....</i>	<i>25</i>
6.2.3	<i>Inland Transport Mode: Roads .....</i>	<i>28</i>
6.3	TRADE AND TRANSIT FACILITATION .....	29
6.3.1	<i>General Presentation .....</i>	<i>29</i>
6.3.2	<i>SWOT Analysis .....</i>	<i>31</i>
<b>7</b>	<b>PILOT PROJECTS SELECTED FOR MOS I AND ILC PROJECTS .....</b>	<b>33</b>

## LIST OF TABLES

Table 1: Bilateral Agreements with LOGMOS Beneficiary Countries .....	10
Table 2: IFI Supported Projects in Armenia .....	14
Table 3: Distribution of Armenia Potential Trade Partners .....	17
Table 4: Armenia Potential Trade with TRACECA Countries and Europe .....	18
Table 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Armenia .....	22
Table 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Armenia .....	24
Table 7: SCR Concession Investment 2009-2020 (million AMD) .....	26
Table 8: Main Features of the Armenian Railway Network .....	27
Table 9: Rail Freight Traffic in 2011 .....	27
Table 10: Asian Highway Routes in Armenia .....	29
Table 11: SWOT Analysis in Trade and Transit Facilitation Procedures .....	31
Table 12: Selected Pilot Projects in Armenia .....	33

## LIST OF FIGURES

Figure 1: General Map of Armenia .....	4
Figure 2: Armenia Trade Partners .....	16
Figure 3: Armenia Trade Partners, Potential Trade .....	17
Figure 4: Armenia Potential Trade with TRACECA Countries and Europe .....	19
Figure 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Armenia .....	21
Figure 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Armenia .....	23
Figure 7: Armenia Railway Map .....	25
Figure 8: Armenia Road Map .....	28



## LIST OF ABBREVIATIONS

ADB	Asian Development Bank
AETR	European Agreement concerning the Work of Crews of Vehicles engaged in International Road Transport
AGR	European Agreement on Main International Traffic Arteries
AH	Asian Highway
AMD	Armenian Dram
BSEC	Black Sea Economic Cooperation
CBC	Cross Border Cooperation
CIS	Commonwealth of Independent States
CMR	Convention on the Contract for the International Carriage of Goods by Road
EBRD	European Bank for Reconstruction and Development
ECMT	European Conference of Ministers of Transport
EDI	Electronic Data Interchange
ENP	European Neighbourhood Policy
ENP	European Neighbourhood Policy Instrument
EU	European Union
EurAsEc	Eurasian Economic Community
IBM	Integrated Border Management
IBRD	International Bank for Reconstruction and Development
IFI	International Financing Institution
ILC	International Logistics Centre
IMF	International Monetary Fund
LOGMOS	Logistics Processes and Motorways of the Sea
LRNP	Lifeline Road Network Program
MOS	Motorways of the Sea
MoTC	Ministry of Transport and Communication
NGO	Non-Governmental Agency
OSJD	Organisation for cooperation of Railways
PRSP	Poverty Reduction Strategy Paper
RTA	Regional Trade Agreement
SCR	South Caucasus Railways
SCIBM	Supporting Integrated Border Management in the South Caucasus Program
SMGS	Agreement on International Goods Transport by Rail
SWS	Single Window System
TEM	Trans European Motorway



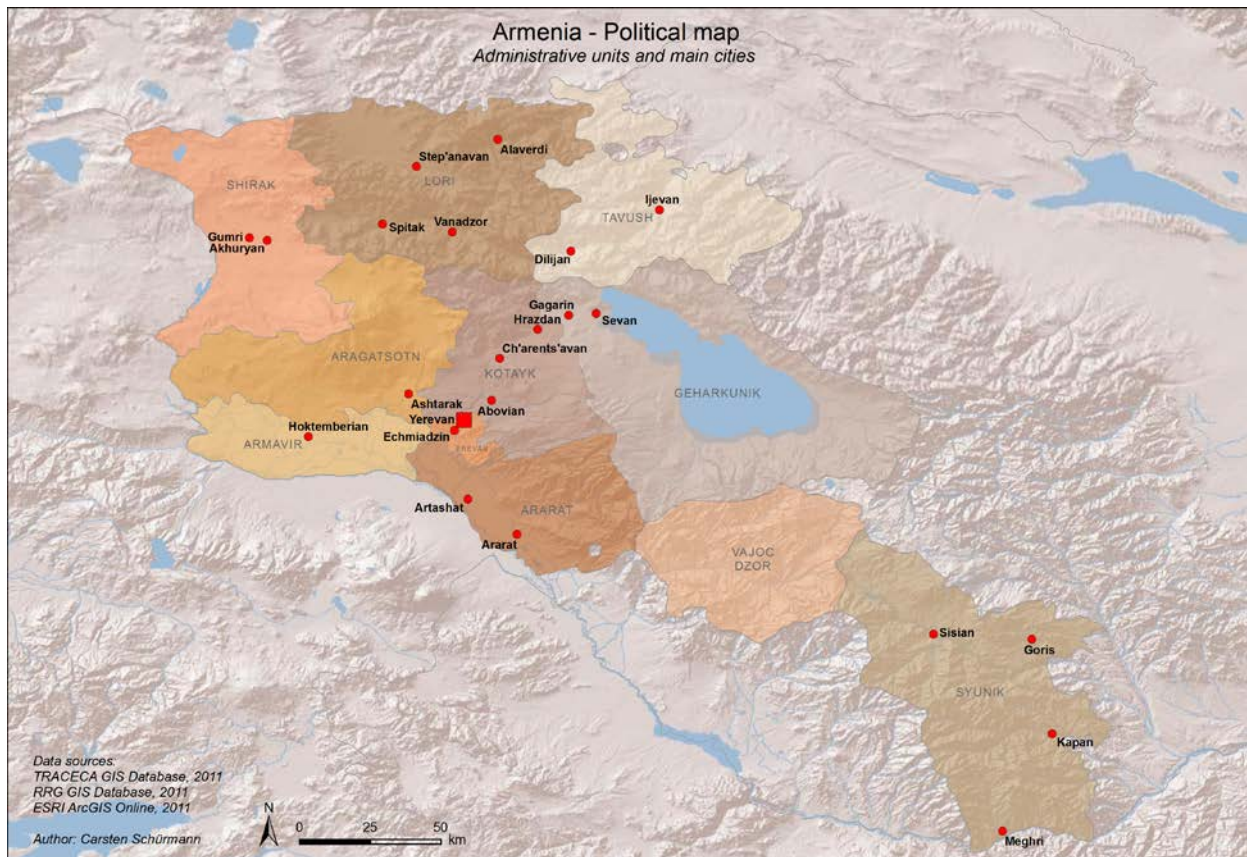


**Logistics Processes and Motorways of the Sea II**

TER	Trans European Railway
TRACECA	Transport Corridor Europe Caucasus Asia
UNDP	United Nations Development Programme
UNECE	United Nations Economic Commissions for Europe
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
USD	United States Dollar
USSR	Union of Soviet and Socialist Republics
WB	World Bank
WTO	World Trade Organization



Figure 1: General Map of Armenia



Source: TRACECA (2011)



## 1 INTRODUCTION

The Republic of Armenia is situated in the south-western part of Asia at the junction with south-eastern part of Europe. This landlocked country occupies the North-Eastern part of Armenian plateau – between Caucasus and Nearest Asia (the inter-river territory between middle flows of Kur and Araks rivers). It borders in the North and East with Georgia and Azerbaijan, and in the West and South with Turkey and Iran.

Road, rail and air transports are main transport modes in the Republic of Armenia. The length of the railway network is 826.6 km (eventually, 725.6 km are in operation) and that of the motor roads 7,749 km, of which 1,730 km are inter-state roads.

Among key problems identified in the field of transport are:

- for road transport: lack of roads in good technical conditions, sub-standard road parameters, which makes them unsuitable for cargo transportation, needed modernization of heavy commercial truck fleet;
- for rail transport: there is only one key railway line connection, which is now under operation even though there is an urgent need to rehabilitate and reconstruct some of its sections and structures and to modernize the rolling stock.

### TRACECA Framework

Armenia has also been an active member of TRACECA since the Brussels Conference in May 1993 which gave birth to the TRACECA program

The ten direct beneficiary countries under review by LOGMOS Project share a globally common legal and regulatory background for the transport sector, but also have different laws and rules resulting from different contexts and policies.

International Conventions and regional or bilateral agreements are completing the framework, and there are expected moves at both national and regional (TRACECA and other groups) levels.

The approach of legal issues related to the LOGMOS Project is focusing on the transport laws and regulations as well as on the afore-mentioned national, international, regional and bilateral conventions and agreements which have a direct or indirect impact on surface transport modes with a priority for maritime and intermodal transport<sup>1</sup>.

The TRACECA program started in 1993 as one of the components of the intergovernmental TACIS program. The active participation of Armenia started in September 1998, when it signed without any restriction the Multilateral Agreement (MLA) on the development of the transport corridor Europe – Caucasus – Asia which was also signed by Azerbaijan, Bulgaria, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Romania, Tajikistan, Turkey, Ukraine and Uzbekistan.

After the Intergovernmental Committee and Permanent Secretariat of TRACECA were established in 2000, Armenia set up a TRACECA National Commission headed by a National Secretary.

Armenian representatives take an active part in all conferences and Working group's meetings organized by IGC TRACECA.

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<sup>1</sup> The Annex 3, Introduction to Legal Case Study of the Progress Report 2, analyzed by the LOGMOS project, can be downloaded here: [Progress Report 2, Annex 3 - Introduction to Legal Case Study](#)





## 2 NATIONAL TRANSPORT POLICY

The governmental body in charge of regulation and defining the axes of development and the national transport policy is the Ministry of Transport and Communication of the Republic of Armenia (MoTC). It is composed of the transport department, which comprises the transport policy and the technical policy sections, the railways department and the road construction department.

The policy of Armenia in the field of transport has been deeply redefined since the independence of the country in 1991. A first Development Strategy, prepared with the help of the World Bank, was adopted in 1997 and aimed in priority at liberalizing the transport sector and restructuring the institutional framework.

Today, the national transport policy of Armenia is defined in two main documents:

- Armenia Transport Sector Development Strategy 2020, approved in 2009 ;
- National Road Safety Strategy for Armenia approved as well in 2009.

Armenia Transport Sector Development Strategy pursues improved management, enhanced infrastructure and technology to maximize the transport sector's performance until 2020, and envisages a long-term prosperity through the establishment of efficient, cost-effective, and environmentally and socially sustainable transport infrastructure and services.

The Strategy has the following overarching goals:

- Efficient and cost-effective transport infrastructure and services for the whole country ;
- Cross-border trade facilitation;
- Environmentally and socially sustainable transport infrastructure and services.

The strategic objectives are:

- to upgrade international and inter-state road corridors gradually;
- to rehabilitate and develop infrastructure up to appropriate standards;
- to institute sustainable transport infrastructure maintenance with adequate funding and effective management;
- to reduce congestion by means of managing transport demand and balancing modal supply;
- to enhance supervision and regulation of service provision and operation;
- to improve institutional set-up and improve management responsibilities;
- to develop a medium-/long- term planning and financial management capability;
- to improve logistics and enhance IT application in transport sector;
- to improve transport safety and environmental protection;
- to mobilize international support for the national transport development needs.

The paper also includes an action plan comprising investment projects and policy reforms to be developed during the period from 2009 till 2020. The allocated budget is 2.2 bn USD.

The National Road Safety for Armenia is a 5- year action plan which targets to reduce the number of road fatalities by 10%. To reach this objective, a 10 M USD budget was set aside for



the improvement of road infrastructure and the implementation of concrete measures and awareness policy. The strategic objectives of this plan are:

- Establishing a new Institutional Framework responsible for delivering the Strategy, including a Road Safety Council of Armenia and a Secretariat. This was done by a decree from the Prime Minister of the Republic of Armenia which was signed on March 11th 2010
- Providing training for staff of the Secretariat
- Developing an integrated national database of Collision information to inform future activities,
- Improving road safety policy and programs, and enabling the monitoring and evaluation of schemes
- Increasing the use of occupant restraints (seat belts) and cycle/motorcycle helmets
- Improving effectiveness of speed and drunk driving enforcement
- Improving road user behaviour, particularly vulnerable road users
- Road safety engineering measures
- Monitoring and evaluating activities

Besides, Armenia also holds a membership in the following international organizations: BSEC, CIS, OSJD, UNECE, UNESCAP, WCO, and International Transport Forum (ECMT), and plays the role of observer in EvrAzEC. It also participates in the Trans-European Railway (TER) and Trans-European Motorway (TEM) Projects.





### 3 LEGAL ENVIRONMENT IN THE FIELD OF TRANSPORT

As from 1991, the national legal framework in the field of transport has been significantly renewed in Armenia. At present the national legislation of Armenia includes the following transport laws:

- On Transport (1998). It regulates the legal, economic and organizational provisions in the sphere of transport activity, rights and responsibilities of participants engaged in the process of transport activity and carries out the protection of their legal interests. In particular, the law defines the main conceptions of transport and transport activity, transport system and transport services (Article 1), State regulation in the spheres of Transport activity and Transport system (Articles 4, 5), Licensing of Transport activity (Article 8), Main Transport activity provisions (Articles 8-15), Security and responsibility in the process of transportation (Articles 16-27).
- On road fees (1998)
- On Licensing (2001). It defines types of activities subject to licensing and regulates the licensing procedure. Some provisions of the Law of Licensing relate to the transport sector. Thus, certain types of transport activities are subject to licensing; namely, "Activity on Organizing of regular transport by passenger vehicles of common use" and "Activity on Organizing transport of passengers by taxis" under Article 43 "16. Transport sector" licensed activity starting from December 2006. Another important point for licensing of transport sector is "Activity on Technical diagnosis of vehicles" (effective June 19, 2007). The clause of the article defines that this function shall be implemented by licensed commercial organizations. "Organizing of railroad transport activity" Article 43 defines the types of activity which also should be licensed. Another licensed activity is vehicle driving training, which is included in the Law on licensing.
- On Road Transport (2006). It regulates legal and economic relations of organization and implementation of vehicle transport activities in Armenia, vehicle exploitation, transport of passengers, luggage and goods, relations connected with safety of services and transport and also rights and responsibilities of legal and physical entities engaged in this process. In particular, the law defines the main concepts of Vehicle transport, Vehicle transport sphere, Vehicle transport activity (Article 1), problems and principles of legislative regulations in the sphere of Vehicle transport (Article 3), State regulation and management in the sphere of Vehicle transport (Articles 5,6), Licensing and insurance (Article 8), organizational issues of transport of passengers, luggage and goods in Vehicle transport (Articles 9-20), rights, obligations and responsibilities of ferryman and customer (Articles 21-25), Security requirements for transport by Vehicle transport (Articles 26-28).
- On Transport Inspection of the Republic of Armenia (2006). It regulates legal, economic and organizational issues of the activities of Transport Inspectorate of Armenia, as well as the relations connected with the supervision of transport participants for compliance with the requirements of Armenia transport legislation during organization of transport process. Especially Article 6 of the law defines the functions of the Transport Inspectorate in the 18 sphere of transport regulation, which are the following; 1) carry out supervision of transport legislation, licenses in the sphere of transport activity, permissions on international transport, water, electro, metro and rail transport activities, legislation on advertising in state vehicle roads of common use, technical exploitation of moving structure related to vehicle transport for the purposes of requirements of legislation of Armenia, 2) analyzes of



## Logistics Processes and Motorways of the Sea II

occurred road-transport accidents on common use transport, reasons, and in case of necessity jointly with respective state bodies take prevention measures; in accordance with Armenia legislation keep cadastre of self-propelled road-building vehicles and mechanisms, water, road-transport means.

- On Railway Transport (2007)
- On Road Traffic safety (2007). It regulates activities related to traffic safety. The main task of the law is to protect the state and society interests on traffic safety sphere, especially the prevention and reduction of traffic accidents.
- On Imposition and revision of Tariffs on provision of services in the field of Mandatory Technical Inspection of Vehicles via Defect Identification Technical Means (2007).

Besides, within the frame of on-going negotiations between Armenia and the European Union on the Association Agreement, which was launched on 19 July 2010, the priority Action Plan for legal EU approximation in the field of transport was adopted.

The Republic of Armenia has also ratified 9 of the 57 UNECE land transport facilitation conventions, which are listed below:

- The European Agreement on Main International Traffic Arteries (AGR), 1985, which provides the international and technical framework for the development of a coherent road network in the UNECE region;
- The Convention on Road Traffic, 1968, which aims at facilitating international road traffic and increasing road safety through the adoption of uniform road traffic rules;
- The European Agreement Concerning the Work of Crews of Vehicles Engaged in International Road Transport (AETR), 1970, which aims at preventing drivers and the crew of commercial vehicles of more 3.5 tons or those transporting more than nine people, engaged in international road transport, from driving excessive hours, as this increases the risk of serious road accidents and may create disparities in competition conditions;
- The Convention on the Contract for the International Carriage of Goods by Road (CMR), 1956, which facilitates international road transport by providing a common transport contract, including a common consignment note and harmonized liability limits;
- The Protocol to the CMR Convention, (1978), which modifies the provisions of the CMR Convention concerning the liability of the carrier regarding the loss of goods;
- The Customs Convention on the International Transport of Goods under Cover of TIR Carnets, (1975), which establishes a procedure that permits the international carriage of good by road vehicles or in containers from one Customs office of departure to a Customs office of arrival, through as many countries as necessary, without intermediate inspection of the goods carried and without the deposit of a financial guarantee at each border;
- The International Convention to Facilitate the Crossing of Frontiers for Goods Carried by Rail, (1952), which facilitates the crossing by rail by providing procedures and conditions for harmonizing and ensuring a high level of efficiency in the control of goods carried by rail at borders between two adjoining countries on a railway line; and
- The International Convention on the Harmonization of Frontier Controls of Goods, (1982), which aims at facilitating border crossing in the international transport of



**Logistics Processes and Motorways of the Sea II**

goods through harmonization and reduction of the requirements for completing the number and duration of border controls.

- The Customs convention on containers (1972), which lays down standards for the construction of Containers, as well as an approval system, and provides for temporary import and repair for containers with minimum formalities.

The Republic of Armenia also joined the Convention on international cargo transport with the use of the booklet of the International Road Transport Carriers (1975) and the SMGS Agreement (on international goods transport by rail), having upgraded its observer status into full membership in 2002.

In addition to the national transport legislation, Armenia has established bilateral relations with LOGMOS beneficiary countries (see Table 1).

**Table 1: Bilateral Agreements with LOGMOS Beneficiary Countries**

Countries	Transport issues				Customs
	Maritime	Road	Railway	General	
<b>Azerbaijan</b>					
<b>Bulgaria</b>		On international road transport 10.04.1995		On cooperation in the field of transport 01.12.1999	On cooperation and mutual assistance in customs issues 01.12.1999
<b>Georgia</b>		On international road transport 25.04.2006	On cooperation in railway transport 19.05.1993	On general principles in the field of transit transportation 19.05.1993	On general principles in the field of customs 24.06.1993 On cooperation and mutual assistance in customs issues 15.10.2007
<b>Kazakhstan</b>		On international road transport 06.11.2006			On cooperation and mutual assistance in customs issues 02.09.1999
<b>Kyrgyzstan</b>		On international road transport 21.04.1997			on cooperation and custom documentation and custom guarantees mutual acceptance 14.02.1996
<b>Moldova</b>		On international road transport			On cooperation and mutual assistance in





**Logistics Processes and Motorways of the Sea II**

		30.10.1996			customs issues 14.02.1996
<b>Romania</b>		On international road transport 25.03.1996		On international combined transport 03.07.1999	On cooperation and mutual assistance in customs issues 31.10.2001
<b>Tajikistan</b>					On cooperation and mutual assistance in customs issues 08.06.1995
<b>Turkey</b>					
<b>Turkmenistan</b>		On international road transport 27.06.1995		On general principles of cooperation in the field of transport 15.10.1992	On cooperation and mutual assistance in customs issues 30.07.1993 On general principles in the field of customs 24.08.1993
<b>Ukraine</b>		On international road transport 22.07.1997	On cooperation in railway transport 24.12.1999		On cooperation and mutual assistance in customs issues 07.10.1994
<b>Uzbekistan</b>		On international road transport 20.08.1992			

Bilateral agreements have also been signed with the Islamic Republic of Iran which borders Armenia in the South. Those are:

- Agreement on international cargo transport. Signed in 1995
- Agreement between the Government of the Republic of Armenia and the Government of the Islamic Republic of Iran on Customs cooperation. Signed on 27.12.2001
- Memorandum of understanding between the Ministry of Transport and Communications of the Republic of Armenia and the Ministry of Roads and Communications of the Islamic Republic of Iran on cooperation on railway transport issues and on the construction of a direct railway line between the Republic of Armenia and the Islamic Republic of Iran. Signed in 2009.



## 4 NATIONAL POLICY AND LEGISLATION IN TRADE AND TRANSIT

The state regulation in trade and services of the Republic of Armenia is aimed at coordination of the legal and contractual relations, identifying and resolving existing problems, establishing conditions for equal competition in transport sector, protecting the interests of Armenian businesses at the national level and in international markets, as well as establishing the cooperation between state agencies and NGOs.

Recently, the foreign trade activities of the Republic of Armenia are built upon the principles of liberalization, maintenance of international obligations assumed by Republic of Armenia, establishment of favourable environment for businesses involved in foreign trade activities, but also promotion of domestic exports.

Key documents regulating trade and transit in Armenia are:

- Customs Code;
- Law On Electronic Documentation and Electronic Digital Signature
- National Programme for Establishing the “Excellence Centre” for Business and Investment Climate Promotion in Armenia (concept);
- Procedure for Establishing Free Economic Zone in “Zvartnots” Airport of the Republic of Armenia;
- Customs administration strategy of the Republic of Armenia for 2008-2012.

Armenia Customs code is in compliance with WTO requirements and international standards.

Certificate of country of origin or any other relevant document is required in order to ensure exceptions envisaged by the international agreements for goods transported through the Armenia’s Customs borders. Armenia has an agreement with Russia, Belarus, Ukraine, Moldova, Kyrgyzstan, Turkmenistan, Kazakhstan, Tajikistan, Uzbekistan “On Free Trade and Creation of Free Trade Zone” for the goods, originating from their countries and imported into Armenian Customs territory, which are exempt from Customs duties.

According to that agreement, the commodities that originate from Armenia are exempted from Customs duties when imported to the aforementioned countries. Based on the provisions of this agreement, the document that confirms the country of origin is the Certificate of the Country of Origin. Transit shipment of goods and means of transportation through Armenia’s territory is regulated by the Customs Code and by the Government Decree N. 887 "On Confirming the Order of Transit Shipment of Goods and Means of Transportation through the Republic of Armenia Customs Territory and Cases of Mandatory Customs Accompaniment".

Cross border cooperation (CBC) is an integral part of European Neighbourhood Policy (ENP), which gives an opportunity both to European Member States and Partner Countries to initiate regional co-operation. CBC programs that are implemented within the ENPI frame involve Eastern European, Southern Caucasian, as well as Eastern and Southern Mediterranean countries. Armenia is involved in one of CBC programs for Black Sea region, which is set in the Black Sea Joint Operation Programme (2007-2013).

In addition to that, Armenia is also a beneficiary country for “South Caucasus Integrated Border Management” project funded by the European Union.

At last, Armenia’s membership at the WTO dates back from 2003. In this framework, Armenia signed Regional Trade Agreement (RTA) with Kazakhstan, Moldova, Russia, Turkmenistan, Ukraine, Georgia and the Kyrgyz Republic. Armenia is also a signatory member of the RTA signed between the CIS countries in 1994. It is also worth underlining that an early



**Logistics Processes and Motorways of the Sea II**

announcement was made on October 18, 2011 concerning the creation of a free trade agreement between several members of the CIS (Armenia, Belarus, Kazakhstan, Kyrgyz Republic, Moldova, Russia, Tajikistan and Ukraine).





## 5 INVESTMENTS IN TRANSPORT AND LOGISTICS SECTOR IN ARMENIA

Investment policy is part of the general economic policy of Armenia and serves as an important means for economic growth. The policy in the field of investments targets the establishment of a favourable environment, reduced opaqueness of regulations, identification and enhancement of country`s competitive advantages, investments` growth, development of market infrastructure, etc.

In this particular field Armenia pursues a liberal approach, which is spelled out in the corresponding legislation, in particular, in the Law “On foreign investments” (adopted in 1994) and in the Concept for Investment policy (adopted in 2005), as well as other legislative acts regulating economic environment concerning investments.

Transport policy of Armenia is implemented in the view of the needed establishment of integrated Euro-Asian transport system, developing harmonized legal and regulatory mechanisms, as well as attracting investments to transport sector. During the last years around 350 M USD have been invested in transport sector of Armenia. Out of this amount, the government allocated up to 45-50 M USD per annum. A significant attention is now paid to the modernization of transport infrastructure, particularly to the reconstruction of the rural roads and road structures (bridges and tunnels).

Within TRACECA framework the European Commission supports ongoing initiatives via the technical assistance and investment projects. Besides TRACECA, the World Bank, ADB and EBRD invest into transport and logistics infrastructure development in Armenia.

**Table 2: IFI Supported Projects in Armenia**

Title of project	Year of approval	Sub-sector	Total project cost	IFI funding
Zvartnots Airport Expansion Project (Phase 2)	2012	Air	173 M USD	40 M USD (ADB)
Armenia Northern Corridor Modernisation Project	2012	Road	71.4 M €	10.3 M € (EBRD)
Road assets management programme	2011	Road	81 M USD	65 M USD (WB)
Lifeline Roads Improvement Project	2010	Road	50 M USD	40 M USD (IBRD)
North-South Road Corridor	2009	Road	962 M USD	500 M USD (ADB)
Rural Roads Rehabilitation Project	2006	Road (rehabilitation)	25.2 M USD	8.4 M USD (Millennium Challenge Corporation)
Armenia International Airport – Passenger Terminal	2006	Air transport	62.89 M USD	20 M USD (EBRD)



## 6 STRATEGIC CHALLENGES

### 6.1 Market Challenges

#### 6.1.1 National Trade: Exports and Imports

##### World Trade Partners

Armenia has a unique geographical position among TRACECA countries.

- It is the only Caucasus landlocked country.
- Armenia is not crossed by the main section of TRACECA East – West corridor which passes through the Caucasus.
- Due to political conflicts, Armenia does not have border crossing points with neighbouring Turkey and Azerbaijan.

Given the three above mentioned reasons, the vast majority of Armenia's land trade (trade with Iran excepted) is transported via Georgia from where it continues on to reach international markets using TRACECA corridors. Unlike its two neighbouring Caucasus countries, Armenia is also not a transit country. The features of goods flows for Armenia differ therefore a lot from its neighbours.

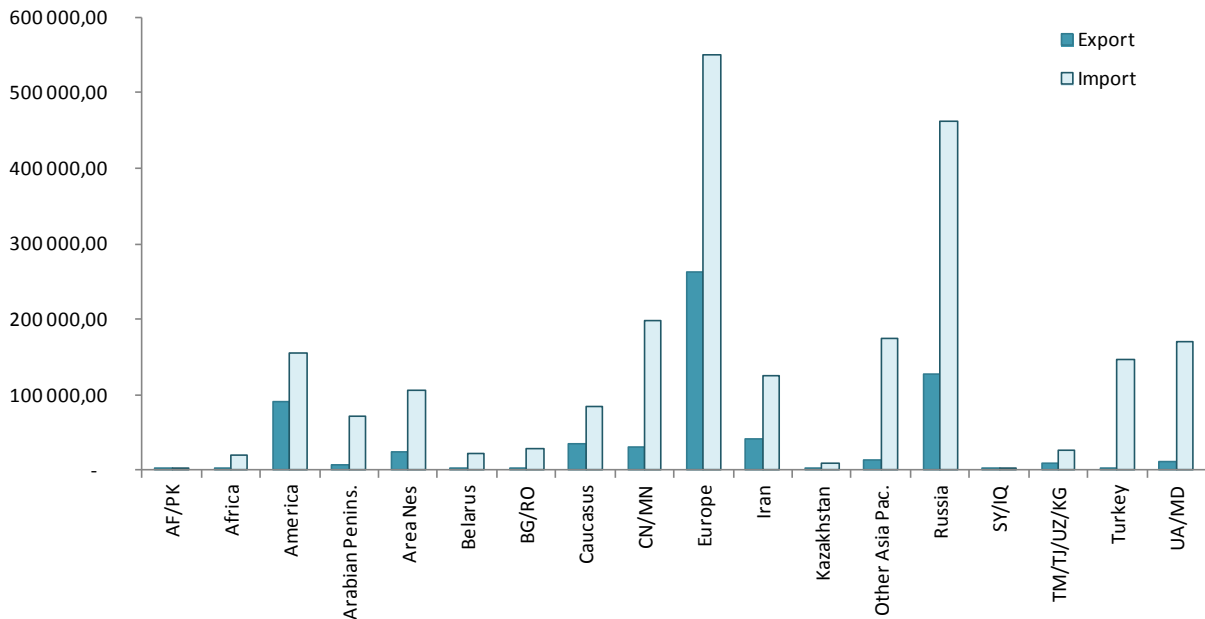
As shown in figure 2, Armenia is a net importer of goods. In 2010, the volume of imports reached 2 357.5 bn Euros while the volume of exports hit 666 bn Euros. The commercial balance is in favour of imports with every trade partner. This is easily understood due to the specific geographical location, and geopolitical situation of the country. The main trade partners of Armenia are Europe and Russia. Together, they account for 46.49 % of Armenia total international trade. They are followed by America (8.20%), China (7.54%) and Asia & Pacific (6.25%).

The share of Armenia's international trade with TRACECA countries is low in comparison with the total trade volume (15.4%). Among these countries, Armenia's main trade partners are Ukraine-Moldova, Iran and the Caucasus region (see Table 3). Trade with Central Asian countries and West TRACECA countries (Bulgaria-Romania) is almost inexistent (see Table 3).



Logistics Processes and Motorways of the Sea II

Figure 2: Armenia Trade Partners, 2010, th euros



Source: Computation based on Eurostat and UN Comtrade databases

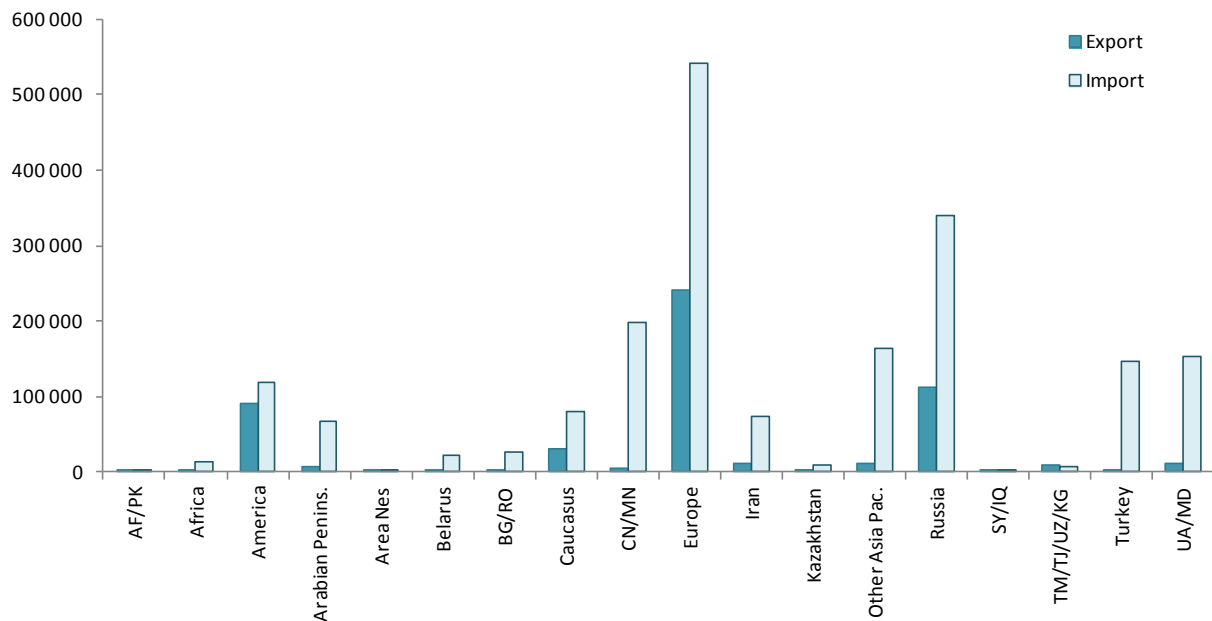
The analysis of Armenia’s potential trade (bulk goods are left aside) is relevant for TRACECA corridors. It firstly tells that the total volume of potential trade accounts for two third of the total trade volume (1 819 bn Euros / 2 718 bn Euros). Imports remain extensively predominant over exports. When looking at the repartition of trade between partners, no significant changes are to be noticed (Table 3). Europe holds the largest trade share (31.15%) followed by Russia (18%), America (8.32%) and China (8.04%). Trade with TRACECA countries is slightly higher and amounts to almost 20%.

Armenia’s relation with TRACECA’s interests is therefore dual. Although TRACECA countries do not constitute the main partners of Armenia, TRACECA corridor (in particular the western part) is of high importance to access international market.





Figure 3: Armenia Trade Partners, Potential Trade, 2010, th euros



Source: Computation based on Eurostat and UN Comtrade databases

Table 3: Distribution of Armenia Potential Trade Partners, 2010, % in trade value

Zones	All products		Total all products	No min. fuel & ores		Total no min. fuel & ores
	Import	Export		Import	Export	
Afghanistan-Pakistan	0.08%	0.04%	0.07%	0.10%	0.05%	0.09%
Africa	0.86%	0.18%	0.71%	0.67%	0.22%	0.57%
America	6.64%	13.75%	8.20%	5.99%	16.73%	8.32%
Arabian Peninsula	3.08%	0.95%	2.61%	3.42%	1.16%	2.93%
Area Nes	4.52%	3.53%	4.30%	0.09%	0.71%	0.22%
Belarus	0.95%	0.56%	0.87%	1.14%	0.68%	1.04%
Bulgaria-Romania	1.27%	0.07%	1.00%	1.34%	0.09%	1.07%
Caucasus	3.54%	5.31%	3.93%	4.11%	5.48%	4.40%
China-Mongolia	8.37%	4.60%	7.54%	10.03%	0.87%	8.04%
Europe	23.34%	39.45%	26.89%	27.49%	44.35%	31.15%
Iran	5.30%	6.14%	5.49%	3.77%	2.14%	3.42%
Kazakhstan	0.40%	0.34%	0.39%	0.48%	0.42%	0.47%
KY-TJ-TM-UZ	1.08%	1.47%	1.17%	0.33%	1.77%	0.65%
Other Asia Pacific	7.41%	2.13%	6.25%	8.32%	2.19%	6.99%
Russia	19.59%	19.21%	19.50%	17.30%	20.49%	17.99%
Syria-Iraq	0.14%	0.06%	0.12%	0.17%	0.07%	0.15%
Turkey	6.22%	0.34%	4.93%	7.41%	0.42%	5.89%
Ukraine-Moldova	7.19%	1.85%	6.01%	7.84%	2.16%	6.61%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Computation based on Eurostat and UN Comtrade databases

The study of trade flows from and to Armenia must be completed with the analysis of their estimated tonnage. Table 4 below shows that tonnage of exports is only one sixth the sizes of those of imports. It also evidences s that more than half of exports, as far as potential tonnage



is concerned, are destined to Caucasus region (56.76%). Regarding imports, the highest trade exchange for Armenia is with Ukraine/Moldova (32.18%) followed almost equally by Turkey (19.86%), Caucasus region (18.63%) and Europe (17.96%).

**Table 4: Armenia Potential Trade with TRACECA Countries and Europe, 2010, in tons and %**

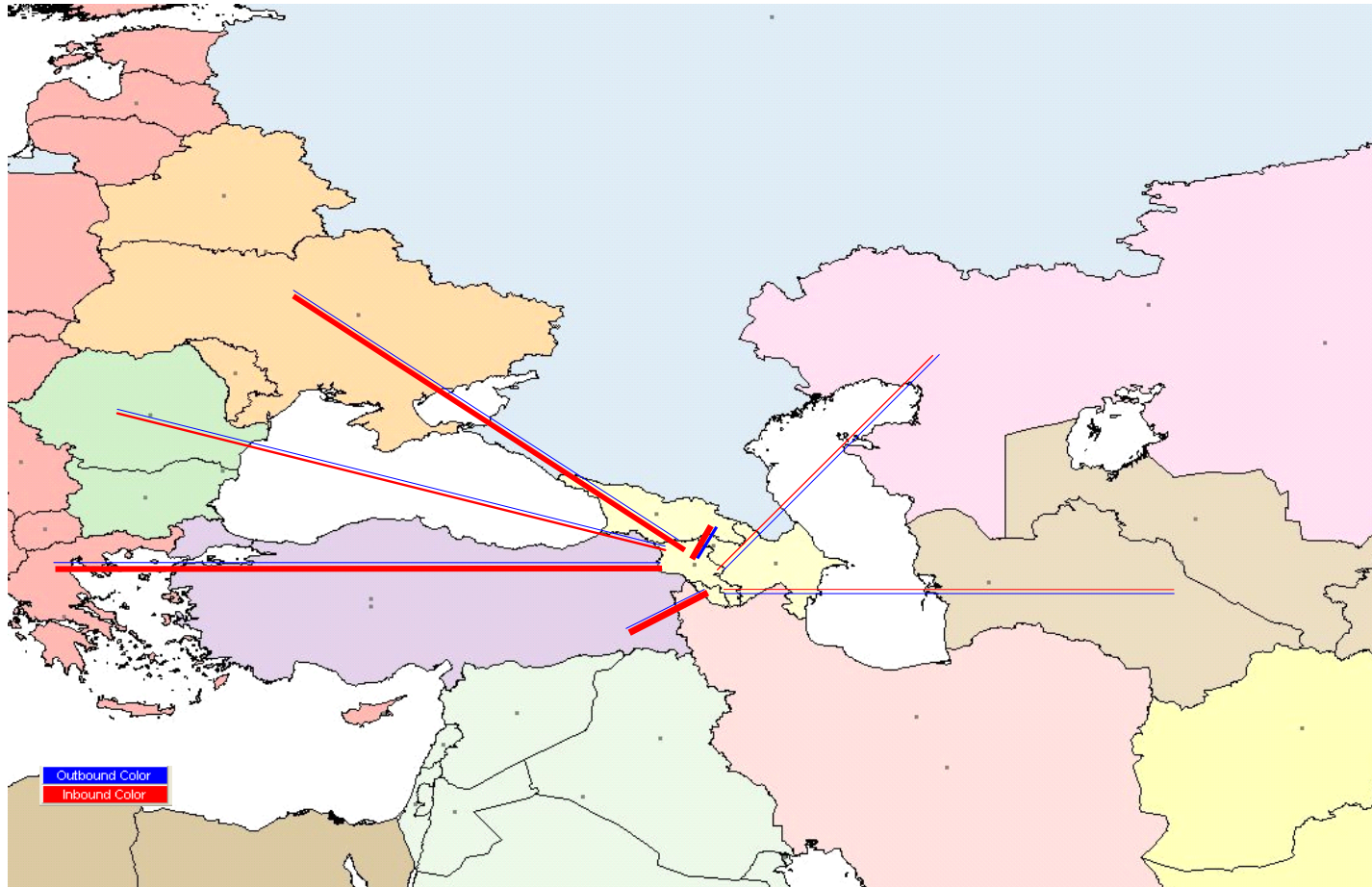
Zones	Tonnage		Share in trade with TRACECA countries and Europe	
	Export	Import	Export	Import
Bulgaria-Romania	232.7	42 934.3	0.22%	6.63%
Caucasus	61 395.0	120 660.8	56.76%	18.63%
Europe	21 778.3	116 349.0	20.13%	17.96%
Kazakhstan	587.8	27 244.5	0.54%	4.21%
KY-TJ-TM-UZ	1 646.4	3 486.9	1.52%	0.54%
Turkey	3 949.1	128 678.3	3.65%	19.86%
Ukraine-Moldova	18 573.0	208 474.5	17.17%	32.18%
<b>Total</b>	<b>108 162</b>	<b>647 828</b>	<b>100%</b>	<b>100%</b>

Source: Computation based on Eurostat and UN Comtrade databases





Figure 4: Armenia Potential Trade with TRACECA Countries and Europe, 2010, in tons



Source: Computation based on Eurostat and UN Comtrade databases





### 6.1.2 Regional TRACECA Trade

In a perspective to develop transport infrastructures and logistics centres to enhance trade between TRACECA countries, it is essential to look also at the commodity structure of trade flows. The following Figure 5 and Table 5 detail the composition of imports to Armenia from others TRACECA countries and Europe.

Main observations noticed are the following ones:

- The volume of imports is very much unbalanced. Imports from Ukraine/Moldova reach a weight of 208.5 th. tons while those from the South-East TRACECA region do not exceed 3.5 th. tons.
- On average, base metal equipment and vegetal products dominate the composition of trade inflows. They are then followed by the commodities “articles of wood” and “foodstuffs”.

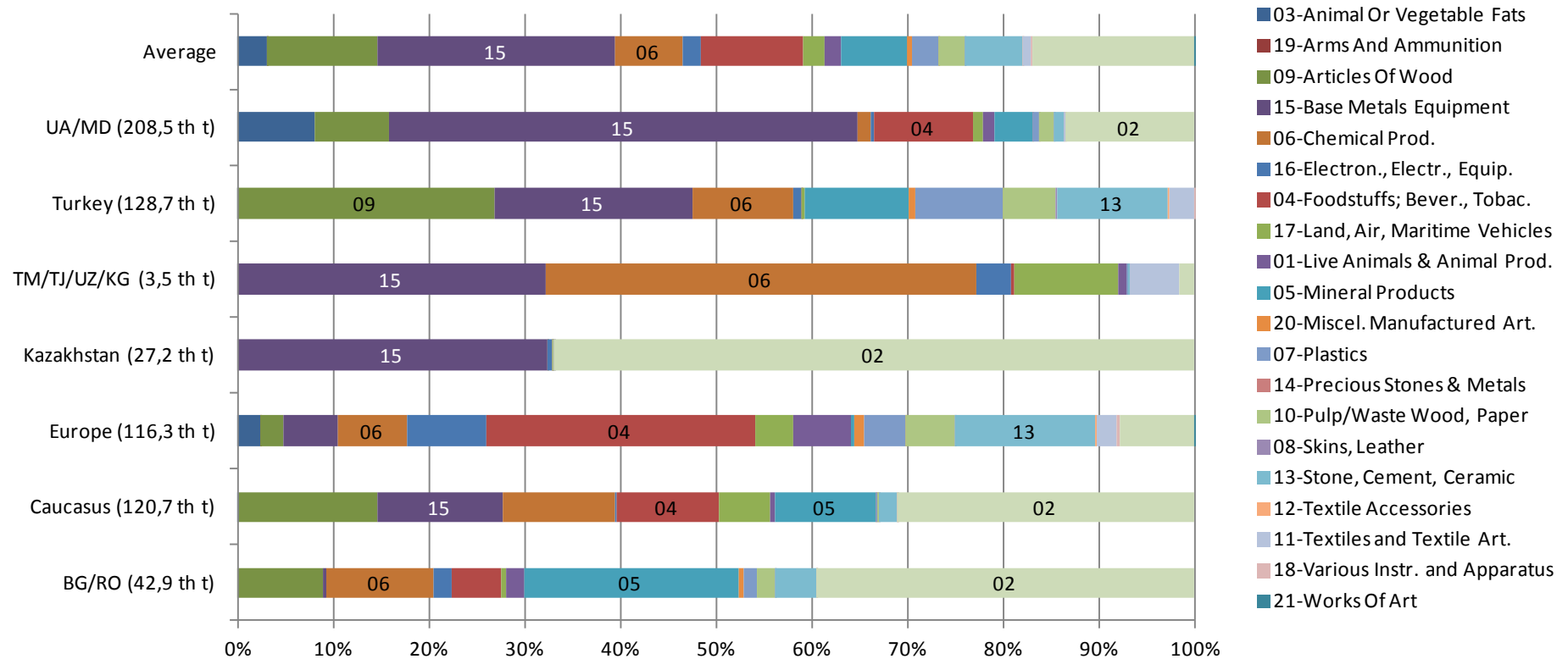
The commodity “base metal equipments” is mainly imported from Ukraine and then Turkey (see Table 5). Vegetal products come mainly from Caucasus and Ukraine. It is also to be noticed that the composition of imports from every trading partners is much diversified. The only exception is Kazakhstan from where only three commodities are imported: base metal equipments, electronics and vegetal products.

The commodity structure of exports is on average dominated by “mineral products” followed by “basic metal equipments” and “stone, cement, ceramic” (see Figure 6 and Table 6 below). However, it varies very much from one country to another. For instance, the exports to Caucasus are dominated by mineral products, while exports to Europe are predominantly composed of base metal equipments. An exception would be Turkey where the two main commodities share an equal part along with the “foodstuffs, beverage, tobacco” commodity.



Logistics Processes and Motorways of the Sea II

Figure 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Armenia, 2010, in tons and %



Source: Computation based on Eurostat and UN Comtrade databases



Logistics Processes and Motorways of the Sea II

**Table 5: Potential Trade with TRACECA Region – Commodity Structure of Imports to Armenia, 2010, in tons**

Commodity Groups	Bulgaria-Romania	Caucasus	Europe	Kazakhstan	KY-TJ-TM-UZ	Turkey	Ukraine-Moldova
Animal Or Vegetable Fats	n/a	95.48	2 780.10	n/a	n/a	1.78	16 730.16
Arms And Ammunition	n/a	n/a	68.92	n/a	n/a	n/a	n/a
Articles Of Wood	3 842.50	17 617.33	2 700.99	n/a	n/a	34 509.70	16 438.93
Base Metals Equipment	166.00	15 682.91	6 636.21	8 822.75	1 121.60	26 637.88	101 872.61
Chemical Prod.	4 785.10	14 103.00	8 495.65	1.05	1 570.33	13 539.65	2 782.72
Electron., Electr., Equip.	821.70	280.20	9 551.76	147.23	122.73	1 198.58	956.08
Foodstuffs; Bever., Tobac.	2 190.60	12 815.88	32 672.61	0.41	16.71	0.17	21 336.40
Land, Air, Maritime Vehicles	242.00	6 437.70	4 730.83	2.07	379.36	323.52	2 106.89
Live Animals & Animal Prod.	800.90	792.25	7 005.00	n/a	25.16	n/a	2 534.33
Mineral Products	9 611.80	12 632.35	226.50	n/a	0.11	13 918.65	8 343.28
Miscel. Manufactured Art.	212.80	51.61	1 350.94	1.27	0.26	947.56	181.44
Plastics	593.30	199.92	4 922.05	3.29	7.18	11 674.51	1 270.94
Precious Stones & Metals	n/a	0.16	10.50	n/a	n/a	0.72	0.01
Pulp/Waste Wood, Paper	859.60	133.74	6 034.41	20.30	n/a	7 271.45	3 363.75
Skins, Leather	0.30	13.33	61.66	0.00	0.01	76.48	1.11
Stone, Cement, Ceramic	1 832.20	2 230.47	17 035.68	0.19	5.03	14 997.59	2 152.52
Textile Accessories	4.50	2.79	106.16	n/a	0.01	151.77	10.66
Textiles and Textile Art.	10.50	18.19	2 510.55	0.03	179.19	3 424.90	129.19
Various Instr. and Apparatus	1.10	5.48	259.68	0.64	n/a	3.42	21.43
Vegetable Products	16 959.40	37 548.04	9 186.61	18 245.26	59.23	n/a	28 242.10
Works Of Art	n/a	0.00	2.20	n/a	n/a	n/a	n/a
<b>Total imports</b>	<b>42 934.30</b>	<b>120 660.82</b>	<b>116 349.02</b>	<b>27 244.50</b>	<b>3 486.90</b>	<b>128 678.33</b>	<b>208 474.54</b>

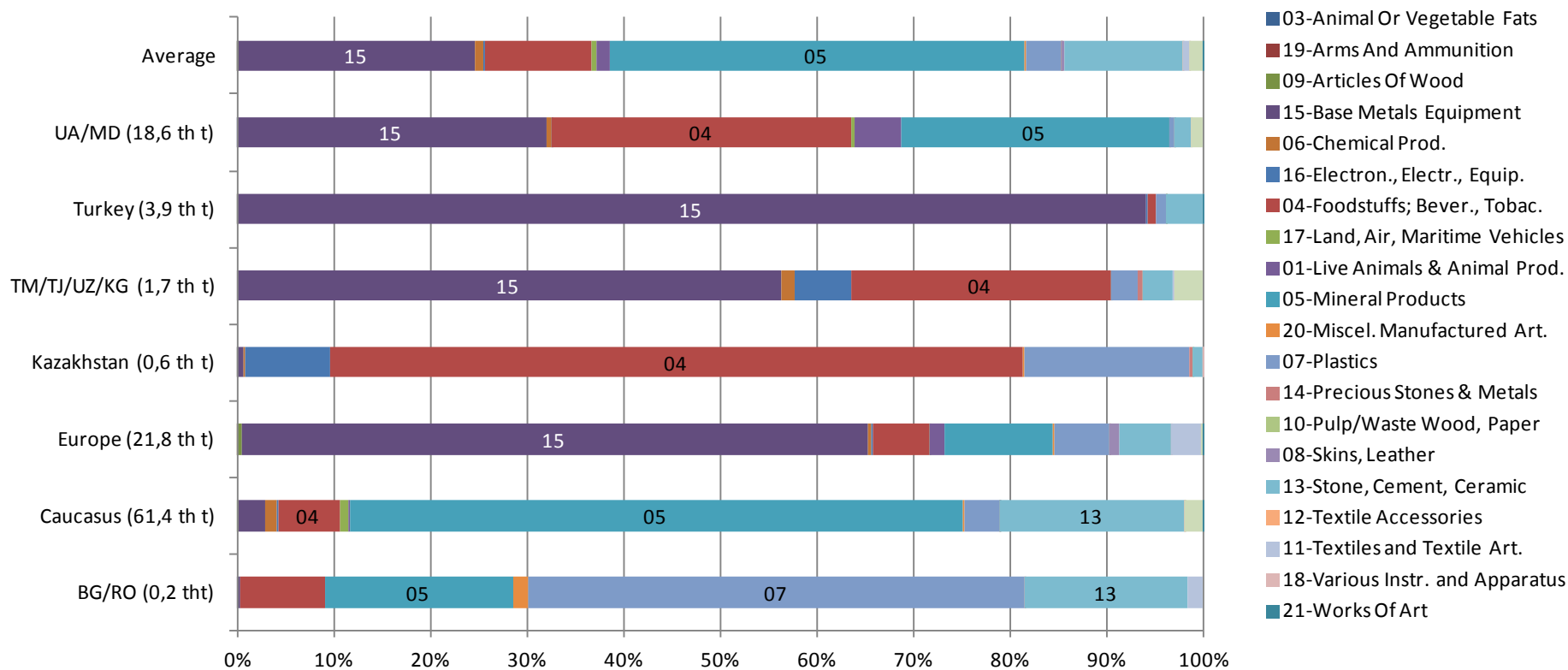
Source: Computation based on Eurostat and UN Comtrade databases





Logistics Processes and Motorways of the Sea II

**Figure 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Armenia, 2010, in tons and %**



Source: Computation based on Eurostat and UN Comtrade databases



**Table 6: Potential Trade with TRACECA Region – Commodity Structure of Exports from Armenia, 2010, in tons**

Commodity Groups	Bulgaria-Romania	Caucasus	Europe	Kazakhstan	KY-TJ-TM-UZ	Turkey	Ukraine-Moldova
Animal Or Vegetable Fats	n/a	n/a	0.00	n/a	n/a	n/a	0.06
Arms And Ammunition	n/a	n/a	10.80	n/a	n/a	n/a	n/a
Articles Of Wood	0.00	93.72	83.60	0.15	n/a	0.00	n/a
Base Metals Equipment	0.60	1 736.58	14 130.68	3.27	926.27	3 716.77	5 937.20
Chemical Prod.	n/a	664.79	59.90	1.78	24.15	n/a	107.90
Electron., Electr., Equip.	0.00	86.58	31.51	51.84	95.20	3.32	12.64
Foodstuffs; Bever., Tobac.	20.50	3 978.78	1 275.01	421.03	442.70	34.65	5 758.59
Land, Air, Maritime Vehicles	0.00	465.21	17.91	n/a	n/a	n/a	38.20
Live Animals & Animal Prod.	n/a	187.73	347.70	n/a	n/a	n/a	913.08
Mineral Products	45.40	38 857.49	2 442.73	n/a	2.07	n/a	5 140.18
Miscel. Manufactured Art.	3.80	97.19	6.52	0.51	0.05	n/a	1.03
Plastics	119.40	2 225.74	1 243.30	100.97	44.52	40.29	109.91
Precious Stones & Metals	0.10	0.31	11.10	1.87	8.84	0.01	n/a
Pulp/Waste Wood, Paper	n/a	87.15	8.30	0.10	0.06	0.06	0.08
Skins, Leather	n/a	9.38	229.10	n/a	n/a	n/a	0.01
Stone, Cement, Ceramic	39.30	11 707.75	1 150.88	5.45	51.49	150.24	303.63
Textile Accessories	n/a	8.09	0.50	0.05	n/a	n/a	n/a
Textiles and Textile Art.	3.60	24.46	681.56	0.16	1.38	3.71	n/a
Various Instr. and Apparatus	n/a	1.04	6.50	0.60	1.22	n/a	2.05
Vegetable Products	n/a	1 163.01	40.26	n/a	48.40	n/a	248.43
Works Of Art	n/a	0.01	0.50	n/a	n/a	0.00	n/a
<b>Total exports</b>	<b>232.70</b>	<b>61 395.02</b>	<b>21 778.35</b>	<b>587.78</b>	<b>1 646.37</b>	<b>3 949.05</b>	<b>18 572.98</b>

Source: Computation based on Eurostat and UN Comtrade databases





## 6.2 Intermodal Maritime Based Transport Challenges

LOGMOS aiming at developing seamless door-to-door intermodal services, all components of the transport chain may be considered as possible segments of LOGMOS projects, depending on their relevance for potential LOGMoS trade flows.

Port interfaces for operations, services, procedures etc. between land and sea are among the most critical points.

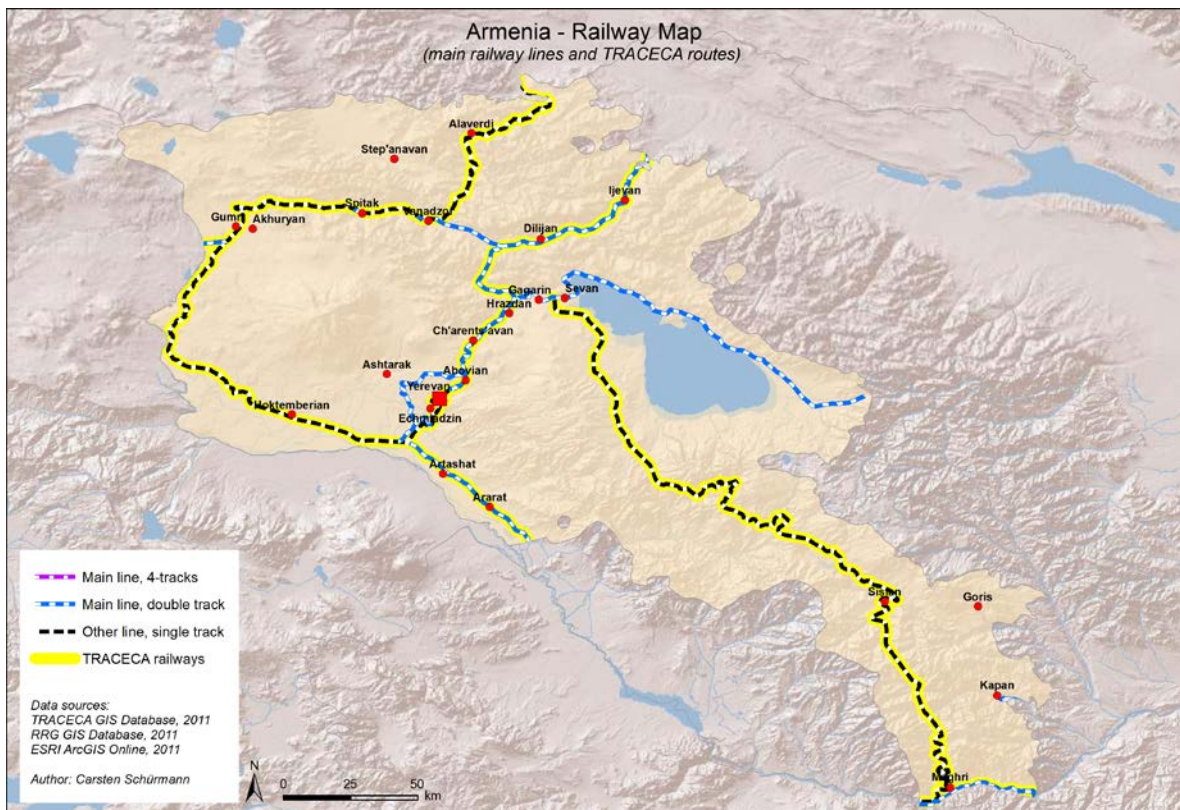
### 6.2.1 Port System and Maritime Links

Armenia is a land-locked country and does not possess any maritime façade. The most accessible ports are those of Georgia, Poti and Batumi, situated on the Black Sea distant of 650 km from Yerevan. The route to Iranian ports is much longer (2000km from Yerevan) and more expensive. The main trade partners of Armenia being Europe, Russia and China, cargos reach those destinations using in majority rail ferry services from Georgian Ports. Land connection with Russia exists through the Verkhny Lars crossing points between Georgia and Russia but its opening is dependent on the state of Russo Georgian relations and the climate conditions.

Given this situation, Georgian Ports and Black Sea maritime links are vital for Armenia's economy. A rapid container train is operated between Karmir-Blur / Yerevan and the port of Poti in Georgia since 2008. The train circulates 3 times per week in both directions and the journey lasts 36 hours. The maximum capacity the container train can handle is 30 wagons-platforms.

### 6.2.2 Inland Transport Mode: Railways

Figure 7: Armenia Railway Map



Source: TRACECA (2011)





The railway transportation is important for maintaining a reliable transport connection, promoting economic and social development in Armenia.

The closed Joint-Stock Company "Southern Caucasian Railways" (SCR) – an affiliate of Open Joint-Stock Company "Russian railways" - is the single railway operator in Armenia. On February 13<sup>th</sup> 2008 the Government of Armenia and SCR signed a 20-year concession contract for the operation of the State Close Joint-Stock Company "Armenian railway". The amount of total planned investments is 572 M USD, including 220 M USD to be invested during 2008-2013. Details of the concession investment are illustrated in the Table 7 below:

**Table 7: SCR Concession Investment 2009-2020 (million AMD)**

Item	2009	2010	2011	2012	2013-2015	2016-2020
<b>Infrastructure:</b>						
Track replacement	-	100	-	43	71	22
Track repair	813	292	926	574	943	287
Other infrastructure (bridges etc.)	3,525	4,295	3,766	3,216	5,282	1,608
Stations (including station track)	407	527	441	430	707	215
Other buildings and equipment (locomotive and wagon depots etc.)	3,525	1,216	1,910	1,099	1,805	549
Signalling and communications	1,356	988	2,446	1,161	1,908	581
Electric power facilities	3,931	4,444	4,915	5,339	8,771	2,670
<b>Sub-Total</b>	<b>13,557</b>	<b>11,862</b>	<b>14,404</b>	<b>11,862</b>	<b>19,487</b>	<b>5,932</b>
<b>Rolling stock:</b>						
Electric locomotives		685			343	
Diesel shunters				212	1,480	
EMUs		208	139	69	69	69
Wagons		143	117	365	1,294	1,523
Coaches	508				111	885
<b>Sub-Total</b>	<b>508</b>	<b>1,036</b>	<b>256</b>	<b>646</b>	<b>3,297</b>	<b>2,477</b>
<b>Total (AMD million)</b>	<b>14,065</b>	<b>12,898</b>	<b>14,660</b>	<b>12,508</b>	<b>22,784</b>	<b>8,409</b>
<b>Total (\$ million)</b>	<b>46.6</b>	<b>42.7</b>	<b>48.5</b>	<b>41.4</b>	<b>75.4</b>	<b>27.8</b>

Source: Armenia Transport Sector Development Strategy 2020

South Caucasus Railways was set into operations on June, 1st, 2008. Its mission is to develop and establish the national railway operator and improve the quality of services by means of upgrading railway transport infrastructure, enhancing partnership with neighbouring countries, operating national and international passenger and cargo transport in Armenia. In more details, the company provides:

- cargo and passenger (distance and suburban) transport services
- infrastructure facilities and locos;
- repairs and overhaul of rolling stock;
- infrastructure building, etc.



**Logistics Processes and Motorways of the Sea II**

The company transports cargoes in international (export and import) directions and in Armenia. Among transported cargoes are cement, grains, oils and mineral oil, chemical and mineral fertilizers.

The total length of railway tracks in Armenia is 1 328.6 km (including 780 km of express tracks) but only 726 km is operated. Double tracks constitute 2.56% of the network. These are Russian-gauge (1520 mm) rail tracks.

**Table 8: Main Features of the Armenian Railway Network**

<b>Total route length (km)</b>	<b>Gauge (mm)</b>
780	1,520
<b>Electrified lines (km)</b>	<b>Electrification system</b>
764	3kV DC

Out of them 726 km are operated now by SCR. SCR is capable of transporting 50 M tons and 5.5 M passengers per year. Almost all rail tracks are single, electrified and equipped with semi-automated blocking and modern communication systems. SCR operates 75 stations, including four border railway stations:

- 1 at the border with Georgia - Ayrum / Sadakhlo. Its capacity is 18 train pairs der day;
- 1 at the border with Turkey - Akhuryan / Dogukapi and
- 2 at the border with Azerbaijan Yerashk / Velidagh and Ijevan / Barkhudarli.

SCR owns 49 electric and 30 diesel locos, but also 1,839 freight and 135 passenger cars.

Railway freight traffic declined with the fall of USSR. The main reasons were a dramatic decline in rail-based industries, an improving road network and strong competition from the trucking industry. In 2011, rail freight traffic reached more than 3 M tons (see the Table 9 below) demonstrating the recovery of the sector (in 1999, rail freight traffic hit 1.9 M tons). Transit traffic was completely lost due to the closing of Armenia’s borders and the end of a direct rail connection with Russia. With new, competing lines under construction in Georgia and Iran, transit traffic may never be recovered.

**Table 9: Rail Freight Traffic in 2011**

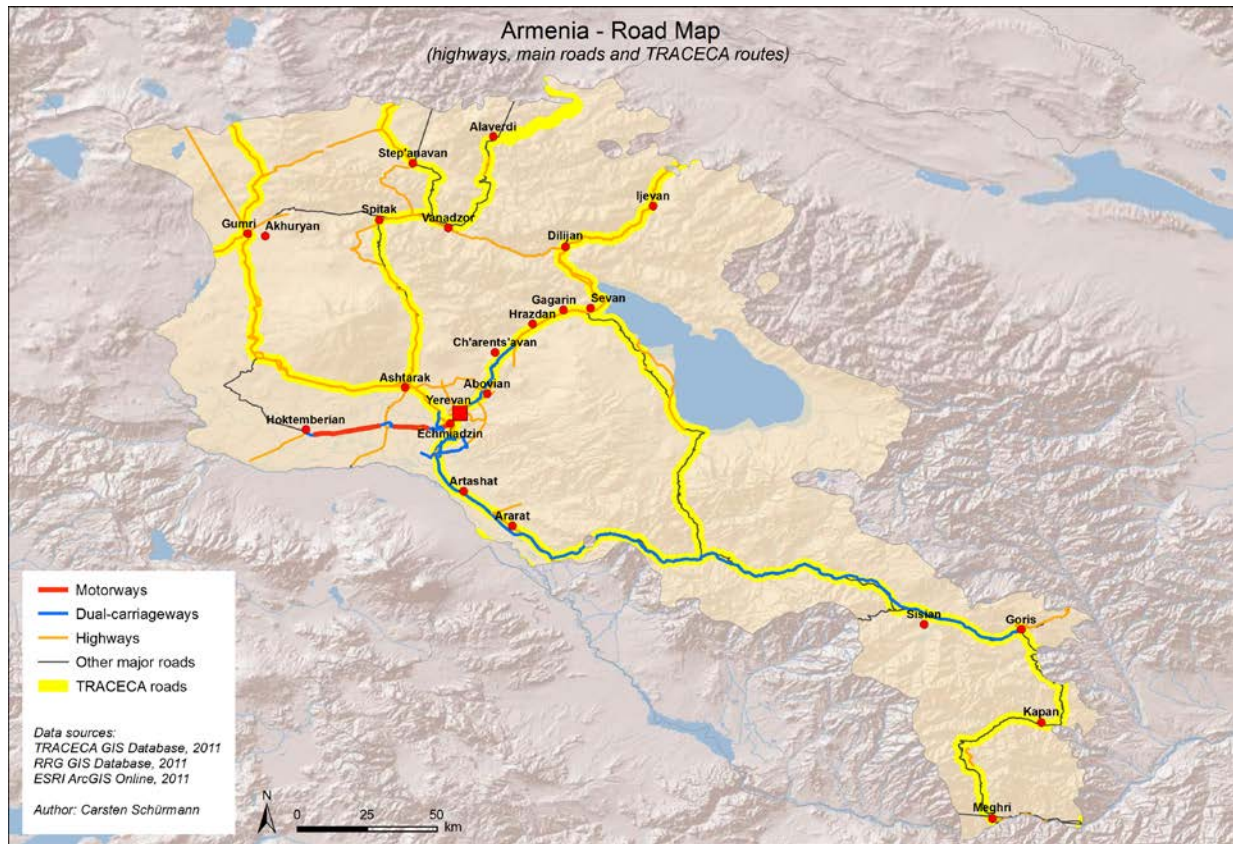
Commodity	Tons '000				Ton Km Million	Haul Km	Revenue AMD Million	Revenue/ Ton Km AMD
	Import	Export	Local	Total				
<b>Total</b>	<b>1,351.1</b>	<b>449.8</b>	<b>1,468.5</b>	<b>3,269.4</b>	<b>815.9</b>	<b>707.4</b>	<b>14,364.4</b>	<b>17.6</b>

Source: National Statistical Service of the Republic of Armenia



### 6.2.3 Inland Transport Mode: Roads

Figure 8: Armenia Road Map



Source: TRACECA (2011)

The total length of road network in Armenia is about 7,749 km divided into 1,730 km of inter-state roads, 4,057 km of state roads and 1,962 of local roads (2011 statistics). The road network constitutes the backbone for the country's economic development and has undergone drastic evolution over the past 20 years.

After gaining its independence, Armenia experienced an economic distress, mainly caused by the post-soviet reconstruction and the economic blockade by Turkey and Azerbaijan which resulted in the border closing with these countries. Given the mentioned reasons and a lack of investment in road development programs in the 1990's, the Government of Armenia decided to prioritize the improvement/rehabilitation of roads which connect the country with Georgia and Iran. In parallel, very few local roads were rehabilitated and maintained, which resulted in their considerable deterioration.

Therefore, according to the Poverty Reduction Strategy Paper (PRSP) for Armenia, which was prepared jointly by the World Bank and IMF in 2003 and targeted the period of time up to 2015, development of infrastructure in the rural areas, particularly the improvement/ rehabilitation of local roads, is considered to be one of the most important instruments for the poverty alleviation. To implement the Strategy, the Government adopted "Lifeline Road Network Program" (LRNP) based on the "Rural Enterprise & Small-Scale Commercial Agriculture Development Project" financed by the World Bank. Under the LRNP, the rehabilitation of existing local roads (up to 2 700 km) is considered to be an advantage even though they are in poor technical conditions.



**Logistics Processes and Motorways of the Sea II**

Within the frames of this project, the Government of Armenia, ADB and the World Bank, have already invested into rehabilitation of some 530 km, 220 km and 150 km of local roads, respectively. However, the funding source for the remaining 1 000 km was not determined yet and Government of Armenia seeks for an investor.

To ensure an alternative road transport connection with Iran, in 2005-2007 some 96.4 km of new motor road was completed, which helped to reduce the transit time through the territory of Iran by 1 hour. All road construction initiatives are financed from the state budget.

As for the international transport corridors concerned, Armenia, as well as other countries in South Caucasus, are located on the crossroad of several transport corridors:

- TRACECA connects European and Asian countries via Caucasus. The corridor is recognized to serve as an alternative transport connection that helps to reduce cargo transport costs in the region;
- North-South corridor even though established recently, it appears to be a promising alternative for transit transport. But Armenia could realize its full transport and transit potential only after opening its borders;
- Pan-European transport network which should be reviewed by HWG in terms of its expansion to EU neighbouring countries and regions. The South Caucasus should be included into South-Eastern axis.

In addition, Armenia is also included into Asian Highways Network. The intergovernmental Agreement on the Asian Highway Network entered into force on 4 July 2005, under the auspices of UNESCAP. The Asian Highways network in Armenia comprises 966 km (see Table 10 below). These routes together constitute the principal international links between Iran, Georgia and Azerbaijan (currently non-operational) through Armenia.

**Table 10: Asian Highway Routes in Armenia**

AH No.	Route	Kilometre
AH 81	Bagratashen (Georgia Border) – Yerevan – Eraskh	271
	Agarak – Meghri	61
AH 82	Bavra (Georgian Border) – Gyumri - Ashtarak	158
	Eraskh – Goris – Kapan – Meghri	324
AH 83	Aigehovit (Azerbaijan border) – Sevan – Yerevan	152

Source: UNESCAP, 2003, Asian Highway Handbook

**6.3 Trade and Transit Facilitation**

**6.3.1 General Presentation**

- **Procedures and formalities** are among the **main barriers** that are hampering the development of Motorways of the Sea:
  - several **border points** must be crossed, mostly in ports but also on land routes f.i. along the central land corridors: minimum 2 points in a single / one sea service, up to 5 points in inter-seas services linking western Black Sea Countries and Eastern







## Logistics Processes and Motorways of the Sea II

Caspian Sea Countries, and possibly more in the case of longer multicountry transit and transshipments trades;

- several physical mode transfers, handling movements and intermediate storage are taking place along the sea based transport chains: commonly 3 transfers and minimum 6 handling plus 2 storage in the case of a single sea leg, and several more handling operations in the inter-seas services
- previous and ongoing experiences of Motorways of the Sea in other regions as well as the global worldwide transport system of containers have demonstrated that the resolution of difficulties in this field is an essential success factor.
- The procedural process in ports and at other border crossing point are **dominantly related to Trade Laws and Regulations**, but actors of the transport and transit chain are responsible for their fulfilment. A significant part of their activities is to deal with these complex issues and they are drawing the corresponding revenues out of their capacities.

Relationships between institutions on one side, - Customs first, but also other Ministries and inspection bodies - operators and users on the other side, are affected by these functions which are mixing with the physical transit and transport operations.

- The **impacts of administrative and regulatory barriers** are generally more important when there is a sea leg since:
  - maritime transport and port transits require more formalities than land transport modes, including specific exchange of information, paper documentation etc. which are rightly perceived as a factor of complexity
  - this adds to the weakness of intermodal sea based transport, particularly when compared to the most simple unimodal road transport
  - transit times are increased if and when formalities and operations are mismatching, f.i. when the transport means of one mode is not coordinated with those of the next mode, which is a frequent situation between the maritime and railways legs in the TRACECA Region
  - costs are not only direct but also indirect, and not only formal but also informal, and unofficial transit levies and other transaction costs are adding to the sum of official tariffs, taxes and dues.
- **Common Weaknesses / barriers** have been identified in all LOGMOS project Countries to various extents and at different degrees. This diagnosis has been shared under the key word "Facilitation" by Country stakeholders and at bilateral and regional levels. Barriers in this field are referred to in the "W" (Weaknesses) list of the various SWOT analyses summarized in the following project documents:
  - Country profiles, as synthesized hereafter
  - Presentations for workshops and meetings
- Among the **solutions** discussed in the diagnosis phase, the following is a series of common **recommendations and targets** that are partly implemented, planned, or contemplated for the future LOGMOS projects and more generally for the development of intermodal transport including port / border crossing points:
  - I.T. systems and solutions electronic solutions / EDI for:
    - information (for users and operators)
    - declarations



**Logistics Processes and Motorways of the Sea II**

- pre-alert (for Customs and other)
- duties, taxes and fees
- One stop shop scheme and extension to Single Window System (SWS)
- Risk management system and methods
- IT interchange solutions between MoS port / communities
- Tracking and Tracing (in coordination with operators)
- Upgrading / redesigning border points layouts
- Training (management, IT organization...)

**6.3.2 SWOT Analysis**

The following table summarizes key-findings for national SWOT analysis in trade and transit facilitation procedures that have been adopted in Armenia.

**Table 11: SWOT Analysis in Trade and Transit Facilitation Procedures**

<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>• WTO Member since 2003</li> <li>• Demonstrated a firm commitment to advance the Integrated Border Management (IBM) system which was attested by the signature of the Presidential Decree on Adoption of the Strategy on Border Security and Integrated State Border Management on 3 November 2010.</li> <li>• Development of a new National Strategy for Transport Security (openly circulated);</li> <li>• Signature of bilateral agreements with Georgia on the development of Border Crossing Points</li> <li>• Implementation of the comprehensive SCIBM Action Plan and of a Twinning Project "Support to the State Revenue Committee for Strengthening of Customs Control Procedures and Enforcement in Armenia according to Best Practices in the EU Member States"</li> </ul>
<b>WEAKNESSES (BARRIERS)</b>	<ul style="list-style-type: none"> <li>• Perceived uncertainties with commitment to Customs and trade facilitation reform and modernization</li> <li>• Mistrust between Customs and trade facilitation agencies and private industry because of integrity issues and lack of complete Customs and trade facilitation</li> <li>• Lack of electronic pre alert import and export declaration on a country wide-scale</li> <li>• Lack of a facilitation "PRO" structure</li> <li>• Not acceded to the UN Landlocked State Convention</li> </ul>
<b>OPPORTUNITIES</b>	<ul style="list-style-type: none"> <li>• Realization of the EU-supported programme "Supporting Integrated Border Management in the South Caucasus (SCIBM)" implemented by UNDP. Within this programme, design documentation for the modernization of Bagratashen, Bavra and Gogavan border crossing points has been developed. Construction works are expected to start in the first quarter of 2012.</li> </ul>





**Logistics Processes and Motorways of the Sea II**

	<ul style="list-style-type: none"><li>• Ratification of the Kyoto convention expected in May/June 2013</li></ul>
<b>THREATS</b>	<ul style="list-style-type: none"><li>• Lack of coordination with Georgian counterparts, in the construction of BCPs</li><li>• Borderline between Georgia and Armenia is not always clear</li></ul>





## 7 PILOT PROJECTS SELECTED FOR MOS I AND ILC PROJECTS

To answer the existing challenges for MOS and ILC promotion, two TRACECA projects made a pre-screening for potential pilot projects. The pre-screening was based on the multi criteria analysis of proposed pilot, which helped to narrow down the pilot projects list.

The list of retained pilot included the following projects:

**Table 12: Selected Pilot Projects in Armenia**

<b>Pilot project</b>	<b>Service proposed</b>	<b>Countries involved directly</b>	<b>Concerned TRACECA project</b>
Yerevan ILC at Zvartnots International Airport	Cargo Facilities, warehousing, Customs terminal and other logistics related investment	Armenia	ILC project

As a result of the first phase of MOS I and ILC implementation, for the above mentioned pilot project, a feasibility study was elaborated. Short summary of this project can be found here: [LOGMOS pilot projects ARM.doc](#)