LOGISTICS IN TURKEY AND PRIVATE SECTOR INITIATIVES

UN/ECE TEM & TER PROJECT RESEARCH & DEVELOPMENT
WORKSHOP, Ankara – 29 March 2012
OVERVIEW:

1. TOBB
2. General Overview of Transport & Logistics in Turkey
3. International Legal Infrastructure & Turkey
4. Connections & Physical Infrastructure in Turkey
5. Border Crossings: Physical Rehabilitation
UNION OF CHAMBERS AND COMMODITY EXCHANGES OF TURKEY (TOBB)
CHAMBER SYSTEM OF TURKEY

- Independent and Democratic
- Non-profit Organizations
- Financed by their own Sources
- Compulsory Membership
1.3 million enterprises;
- Small, medium and large enterprises
- From all sectors and regions of the economy

365 Local Chambers and Commodity Exchanges

57 Sectoral Assemblies
- Representatives among the top companies, relevant public institutions and academics
365 local chambers and commodity exchanges
INTERNATIONAL NETWORK

- DEIK
- BILATERAL CHAMBERS
- ICC
- WCF
- ICCI
- IRU
- Eurochambers
- GS1
- BSEC-URTA
TOBB’s PRIMARY FUNCTIONS

- TIR Carnets
- Permits and other authorizations
- Digital Tachograph Card Issuing Authority (STAUM) (CIA, CA, CP of Turkey)
- ATA Carnets
- Certificates of Origin
- Free Circulation Certificates
- GS 1 System
- Capacity Reports
- Trade Registry Gazzette
- Insurance Agents and Loss Adjusters
- Fairs Authorization
TRADE AND TIR DEPARTMENT

BY VIRTUE OF THE AUTHORITY ISSUANCE OF;

- TIR CARNETS (672,000 – 2011)
- ATA CARNETS (1,150 – 2011)
- INTERNATIONAL ROAD TRANSPORT QUOTA PERMITS (891,000 – 2011)
- DIGITAL TACHOGRAPH CARDS (22,100 – 2011)
- DOMESTIC GOODS TRANSPORT LICENCE (K-TYPE) (267,800 – 6 YEARS)
  (19,270 – 2011)

FOCUSING ON OTHER UNECE CONVENTIONS;

- AETR
- ADR
- ATP
- E-CMR PROTOCOL
- HARMONIZATION CONVENTION (NEW ANNEX 8)

TAKING PART AT REGIONAL COOPERATION INITIATIVES;

- TRACECA, BSEC-URTA, ECO, REVIVAL OF SILK ROAD, FIRTA
GENERAL OVERVIEW OF TRANSPORT & LOGISTICS IN TURKEY
TURKEY’s STRATEGIC LOCATION

- Europe
- CIS
- Central Asia
- Africa, Southern Europe, USA
- Middle East
Türkiye Odalar ve Borsalar Birliği

UNESCAP EURASIAN ROAD ROUTES

UNECE-UNESCAP Euro-Asian Links Project
ROAD ROUTES

Euro-Asian Road Routes
Legend
- Routes Group 1
- Routes Group 2
- Routes Group 3
- Routes Group 4
- Routes Group 5
- Routes Group 6
- Routes Group 7

Data from the UN ESCAP countries
Data from ADC WorldMap Version 4.0, USA (www.adcworldmap.com)
UNESCAP TRANS ASIAN RAILWAY

PROPOSED TRANS-ASIAN RAILWAY ROUTES

MAP 1

LEGEND

TAR LINKS (1676 MM)
TAR LINKS (1520 MM)
TAR LINKS (1435 MM)
TAR LINKS (1067 MM)
TAR LINKS (1000 MM)
NEW TAR LINKS (PLANNED)
POTENTIAL TAR LINKS
BREAK - OF - GAUGE POINT
FERRY CROSSING
UNECE-TER

TRANS-EUROPEAN RAILWAY NETWORK

TER MEMBER
& Observer Countries

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MAIN PORTS OF TURKEY
<table>
<thead>
<tr>
<th>Mode</th>
<th>Exports</th>
<th>%</th>
<th>Imports</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road</td>
<td>50,284,840</td>
<td>39%</td>
<td>44,513,254</td>
<td>18%</td>
</tr>
<tr>
<td>Maritime</td>
<td>73,607,918</td>
<td>57%</td>
<td>133,436,108</td>
<td>55%</td>
</tr>
<tr>
<td>Rail</td>
<td>1,243,110</td>
<td>1%</td>
<td>3,185,490</td>
<td>1%</td>
</tr>
<tr>
<td>Air</td>
<td>2,583,259</td>
<td>2%</td>
<td>21,514,992</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>1,252,419</td>
<td>1%</td>
<td>38,184,548</td>
<td>16%</td>
</tr>
</tbody>
</table>

(TÜİK, 2011)
ROAD TRANSPORT INTERNATIONAL FLEET

- 1,500 companies
- 60,000 trucks-only international
  (national >600,000)
- One of the biggest in the world in quantity
ROAD TRANSPORT INTERNATIONAL FLEET

- But also quality....

- Law No. 4925/2003

- At least 10 trucks to establish an international trucking company

- CPC certificates for managers and drivers
FROM ATLANTIC TO SIBERIA AND CHINA
INTERNATIONAL LEGAL INFRASTRUCTURE & TURKEY
Turkey – an active member of World Trade Organization (WTO)

an important player in the European Customs Union

party to most international transport conventions – TIR, CMR, SOLAS, ICAO, COTIF...
### TURKEY: International Legal Infrastructure

<table>
<thead>
<tr>
<th>Protocol/Convention</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIR Convention</td>
<td>1959</td>
</tr>
<tr>
<td>TIR Convention</td>
<td>1975</td>
</tr>
<tr>
<td>Temp. Import. Aircraft &amp; Boats</td>
<td>1956</td>
</tr>
<tr>
<td>Spare Parts Europ Wagons</td>
<td>1958</td>
</tr>
<tr>
<td>Customs Container Convention</td>
<td>1956</td>
</tr>
<tr>
<td>Customs Container Convention</td>
<td>1972</td>
</tr>
<tr>
<td>Customs Treatment Pallets</td>
<td>1960</td>
</tr>
<tr>
<td>Harmoniz. Frontier Controls Goods</td>
<td>1982</td>
</tr>
<tr>
<td>Customs Pool Containers</td>
<td>1994</td>
</tr>
<tr>
<td>Dang. Goods by Road (ADR)</td>
<td>1957</td>
</tr>
<tr>
<td>Protocol to ADR</td>
<td>1993</td>
</tr>
<tr>
<td>Dang. Goods by Inland Waterways (ADN)</td>
<td>2000</td>
</tr>
<tr>
<td>Perishable Foodstuffs (AIP)</td>
<td>1970</td>
</tr>
</tbody>
</table>

#### Border Crossing Facilitation
- Special categories
- Dangerous goods
- Perishable goods
TIR CARNET

Issued & distributed by IRU (in Geneva, CH)
Turkey → Party to UNECE TIR Convention since 1969

Main benefit → guarantee for customs debts

TOBB → Issue & guarantee TIR Carnets in Turkey
TOBB TIR CARNET IN FIGURES

2007 2008 2009 2010 2011

0 100000 200000 300000 400000 500000 600000 700000 800000

Türkiye Odalar ve Borsalar Birliği
ROLE OF GUARANTEERING ASSOCIATION

GUARANTOR ROLE IS UNDERTAKEN BY
Union of Chambers and Commodity Exchanges of Turkey (TOBB) in accordance with Law No.5174
UN/ECE AETR Convention ➔ 16 June 2010

- Analog Tachograph
- Electronic Tachograph
- Digital Tachograph
Digital Tachograph Cards

• Driving & Rest periods + speed inspection = Road safety + social rights

• Protocol with MoT → 16 April 2010 → TOBB as CIA, CA & CP

• First Cards → October 2010

• 2010 EU Progress Report on Turkey

• Record time + cheapest price

• More than 34,000 cards distributed
ATA Carnet Operations

- Temporary import/export
- WCO ATA Convention (1961)
- ICC/WCF
- TOBB is the Guaranteeing Association (since 1975)
<table>
<thead>
<tr>
<th>Year</th>
<th>Number of ATA Carnets</th>
<th>Total Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>942</td>
<td>43.757.443,44</td>
</tr>
<tr>
<td>2004</td>
<td>1433</td>
<td>93.979.715,37</td>
</tr>
<tr>
<td>2006</td>
<td>1290</td>
<td>96.357.966,96</td>
</tr>
<tr>
<td>2007</td>
<td>1242</td>
<td>91.035.024,80</td>
</tr>
<tr>
<td>2008</td>
<td>1250</td>
<td>90.535.651,20</td>
</tr>
<tr>
<td>2009</td>
<td>1120</td>
<td>97.084.824,05</td>
</tr>
<tr>
<td>2010</td>
<td>1120</td>
<td>103.568.625,00</td>
</tr>
<tr>
<td>2011</td>
<td>1150</td>
<td>110.139.479,00</td>
</tr>
</tbody>
</table>
LOCAL DISTRIBUTION

- TIR Carnet
- Bilateral Permit
- Domestic Licence
- ATA Carnet
- Digital Tachograph Card
Community/Common Transit

Map of European Union (2008)
CONNECTIONS AND PHYSICAL INFRASTRUCTURE
Revival of the Silk Road
REVIVAL OF THE SILK ROAD

REGIONAL LEVEL

GLOBAL LEVEL

Silk Road Initiative by Ministry of Customs and Trade

Antalya Declaration, 2008
BLACK SEA RING HIGHWAY-TURKISH PART
RAILWAY BAKU/TBILISI/KARS

Occupied by Armenia
ANKARA LOGISTIC BASE
TOBB-UND LOGISTICS J.S.C.

- Common Transit
- Driver’s database
- Logistic centers: Samsun
- Secure TIR Parkings
Western Anatolia Logistics Organization

- İzmir – Kapıkule Km Karşılaştırması
- TCDD Parkuru: 1187 km
- BALO Parkuru: 512 km
MoU signed during ECO-CCI meetings on 19 – 21.11.2011

Cooperation among railway bodies

- Van Lake: Ferry - 13 hour
  Under 6 hour until 2012

- Kapıköy: Customs - 6 hour

- Islamabad
- Taftan – Quetta
  Old rail
  18-36 hour

- Taftan
  Customs – 6 hour

Length (Islamabad–İstanbul)
- Pakistan: 1990 km
- Iran: 2570 km
- Turkey: 2006 km
- Total: 6566 km
BORDER CROSSINGS: PHYSICAL REHABILITATION
MODERNIZATION OF THE BORDER GATES VIA PPP

Gürbulak-Completed-Iran (UND)
İpsala- Completed- Greece (TOBB-GTI)
Habur- Completed-Iraq (TOBB-GTI)
Cilvegözü- Completed-Syria (TOBB-GTI)
Hamzabeyli-Completed -Bulgaria (TOBB-GTI)
Kapıkule- Completed- Bulgaria (TOBB-GTI)
Sarp -Completed- Georgia (TOBB-GTI)

Nusaybin – Syria (TOBB-GTI)
Dereköy –Bulgaria (TOBB-GTI)
Akçakale – Syria (TOBB-GTI)
Eşendere- Iran (TOBB-GTI)
Dilucu –Nakhcivan (TOBB-GTI)
Türkgözü –Georgia (TOBB-GTI)
İPSALA (TR-GR)
COMPLETED MODERNIZATIONS

HAMZABEYLİ

SARP

KAPIKULE

HABUR

CİLVEGÖZÜ
CURRENT PROJECTS

DEREKÖY

TÜRKGÖZÜ

DİLUCU

KAPIKÖY

ESENDERE

NUSAYBİN

AKÇAKALE

KARKAMIŞ

ÖNCÜPINAR

YAYLADAĞI

Approval Process
WHY MODERNIZATION?

- To facilitate and accelerate traffic flow
- To facilitate the customs procedures
- To serve in international standards
- To improve the public opinion on our border gates.
- To assist and enable effective fight against smuggling and human trafficking.
KAPIKULE BORDER GATE (TURKEY - BULGARIA)
SARP BORDER GATE (TURKEY - GEORGIA)
HABUR BORDER GATE (TURKEY - IRAQ)
JOINT BORDER CROSSING
THANK YOU

Union of Chambers and Commodity Exchanges of Turkey (TOBB) Trade & TIR Department
Phone: + 90 312 218 22 41
Fax     : + 90 312 218 22 44
e-mail : sancar.suer@tobb.org.tr
tir@tobb.org.tr