1. Traffic trends

Railway Transport

The shares of transport modes in Turkey fluctuate in a narrow band therefore can be considered stable since 2004 because of the fact that the ongoing share increase of roads has stopped. This outcome particularly results from investments made in railways and from development of passengers transport at airways. According to the 2006 figures in Turkey, the share of railways in freight transportation was approximately 5%, while the share of railways in passenger transportation was 2%. Moreover this figure is likely to change in favor of railways for the next years, especially in passenger transportation at first, due to high speed lines under construction between major metropolitan cities of Turkey.

Investments particularly given to railways have kept up with its speed for 5 years. Within this framework, additionally the Transport Master Plan Strategy has been elaborated and the opinion was reached that the railway portion at the freight transportation would be 20% and the railway portion at the passenger transportation would be 10 % in the years of 2020.

Civil Aviation

For the last 5 years in Poland international line passenger traffic has increased 32%, total of passenger traffic has increased 83%. Aircraft traffic has increased in spite of its expanding body structures. In addition international aircraft traffic has 33%, total plane traffic has increased 69%.

As the forecast about the traffic for the future has shown that we must invest more capital for the improvement of infrastructure and capacity. Public Private Sector Cooperation Projects have come up into position fastly in order to win the projects to the sector. For the last 5 years, total cost 700 Million Dollar, 479.378 m2 4 major infrastructure have put into service within average 1.5 year period.
Total aircraft traffic in the year 2006 was 852,371 (Domestic: 343,956; International: 286,713; Transit: 221,702).

By the end of October 2007, total aircraft traffic has been 793,783 (Domestic: 306,275; International: 283,116; Transit: 204,392).

Total number of passengers carried in 2006 was 61,684,203 (International: 32,884,325; Domestic: 28,799,878).

By the end of October 2007, total number of passengers carried has been 61,890,968 (International: 34,649,396; Domestic: 27,241,572). It is aimed to reach a total number of 75 million passengers by the end of the year 2007.

Total freight carried in the year 2006 was 1,346,989 tons (International: 973,934; Domestic: 373,055).

By the end of October 2007, total freight carried has been 1,338,326 tons (International: 985,910; Domestic: 352,416).

Since the year 2002, air transport sector in Turkey has developed at a rate of 30% above the world average of 5%. It is aimed to reach an average 20% development for each following year.
2. Obstacles to the development of transport

Road Transport

Major obstacles that are hindering the development of road transport and trade especially in the international road transport and policies of Turkey regarding these issues are given briefly below:

Quota Limitations:

Road transport quota limitations are deemed as quantitative restrictions on the free flow of trade between countries. Trade among countries grows gradually in every year but the quota permits imposed on road vehicle do not increase as the trade between states does. At the moment international transport of goods by road is being carried out through bilateral licenses and the ECMT multilateral quota system. Although bilateral license exchanged between countries is much more dominant in the international road transport as compared to ECMT Multilateral Quota System it is often subject to the limitations resulting with insufficient permits due to the concerns of states to protect their own sector and domestic market from competition. On the other ECMT Quotas are in very limited quantities and do not increase in parallel to the international trade volume.

Liberalization of Quotas is the most important requirement to ensure the smooth flow of trade and development of road transport. Turkey has a long standing position for encouraging the full liberalization in international road transport by abolishing quotas exercised in bilateral and multilateral basis. Out of 55 countries, through bilateral agreements and protocols, Turkey has already liberalized transport quotas with 16 countries.

NO Freedom of Transit Passage:

As it is known a number of important international agreements impose freedom of transit. Without embarking on a detailed legal analysis, it is possible to cite at least Article V of the 1994 General Agreement on Tariffs and Trade and the revised Consolidated Resolution on the Facilitation of International Road Transport (R.E. 4) adopted by UNECE in 2004: Article V of the GATT, which was adopted in 1994 in connection with the Marrakech Agreement instituting the World Trade Organization, stipulates:

“There shall be freedom of transit through the territory of each contracting party, via the routes most convenient for international transit, for traffic in transit to or from the territory of other contracting parties. No distinction shall be made which is based on the flag of vessels, the place of origin, departure, entry, exit or destination, or on any circumstances relating to the ownership of goods, of vessels or of other means of transport.”

The revised Consolidated Resolution on the Facilitation of International Road Transport (R.E. 4), adopted by UNECE in 2004, is even clearer in that it asserts: (CEMT/CS/TR(2005)4)
“Without prejudice to other provisions of these principles, freedom of transit should be granted on major international traffic routes (E-roads in Europe, similar roads on other continents). Traffic should not be banned or subjected to such measures as transit duties, taxes (other than user charges and tolls for the use of transport infrastructures) or quotas.”

Despite the existence of widely accepted respectable international agreements, such as these, freedom of transit passage is subject to limited amount permits exchanged among countries which significantly limit the development of international road transport as well.

**Visas for Drivers**

The high number of the documents required for driver visas, the expensive visa fees, short periods of staying for the drivers are some of the other factors that affect the transport in a negative way. Though Professional drivers in road transport needs 1 year multiple-entry visa countries often comes up with new regulations making visa procedures harder and periods shorter. In the age of globalization we believe that such policies cannot be justified and therefore, more efficient practices regarding Visa conditions and duration should be encouraged for the sake of international road transport, and trade. Moreover, passport and visa checks in transit countries is not only time consuming but also leads to long queues of vehicles blocking border crossings.

In this regard, we believe that an international regulation related to Visas based on the needs of professional drivers would be highly beneficial in promoting road transport and trade.

**Border Crossing**

Regarding administrative barriers border crossing can be a hectic experience to road haulage due to the unnecessarily long procedures and many signatures from borders officials. Some borders still follow the old method of searching the cargo by taking off all or major part of the load of the truck. Also some borders open only for 8 or 12 hrs. for road haulage and they require the movements of trucks to be by convoys. Rules and regulations that applied at many of those land borders are not clear or transparent and they constantly change without notifications to shippers or operators.

In order to eliminate such problems, Turkish Ministry of Transport took the necessary initiative to launch computer-based automation system so as to mitigate workload at border gates. All border crossing activities and performances can be diligently managed and monitored through this newly established system. All relevant institutions engaged in road haulage such as customs authority, undersecretariat for foreign trade and ministry of finance are directly linked within this system, thus minimizing communication time and delivering reliable and fastest data regarding respective areas of expertise. It is true that the more Automation in Customs Procedures is introduced, the less human mistake and red tape will occur at border crossing points. Therefore, time loss due to heavy paperwork at borders would be eliminated to the advantage of road haulers. Thanks to our computer-aided automation system; one particular transaction which used to take up time for 25/30
minutes with human effort is now carried out in 3/4 seconds. After the introduction of this system, all transactions and control procedures previously undertaken by the Ministry of Transport have been delegated to the customs authority. Therefore, all activities concerning road transport were consolidated within a single unit.

Another serious problem related to border crossing in road transport sector is the insufficient and/or outdated technology of infrastructure in the border gates. To remove the physical barrier at border crossing points, appropriate infrastructure must be available at the border points including offices for the inspection and control agents, laboratories, warehouses, road approaches to the border, border gates, vehicle parking areas, reliable electricity and power sources, reliable telecommunications services, scanners, etc. If, due to financial constraints, this is not possible to achieve at all border points, then priority would need to be given to the ‘busiest’ border points that currently experience considerable freight traffic.

Such modernization projects at border gates can be realized through the Public-Private Partnership (PPP) financing package. Turkey has a long experience in stimulating private sector to opt in financing particular project for modernization purposes. Cooperative efforts are being made by Turkish Ministry of Transport together with the relevant haulier associations with the purpose of renovation of several border crossing points. For Example, Gürbulak (Iran), Hamzabeyli (Bulgaria), and Habur (Iraq) have been modernized and upgraded by considerable amount of private funds provided by private sector/road hauliers. Modernization projects for Cilvegözü (with Syria) Sarp (with Georgia) and Kapıkule (with Bulgaria) Border Gates are ongoing with PPP, which in turn shall help to ease traffic congestion and ensure smooth flow of trade by reducing unnecessary delays.

**Railway Transport**

The following conditions at our existing lines are the obstructive factors for the development of railway transportation:

- at 95% section single line operation;
- at 35% section (3.080 km.) the rails are older than 20 years;
- at 31% section (2.756 km.) having steel and wooden sleepers;
- at 30% section (2.602 km.) having curve radius less than 500 m;
- at 10% section the gradient is over 15%.
- approximately 69.2% (6000 km) of 8.671 km long main lines are not equipped with automatic signalling system;
- 98% of non-automatic signalled track section is single line;
- insufficient number of staff;
- 47% of diesel mainline locomotives are older than 25 years;
- 33% of electrical mainline locomotives are older than 25 years.

**Civil Aviation**

As an example of Turkey’s main transportation problems we can indicate that multiple administration decisions, environmental pollution problems, some of the airport’s insufficient infrastructure and technological superstructure problems. Governments must put into practice the legal measures more districtively.
As a result of the fact that the functions of the Joint Aviation Authorities (JAA) are transferred to the European Aviation Safety Agency (EASA), Turkey faces the problem of loosing its acquisitions at JAA, of which Turkish Directorate General of Civil Aviation is a full member, and no solution has been found for this problem yet.

Integration of air transport with other modes of transport has not been accomplished at the optimum level yet.

3. Best practices in transport and infrastructure regulation

Road Transport

In the last years Turkey launched a series of remarkable regulatory reforms in road transport to improve efficiency, and safety in road transport as a part of her efforts to comply with the EU Acquis and International regulations/agreements

A brief summary of these regulatory arrangements can be found below:

Turkey as an acceding country to the EU has put into force a new road transport law which is a framework law that specifies conditions for access to the market and profession in road Transport.

Based on this law, a series of by-laws which are to a large extent compatible with the EU acquis have been prepared and put into force.

With these new by-laws, efforts in transposing the EU legislations and directives that are related to the access to market and profession have been made. To be more specific new legislations three new qualitative requirements to the road transport sector such as financial standing, professional competence, and good repute have been introduced.

With all these activities, a higher quality, a more systematic, and environment-friendly sector is being created. These regulations also aim at creating a fair competition environment for road transport service for domestic and international markets.

With the introduction of a new licensing system in domestic freight transport; 263,000 licenses have been issued by November 2007 which covers roughly 95% of the total of road vehicles registered in Turkey

In international freight transport; 1,500 licenses have been issued by November 2007, which cover approximately 100% of the total of road vehicles registered.

For the first time, license system is introduced in domestic freight transport market.

There is also remarkable progress regarding improvement of safety conditions, social conditions as well as technical condition in Turkish road transport market.

As it is known one of the most important factor affecting road safety is the necessary road worthiness tests to be carried out in a proper and regular manner.
In this regard, based on the principles of Council Directive 96/96/EC on road worthiness tests for motor vehicles and their trailers our Ministry has published a new directive on 23 September 2004 related technical inspections and road worthiness tests of motor vehicles.

- A consortium was authorized to build and operate Technical Inspection Stations for 20 years
- Totally, 189 fixed and 38 mobile stations are being set up which are distributed according to vehicle number and geographical conditions of the provinces of Turkey.
- MoT will supervise/audit the establishment and management of these stations.

On 13.08.2007 Ministry of Transport signed the necessary protocols with the consortium.

Upon the completion of the said fixed and mobile stations and start of their operations which is planned to be happen within next year, road-worthiness test for motor vehicles and their trailers and the technical roadside inspection of these vehicles shall be carried out according to highest international standards.

Moreover, to improve the safety and quality of road transport sector, Ministry of Transport has launched new initiatives such as to upgrade and set up new Weight and Dimension Control Stations all over the Turkey to comply with 96/53/EC and 2002/7/EC of the EU acquis.

MoT of Turkey is currently working on implementation of a Fleet Renewal Mechanism for with drawing the old vehicles from market, and going to realize it in the beginning of year 2008.

Regarding the professionalism of drivers; A new regulation concerning the professional competence is in force since 2004. One of the qualitative requirements for the road transport market has been introduced in accordance with the EU standard. On this basis:

- MoT has granted authorizations to 50 institutions for providing professional competence training;
- They are carrying out training activities according to the program prepared in compliance with the EU acquis communitaire;
- Approximately 1,250,000 people having driving license for commercial vehicles have applied for obtaining CPC;
- Up to now roughly 609,000 CPC have been issued to drivers who are exempted from training and examination;
- From the 1st of January 2008, The CPC will be compulsory in Turkey for Drivers and operators.

Moreover, The European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) has been ratified by Turkish Grand National Assembly on 30 November 2005 and published in Official Journal on 6 December 2005 (Law No: 5434), and the process for being a party to this agreement is still going on. In this regard a new regulation on Transport of
Dangerous Goods by Road has been prepared by the Ministry of Transport and published on 31 March 2007 in the Official Journal (No: 26479) to be effective as of 2009 and subject to revision.

**Railway Transport**

Considering the importance of having efficient transport network, Turkish government has taken several measures and undertaken investments to modernize and rehabilitate the railway infrastructure.

The Turkish Government has a policy, within the scope of Strategy for Transport Main Plan, to establish a balance between transport modes by considering all modes a part of combined transport and giving priority particularly to railway and maritime transports. Moreover, Ministry of Transport (hereafter MoT) Strategic Plan for 2009-2013 is being prepared.

MoT Main Plan Strategy, which contains macro target and policies for the future Transport Sector, was prepared in 2005 and being applied by MoT. Establishing balance between transport modes, developing modes as complementary to each other, strengthening combined transport system in compliance with international legislations are major priorities set in Transport Main Plan Strategy of Turkey.

The Passenger traffic to/from Europe is via both Bulgaria and Greece. The scheduled passenger trains are: Bosporus Train (Istanbul-Bucharest, daily) and Friendship Train (Istanbul-Thessaloniki, daily). There are also passenger trains to Iran, which are: Trans-Asia Train, once a week between Istanbul and Tehran, and a weekly train between Van-Tabriz, and to Syria, which is Taurus Train once a week between Istanbul-Damascus. Moreover, there is a train between Iran and Syria through Turkey, as from Tehran via Van - Tatvan to Damascus once a week. The Train operating Gaziantep-Baghdad-Gaziantep was cancelled due to Iraq’s situation.

“Produktverbund” a block train between Germany and Turkey has been started to run on regular basis on 9 May, 2004. The train follows Bulgaria-Romania-Hungary-Austria route between Köseköy (Turkey) and Cologne (Germany) and operates once a week. 5 journeys a week is planned for near future. “Istanbul-Almaty Block Container Train” runs once a week since 22 June 2002. The second stage for this train is to extend it from Hamburg to Lianyungang (China).

Block train operations were started at national and international freight transportation simultaneously and within this context, the block freight trains between Turkey-Europe, Turkey-Middle East and Turkey-Central Asia have been running reciprocally. Furthermore, Ro-La transportation has been launched between Turkey-Austria in 2006 with the cooperation of private sector, after the agreements were approved among the countries on the route.

Combined transport operations are successfully done in Halkali, Haydarpasa, Kosekoy, Ankara, Alsançak, Bogazkopru, Iskenderun, Mersin and Gaziantep (Baspinar), which have container depots. Implementation of Future investments is planned as to merge such container terminals into new logistic villages. Logistic Villages are under construction in Bogazkopru (Kayseri), Gelemen (Samsun),
Kosekoy (Izmit), Halkali (Istanbul), Hasanbey (Eskisehir), Gokkoy (Balikesir) and also feasibility studies for establishment of logistic villages are completed for Palandoken (Erzurum), Usak, Yenice (Mersin), Aydin and Kaklık (Denizli).

<table>
<thead>
<tr>
<th>Years</th>
<th>Transport Share among Other Sectors (%)</th>
<th>Railways Share among Transport Modes (%)</th>
<th>Allocation to Railway Sector (Million YTL)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TCDD</td>
<td>DLH</td>
<td>TCDD+DLH</td>
</tr>
<tr>
<td>2000</td>
<td>18</td>
<td>6</td>
<td>75</td>
</tr>
<tr>
<td>2001</td>
<td>17</td>
<td>9</td>
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<td>2002</td>
<td>17</td>
<td>10</td>
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<td>2004</td>
<td>27</td>
<td>28</td>
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<tr>
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<td>25</td>
<td>39</td>
<td>1,351</td>
</tr>
</tbody>
</table>

The ratio of Investment amount of railways to GDP is about 2.6% in 2007.

In addition to constructing high speed lines between major metropolitan cities, upgrading the existing lines by installing signaling systems and electrification systems, track doubling and also renewal of tracks, TCDD aims at increasing operational speed, comfort as well as line capacity of existing lines. The planned and ongoing Projects are as follows:

- Constructing 467 km - high speed line between Istanbul – Ankara
- Constructing 212 km – high speed line between Ankara – Konya
- Upgrading existing line between Basmane – Bandırma 341 km in length
- Marmaray Project connecting Europe and Asia via railway (13.6 km tube tunnel out of 76.7 km total)
- Line works between Adana-Mersin and sleeper maintenance between Adana-Ceyhan
- Upgrading existing lines of 2934 km in length by installing signalling systems to increase line capacity
- Upgrading existing lines of 2431 km in length by installing electrification systems

Furthermore according to Investment Plan of TCDD, within 2008 – 2010 period:

- 1777 km track renewal will be realized;
- 111 km line will be renewed with used materials;
- 600 switches are to be renewed;
- 117,600 rail welding will be done.
The Final Drawings of Ankara – Sivas, Ankara – Izmir, Bursa – Osmaneli and Istanbul – Kapikule high speed train lines, which have 250 kph operational speed with signaling and electrification systems, have been completed, in order to improve the existing situation of the railway against the other modes of transport.

Moreover incomes to be obtained from privatization of ports, namely Bandırma, İzmir, Samsun, Derince, Mersin and İskenderun Ports will be transferred to TCDD for procurement of rolling stocks, and maintenance, repair and construction of infrastructure after the decision of Board of Ministers dated on 29 July 2007.

3. **Best practices in transport infrastructure regulation**

**Marmaray Project**

The Marmaray Project provides an upgrading of the commuter rail system in İstanbul, connecting Halkalı on the European side with Gebze on the Asian side with an uninterrupted, modern, high capacity commuter rail system.

The Bosphorus Rail Tube Crossing and Commuter Railway Upgrading (MARMARAY) Project comprises of three phases as following;

i. Constructing an immersed tube tunnel under the Istanbul Strait with approaching tunnels, three underground and one surface stations,

ii. Upgrading the existing commuter rail system including a new third track on ground and completely new electrical and mechanical systems,

iii. Procurement of the rolling stock.

Total length of the Project is approximately 76 km; immersed tunnel part is 1.4 km., approaching tunnels are 12.2 km. and surface tracks to be upgraded are nearly 63 km. There will be constructed three new underground stations, upgraded and renovated 37 existing surface stations. The Project will have three tracks. While two of the tracks will serve as high capacity commuter rail system, the third track will be used by intercity passenger and freight trains between the continents Asia and Europe. The tunnel will provide uninterrupted railway connection for Asia and Europe. The Project has also significance for Turkey’s connection to the Trans European Network.
This Project is one of the major transportation infrastructure projects in the world at present. When introducing major infrastructure projects such as the Marmaray Project, it is important to realize that it will influence not only the daily traffic pattern of Istanbul, but it will also influence the development of the city and the region. It is therefore imperative that the objectives of the project are described in clear terms.

The most important objectives are to:

i. provide a long-term solution to the current urban transportation problems of Istanbul;
ii. relieve existing operating problems on the mainline railway services;
iii. provide direct connection of railway system between the continents Asia and Europe
iv. increase capacity, reliability, accessibility, punctuality and safety on the commuter rail services;
v. reduce travel time and increase comfort for a large number of commuter train passengers;
vi. reduce air pollution resulting from the exhaust gases and thereby improve the air quality of Istanbul;
vii. reduce adverse effects on historical buildings and heritage sites by offering a potential for reducing the number of cars in the old center of Istanbul.

The total cost of the Project is expected as roughly 3 billion USD including the engineering and consulting services and other costs such as land acquisitions, archaeological excavations, etc.

Current Status:

A loan agreement between the Japan Bank for International Cooperation (JBIC) and the Republic of Turkey has been signed under Official Development Assistance (ODA). The loan is to cover the costs for the engineering and consulting services including supervision and the construction costs for the Istanbul Strait Crossing phase of the Project; i.e. the tunnelling works, the deep stations and some related Electro-Mechanical works.
The tender for Consultancy Service was started in 2001 and the Avrasya Joint Venture (PCI, Oriental, JARTS, Yuksel Proje) consequently was awarded the tender and started to work in March 2002.

The process for selection of a Contractor for the first phase was started in mid 2003. The Tender evaluation has been finalized and the TAISEI-KUMAGAI-GAMA-NUROL Joint Venture is declared as the winning JV. The Contractor has started working in August 2004. The archaeological excavations and NATM tunnelling works are being performed. Dredging works in the Strait has almost finished. Ground treatment of the Strait and manufacturing of two tube elements had been realized. Three tube elements have been immersed in trench and other eight tube elements are under construction. Furthermore five Tunnel Boring Machines (TBM) used during the construction works and three of them had started boring.
The second phase of the Project (Commuter Rail Upgrading) will be partially financed by European Investment Bank. The loan agreement between the European Investment Bank (EIB) and the Republic of Turkey has been signed. This loan is to cover the infrastructure and all electrical and mechanical systems of the Project, i.e. the tracks, signalling system, on-ground stations, operations and control centre, power supply system etc. The funding of remaining amount, which will be need in this phase, is being negotiated with European Council Development Bank. The submission of bids had been eventuated on 15 February 2006 and the work was been started on 21 June, 2007.
On the other hand, a loan agreement including €400 million for the third phase (Rolling Stock Procurement) between the European Investment Bank (EIB) and the Republic of Turkey has been signed in March 2006. The tender of Rolling Stock Procurement has been continuing.

CIVIL AVIATION

Since the 1990s, BOT (Built-Operate-Transfer) models have largely taken into consideration in different sectors but the most applicable one has come into practice in the air transportation sector under the responsibility of Ministry of Transportation. This was not a coincidence because the carrying out politics for the last 5 years has done deep positive impacts in domestic and international line traffics realizing above the expectations of European average.

Tenders have done during the intensive competition environment between the private sector. By this way management periods have become shorter. Another PP cooperation model which was “Operating Right Transfer” model has provided them to manage over again by the private sector.

Thus including Turkey’s most spectacular two airports which were Antalya&İstanbul Atatürk Airports, by the Operating Right Transfer we have gained $6.2 Billion income.

After 1 January 2007, Directorate General of Civil Aviation (DGCA), which is the Civil Aviation Authority in Turkey, is financially autonomous in line with the Law on the Duties and Organization of DGCA No. 5431. DGCA has started to have its own revenue from service charges, such as charging of licenses granted to air carriers and ground handling service organizations. A second revenue item would be shares from Eurocontrol revenues. Should revenues not cover the expenses, DGCA will receive funds from the state budget.

As the Civil Aviation Authority of Turkey, Directorate General of Civil Aviation employed new engineers and air traffic controllers. They are trained on the job. Also they attend the training programmes of international organizations. There are already 139 people working at DGCA and the staff is foreseen to increase to 300 within four years.

Hatay and GAP airports are opened to service and at several airports maintenance works have been done in order to enhance the existing infrastructure standards.

Economic Airports Project has been realized at some of the airports (ex: Bursa-Yenişehir, Isparta Süleyman Demirel, Nevşehir-Kapadokya, Tekirdağ-Çorlu, etc.) in order to provide the passengers with economical air transport to the new destinations, which were previously not actively used by air carriers.

The number of Safety Assessment of Foreign Aircraft (SAFA) inspections increased from 150 in the year 2006 to 379 today and the number of Safety Assessment of National Aircraft (SANA) inspections increased from 85 in the year 2006 to 192 today.


By-Law on Certification and Licensing of Air Traffic Safety Electronics Personnel was published in the Official Gazette no: 26420 dated 31 January 2007 (prepared according to ESARR 5 version 2.0).


By-Law on Aircraft Certifying Staff, SHY-66 Rev.1 was published on 29 May 2007.

Revision of By-Law on Approved Maintenance Organizations, SHY-145 Rev.1, which is aligned with JAR-145, annex of the Council Regulation (EEC) No 3922/91 of 16 December 1991 on the harmonization of technical requirements and administrative procedures in the field of civil aviation (in accordance with the amendments by EASA) was published on 17 July 2007.