AN ANALYSIS ON THE IMPACT OF ROAD TRANSPORT QUOTAS

UNECE Inland Transport Committee
Working Party on Road Transport, 108th session
Geneva, 28–30 October 2013
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.
<table>
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<tr>
<th>Country</th>
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<th>Change</th>
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</tbody>
</table>
• 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
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”
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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