TRANSPORT SITUATION IN TURKEY

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A Brief Overview: 1923-2002

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

**Railway Construction in Turkey**
- Before the Republic: 972 km
- 1923-1950: 4136 km
- 1951-2008: 3764 km
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

<table>
<thead>
<tr>
<th>Road Type</th>
<th>(km)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motorways</td>
<td>2,001</td>
</tr>
<tr>
<td>State Roads</td>
<td>31,326</td>
</tr>
<tr>
<td>Provincial Roads</td>
<td>30,555</td>
</tr>
<tr>
<td>Total</td>
<td>63,882</td>
</tr>
<tr>
<td>(15,358 Dual Carriageway)</td>
<td></td>
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</tbody>
</table>

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)

1 TL = 0.67 $

2003 2004 2005 2006 2007 2008

%520 Increase

Railway Network

SIGNALLED LINES
SIGNALLED/SELECTRIFIED LINES
Railway Transport

HIGH SPEED RAILWAY LINES

- ANKARA-İSTANBUL: 533 km (3 h.)
- ANKARA-KONYA: 212 km (1 h. 15 min.)
- ANKARA-SİVAS: 466 km (3 h.)
- ANKARA-İZMİR: 423 km (3 h. 30 min.)
- BURSA-OSMANELİ: 104 km (30 min.)
- İSTANBUL - EDİRNE: 230 km (1 h. 20 min.)
- (BORDER with BULGARIA)
- SİVAS-KARS: 710 km

IN OPERATION
UNDER CONSTRUCTION
FINAL DRAWINGS COMPLETED
UNDER STUDY

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

Aircraft Fleet grown by 78% in 6 years

267 Aircraft

Having the Second Rank in the European aircraft traffic with 1,800 daily traffic

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

- Turkey: 53.30%
- World Average: 5%

41 million international passengers
%63 increase in 6 years

120 International Destinations

43 Domestic Destinations

34 million domestic passengers
%300 increase in 6 years
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

2506 Vessels (over 150 GT)

17,000,000 DWT capacity

5th Largest Shipbuilding Country in the World

Cruise Tourism

<table>
<thead>
<tr>
<th>Year</th>
<th>Cruise Ships</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>927</td>
</tr>
<tr>
<td>2005</td>
<td>1048</td>
</tr>
<tr>
<td>2006</td>
<td>1317</td>
</tr>
<tr>
<td>2007</td>
<td>1421</td>
</tr>
<tr>
<td>2008</td>
<td>1612</td>
</tr>
</tbody>
</table>
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) **Halkah (Turkey)-Wells (Austria) : Ro-La Line**
   (Longest Ro-La Line in the World)

2) **Halkah (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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