

REPUBLIC OF TURKEY
MINISTRY OF TRANSPORT

TRANSPORT SITUATION IN TURKEY

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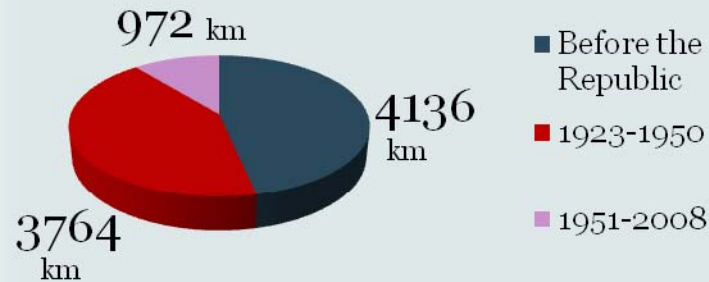
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A Brief Overview: 1923-2002

Railway Construction in Turkey



- Republic of Turkey established in 1923
- Ambitious Railway Development until 1950s
- The rise and dominance of Road Transport after 1950s.

Shares of Modes in Passenger and Goods Transport									
Years	Domestic Passenger Transport (%)				Domestic Goods Transport (%)				
	Road	Railway	Maritime	Aviation	Road	Railway	Maritime	Aviation	
1950	49.9	42.0	7.5	0.6	17.1	55.1	27.8	-	
1960	72.9	24.0	2.0	0.8	38.0	48.0	14.0	-	
1970	91.4	7.6	0.3	0.7	65.7	21.6	12.7	-	
1980	94.0	4.1	1.2	0.7	73.6	10.4	15.9	0.1	
1989	94.2	4.9	0.1	0.8	81.6	9.5	8.8	0.1	
1995	94.8	3.5	0.1	1.6	92.5	7.1	0.2	0.2	
1996	95.0	3.2	0.1	1.7	93.0	6.8	0.0	0.2	
1998	95.2	3.1	0.0	1.7	94.6	5.3	0.0	0.2	
1999	94.8	3.3	0.0	1.8	89.9	5.0	4.9	0.2	
2000	95.2	3.0	0.0	1.8	89.9	5.5	4.4	0.2	
2001	95.2	3.2	0.0	1.6	90.5	4.5	4.8	0.2	
2002	95.4	3.0	0.0	1.6	91.9	4.4	3.5	0.2	

A New Period of Progress: 2002-2009

NEW GOVERNMENT → NEW TRANSPORT POLICY

URGENT ACTION PLAN

STRATEGY FOR A TRANSPORT MASTER PLAN

INFRASTRUCTURE DEVELOPMENT

REGULATORY MEASURES

LIBERALISATION

Road Transport

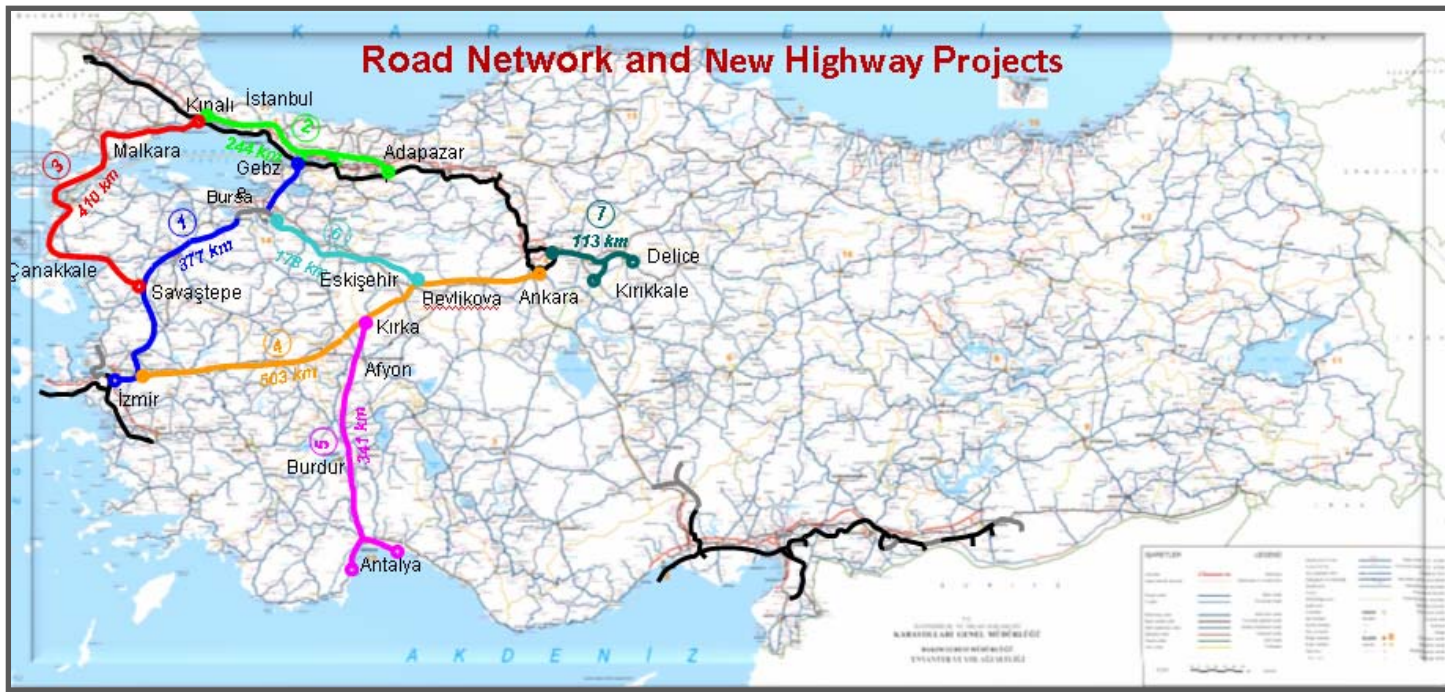


Road Type	(km)
Motorways	2.001
State Roads	31.326
Provincial Roads	30.555
Total	63.882 (15.358 Dual Carriageway)

1553 Carriers in
International Goods
Transport

139 Carriers in
International Passenger
Transport

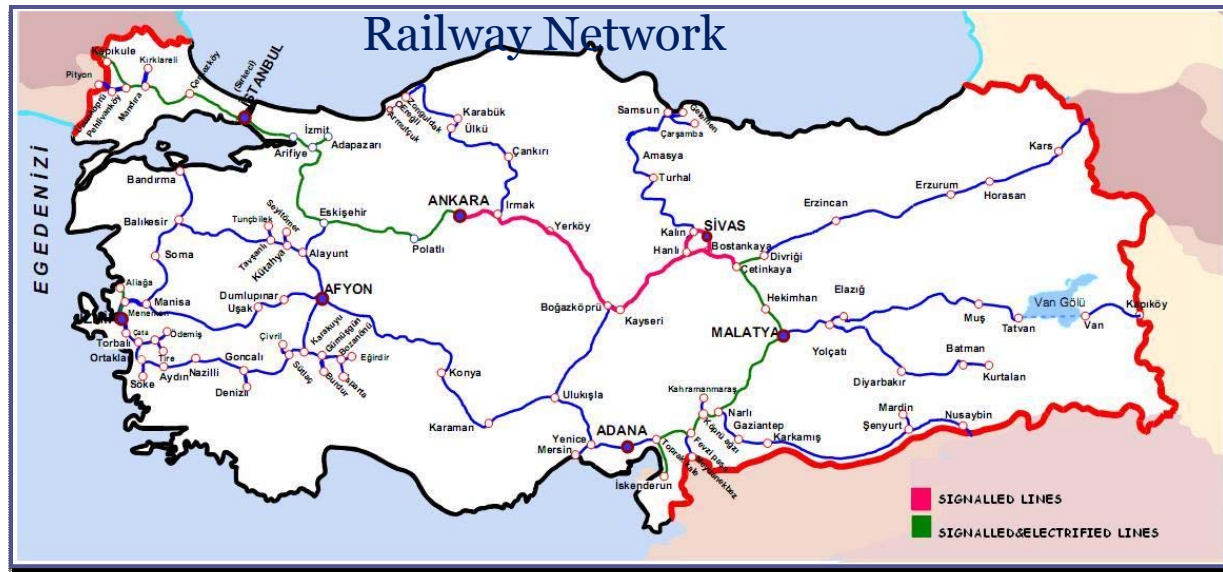
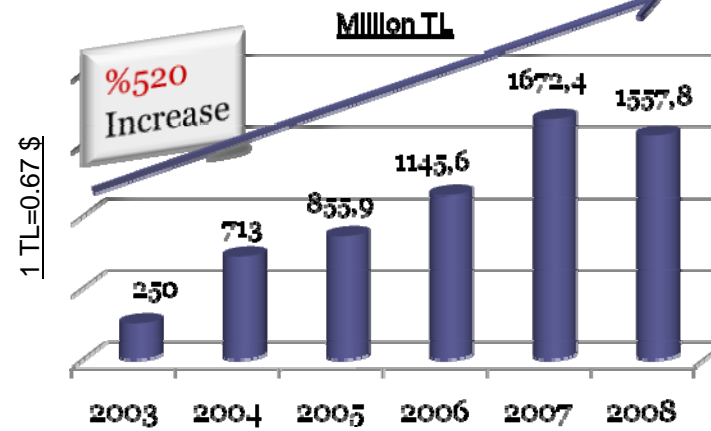
Road Transport



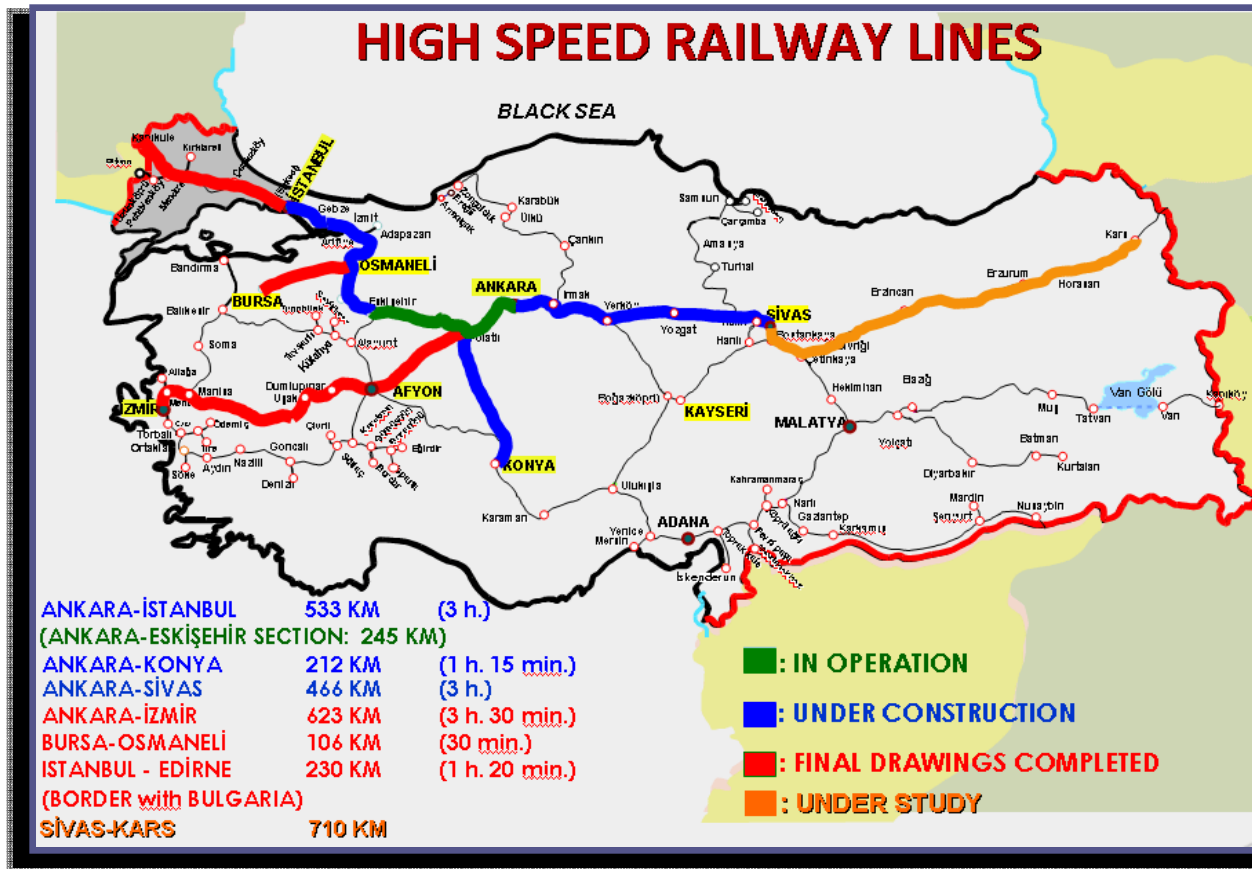
- New Highway Projects (**Public-Private-Partnership**)
- Total Cost: **17 Billion \$**

Railway Transport

Investment Allocation to the State Railways (TCDD)



Railway Transport



2503 km of High Speed Lines

6 Billion \$ Investment

Railway Transport

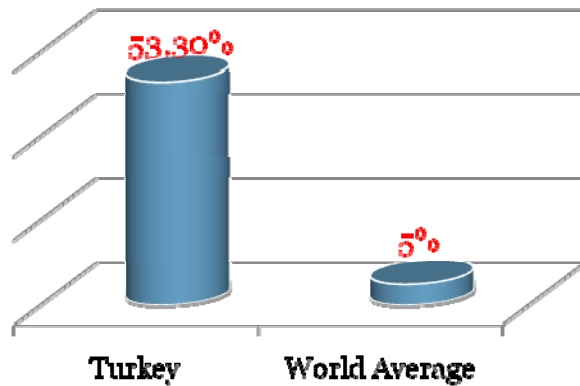
Marmaray Project



- An uninterrupted rail connection between Europe and Asia
- 76 km of immersed tube tunnel under the İstanbul Strait
- 3 billion US \$ of investment

Civil Aviation

**Growth Rates in the Sector
(during the last 6 years)**



Having **the Second Rank** in the European aircraft traffic with **1.800 daily traffic**

Civil Aviation



**67 AIRPORTS
(23 INTERNATIONAL)**

**Major Airports renewed with
Build-Operate-Transfer Model**

**- 25 million passengers/year
extra capacity**

- 25.000 extra employment

Maritime Transport

Main Ports on 8000 km of Coastal Strip



Annual Total Handling Capacity
350 Million Tonnes

Handled in 2008

- **314 Million** Tonnes of Cargo
- **5 Million** TEU of Containers

Since 1999, the total number of containers handled in Turkish ports increased by **4 times**.

Ongoing Privatisation of the Main Ports

- Mersin
- İzmir
- İskenderun
- Samsun
- Derince
- Bandırma

Maritime Transport



Multimodal Transport and Transport Facilitation



Proposed Measures

- Intermodal and Logistic Master Plan
- Legal Environment - Regulatory Framework
- Separate Department under the MoT

Some Intermodal Applications in Turkey

- Block Train Transportation
- Ro-La Transportation
- Ro-Ro Shipping and Rail-Ferry Services
- Freight Villages

Multimodal Transport and Transport Facilitation

Block Train Transportation



170 Block Trains per day (Domestic and International)

Europe: Germany, Hungary, Austria, The Netherlands, Romania, Slovenia

Central Asia: Turkmenistan, Kazakhstan

Middle East: Iran, Iraq, Syria

Freight Transport in 2006 (compared to 2002):

%37 increase in quantity

%110 increase in income

Ro-La Transportation



**1) Halkalı (Turkey)-Wells (Austria) : Ro-La Line
(Longest Ro-La Line in the World)**

**2) Halkalı (Turkey)-Wells (Austria):
Semi-Trailer Transport via Rail (1979 km)**



Multimodal Transport and Transport Facilitation

Ro-Ro Shipping & Rail-Ferry Services

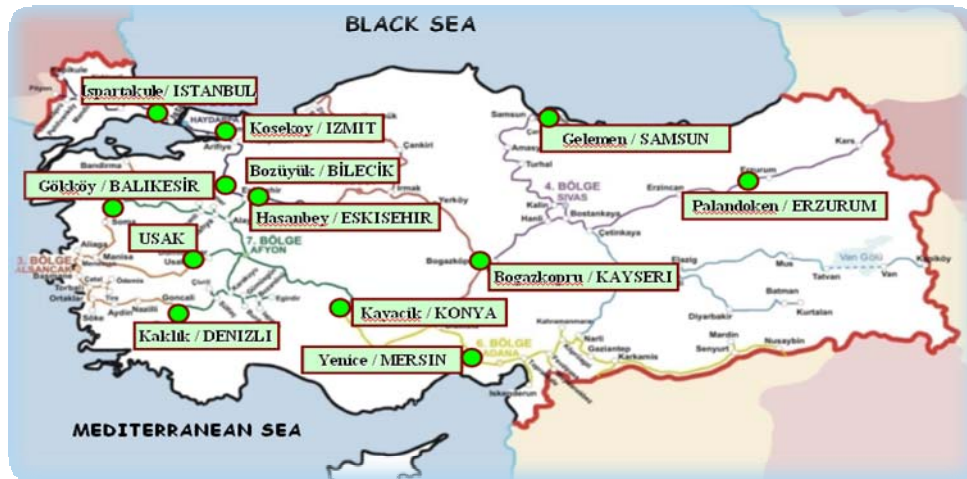


In 2008, more than **330.000 vehicles** were carried on **8 major Ro-Ro lines**



New International Ro-Ro and Rail-Ferry Lines planned

Freight Villages



Alignment with the EU *Acquis*

- **Harmonization** of Turkish Legislation with the Relevant EU Legislation
- **Twinning Projects** with the EU Member Countries
- **Liberalization** of the Sectors
- Setting Up Necessary **Regulatory and Monitoring** Institutions

Conclusion

No compromise the quality of transport services even under the crisis conditions

Continuing

- » to implement huge infrastructure projects
- » the liberalisation and restructuring Process
- » to cooperate with the private sector
- » to improve the administrative capacity

Strengthening the international cooperation



THANK YOU

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