



UDH

T.C. Ulaştırma Denizcilik ve
Haberleşme Bakanlığı

**Ministry of Transport, Maritime Affairs and Communications
Republic of Turkey**



*The Third Meeting of the COMCEC Transport Working Group on
'Developing Multimodal Freight Transport among the OIC Member Countries'*

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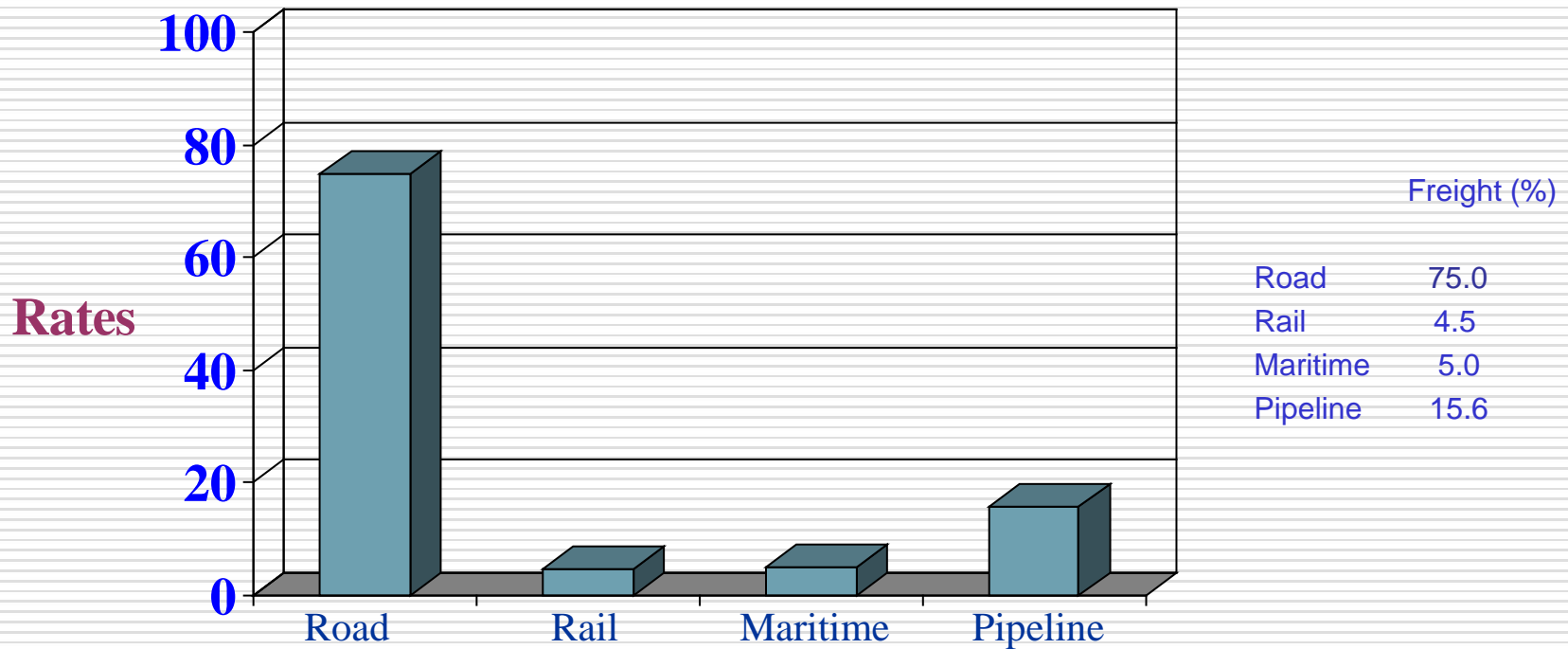
EU Expert

DG for Dangerous Goods and Combined Transport

Ankara, 13 March 2014



FREIGHT TRANSPORT IN TURKEY



Source: TURKSTAT, 2010



ONGOING ACTIVITIES

A) TRANSPORT STRATEGIC PLAN (2014-2018)-Three Main Pillars on Intermodality

- Intermodal/Combined Transport Strategy Paper
- The Promotion of Combined Transport Operations
 - Draft regulation on combined freight transport
- Development of Multilateral and Bilateral Cooperation in international combined transport
 - Turkey-Azerbaijan Agreement on International Combined Transport of Goods

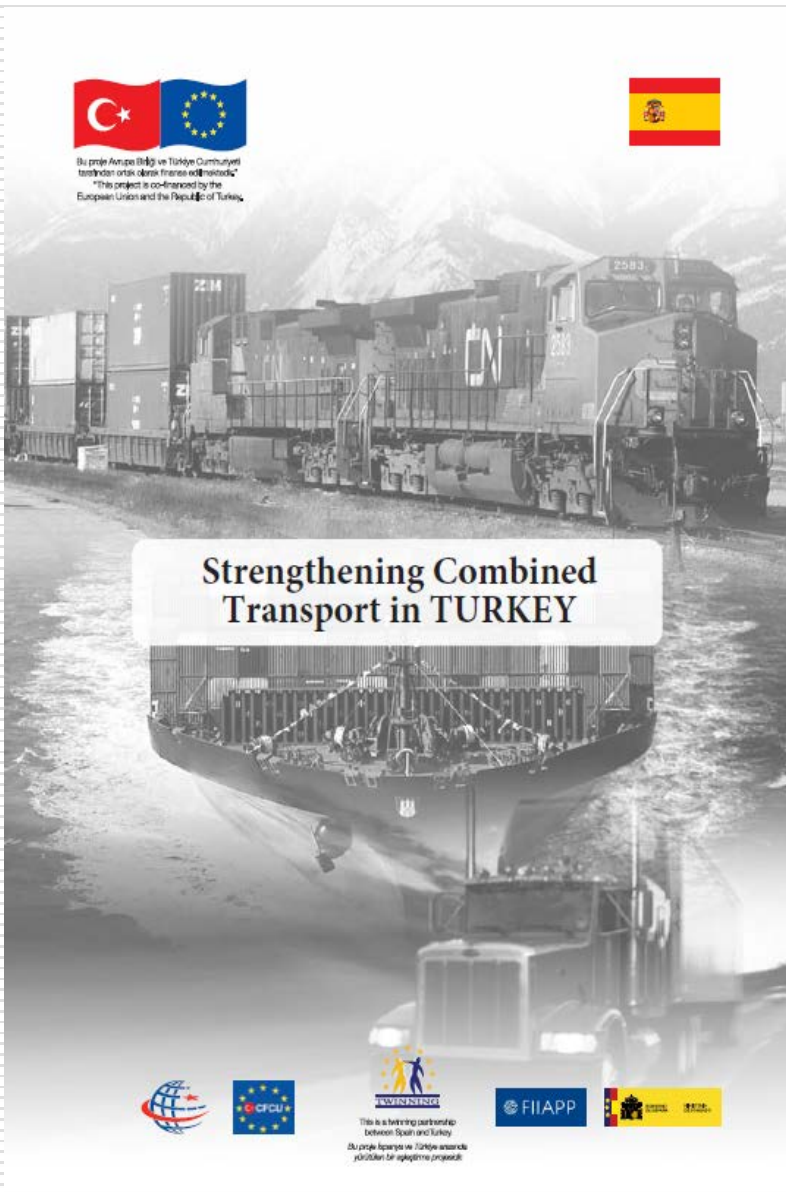
B) NATIONAL TRANSPORT MASTER PLAN

- ToR drafted (Both English and Turkish)
- EU Programme: IPA Programme 2007 – 2013

C) LOGISTICS MASTER PLAN

- ToR first draft ready
- each transport mode, current situation, regulatory framework and future policies reviewed





Operational objective 1.1: PORT INTERMODALITY

- Promotion of SSS
- Improvement to maritime-railway operations

Operational objective 1.2: RAILWAY INTERMODALITY

- Rail Freight Corridors
- Overland Intermodality

Operational objective 2.1: TRANSPORT PLAN FOR TURKEY

- Measurement of goods traffic and flow studies
- Proposed courses of action
- Plan Implementation and assessment

Operational objective 2.2: LOGISTICS MASTER PLAN

- Diagnosis of logistics sector
- Analysis of production and logistics chain
- Definition of logistics enclaves and centers
- Logistics map of Turkey



Strengthening Combined Transport in TURKEY



Component 3: Turkish Combined Transport Strategy

Executive Report

November 2013



Operational objective 3.1: SUPPLEMENTAL LEGISLATION

- Development of Logistic Sector Legislation
- Feasibility Study for a Single CT Contract
- CT Permanent Platform
- Arbitration for solving CT Problems

Operational objective 3.2: INCENTIVES FOR CT

- Technical Commission for the Study of Combined Transport Incentives
- Development of Public-Private Sector Dialogue

Operational objective 4.1: CUSTOMS OPERATIONS

- Single Window
- Bilateral Agreements with border countries

Operational objective 4.2: PORT COMMUNITY SYSTEMS

- Turkish Port Community System
- Public-Private Dialogue

MAIN CHAPTERS IN THE REGULATION

Combined Freight Terminals (Dry Ports)

- Administrative and Technical criteria for the establishment of CT Terminals.
- Licensing

Incentives

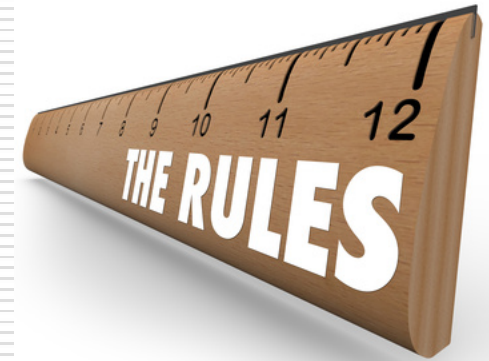
- Financial/fiscal Incentives to the supply of services for the creation and/or improvement of combined transport routes.
- Incentives to the demand of services to enforce the use of maritime, inland waterways and railway transport services.
- eligible actions

Combined Transport Permanent Platform

- consultation body and the main instrument for private sector participation in the combined transport policy.

Observatory of combined transport market

- to monitor the combined transport market, included supply and demand, traffics, prices, costs, services facilities etc.
- collect the figures, and the statistics data need to monitoring market.



INTERMODAL TRANSPORT IN TURKEY

FACTS AND FIGURES



- Dominant road transport sector with a share of 75% in domestic transport and 43% in international transport
- Regular International Ro-Ro Lines to Italy, France, Russia, Romania, Ukraine, Regular Domestic Ro-Ro line in Marmara Sea



- Use of Ro-La by Turkish Trucks in Corridor IV and Corridor X (through Hungary, Austria, Slovenia, Germany)
- No Ro-La in domestic transport

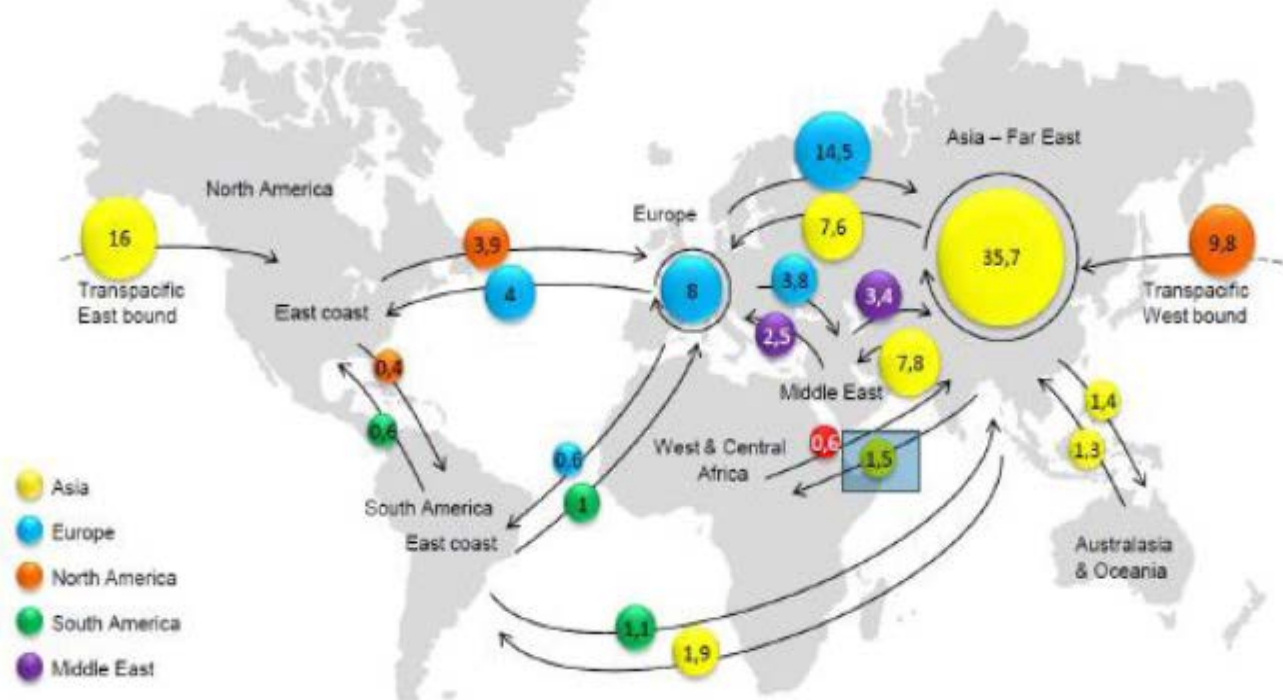


- Block ContainerTrains (135 Domestic, 14 International per day),
- Rail Ferry services (Marmara Sea, Black Sea, Lake Van)
- Build of Logistics Centers (Located in 18 different regions)
- Privatised Ports, Private ports and new container ports to be constructed (Çandarlı-Nort Aegean Sea, Filyos-Western Black Sea, Mersin- Medditerranean)
- General Directorate for Dangerous Goods and Combined Transport Established on 1st November 2011

Interest for transcontinental rail developments

(projection 2014, M TEU Twenty Equivalent Unit)

Forecast 2014
(TEU)



Fact: Long-term (2030), rail transport between Asia and Europe is forecast to reach around 950,000 TEU p.a. This includes traffic from East Asia, Mongolia and Kazakhstan to the EU in both directions. Traffic from South Asia could add another 150,000 TEU in the long-term.

Fact: Already today, rail could hypothetically achieve a potential of 480,000 TEU p.a providing some adjustments

Fact: Need to create awareness on opportunities, prepare the ground for enhanced rail cargo services between Asia and Europe and to promote rail transport solutions



TURKEY OFFERS DIFFERENT TRANSIT ROUTES



Istanbul Strait Tube Tunnel Project (Marmaray Project)

- Inaugurated 29 Oct. 2013
- It links Asia and Europe by rail.
- The project included the construction of 1.3 km of completely submerged tunnel of a total 13.6 km.
- The railway between Halkalı, on the European side and Gebze, on the Asian side, will be fully renewed and there will be three railways. Two lines of this route, covering a total 76 km, will provide urban transport services, while other connected lines will be used by high-speed trains.
- it is the first tunnel to offer both passenger and freight transport services. (Freight transport btw 24:00 – 06:00)



KARS-TBİLİSİ-BAKU RAILWAY PROJECT



High level commitment of 3 states
(Azerbaijan, Georgia and Turkey).

6.5 million tonnes freight volume per year

90% of the project completed.

TRACECA SILK WIND BLOCK TRAIN



Joint Project with Kazakhstan, Azerbaijan, Georgia and Turkey

«Memorandum on the principles of joint activity on development of transport networks and organization of cargo transport» signed on November 28, 2012 in Izmir,

Route: Dostyk-Zhezkazgan-Beineu-Aktau-Baku-Alyat Sea Port-Akhalkalaki-Kars-Istanbul

- The total length of the route is 4,192 km with the estimated transit time of 12 days.
- Project would enable new infrastructure objects: straightening railway line Zhezkazgan-Beyneu(Kazakhstan), International Sea Trade Port Alyat (Azerbaijan), railway line Baku-Tbilisi-Kars (Azerbaijan, Georgia, Turkey) and Marmara railway channel line (Turkey).

MAIN CHALLENGES IN INTERMODAL TRANSPORT



Not market-driven, but policy-driven

Lack of equipment and efficient nodes (terminals).

No master plan or regulation governing intermodality



Lack of multilateral and bilateral agreements on the development of intermodal transport

Long loading/ unloading times for vessels and trains

Joint Controls at Customs (lengthy procedures)



Permit requirement from the vehicles using Ro-Ro line

Financial support measures

Single Liability Document (Lack of Harmonisation)

CONCLUSION

In order to make the Intermodal Transport effective and sustainable:

Intermodal transport should be an alternative to road transport in terms of time and price; therefore:

- ❖ Financial incentives to be utilised to stimulate intermodal operations
- ❖ Vehicles using Ro-Ro and Ro-La lines should be exempted from quota restriction, permit free.
- ❖ Use of Ro-Ro and Ro-La should be encouraged by incentives such as bonus permits, lower tariffs etc.
- ❖ Intermodal transport (Ro-Ro, Ro-La, container) should be supported at UNECE and EU level by new legislations.
- ❖ More accessible intermodal terminals should be constructed
- ❖ Customs procedures should be accelerated and simplified
- ❖ Electronic applications should be used



THANK YOU FOR YOUR ATTENTION

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