



REPUBLIC OF TURKEY
MINISTRY OF TRANSPORT, MARITIME AFFAIRS
AND COMMUNICATIONS

AN ANALYSIS ON THE IMPACT OF ROAD TRANSPORT QUOTAS

*UNECE Inland Transport Committee
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Turkish road transport fleet

- modern and reliable vehicles
- more than 75.000 tractor-trucks operating in international transport.
- Environment-friendly trucks of engines EURO III and over. (*%70 of the vehicles in Turkish fleet, performing international road transport operations, is Euro V engines.*)



Figures

- 41% of the export volume of Turkey by road transport
(2012 figures)
- Turkish exports carried by road in 2011 increased by **9.4%** in comparison to the previous year while the total road transport quotas allocated to Turkey increased only by **3.9%**.

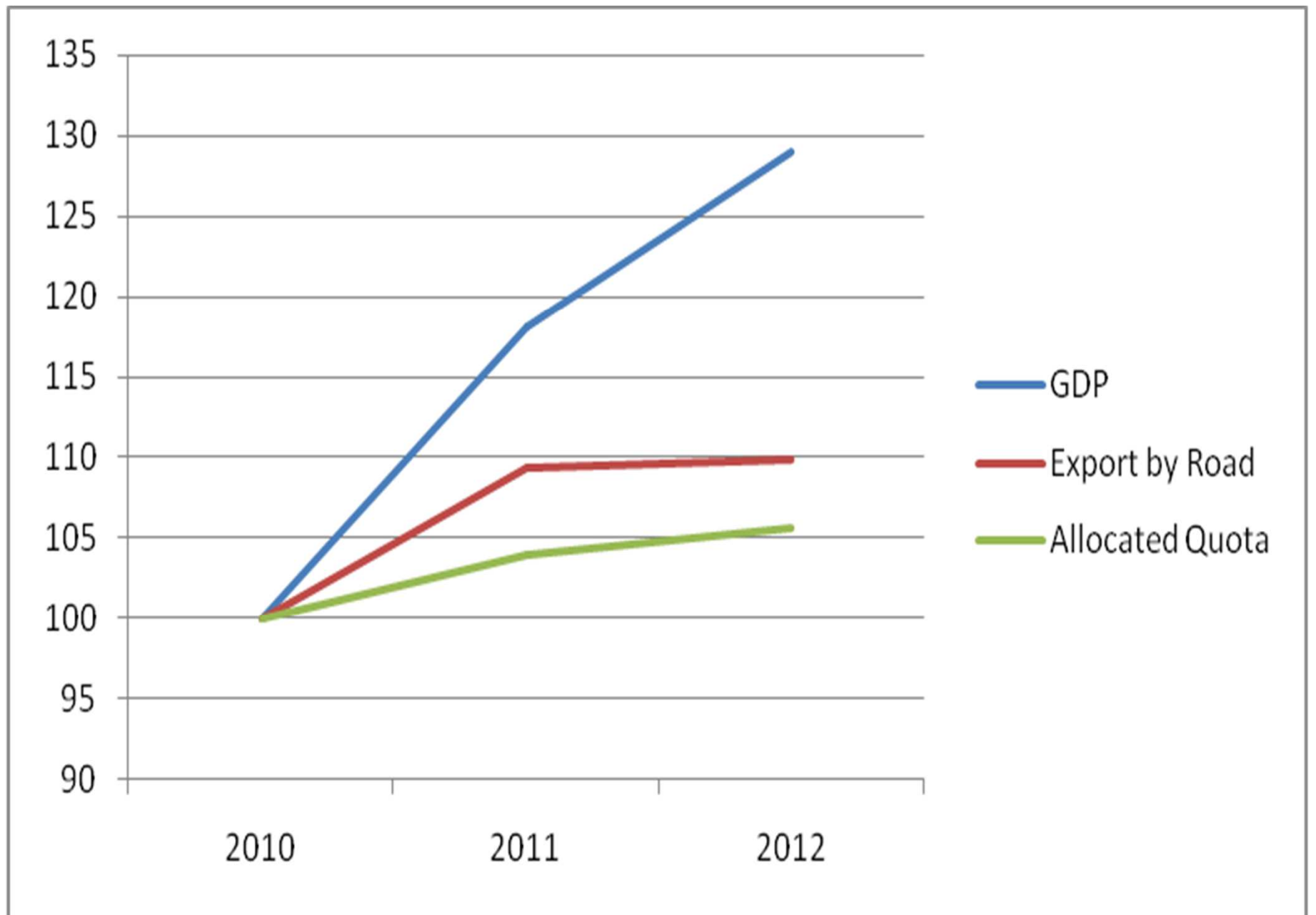
The total number of road transport quotas lags behind the economic development and yearly change in the exports of Turkey.



- A study conducted by an Istanbul-based University
- Mathematical models (fixed effect model and the random effect regression model).
- Evaluation in terms of amount
- Evaluation in terms of financial value
- a 7-year period, starting from 2005 to 2011.

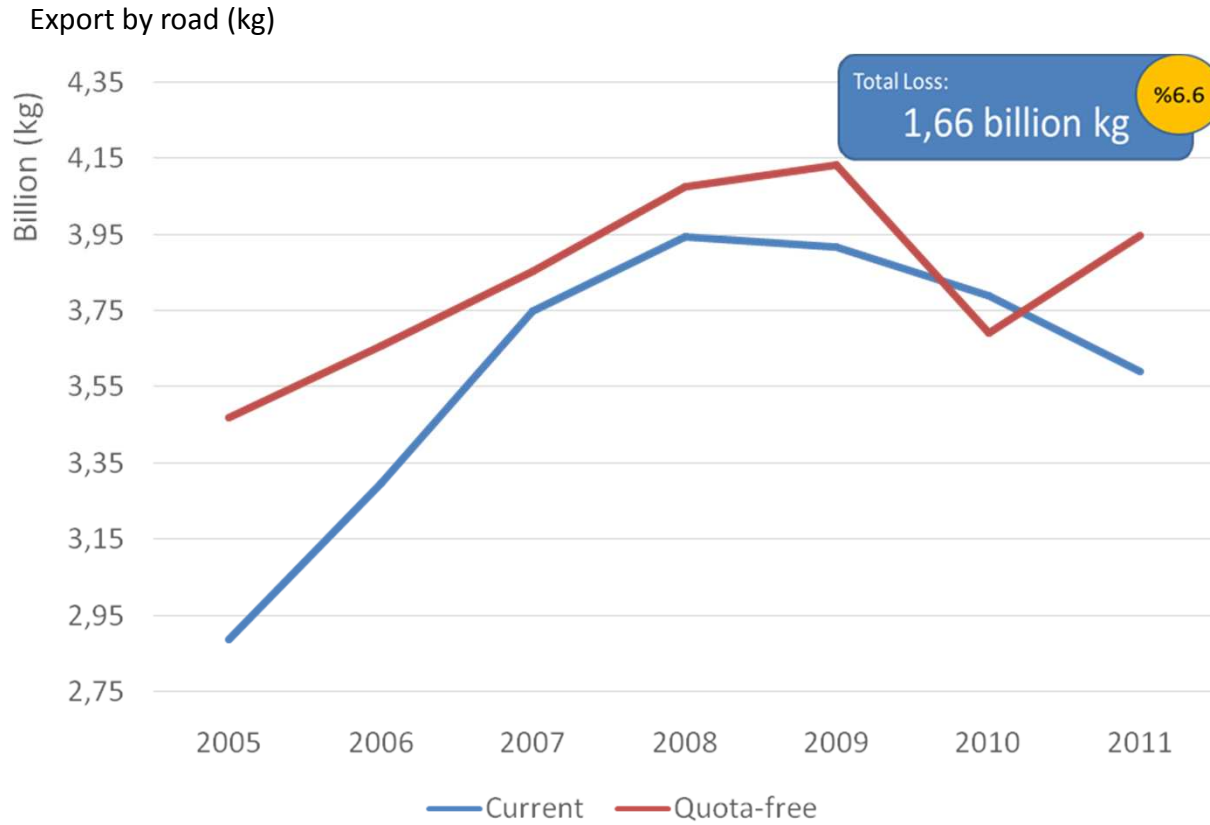


Country	Turkish Exports (million \$)			Permit Quota Allocated to Turkey (number of permits)		
	2010	2011	Change	2010	2011	Change
Germany	11479	13950	22%	157050	170550	9%
Russia	4628	5992	29%	15500	16500	7%
Italy	6505	7851	21%	48000	48000	0%
Spain	3536	3917	11%	5260	5260	0%
Netherlands	2461	3243	32%	6850	6850	0%
Romania	2599	2878	11%	48000	52000	8%
Greece	1455	1553	7%	55000	55000	0%



- Evaluation in terms of amount
- Evaluation in terms of financial value

(a 7-year period, from 2005 to 2011)





Deficit

-246 million kg / Bulgaria

-231 million kg / Spain

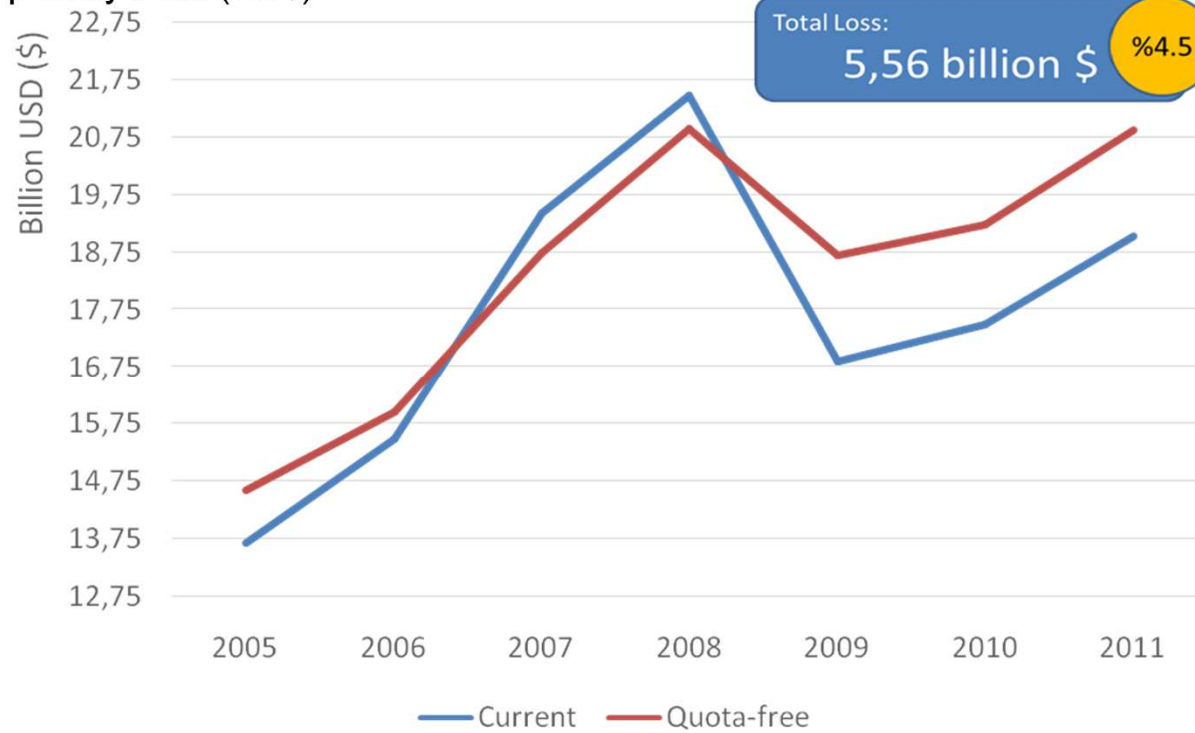
-159 million kg / Germany

-157 million kg / Slovakia

-101 million kg / Greece



Export by road (US\$)





Deficit

- 2.4 billion \$ /Spain
- 604 million \$ / Italy
- 598 million \$ / Slovakia
- 297 million \$ / Bulgaria
-
- 277 million \$ / France



Situation in Turkey

- Market access conditions fully aligned with the EU acquis
 - Licensing system
 - Digital Tachograph System in force,as of 1 January 2011
 - Environmental-friendly Turkish fleet
 - Contracting party to ADR Agreement
 - The biggest beneficiary of TIR carnet all over the world
- etc....*





Quotas imposed on Turkish hauliers=technical barriers for the restriction of the free movement of Turkish industrial products

“unfair competitive environment”





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Quota problem causes delays in delivery times.





- Foreign investors in Turkey are equally affected like the Turkish manufacturers and have to perform road transport operations under conditions of unfair competition:
- amount of direct foreign capital entered Turkey is 16 billion \$ (2012)
- more than %70 of the foreign investors (30.000) in Turkey is from EU



- Turkish exports remain below the levels that it should actually be,
- unfair competition for Turkish producers ,
- Income loss due to the decrease in the level of production,
- Employment level of Turkish workers can not increase enough,
- This practice deters the foreign investors from coming to Turkey.

Thank you for your attention

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