

Turkish Transport News

INTERMODAL

Combined Transport and Logistics Systems Magazine

Issue 28

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CRITICAL TURNS TAKEN FOR RAILWAYS



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The wind sowed in the North Africa with the Arab spring is reaped as ISIS whirlwind in the Middle East and it will take some time to regain balance. While some benefit from this war and destruction some others, especially the citizens of the affected countries, will suffer from the permanent marks of the war and destruction in their memories. But the rest of the world cannot continue their lives by pretending that nothing happens. This destruction will and should end. And this can be only done by those who have the power to do it. Some countries will have to be rebuilt. There will be an extraordinary investment, repair and renovation period and in parallel with it, an extraordinary goods movement, as well.

The open gates of Turkey are at the service of the West and also the East including the countries destroyed as the most important assurance of this movement. Taking the western civilization as a model during its establishment nearly a century ago, the Republic of Turkey is the most important connection of both worlds in future. Turkey has reached the same standards with the West not only in terms of concepts but also in terms of infrastructure approach and investments. Having realized the regulations especially regarding the finance, logistics and foreign capital investments, Turkey is the safest country that offers access opportunities to the countries that need investments.

Having a business culture that paves the way for their partners with their trained staff and business experience, Turkish businessmen have attracted major investments not only from Germany, UK, France but also from Far East countries such as Japan, Korea and China. Being a country with structures that satisfy the needs of such investments with the logistics facilities she offers, Turkey is the strategic business partner of the Middle East to be re-established in future.

Surrounded by Europe on one end and Iran and the Middle East on the other, Turkey is ready for the future with its sustainable growth and open gates despite all negative developments. Turkey continues to offer surprising and reliable opportunities to those who want to do business, make investment and develop cooperation as well as the ones who will to access to Iran, Iraq, Syria, and to the Central Asian and Gulf countries and take a role in the restructuring process projects. ■

Altınay Bekar
Editor-in-chief

Issue 28

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Transportation Guidebook

Transportation Guidebook comprises useful information about vehicles and transportation, national and international associations and contact information of their members and a glossary.

Finding the details of any transport company in Turkey becomes very convenient by the Guidebook.

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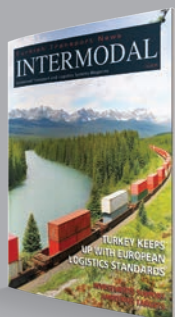
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Turkey To Become A Safe Harbour Soon

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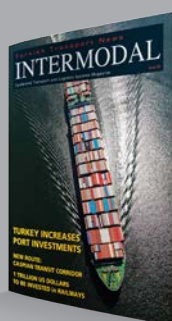
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LOGISTICS: CORE POWER THAT DISTRIBUTES ITS POWER TO ALL OTHER SECTORS

Çetin NUHOĞLU
President



► In recent years, we have witnessed extraordinary developments both in Turkey and the region. Without doubt, they have significantly affected the sector. Both the sector and the companies never had such a very difficult period before. This unfortunately affects our business and the service quality. Thanks to its dynamism, hardworking and positive reflexes in severe conditions, our sector has succeeded in surviving under any negative condition. The logistics sector is a very big opportunity for Turkey. Preferring to grow as export oriented, Turkey should increase its speed and service quality. I trust the sector players. They have never stopped making investments in the past and they will for sure continue with their investments in future. But this requires the elimination of all infrastructure problems, speeding up the customs clearance transactions and facilitating the transits. Only then, we will become a leading competitive country. As part of the international law process continuing since 2014 with the financial support of the Ministry of Economy and the contributions of the Ministry of Transport, Maritime Affairs and Communications,

our association has initiated a comprehensive struggle to defend the EU law rights of the Turkish international goods transport by road sector under the cooperation of the exporters (Turkish Exporters Assembly). Finally, our works have yielded its fruit. The European Court of Justice, the supreme court of the European Union (EU) headquartered in Luxembourg, has resolved the lawsuit filed against charging transit fees to Turkish trucks in Hungary. The Court has ruled that İstanbul Lojistik Hiz. Taş. ve Tic. Ltd. Şti. was right about the lawsuit initiated against the Hungarian National Tax and Customs Administration. According to the ruling, charging a fee from Turkish trucks for each transit was equal to a customs fee and therefore, violates the concluded agreements and cannot be charged. To become a precedent, this ruling will be notified to the related Hungarian Court that filed a lawsuit to the European Court of Justice. This is a historical decision for Turkey. Now it is time to file a lawsuit to EU to claim the damages of one thousand and 500 transport companies for their loss of around 800 euros

per truck up until now. We will closely monitor this lawsuit, too. We have always said that we want to compete at equal conditions. Each obstacle both decreases our speed and increases our costs. This in turn affects our competitiveness. We will continue our struggle until we overcome all obstacles of EU member states. Turkey should develop solutions to increase her speed. To achieve this, certain steps are needed; i.e. new software should be deployed at customs offices, bureaucratic obstacles should be removed, the domestic safety problem should be solved, cooperation should be ensured at border gates and the authorized economic operator practice should be put into operation. We are always ready to fight against the international problems and the obstacles with our country. Since the logistics will become a core sector both strategically and economically, its strengthening should be prioritized. That is because, if the logistics become more powerful, then agriculture, textiles, automotive sectors will become more powerful, too... That is why we call it a core sector. Logistics is the core power that distributes its power to all other sectors. ■



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INDUSTRY 4.0 ALSO RESHAPES THE LOGISTICS SECTOR

Emre ELDENER
President



► The logistics sector with a global volume of 7 trillion dollars also constitutes a significant part of the Turkish economy. Being the second after tourism when considered from the service exports, logistics is one of the most suitable sector for improvement and being improved. We as UTİKAD (Association of International Forwarding and Logistics Service Providers) always consider the Turkish logistics sector from this respect. We make a great effort to ensure that both the legislation and physical infrastructure investments are supported to further excel the strengths of Turkey arising from its geographical location to become a 'hub'. Looking at 2017, UTİKAD has recorded many achievements as an association. We are also happy with the developments regarding the Turkish Logistics Master Plan that we believe to take the Turkish logistics sector not one but many steps further. We also take an active role in the works initiated by the Railway Regulation Department of the Ministry of Transport, Maritime Affairs and Communications. We represented our members and the sector at the general

assembly held in July. There are 84 licensed warehouses, 1223 storages, 19 free zones, 466 small industrial sites, 298 OIZs, 28 loading ports/terminals and 20 logistics centers in Turkey. These centers are planned to be connected to the logistics centers to be established in future. We expect that they will contribute to Turkey's getting a bigger share from the world market and becoming an international logistics hub. In future, both site visits and two workshops are planned to be organized. We as UTİKAD will bring our knowledge, the expectations of our members and the benefits of Turkey and the sector to the forefront and make contributions to them. The increased number of infrastructure investments in the recent years are of great importance for the logistics sector. The most important of them all is, of course, the New Airport. With the New Istanbul Airport, especially the transit air cargo transport is expected to significantly increase. Therefore, it is crucial that effective connections with other transport modes should be established at the airport. Another important item that we as UTİKAD want to emphasize

is the impacts of the Industry 4.0 trend in the world. Keeping up with this change and development without any delay is of significant importance both for the sector and our members. The 'sustainability' concept that we have been emphasizing for years once again comes to the spotlight. To ensure and strengthen their 'sustainability', the sector players should understand well the impacts of Industry 4.0 on logistics and integrate it into their business methods. As we always say in every chance we get, we as transport organizers will serve as a software-IT company in the next decade or sooner. Therefore, we should not just observe the change in the world but also keep up with it. In this regard, of course, concepts such as the customs clearance points integrated to Europe and the world, e-AWB, 'Single-Window System' take their places in the agenda. While we continue to work in these areas, we also continue to perform our representation duty at the Trade Facilitation Board with the supports of our members. We also continue to explain the requirement to speed up and functionalize the digitalization at every platform. ■

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POLICY FROM GATE TO GATE

İlker ALTUN

Managing Director - Aysberg Group



► Nowadays Turkey, Syria, Iran and Iraq are frequently used in the same sentence. During the Iran-Iraq war from 1980 to 1988, Turkey and Syria competed with each other as supplier countries. They would compete for whether the goods purchased by such countries are delivered from Mersin and İskenderun or from Latakia. The names of those four countries were again used all together at those times. Nowadays, Kurd separation issue, Northern Iraq, Syria war make the names of those countries to be uttered together once again. It is difficult to be Iran or Iraq in this geography which is united by history but divided by politics... It is also very difficult to be Turkey or Syria... Or to be Kurd... We have witnessed the puppet Republic of Mahabat which was established in Iran but could not last for even one year, Halabja dram at the end of the Iran-Iraq war and consequent migrations to Turkey. The things that happened to the Kurds without ID in Syria since the reign of Father Esad and cantonal politics supported by USA, EU, and even China and Russia benefiting from the chaos in Syria and the 'peace process' initiated in parallel with it have ended with the filling in the ditches that had been dug out in Turkish lands. The names of those four countries were again used together in all those events... Like the many things that unite the fate of Turkey, Iran, Iraq and Syria

that declare or are about to declare wars to each other from time to time, they have very important differences, too. For instance, the Shia and Sunni discrimination in those four Islamic countries might cause important problems. The secular and religious management approaches reinforce the main discriminations. Moreover, the historical grudges regarding Hatay, Shatt Al-Arab waterway and the use of the waters of the Euphrates and the Tigris rivers have left their places today to problems regarding Turkish vehicles' going to Turkic Republics via Iran or the Gulf countries via Syria, the lack of the necessary and sufficient support from those countries to Turkey regarding Nagorno Karabakh just like Cyprus, different attitudes toward the domestic problems in the Arabian geography, and supporting of different parties by even sometimes sending troops. Perhaps these four countries are only united by the Kurd separation problem today - apart from history... Even at the expense of supporting the Kurd separation activities of the other from time to time... I would like to end this subject by giving a few more examples to the problems of the region and the tragicomic stories of those countries: For instance, USA's selling weapons to Iran for the war against Iraq, the country which USA supports... Esat regime's supporting Kurdistan Workers' Party (PKK) and its leader for

years that today establishes cantons in their country... Turkey's protecting Northern Iraq after USA withdrew its forces, having problems with the Iraqi government in this regard, the Iraq management's establishing closer relations with Iran and finally the referendum by Iraqi Kurds... All these make us think that it is the last straw that broke the camel's back. There is a terror balance between PKK leaders, who certainly hold a passport of another Western country in their pockets... Even though Iraq deals with IKBY, Syria with PYD, Turkey with PKK and Iran with Pejak, in fact all these four countries have a single Kurd problem. Gates are either opened to each other or closed. It seems more sensible to keep the gates open. It is unjust that Turkey, the only country in this geography with Western norms, is left alone to keep doors open. There is a Turkish proverb as 'it takes more than a few buckets of water to turn the water wheel' meaning that you cannot finish a job with the small helps of others if you do not have the necessary capability and power'... The Middle East have tried to turn the water wheel with a few buckets of water for years. Both the crisis and the conjuncture are temporary. The remaining brings Turkey to the forefront. Thanks to its geography, history, citizens, population and culture, Turkey is the only country that one way or another all countries in the region have good feeling about... ■

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NO TRANSIT FEE CAN BE CHARGED TO TURKISH TRUCKS

- The European Court of Justice has resolved the lawsuit filed against the transit fees charged by Hungary from Turkish Trucks. The Court has ruled that İstanbul Lojistik Hiz. Taş. ve Tic. Ltd. Şti. was right about the lawsuit initiated against the Hungarian National Tax and Customs Administration.

According to the ruling, charging a fee from Turkish trucks for each transit was equal to a customs fee and therefore, violates the concluded agreements and cannot be charged. To become a precedent, this ruling will be notified to the related Hungarian Court that filed a lawsuit to the European Court of Justice. Mr. Fatih Şener, the CEO of International Transporters Association (UND), "UND has always said that despite the frequently changing perspectives of the politicians regarding Turkey, there are judges whom we trust and we were right".

Mr. Şener further commented as follows: "The European Court of Justice has ruled that Hungary cannot charge 436 euros as transit fee. Greece charges thousand euros while Bulgaria charges 86 euros and Romania 236 euros. The

Hungarian court has asked the European Court of Justice and the Court told that such fees cannot be collected. We will initiate necessary actions to ensure that the related ruling is accepted as a precedent in other countries."

History of Lawsuit

Hungary imposed a fine of 2 thousand and 400 euros to a truck driver in March 2015 since he did not pay the transit fee of 438

Fatih Şener
CEO of International Transporters Association (UND)



euros. Then, İstanbul Lojistik Hiz. Taş. ve Tic. Ltd. Şti., the company of the mentioned truck driver, has filed a lawsuit to the Hungarian courts with the support of UND and Turkish Exporters Assembly (TİM). The Hungarian court has resolved that this issue should be submitted to the European Court of Justice which in turn asked for the opinion of member states and the EU Commission in January 2016.

In the hearing in Luxembourg on January 19, 2017, the EU Commission has shared its opinion similar to the Turkish hypothesis and informed that charging of a transit fee violates article 4 and 5 of the EU-Turkey Partnership Council Agreement. The Commission has further informed that due to the transit fee, annual trade between the EU and Turkey suffers from a loss of 3,5 billion euros and such fees restrict the trade activities. According to TİM, "We believe that the trade to EU countries will continue to grow after the elimination of the related obstacles which cause a loss of 3.5 billion euros for the Turkish-EU trade per year". ■



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ROUTE OF ISTANBUL CANAL TO BE FINALIZED SOON

► The works for İstanbul Canal project expected to resolve the ship traffic problem at Bosphorus have been speeded up. The drilling works have been completed to determine the route of the project. Stating that the most important components of the transport sector are waterways and sea, Minister of Transport, Maritime Affairs and Communications Mr. Ahmet Arslan told that they have started the works for the new waterways project to be integrated with major projects such as New İstanbul Airport to strengthen the logistics sector by developing the waterways of Turkey, to reduce the goods traffic of Bosphorus and to prevent potential disasters that might be caused by the tankers which carry dangerous goods. Noting that annually 53 thousand ships in average pass through Bosphorus, Mr. Arslan emphasized that especially the number of ships that cause risks in Bosphorus since they

carry dangerous goods is remarkably high.

Mr. Arslan said that due to the accidents in the past, an alternative canal project is planned in order to preserve the historical texture of Bosphorus and human life and further commented as follows: "İstanbul Canal Project will minimize the ship traffic that endangers the life and cultural assets in Bosphorus and will provide an alternative route to the ships which suffer from busy traffic on both entrance points to Bosphorus. Besides, the project will create a new international waterway, a transport corridor for both Turkey and the region. Alternative routes for the project site have been evaluated and the most ideal route has been tried to be identified. The canal corridor is around 43 kilometers and the Canal section and the final route will be determined after the completion of the survey project and consultancy services."

"Ministry has carried out 162 different drilling works on the project site"

Telling that the Ministry has drilled 162 different points on the project site, Mr. Arslan remarked that İstanbul Metropolitan Municipality has performed the development plan works while the Housing Development Administration of Turkey (TOKİ) has carried out landscaping and some universities have also prepared some reports for the project.

Underlining that the Canal planned to be excavated on the European side of İstanbul will have a specific structure as compared to similar structure in the world in terms of topographic structure, ground, hydrographic, seismological, ecological and route length, Mr. Arslan told that an agreement was signed on July 3 as part of the survey project in order to determine the route of the canal and its sections.

Mr. Arslan gave the following information about the works to be carried out by the Ministry within the scope of the following agreement: "Ecological, environmental and engineering and environmental impact assessment analyses will be carried out; water hydrodynamics and flow regimes in Black, Marmara and Aegean Seas will be examined; additional geotechnical, geological, hydrogeological and geophysics works will be carried out; a feasibility report will be carried out by utilizing the engineering technologies of similar projects; expropriation matters will be clarified; tender files will be prepared for construction works and the integration points of İstanbul Canal Project with other transport modes will be determined." ■



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LOGISTICS HUBS WORKS CONTINUE AT FULL SPEED

► Minister of Transport, Maritime Affairs and Communications Ahmet Arslan said: "As part of the campaign initiated to make Turkey a global logistics hub, we organize projects at various places in Turkey." Inspecting Kars Logistics Center whose construction is currently ongoing, Arslan told the press that they carry out some projects for developing the Turkish industry and making Turkey a logistics hub. Visiting Kars together with his company after Sarıkamış, Arslan inspected Kars Logistics Center currently under construction. In his speech, Arslan told that they carry some projects for the development of Turkish industry and making the Turkey a logistics hub.

Turkey to have 21 logistics centers

Reminding that they have built and put into service 7 logistics centers up until now within the scope of the project, Arslan made the following remarks: "Kars Logistics Center is one of the 7 logistics centers currently under construction. There are also 7 more logistics center which are planned or whose tender and project preparations are currently ongoing. Therefore, Turkey will have 21 logistics centers when all the works are completed. This means adding an additional goods capacity of 35 million tons to the capacity of goods handled (stocking of goods at customs) in Turkey and creating a logistics area of around 10 million square meters." Stating that they carry out logistics center projects in accordance with a certain programme, Mr. Arslan told that one of the logistics centers is currently built in Erzurum and will be completed in a short period of time. Arslan further made the following remarks: "With the logistics centers, we aim to have a goods handling capacity of 35

million tons and a logistics area of 10 million square meters. We reached a construction level of 25 percent at Kars Logistics Center and plan to complete it in October 2018. The Baku-Tbilisi-Kars Railway Project to be completed this year and Kars Logistics Center that will act as an intermediary for the transportation of the goods from Europe to Central Asia will complete each other. Noting that the logistics centers will also contribute to the employment in the Eastern Anatolia, Arslan further commented as follows: "The goods movements from these regions to the north and south of Turkey will revive the trade activities in these areas and development of Kars with the development of and the increase of the industry at these regions. Everything is going well at Kars Logistics Center whose construction has started around 5 months ago. As part of the campaign initiated to make Turkey a global logistics hub, we organize projects at various places in Turkey. They will contribute to the growth of the Turkish economy and industry". ■





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TRANSPORT LIMITS TO BE PUSHED FOR PREVENTING FOOD LOSS



► Noting that they have made crucial decisions about structural problems to decrease food inflation, Deputy Prime Minister Mr. Mehmet Şimşek said that: "These decisions to decrease food inflation that affects around 80 million people in Turkey will be implemented in October." Mr. Şimşek remarked that the 1-year additional economic value to be created by minimizing the waste ratios is a remarkable gain and stated that: "Even if we can decrease the waste ratios by half, it will contribute to around 15 to 20 billion liras to the Turkish economy". Mr. Şimşek further reminded that they have implemented short term precautions to decrease the fluctuations in the food prices and told that "We will implement structural precautions to increase food supply".

Stating that their main agenda item is the precautions to decrease high waste ratios for the fresh fruit and vegetables and increase the overall quality of the logistics process, Mr. Şimşek made the following further remarks: "The waste ratios of 25 to 30 percent in fresh fruit and vegetable in Turkey indicate a serious financial loss, taking into consideration the annual retail trade volume of around 100 billion liras in the domestic market. These rates reach up to 50 percent for some products especially when the weather gets colder."

Packaging and Transport

Mr. Şimşek further made the following remarks: "Those decisions have been made upon the final evaluation at the most recent Food Committee meeting. Accordingly, fresh fruit and vegetables will be packaged with single and multiple use packages in international standards. The packaged products will be transported to the sales points in reefers. They will be displayed on the sales points in refrigerated aisles. These will be mandatory. The standards in this regard have been determined in harmony with the international norms. They will be published in the Official Gazette soon and will become effective afterwards. We have also set the roadmap for the management of the transition period. If necessary, incentives and supports might be introduced for helping with the adaptation process."

Emphasizing that the wholesale market halls should be also modernized for ensuring that the logistics

improvements in the packaging, shipment and retail sales process to be effective, Mr. Şimşek told the following: "In the current situation, the physical infrastructures of the wholesale market halls make it difficult to implement logistics standards. Based on this observation, the Food Committee gets ready to take an important step for the modernization of the domestic wholesale market halls at global standards. The reform package to be recommended by the Ministry of Customs and Trade in this regard will be evaluated at the first Food Committee meeting to be held after the Feast of Sacrifice and decisions will be taken as a result of the evaluation. Evaluating such decisions as a whole, fast growth in fresh fruit and vegetable sector, a significant increase in export potential, a remarkable improvement in hygiene conditions, improvement in product quality and affordable prices are expected." ■



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ACTIONS TO COMPLY WITH NEW ADR REGULATION CONTINUE AT FULL SPEED

► ADR regulation in force since 2015 will change as of 2018. While the deficiencies in practice are tried to be corrected, we do not know whether new problems might emerge in practice.

The regulation has changed last month for the ADR Certificate required to be obtained by any institution that works with dangerous goods, not just dangerous goods transporters. The new legislation focuses on the practices which seem to be good in theory but does not function in practice or cause problems. It has been told for the last 2 years that the transporters sometimes do not want to satisfy the legislation requirements after they have obtained the necessary certificates. The new regulation requires that each sector should employ a Dangerous Goods Security Consultant to ensure better compliance with the legislation. Another important change is to elimination of the double standard allowing exceptions to the public authorities and institutions. What kind of differences would there be for the vehicles that transport the same goods?

The new regulation is expected to resolve some issues but it is a fact that the legislation will change a number of times in future. Unfortunately, it is not possible to anticipate some problems and take necessary actions to resolve them without implementation of the regulation. Just like in all matters, due diligence

of all parties are of great important for the human and environmental safety and health.

Will the tense relations with EU affect the future revisions?

Turkey has long been following and trying to implement many EU regulations in order to become an EU member and to improve herself. Turkey has become a party to the European Agreement concerning the International Carriage of Dangerous Goods by Road known as ADR in 2010. The Regulation on Carriage of Dangerous Goods by Road became

effective on June 30, 2015 and has required that any institution that transport, ship, package, load, fill and unload should employ a dangerous goods security consultant (DGSC) or procure services from a DGSC. Due to the recent tense relations between EU and Turkey, some government officials said that they will not implement every legislation and practice requested by EU. This is not very probable since it is mandatory to comply with common decisions and practices in matters such as international transport etc., there might be differences in domestic practices. ■





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MOROCCO TAKES TURKEY AS A MODEL FOR DEVELOPMENT AND LOGISTICS

Located at the northern end of Africa, Morocco is getting increasing interest because of its closeness to the Western Africa coasts and Europe. During our visit to Morocco, we had the chance to evaluate the logistics structures both in Turkey and Morocco.

► Having started to utilize its geographical location advantage, Morocco, on one hand, attracts production related investments and on the other hand, takes steps to support investment and production processes with logistics services. Morocco currently has a major logistics infrastructure attempt. Significant investments are especially made in textiles and automotive in Morocco drawing attention with the investments in ports and airports and roads as well. French is the second language in Morocco (Spanish is also talked in its northern region) and the connections of Morocco with Spain date back to the colonial period. However, using the same language is an advantage in business relations with Francophone countries focusing on the Western Africa and also forms a basis for commercial union. Being in fact a Northern Africa country, Morocco will become a member of the African Trade Union. Morocco is a focus point of many western automotive brands

including especially Renault producing around 400 thousand automobiles in its two plants. Morocco has also drawn attention with major investments in textiles. Turkish Airlines flies to Casablanca in Morocco. Omsan is the first Turkish company entering Moroccan market for automotive logistics and currently has over 50 percent market share while Arkas provides international sea transport services. Both companies represent Turkish logisticians in this market. BIM supermarkets also provide services to Morocco and LC Waikiki, Hayat Kimya, Koton, De Facto and Flo shoes sell Turkish goods at their own shops in Morocco. Krone exports trailers from its Tire plant to Morocco. Ford Otosan is another company to take a step in commercial vehicles market in the name of Turkey in Morocco which increases its trade activities, attracts foreign investments for production and is in an area of constructions and investments. Morocco purchases all Ford commercial vehicles from

Turkey and Auto Hall represent Ford passenger vehicles and Ford Trucks in Morocco. Directed by Mr. Tufan Altuğ, a well-known name in the sector, Ford Otosan Africa manages the sales and dealer network for all African countries in Morocco.

The Office of the Commercial Counsellor has great contributions in all these positive developments. We had the chance to interview Mr. Hicham Abdelaziz Moumni, the Vice President Responsible for Strategy, Programmes and Transport Coordination of the Logistics Department of the Moroccan Ministry of Transport with the help of the Consulate officials. The interview has focused on the interest of Morocco in Turkey. Mr. Moumni especially emphasized the development of trade and importance of logistics in the relations with Turkey and told that they plan to organize a purchase committee visit for the International logitrans Transport Logistics Fair and maybe they

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will participate in the fair with a Moroccan pavilion with the aim of increasing logistics cooperation between the countries. After our visit to SNTL (International Transport and Logistics Company), the most effective supply chain company in Morocco, we have visited

the Moroccan Logistics Development Agency AMDL. We had a meeting with Deputy General Manager Mr. Issam Chabbi, Supply Chain and Logistics Operators Supervisor Mr. Abdelkebir Chajai and Logistics Development Director Mr. Tarik El Bahlouli. They have told us about

their desire to establish cooperation with Turkey. Turkey should take immediate action to establish cooperation with Morocco regarding automotive supply parts and other areas of improvement. Because Morocco continues its development journey. ■

FORD OTOSAN TREATS MOROCCO AS THE CENTER OF AFRICAN MARKET



Tufan Altuğ
African Countries
Manager of Ford Otosan.

► Selecting Morocco as its base, Ford Otosan established its office in Casablanca in order to coordinate its trades and Mr. Tufan Altuğ acting as African Countries Manager of Ford Otosan said: "We as Ford Trucks have opened 35 showroom in Casablanca in November 2015. We also opened Ford Trucks branches in other 6 major cities of Morocco in 2017. We have the largest sales and after sales service network in Morocco." He further commented as follows: "Auto Hall, a local company in Morocco, is our Moroccan dealer. It is the largest automotive distributor of



Morocco and sells Ford passenger vehicles, commercial vehicles and trucks. Mr. Altuğ has answered our questions about their Moroccan operations:

Can you evaluate the logistics potential of Morocco? How is the business in Morocco?

Morocco has known well what 'logistics' is. The Moroccan government has its own logistics company with major warehouse investments. They can perform port clearing, freight storage and shipment of deliveries from warehouses to dealers. If you have a dealer network, they can even provide distribution services. A high number of international transport services from/ to Europe and Africa and Morocco are also carried out. Tanger Med port is the logistics hub for the ships from/ to Atlantic and Mediterranean. This port is also the most important logistics



center that connects Europe and Africa. Morocco especially exports agricultural products, fruit, vegetables, fish and textile goods. All kinds of truck and trailer options are available for such services. Fuel transport is also common for fuel transport. There are three major fuel companies in Morocco: Total, Shell and local Afriquia. These companies transport LPG and fuel oil and prefer vehicles that comply with ADR regulations just like Turkey for those transports. Cold chain transport is also very common and reefer trailers are preferred for transporting fish. Krone send disassembled trailers from Turkey and they are assembled there. Krone sales are very good in Morocco. Another highly sold product in Morocco is damper trailer because of the business volume of the construction sector. Many ports, highways and residences are constructed in Morocco.

What do we see when we look at the commercial vehicle market of Morocco and which companies provide which services?

The heavy commercial vehicle market of over 18 tons is constituted of around

2.500 vehicles. I expect that the market will grow to 4 thousand vehicles per year in the following 3 to 4 years. Morocco is a stable and consistent market that develops itself. Its economy is the same. You can do the planning smoothly.

The emission level is Euro 5 in Morocco but is Euro 2 or Euro 3 in other African countries. Morocco is one step forward and follows European regulations. It is similar to Turkey in this respect. One of the most striking difference between us is that they use mostly 4x2-axle trailers in domestic transports. There is no axled trailers in Turkey. All of them are air suspended. They use air suspended trailers mostly in international transports. Turkey mostly exports trailers, 4X2 and 6X2 truckss and 8X4 dampers to Morocco. 8X4 trailers are used in phosphate mines while 4X2 trailers are used for transporting phosphate. Each country in the African market has its own differences and only chassis come to Morocco and their superstructures are made in Morocco. Therefore, the superstructure industry is well developed. That is because Morocco

together with the South Africa and Egypt have the largest industry infrastructure of Africa. Morocco is the largest production center of the automotive industry in Africa.

How is the situation of Ford Otosan in the market? What are your future plans?

Our office in Morocco is a management office. We manage all sales operations from here. All vehicles are transported from Turkey to export countries. Those shipments are made by the maritime countries providing RO-RO transport services to Ford Otosan. We work with Neptune and Grimaldi. We have branches in Casablanca and other countries. We also have 2 mobile services. We use them for vehicles that work in mines and construction sites. We send the vehicles directly to the work sites when necessary. They do necessary interventions on site and perform periodical maintenance works. We sell around 150 vehicles in a market of 2 thousand 500 and 3 thousand vehicles. Our goal is to get a market share of 10 percent. ■

OMSAN'S BUSINESS IN MOROCCO FLOURISHES

- One of the leading Turkish logistics companies, OMSAN extends its organization and effectiveness in Morocco with 'OMSAN Maroc'. Omsan General Manager Associate Professor Mr. Hakan Keskin has answered our questions.

How long has Omsan been and how is its organization structure in Morocco?

Omsan established "Omsan Maroc" in 2013 in Morocco being a "hub and spoke" because of the increasing trade volume and geographical location of the North Africa. We preferred the Kingdom of Morocco because of its strategic location and its importance on the trade route from/to the Mediterranean and Europe and Tangier and Casablanca since they are at the center of this route. We have a local and regional distribution company structure in Morocco.

Omsan Maroc has established a remarkable organization in short period of time and can now provide road, sea, air and intermodal transport services to all sectors in the Western European countries and Turkey with its own vehicles and warehouses.

What is your vision for Morocco and Africa?

We carry out our operations with the vision to become the largest Turkish logistics company in Africa and are a market leader in Morocco with an annual domestic automobile distribution of around 90.000 automobiles. Omsan Maroc transports 1 out of 2 automobiles sold in Morocco and can store 7.500 automobiles with a

vehicle storage area of 125 thousand square meters.

In addition to the automobile logistics, Omsan Maroc carries out activities also in the sea, container and air cargo transports and offers customs clearance, storage and distribution services with a bonded warehouse in Tangier. We also offer direct and transit logistics services from/to Turkey and Africa and aim to decrease delivery times for the exporters in Turkey and develop the trade between Turkey and the countries in the region. We also aim to carry out operations in all fields of logistics and to become a 4rd party logistics service provider and plan to open a general cargo storage and distribution facility in Casablanca in near future.



Associate Prof. Hakan Keskin
Omsan General Manager Association.

Omsan also takes strategic steps regarding Sub-Saharan Africa with a trade potential. Providing services in the Western and Southern Africa markets, Omsan Maroc also plans to enter the Southern Africa market. ■





MOROCCAN STRATEGY FOR THE DEVELOPMENT OF LOGISTICS COMPETITIVENESS

► The development of the logistic sector constitutes a major stake for the improvement of the Moroccan economy competitiveness. Multiple and important issues requires Morocco to make every effort in order to implement an efficient logistics:

- Growing Need of proactive economic strategies adopted by the Kingdom (Agriculture, Industry, Trade, Energy),
- An ambition clearly displayed for the attraction of investment that creates added value and generates jobs,
- Improving the integration of Morocco in the regional and global trade,
- Sustainable development and life quality (reducing logistics externalities).

Fully conscious of these issues, Morocco has adopted in 2010, through the national strategy of development of logistics competitiveness, a proactive project and a unique approach in the region. This strategy aims to:

- Reduce the weight of logistics costs in Morocco in relation to the GDP to 15%,

- Accelerate GDP growth by gaining 5 points over 10 years through increasing the added value induced by a decrease in logistics costs and the emergence of competitive logistics sector,

- Contribute to the country's sustainable development through the reduction of CO2 emissions linked to road freight transport and the decongestion of roads and cities.

To reach those goals, the Moroccan Logistics strategy forecasts the implementation of multiple projects:

- Endowing the country with modern logistics infrastructures, through the development of a national network of logistics areas that should cover an area of about 3.300 hectares by 2030, gradually realized in the framework of regional plans which mobilize essentially public lands and designed in consultation with local actors, on the basis of the current and forecasted needs of these regions,
- Accelerating a coherent moderniza-

tion of the sector, through sectorial action plans to optimize logistics flows, measures to encourage the emergence of integrated and efficient logistics operators; a global national plan for the development of logistics competencies; the reinforcement of the governance of the sector through the establishment of dedicated entities that are the Moroccan Agency for logistics Development (AMD) and the Moroccan Observatory of Logistics Competitiveness (OMCL).

Since its launch in 2010, the deployment of the national logistics strategy has known a real boost and important efforts were made that allowed to realize several achievements for this sector at various levels. Morocco, which had in 2010 a few dozen hectares developed to offer modern logistics platforms has now a total of nearly 600 ha developed in Casablanca, Tangier and in several regions (in the frame work of the integrated industrial platforms). ■

INTERVIEW WITH M. AISSAM ECH-CHABBI, ACTING GENERAL MANAGER OF MOROCCAN AGENCY FOR LOGISTICS DEVELOPMENT

► **Moroccan Agency for Logistics Development ! Such public agencies are rarely found around the world. What are the objectives that Morocco has assigned to such an agency?**

The Agency is a public institution that acts on several levels and focuses in particular on the promotion of logistics zone projects through a concerted planning exercise with the territorial level and through the preparation of structuring schemes contributing to the realization of these projects.

The agency is also investing in a set of actions aimed to improve the performance of logistics supply chains that present a potential for progress in Morocco, such as upgrading urban logistics and import-export logistics. We are also undertaking initiatives to develop logistics skills by establishing a training plan allowing the adequacy between supply and demand in training in logistics professions. The development of efficient logistics operators is also one of the Agency's action priorities.

How do you proceed to strengthen the competitiveness and logistics performance of companies?

The national logistics strategy has brought out that the performance and the logistics competitiveness for which aims Morocco imperatively requires the emergence of integrated logisticians and the modernization of logistics practices of companies. In this context, the Moroccan Agency for Logistics Development has prepared, in partnership with the General Confederation of Enterprises of Morocco (CGEM) a program aiming at the upgrading of SME's logistics



called "PME LOGIS"

This program will cover the period 2017-2021 with a first phase covering the period 2017-2018 which targets a large population of beneficiaries with about 600 SMEs.

"PME LOGIS" responds to strong expectations of SMEs in terms of technical and financial support on various aspects such as logistics diagnoses, logistics information systems (WMS / TMS), certification / labeling and training.

Morocco, a logistics hub to Africa, what are the assets that would allow Morocco to play such a role?

As you know, under the leadership of His Majesty King Mohammed VI, May God Glorify Him, Morocco has profoundly redefined the contours of the partnership linking it with Africa. This new orientation, carried with clear-sightedness of His Majesty the King, preaches not only an efficient, solidarity-based and win-win South-South cooperation, but also confirms the African vocation of the Kingdom of Morocco.

Moreover, the various structural reforms initiated by Morocco, and its anchoring more and more pronounced in Africa, its undeniable position as an economic and industrial hub, make it a key player in the development of the south-south partnership. From this fact, and with its expertise and accumulated experience over the last few years, supported by the implementation of the National Logistics Strategy in 2010, Morocco remains in the field of logistics a privileged interlocutor for African countries and should therefore play a central role as a logistics hub to Africa. ■



Selçuk
Boztepe
CEO

U.N. RO-RO CONTINUES TO GROW WITH NEW INVESTMENTS AND COOPERATIONS

CEO of U.N. Ro-Ro, Selçuk Boztepe, has made the following remarks regarding their investments and cooperations: "2017 is the year that we will have a direct and positive impact to our operations by expanding our services that have been put into services last year. As a part of our growth strategy, increased vessels, new train connections, and additional storage areas will be put at disposal of our customers as of 2017."



► “In the first half of 2017 we have taken the first step with extending and increasing the capacity of our two ships which are called Akdeniz and Cüneyt Solakoğlu. We have added a new part – 30 meters and 1130 tons - to Akdeniz Ro-Ro ship constructed in 2008 and to Cüneyt Solakoğlu Ro-Ro ship constructed in 2009, and we have completed the ship lengthening transaction successfully. As we wanted to contribute to the development of the shipping and ship construction sectors, we preferred GEMAK for the ship lengthening project and paved the way for the extension of a Ro-Ro ships by a Turkish shipyard for the first time in Turkey. By launching those ships with Toulon line and Trieste line, we focused on providing solutions to our transporters who suffer from long queues at border gates and focused on increasing the service efficiency. I believe that U.N. Ro-Ro’s experience and equipment investments in ship lengthening field will lead the way for construction of large Ro-Ro ships in Turkey. We would like to thank to GEMAK management and its team once again for their meticulous and competent work in this field. Another development within the year is to open a new gate to the south of Italy for the exporters with an affordable transit time and freight. With the launch of the Pendik-Bari line, which is the first and only Ro-Ro line to the south of Turkey and Italy, international transportation companies are able to go to the south

of Italy directly by Ro-Ro ship instead of passing through Ipsala exit gate and transporting transit over Greece. So we provide solutions to the gate densities and transit issue to our customers. With the Bari line service as U.N. Ro-Ro, we reduce both the costs of international transporters and save 2-days transit time.

We attach great importance to train services which are the most important parts of intermodal transportation and we continue our work in this area. The Wels-Rostock-Wels line of our business partner Kombiverkehr provides services from Turkey to Rostock, Germany and from there to the Scandinavian countries without being subject to transit quotas. Thanks to the cooperation with ECL, we offer transport services in competitive periods and at more advantageous prices for all semi-trailers, 45’ HC container and swap body transporting units from Trieste over Ludwigshafen to Lübeck in Germany, Trelleborg, Malmö, Göteborg and Stockholm in Sweden, Oslo in Norway, Liepaja in Latvia, Hanko and Kotka in Finland and St. Petersburg in Russia. GTS, the operator of the railway lines from Bari, can transport P386 Cranable semi-trailer and any kind

of container on Milano, Piacenza, Padova and Bologna lines from Bari. Moreover, thanks to the cooperation with Novatrans, we have started to transport 45 HC, swap body and other containers destined for Toulon. This year we also do our best to provide services based on the requests of our customers and we continue to shape our works accordingly. We direct the export goods coming from Italy and France to Ambarlı line from Pendik Port, thus decreasing the number of trucks using the bridges in İstanbul and offering cost advantages for goods destined to İstanbul European side and Thrace. Moreover, with the authorization of U.N. Ro-Ro Pendik Customs Directorate as the gate for importing livestock, we can now transport on our ships livestock, raw and processed leather, milk and dairy products, vegetables and crops. Also, thanks to increase of purchase of fuel without special consumption tax (SCT) from 550 liters to 900 liters by the Ministry of Customs and Trade, we have started to provide fuels of 900 liters without SCT to the vehicles of the road transporters which carry “Turkish Export Goods” to abroad from the gas stations at Pendik and Mersin Ports since 2006. Besides, with the 45’ HC container renting campaign initiated via Oregon, we offer a new service to our customers who do not have such containers. We emphasize our trust in the Turkish economy with the new lines and our investments in the sector.” ■

TURKISH CARGO OFFERS INTEGRATED SOLUTIONS

In 2017, Turkish Airlines was awarded "Best Airline in Southern Europe", "Best Business Class Onboard Catering", "World's Best Business Class Lounge", and "Best Business Class Dining Lounge" by passenger rating Skytrax World Airline Awards.

► Turkish Airlines, the 4 star airline company that flies to more countries than any other airline in the world, operated its first international air cargo shipment in 1936 and now reaches 300 destinations in 120 countries worldwide.

In 2017, Turkish Airlines was awarded "Best Airline in Southern Europe", "Best Business Class Onboard Catering", "World's Best Business Class Lounge", and "Best Business Class Dining Lounge" by passenger rating Skytrax World

Airline Awards.

The Company, which has been maintaining its cargo services and operations under the sub-brand Turkish Cargo since the beginning of the 2000s, stands as the internationally fastest growing brand offering air cargo services to the highest number of countries around the world.

Turkish Cargo, a subsidiary brand of Turkish Airlines, has been continuing to grow along with Turkish Airlines in recent years. Today, Turkish Cargo is at

your service all over the world and provides the most efficient connections to the leading production and commercial centers across the globe with its 16 freighters and the belly capacities of Turkish Airlines' 329 passenger aircraft. Its network and fleet expansion policy enables Turkish Cargo to launch high quality cargo services to new destinations and increase freighter cargo capacity in existing destinations as well. This enables Turkish Cargo to provide you with closer access to business opportunities and reach partners in many main commercial hubs, and also increased cargo delivery capacity to even more destinations.





In addition to the growth of its cargo network capacity, Turkish Cargo is significantly revising its infrastructural and procedural processes. Turkish Cargo has been awarded with IATA's Pharmaceutical and Healthcare Products Transportation certificate 'Center of Excellence for Independent Validators' (CEIV) in Istanbul Hub in August 2016. Turkish Cargo revised each step of the process in order to ensure high level of reliability and security throughout shipment. Turkish Cargo plans to successfully maintain the re-certification process which will be performed by IATA every two years. Turkish Cargo plans to maintain its success in the inspections made in definite periods by world's leading pharma producers. Herewith, it plans to be an airline which constantly innovates via continuous improvement in activities. Turkish Cargo is planning to attend the seminars and exhibitions attended by the sector's leading pharma



consignors and experienced cargo agency representatives where technical matters and expertise regarding pharma transportation are discussed. It maintains the continuation of current cooperations in events where the cargo agencies find the opportunity to share their reviews regarding the current situation and the future of the health sector, and aims develop pharma transportation further focusing on customer needs and behaviour. Within this scope, Turkish Cargo regularly monitors sector requirements complying with Operational Quality and Pharma GDP standards for and strive to continues to realize activities in this direction. Turkish Cargo's vision and growth trend would continue and shared the aim of

Turkish Cargo to be one of the top 5 air cargo pharma companies in the sector by the year 2023. Turkish Airlines has steadily grown over the past decade and Turkish Cargo is now well on the way of performing similar expansion along with passenger growth. According to the WorldACD 2017 June data, Turkish Cargo has grown with its uprising performance to become one of the top ten air freighters in the world. According to figures recorded end of the June, 24,4% increase in revenue and 26,1% increase in carried tonnage has been performed. The worldwide market share has grown from 0,9% in 2009 to 2,5% in 2017, showing Turkish Cargo's fast and sustainable growth. With the upcoming Istanbul New Airport, Turkish Cargo aims to make Istanbul a logistics hub with a new cargo center of 150,000 m² indoor area, while continuously improving its quality of service. ■

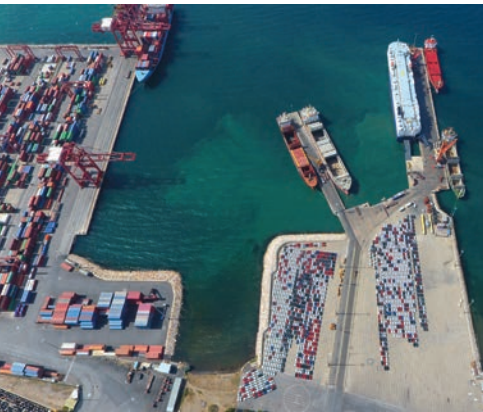
İbrahim Dölen
General Manager

BORUSAN LOGISTICS GROWS WITH DIGITALIZATION

Being one of the subsidiaries of Borusan Holding - one of the well rooted companies of Turkey -, Borusan Logistics keeps being on the front burner with the importance it recently places on digitalization. Having branded a remarkable project such as Electronic Transportation Acquisition (eTA) in Turkey in a short period of time, Borusan Logistics will continue its investments in digitalization and R&D in future. In addition to the new project, the company has re-planned its foreign growth and development strategy. Borusan Logistics General Manager Mr. İbrahim Dölen has answered our questions.

► **Can you explain the new vision of Borusan Lojistik with the recent transformation?**

Borusan is one of the oldest players in the sector. Especially in 2001, we have been restructured and focused on integrated logistics field. From that date on, we have reinforced our position as being one of the sector players. Since the last new year's eve, we have united our two headquarters in Kozyatağı and Güneşli in a new building in Kağıthane. Because of the traffic in İstanbul and our need to manage many changes simultaneously, we have united our two headquarters in one and revisited our strategy. After revisiting it, we have re-changed our



strategy and set the next 10 years as a digital change period. We try to transfer different softwares to the same platform to ensure monitorability and traceability throughout the whole process and checking of performance on even mobile phones by our customers or their customers. Of course, this requires a serious work. We review all our process and try to answer "We review all of our processes and try to answer "what we can accelerate, where we can use the digital technology, how we can make faster transactions in a right way".

After moving to the new headquarter, we have doubled the number of the staff of R&D department and we have



restructured the R&D department. Our center has been also approved by the Ministry of Industry and Trade. Our developers currently work on 18 different projects. Most of them will be finalized by the end of the year and some in the first quarter next year. After they are completed, 32 digitalization projects will be initiated. This journey will last until 2020 and we will be making an investment of around 30 to 24 million dollars to digitalize our company. We believe that only when we can satisfy the needs of the developing world.

How well is eTA doing? Do you want to globalize it?

We want it to become global by 2020. However, when we first launched eTA in 2013, smart phones were not that common and only few people had it. We have changed the entire eTA software in the last one year. If you log into eTA from your mobile phone, you will see that we have rendered it as user friendly easier to use and made it compatible with the current technology. We have launched it in August. We have to re-change our infrastructure since some technologies offer solutions that will enable you to achieve what you desire faster. We have two goals for eTA. Firstly, we want Borusan Logistics to have an important leverage with its competitiveness. Secondly, we expect eTA to change the logistics game not only in Turkey but at least in Europe.

The automotive sector is still the locomotive of Turkey's exports and it is estimated that this position will not be changed for years to come. What do you think? The exports have increased significantly. The sales in the domestic market are only 2 percent lower than

the previous year, as far as I know, which means that there is no serious difference. The sales were bad at the beginning of the year but then the sector recovered fast. When I meet the staff of the companies that we work with, I can see the ambition, energy and plan to keep this success story going on for the next 4 to 5 years. I expect other countries with strong automotive industries to enter the Turkish market; because the ecosystem in Turkey is very suitable for - this industry. Considering many aspects from logistics to human resources and from the automotive sub-industry to how developed the sector is, Turkey should be drawing more investments for automotive industry plants. If you look at all the vehicles imported to or exported from Turkey, you will see that Borusan Lojistik have touched 1 out of 2 of them. We have 3,500 staff and about 1,000 of them work in the field of automotive logistics.

What about your other investments?

As part of a study we conducted at the beginning of 2017, we have analyzed common international transport needs of the automotive sector and some other sectors too and understood that when you offer an environment-friendly and cost effective transport model with clear delivery times, you -have been preferred more by the customers. We have based our plan on this understanding and made our first investment in August. We have planned to purchase around 600 intermodal transport vehicles and purchased the first 105 in August. We will order next 100 soon and will make a strong beginning to multimodal transport. 2 of my colleagues have completed formal procedures in Germany in order to put German Borusan Lojistik into operation. Soon we will be providing services in Germany at 3 locations, with 2 warehouses. ■



ALIŞAN LOGISTICS BECAME A GLOBAL BRAND

Alişan Logistics has a minimum growth trend of 20 percent in recent years. Having completed 2016 with a similar growth rate, Alişan Logistics aims for maintaining its growth at this level also in 2017. Considering the first 9 months of 2017, this aim seems possible to be achieved.



- Established with the title of "Alişan Uluslararası Taşımacılık A.Ş." in İstanbul on April 1, 1985, Alişan Logistics has become one of the leading logistics service providers in Turkish market and has achieved in becoming the market leader in the consumer and chemical goods logistics in a short period of time. Aiming for continuous growth and development since its establishment, Alişan Logistics continues its growth and development by including under its

umbrella companies and services that offer solutions in different fields.

Alışan Logistics has a minimum growth trend of 20 percent in recent years. Having completed 2016 with a similar growth rate, Alışan Logistics aims for maintaining its growth at this level also in 2017. Considering the first 9 months of 2017, this aim seems possible to be achieved.

We as Alışan Logistics continue our growth trend and investments in the recent years at full speed. We opened a new warehouse with a capacity of 20.000 pallets in early March 2016 and also a new warehouse with a capacity of 15.000 pallets at the beginning of summer in Gebze Güzeller Organized Industrial Zone. We have added the new operations center and the new warehouse with a capacity of 12.000 pallets in Konya to our distribution services in the domestic shipment area. With this investment, we have started to provide services to the entire Central Anatolian Region after Marmara, Thrace, Aegean and Çukurova Regions with a storage capacity of 265.000 pallets in total.

In addition to other fields of activity, Alışan Logistics is a leader in the sector with its chemical goods logistics and dangerous chemical goods know-how. Providing services to the leading companies in the Turkish chemistry sector since its establishment, Alışan Logistics has a serious know-how, a strong infrastructure and a successful business model for the handling, transport and storage of dangerous chemicals, being the one of the most important fields of the chemistry sector.

Being one of the leading



Damla Alışan
Vice Chairperson

companies in the sector with the services it provides at international standards, Alışan Logistics regularly expands and adds younger vehicles of its own fleet of 450 vehicles. Additionally making new warehouse and operations centers investments since 2016, Alışan Logistics today has a storage capacity of 265.000 pallets and provides services to Marmara, Thrace, Aegean and Çukurova Regions and the entire Central Anatolia Region.

R&D Works

Alışan Logistics aims for leading the sector with its philosophy that the future can be only shared by constructing it. Alışan Logistics also adopts the principle of the requirement to optimize processes in order to ensure sustainability in the local and global sectoral competition. Believing in that all company personnel can adopt the R&D and innovation concepts on the route leading to "Industry 5.0" after "Industry 4.0" where sustainability and interaction of real and virtual worlds are ensured, users or transport vehicles communication with each other, thus ensuring correct and more efficient operation of the processes, Alışan Logistics has decided to

establish a "R&D Center" with the motto of "Innovation Takes us to Future!" and started to take necessary actions.

"Alışan Logistics Yön R&D Center" acts with a perspective that the adaptation is indispensable in terms of sustainability in the local and global competition in a world where objects start to communicate with each other. Aiming and claiming to lead the sector, "Yön R&D Center" attracts attention with its available strong senior management discretion, which is the most important need of a R&D center at a successful cultural transformation point.



Alışan Logistics Yön R&D Center will develop the information, technology and software regarding the self-managing devices, automation systems, automatic product collection systems, automatic separation systems, automatic loading and unloading systems. Alışan Logistics aims to lead the sector with the projects to be carried at the R&D center and to optimize the resources and processes of the sector and their global sustainability. ■

Mine Kaya
General Manager

ALL IS WELL WITH SGS

"SGS TransitNet is the first and only company that uses its own guarantee in 13 countries and that provides such a large range of services in its own field of activity. SGS TransitNet provides guarantees for all kinds of transport - national and international."

► Just like many other sectors, the transport sector also undergoes a great transformation thanks to digitalization. Documents become digital, passing through gates becomes easier and speed and efficiency is ensured in many others. Providing important digitalization services to the transport sector, SGS TransitNet continuously expands its service network and increases its quality for better successes. Thanks to the facilities SGS provides, the logistics companies can monitor the declaration they make to the customs office from their offices electronically from their offices until the end of transport formalities are completed. With its well developed software infrastructure, all transactions can be performed quickly without any error risk. Providing very special services to the sector, SGS TransitNet General Manager Mine Kaya has answered our questions.

Which services does SGS TransitNet provides? Can you give information on the history of the company?

SGS TransitNet is the first and only company that uses its own guarantee in 13 different countries and that provides such a large range of services in its own field of activity. SGS TransitNet provides guarantees for all kinds of transport - national and international. SGS TransitNet is a web-based application that you can use to submit T1/T2 and TR declarations, preliminary truck TIR declarations and ENS declarations in EU and Turkish transit regimes. SGS TransitNet offers T1 service to the transporters since 2006. We used to provide this service with our partners under the name of RoderNet and UNDNNet but we started to provide it under SGS TransitNet with a larger product range on March 1, 2012 and we continue to provide this service today.

Can you please inform us about the service quality and network of your company and the benefits it provides to the users?

We provide services to national and international transporters with our own guarantees and 8 customer centers in 13 countries. We have a professional team that provides operational and marketing services and monitoring services for declarations. As SGS TransitNet, we try to ensure sustainability with our personnel both in Turkey and abroad. A team with a certain level of experience is one of the most important factors that increases the quality of service. Thanks to the team, the transporters always feel the support of an expert and experienced team by their side and perform their transport operations with this trust. Another thing about our service quality is the ease of accessibility to our services. The new interface ensuring faster data entry allows uploading of data from Excel to the system. This interface also allows definition of more than one users to the system and simultaneous declarations at more than one customs offices. Moreover, we also make a difference with the financial benefits such as not asking for deed such as letter of guarantee, promissory note etc. that might cause additional costs and providing coverage for the taxes to be charged from the transported goods and thus, not being required to give additional guarantee to the customs office or to work with a customs escort/guard. Besides, we

also offer the transporters to make declarations abroad directly from their offices without a broker.

What kind of innovations will you make in the upcoming period?

SGS TransitNet has a structure that continuously renews itself and expands its service network in accordance with the needs of the transporters. By taking guarantees from different countries, we would like to offer more alternatives to our customers. Thanks to the updates in our organizational structure, we would like to provide services directly to our customers and increase customer satisfaction and engagement.

What would you like to tell to the logistics sector?

SGS TransitNet is a distinguished company with the facilities it provides to the logistics operators. Thanks to the facilities we provide, the logistics companies can monitor the declaration they make to the customs office from their offices electronically from their offices until all formalities are completed. We will continue to create the best conditions for our sector facing very high costs. Our goal is to make maximum contribution to the Turkish logistics sector.

Would like to add anything?

SGS TransitNet continuously renews itself to become the best in its fields of activities. Our customers prefer use for our ability to always provide the best, the most reliable and unique services to them. ■





ALTERNATIVE LAUNCHED ITS OPERATIONS IN YALOVA RO-RO TERMINAL

► Expanding its fleet in order to become the leading service provider in the Mediterranean and Black Sea, Alternative Transport will strengthen its hand in the market with the help of Yalova Ro-Ro Terminal. The most modern terminal in Turkey and in Europe, Yalova Ro-Ro Terminal had an initial investment of 40 million Euro. Through the new terminal, Alternative Ro-Ro will provide more value-added services which will also reflect to Turkey's national economy. Beginning with an export departure, Yalova Ro-Ro accepted its first vehicles October 3 and the first Ro-Ro trip commenced on October 4. Alternative Transport's vessel, QEZBAN, has already set out for Trieste/Italy. The official Opening Ceremony of Yalova Ro-Ro Terminal will take place in the days ahead. Turkey's 63rd sea border gate, Yalova Ro-Ro Terminal will offer more efficient, quality and sustainable solutions to customers with its 80,000



square-meter floor area and 500 trailer capacity in Topçular, Yalova. Yalova Ro-Ro Terminal has a dock with two ramps, X-Ray, a customs office, a laboratory, agency offices, social facilities for drivers, a short-term storage area of 16,000 square meters and an ADR warehouse. Yalova Ro-Ro Terminal will be operational with an initial annual capacity of 260 vessels. The capacity of the terminal will be later increased to 365 vessels. Also with the procurement of majority shares of Europa Multipurpose Terminals Spa. (EMT) in Trieste, Yalova Ro-Ro Terminals AS became an international terminal operator company. EMT, who is offering ro-ro terminal service in Pier VI of Port of Trieste is connecting both ports and countries under 1 line

and software to be able to obtain a smooth flow also in documents-customs process.

The Laboratory Will Facilitate Trade

Carcinogenic materials will be tested in the laboratories at Yalova Ro-Ro Terminal, paving the way for exporting textile and leather products, shoes, stationary and toys. The department that will analyze the food items for import and export will be operational by the end of the year. As of November, vehicles destined for export will use the gasoline station without paying Special Consumption Tax.

Yalova Ro-Ro Terminal Will Reduce Istanbul's Traffic

Bringing a new understanding to the Ro-Ro market, the terminal will also ease Istanbul's traffic. All intermodal transportation operations currently at the Port of Haydarpaşa will be transferred to the Yalova Ro-Ro

Turkey's 63rd sea border gate, Yalova Ro-Ro Terminal will offer more efficient, quality and sustainable solutions to customers with its 80,000 square-meter floor area and 500 trailer capacity in Topçular, Yalova. Yalova Ro-Ro Terminal has a dock with two ramps, X-Ray, a customs office, a laboratory, agency offices, social facilities for drivers, a short-term storage area of 16,000 square meters and an ADR warehouse.

Terminal. Yalova Ro-Ro Terminal will remove 100,000 trailers out of Istanbul traffic. This way, the terminal will put an end to high trailer density in Haydarpaşa and also provide traffic relief in the Harem-Üsküdar direction on main roads and bridges. Alternative Transport had transferred its foreign operations to Yalova, Topçular. Resolving the operational inefficiency caused by bans on truck transportation at certain hours will be one of the biggest advantages of Yalova Ro-Ro Terminal.

Yalova Ro-Ro Terminal is located very close to Turkey's prominent industrial areas and automotive manufacturers. The transportation of industrial products in the region can easily access the terminal, by passing the city. Reaching the Istanbul-Izmir highway through a 2.5 kilometer connection route that will bring momentum to the Osman Gazi Bridge, Yalova Ro-Ro Terminal will be able to provide a competitive service to Southern Marmara and Aegean Regions, alongside Middle and East Anatolia.

Environment Friendly Terminal

Apart from the economic contributions, Yalova Ro-Ro Terminal also stands out with its environment friendly features. To increase time and cost effectiveness for manufacturers and transporters through modern investments, we are reducing our carbon dioxide emissions by 3.7 million kg., our diesel use by

1.5 million liters, and hazardous waste generation by 12,000 kg. each year. Moreover, annual highway travel will be reduced by 4 million kilometers.

Alternative's Fleet Expands With Over 110 Million Euro Investment

Having transformed into an important brand in Ro-Ro transportation within a short period of four years since being established, Alternative Transport is continuing investments to expand its fleet.

Having invested more than 100 million Euro to expand its self-owned fleet, Alternative's sixth and Turkey's largest vessel MELEQ began service between Turkey and Italy. After MELEQ, the vessel that will replace FADIQ, which is currently on charter, has been commissioned. FADIQ is planned to be operational by the first quarter of 2018. Both vessels share the same technical specifications and have a 280-trailer capacity. However, capacity can be increased to 340, thanks to the double-decker container load project brought to Turkey. The vessel is 210 meters long, has a freight capacity of 32,600 tons, and can achieve a top speed of 21.3 knots-per-hour. Offering significant operational advantages to the maritime industry and Turkey's exports with our expanding fleet, Alternative continuously strives to open new routes and increase frequency on existing ones. Our Ro-Ro vessel with 240-trailer capacity, FADIQ was



renamed as QUBRA.

Alternative aims to become an intermodal infrastructure supplier with an extensive preferred network within Europe. Accordingly, we will invest in the upcoming period in line with the market's needs.

Alternative Wins The Golden Anchor, The Most Distinguished Award Of The Maritime Industry

Alternative won the "Golden Anchor", the Oscar of the Turkish Maritime Industry. Alternative Transport won the Vessel Management Award in the International Ro-Ro Vessel Management category at the 12th Golden Anchor International Maritime Achievement Awards, organized by the Deniz News Agency. ■

"WE CONNECT TURKEY AND EUROPE WITH ENVIRONMENTALLY FRIENDLY SOLUTIONS"

► Employing a team experienced in different transport modes, Bulung Logistics attract attention also with its environmentally friendly solutions. Knowing Turkey and the Turkish transport sector well, Bulung Logistics sets an example with its organizations in many countries and provide smooth solutions. Based in Austria, the company provides special services to Central Asia, the Middle East and the Commonwealth of Independent States (CIS) with its fast growing structure and high quality service. Bulung Lo-

gistics Regional Manager CIS Andreas Schüßl answered our questions.

Could you please give some information about Bulung Logistics?

Bulung Logistics is a company established in September 2012 and owned by the Bulung Holding which belongs 100% to Yusuf Erkara. Starting as a 2 man Show in Austria-Schwechat, Bulung Logistics has nowadays already around 40 employees and 4 own branch offices as well as 35 own 13,6 Coil Trucks and a turnover last

year of 13 Million Euros. The branch offices are located in Turkey-Istanbul, Adana and Gaziantep and since April this year we opened a new branch in Bulgaria, Sofia. In our headquarter in Schwechat we are 15 high professional forwarders which collected a lot of experience in former jobs at well known forwarding companies. The amount of high class customers we already call our own proofs this as they give us their trust. Our company is specialized in transports to Turkey from all over Europe



Bulung Logistics Regional Manager CIS Andreas Schüßl; "We have 3 own branch offices in Turkey with around 20 employees (excl. our own drivers) in Istanbul, Adana and Gaziantep. Our operation team there organizes all truck loadings from and to Turkey with our own trucks as well as our wide partner network. Container loadings are handled through our head office in Austria. As Turkey is our main market we are planning to invest further in the future, to be exact in new trucks and growing stuff."

as well as vice versa. Further we are transporting regularly to Central Asia and former CIS countries. To the CIS Countries we can offer also weekly LTL trucks. Our vision for the next years is to get our brand better known in the world of Intermodal Forwarders and to bundle our forces.

What can you say about your operations in Turkey? What are your plans with Turkey? (investments etc.)

As already mentioned we have 3 own branch offices in Turkey with around 20 employees (excl. our own drivers) in Istanbul, Adana and Gaziantep. Our operation team there organizes all truck loadings from and to Turkey with our own trucks as well as our wide partner network. Container loadings are handled through our head office in Austria. As Turkey is our main market we are planning to invest further in the future, to be exact in new trucks and growing stuff. Also we are planning to open new branch offices in Turkey.

Green Logistics is so important for you. Could you please give some statistics about your company? (co² emission, saving etc.)



That is correct, we are trying to get as much loadings as possible for our great service which we already provide to several customers - the 45" High Cube Pallet Wide Containers. We organize them mainly from Austria and Germany to Turkey but would love to get more volume from this regions as it's for us a and the customers already using it an great way of transportation. You can load the exact volume as in a 13,6 Standard Tilt Trailer but saves a lot of co² and not less important - Money. The transit time is nearly the same as per road and the background of saving the environment is a big bonus.

Last year we made 3000 containers loaded as Intermodal and could save therefore over 12.000.000 KM by road. Which is a saving of approx. 10Mil. KG - CO₂.

What can you say about your new investments, innovations which will happen soon?

We are planning to buy another 15-20 trucks and another 50 cranable trailers in Turkey as well as 50 trucks & cranable trailers for our new office in BG in the next 2 years. Additionally another 150 pieces of 45"HC PW Containers. Innovations we are planning since approx. 2 years is to charter Ropax Vessels between Turkey and Romania for Fulltrucks, Trailers and 45"Containers. To be more detailed ex Derince to Constanza from which we can send further to the main hubs in Eastern and Western Europe. We are working therefore with well known Rail Operators. ■





First LNG truck delivered to Vega in Austria.



Emission free filling station learning to fly; Learning to fly - a Volvo truck on the way to Turkey.

INNOVATION AND ECOLOGICAL RESPONSIBILITY IS THE NAME OF THE GAME IN MODERN LOGISTICS

► VEGA Trans. #worldofgreenlogistics is for VEGA not only a slogan but part of the company's philosophy with the focus on ecological transport technology as important success factor in the daily logistic business. Despite the high pressure for best (=quick and cheap) performance by the Industry and a rising volume to be

moved, VEGA nevertheless focusses on sustainable and ecological friendly transport solutions. The logistic provider for the commercial vehicle industry with its headquarter in Salzburg/Austria and 15 subsidiaries all over Europe and Asia, including a very important one in Orhanli/Istanbul offers a variety of solutions for its customers, like multimodal transport

Hand over ceremony of our CNG Sprinter fleet.



VEGA has specialized in multimodal logistic chains using always the most cost and ecological efficient solution by road, rail and short/deep sea transport solution.

chains, storage as well as additional tailor-made services according to the customers' requirements. Excellence is our driver in all our actions and among this excellence the ecological responsibility is as important as cost leadership and smooth delivery processes.

VEGA has specialized in multimodal logistic chains using always the most cost and ecological efficient solution by road, rail and short/deep sea transport solution. World of green logistics is the target for any job performed, therefore a special department looks into the Co2 emission of each transport executed and its potential to improve the ecological balance. The yearly Co2 saving is crucial for the overall performance of the company and an important key figure in the balance scorecard.

The company moves 80.000-100.000 new trucks, buses and trailers for its customers like Daimler, Volvo/



Renault, Iveco, MAN, Scania, Schmitz, Krone, Kässbohrer and many other important trade marks of this industry and more and more of them by ecological friendly rail solutions. Rail was important from the early beginning of the company, but it was missing a suitable multimodal solution which could combine the flow of new commercial vehicles with the general cargo flow in Containers and crane able trailers. Last year VEGA has founded an innovation circle together with Kässbohrer Transport Technik in Austria, specialized in vehicle for the automotive Industry and several rail partners among them Deutsche Bahn and Rail Cargo Austria in order to find the right tools for a combination between road, rail and sea transport.

In a process over 15 months we have developed an innovative adapter which allows us to load new trucks as well as new trailers into standard rail waggons and integrate our cargo flow into the network of multimodal trains all over Europe. Our close partnership with U.N. Ro-Ro has become a major driver for this project too and today we have combined our flow from Trieste to Wörth/Rhein with their customers demand for a rail solution from Trieste to Ludwigshafen and together we move now a daily train

on this line with more projects like this in the pipeline.

Vega goes green and in December 2016 VEGA has decided to move a step forward and to join the Global Compact of the United Nations. The UN Global Compact is the biggest global initiative for companies with ecological responsibility and sustainability. VEGA is ready for the challenges of the social and ecological standards of the UN Global Compact and wants to improve in all their processes for the best achievable result.

Sustainable ecological management is proven in the daily job by all VEGA members: The electricity for the headquarter in Salzburg is produced by a large solar power station on the roof of the building, for the driver transfer new CNG buses from Daimler were purchased, which have no NOX and particle emissions and just recently VEGA has received the first LNG truck in Austria delivered by IVECO. The ecological balance compared to an EURO 6 Diesel engine is fantastic as no NOX and particle emissions are occurring and in addition the CO2 saving is more than 20 tons per year.

And the fleet of passenger cars in the company is step by step exchanged from diesel and fuel cars to electric vehicles with ZERO emissions.

VEGA is looking forward to the challenges of a sustainable World of green logistics and has taken already major steps to be a leader in this important development in the logistic market. ■



DEVELOPING ROAD INFRASTRUCTURE ALSO TRANSFORMS TRANSPORT

Placing great importance on the roads, Turkey aims for increasing the speed and comfort of the road transport taking into consideration the high costs and time losses caused by geographical challenges. Turkey plans to make an investment worth of over 30 billion dollars by 2023.

► Due to the challenging geographical conditions, Turkey has to pay higher costs for its well developed road infrastructure as compared to many other countries. Especially for the highways, Turkey has to carry out projects such as viaducts, tunnels at high costs. However, as each project with high costs and longer delivery times is completed, the transport speed and comfort gets better. Therefore,

Turkey aims for making an investment worth of 166 billion liras in total to the road transport by 2023.

Road Network to Reach 67 Thousand Kms by 2023

According to the Turkish Transport and Communication Strategy 2023 Document prepared by the Ministry of Transport, Turkey is expected to invest TL 166 billion in total only to the

road transport by 2023. When all these investments are completed, the total length of divided roads will increase to 32 thousand kms and the length of highways to be constructed with the Build - Operate - Transfer (BOT) model to 7 thousand and 500 kms. The highway length of 2.5 kms per 1000 square kilometers today will increase to 9,2 kms and reach the average value in EU member states and the total length



of the entire road network will reach 67 thousand kms.

Works Initiated for Big İstanbul Tunnel

The tendering works of the Big İstanbul Tunnel expected to solve the traffic problem of İstanbul and passing from/ to Asia and Europe were completed at the beginning of the year and the construction works have been initiated. The ground exploration works are currently ongoing by a research ship and the preparation of the plan for the route has been accelerated.

To become one of its own kind in the world both in terms of its size and scope, the project will include both a road and railway in a single tube. The tunnel will have a railway on the middle floor and a two-lane road on the top and ground floors. İstanbul Tunnel will be integrated to TEM highway, E-5 highway, Kuzey Marmara highway and 9 metro lines. Aimed to be constructed with Build-Operate-Transfer model in 5 years, the trip from İncirli in the European side to Söğütlüçeşme in the Anatolian side over a 31-km high speed metro line of 14 stations will take 40 minutes. The road trip from Hasdal intersection



on the European side to Çamlık intersection on the Anatolian side will take around 14 minutes. 6,5 million passengers are expected to the tunnel route every day.

Foundations of Çanakkale Bridge are Laid

The foundations of Çanakkale Bridge and Malkara-Çanakkale Highway have been also laid and these two projects are expected to provide great advantages to pass through Marmara Sea. To be constructed on the line from Şekerkaya, Lapseki on the Anatolian side and Söğütçe, Gelibolu on the European side, the bridge will become the first suspended bridge of Çanakkale Strait and the 5th in Marmara Region. Planned to be put into operation in 2023 on the 100th anniversary of the foundation of the Republic of Turkey, Çanakkale 1915 Bridge will become the "bridge with the longest span" in the world when completed. The bridge will render Çanakkale indispensable for Marmara Region on the transport line from Thrace to Aegean and the Mediterranean and will be constructed with an investment of over 10 billion liras.

The bridge will have a length of 3 thousand 860 meters together with its

wing spans and of over 5 kilometers with viaducts. The distance between the two abutments of the bridge, on the other hand, is set as 2 thousand 23 meters by referring to 2023, the 100th anniversary of the foundation of the Turkish Republic. There will be 6 lines on the bridge, including 3 three on each direction.

Uninterrupted Highway from Edirne to Şanlıurfa

Being one of the most important highway projects of Turkey, Ankara Niğde Highway will start from Hacılar Village to the west of Gölbaşı district of Ankara Highway. It will end at Niğde-Gölcük Intersection. The highway will be connected to Kırşehir-Kayseri D260 highway from İçdecik and Gölhisar Neighborhood of City Center of Kırşehir over Kızılırmak River.

Ankara-Niğde Highway Project will ensure uninterrupted transport from Edirne to Şanlıurfa with the construction of a 330-km highway. Tarsus-Niğde section and Ulukışla connection road on Toros Mountains of the project have been opened. The completed section of the highway being Kırkeçit Tunnel and Viaduct group is planned to be operated with the Build-Operate-Transfer model. ■

FREIGHT-PASSENGER TRANSPORTATION STATISTICS OF TURKEY (MILLION)

Year	Vehicle km	Tonne km	Passenger km
2001	52.631	151.421	168.211
2002	51.664	150.912	163.327
2003	52.349	152.163	164.311
2009	72.432	176.455	212.464
2010	80.124	190.365	226.913
2013	99.431	224.048	268.178
2014	102.988	234.492	276.073
2015	113.274	244.329	290.734
2016	119.671	253.139	300.852

Source: General Directorate of Highways
Data covers the transportation on the road network within the responsibility area of General Directorate of Highways.

CRITICAL TURNS TAKEN FOR RAILWAYS

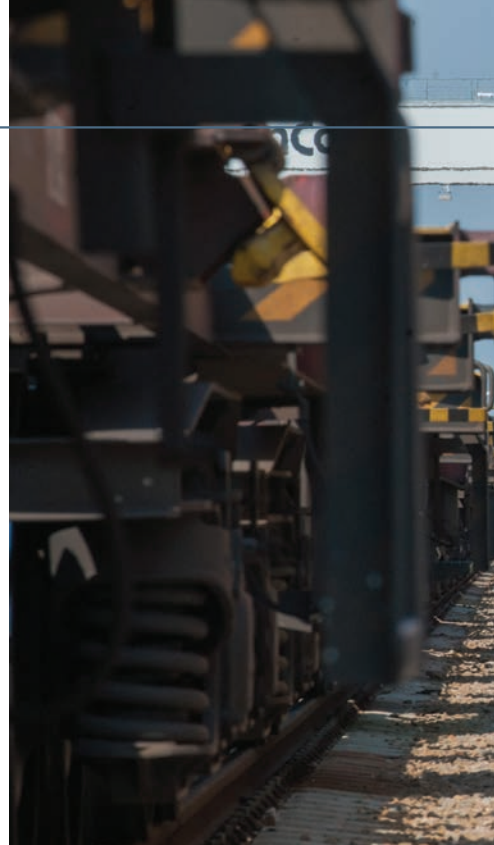
Having focused especially on the high speed train infrastructure in recent years, Turkey has re-focused on the goods transport by railway with new ports with railway connections. With the official liberalization of the railways, the sector is expected to grow.

► After constructing the main railway lines, Turkey was not much willing to construct railway lines to the regions with low population and trade due to the difficult geographical conditions and high investment costs. Nearly half of the high speed train - metropolitan connections have been completed for passenger transport in the recent years. The construction of other main connections is currently ongoing.

Especially with the plans for railway connections to recently constructed and planned ports railways are wanted to be the focus of the goods transport again. In parallel with this development, steps have been taken for the liberalization of railways to ensure growing of trade. Private companies can use national railways from now on.

Turkey is Connected to Iron Silk Road Baku-Tbilisi-Kars Railway project has

been finally completed and has been put into operation last month. Thus, the railway line from China has been connected to Europe via Turkey. Remarking on the line, Mr. Ahmet Arslan, the Minister of Transport and Communications, said that Baku-Tbilisi-Kars Railway project is an important project not only for Turkey but also for the world and further commented as follows: "There were two obstacles before a train from London to have an uninterrupted journey to Beijing. The first was the Bosphorus, i.e. connecting Asia and Europe via railways under the sea and we constructed it. The second was a missing railway connection between Kars and Ahilkelek in Georgia and the construction works for the missing part have been also completed". Noting that the test journey of the railway was successfully made, Mr. Arslan said that: "We have organized trial journeys both in July and September. We have successfully organized an uninterrupted trip from Tbilisi to Kars on September 27. Ahilkelek will be the transit station.





We have just changed trains there. The tests are ongoing and the results are very good. The Silk Road was very crucial for the countries on its route. Just like the Silk Road, this Iron Silk Road will create serious added value to the countries on its route and our region and Kars. It will help with the revival of its economy and ensure delivery of local products to the target markets. Therefore, it is of great importance."

Freight Train Connection between Azerbaijan and Iran is Ready

Azerbaijan Railways CJSC Chairman Mr. Cavid Gurbanov told that the first freight train trips from Astara (Azerbaijan) to Astara (Iran) will start in the late 2017.

Azerbaijan Railways CJSC Chairman Mr. Cavid Gurbanov told that the first freight train trips from Astara (Azerbaijan) to Astara (Iran) will start in the late 2017. Stating that the construction of Astara (Azerbaijan) - Astara (Iran) section of the International Northern - Southern Transport Corridor has been nearly completed,

Mr. Gurbanov made the following remarks: "All works at Azerbaijan territories have been nearly completed. The construction of the railway bridge on Astarachay river, being the most critical section of the railway, has been completed and is now available for trains."

The Northern-Southern Transport

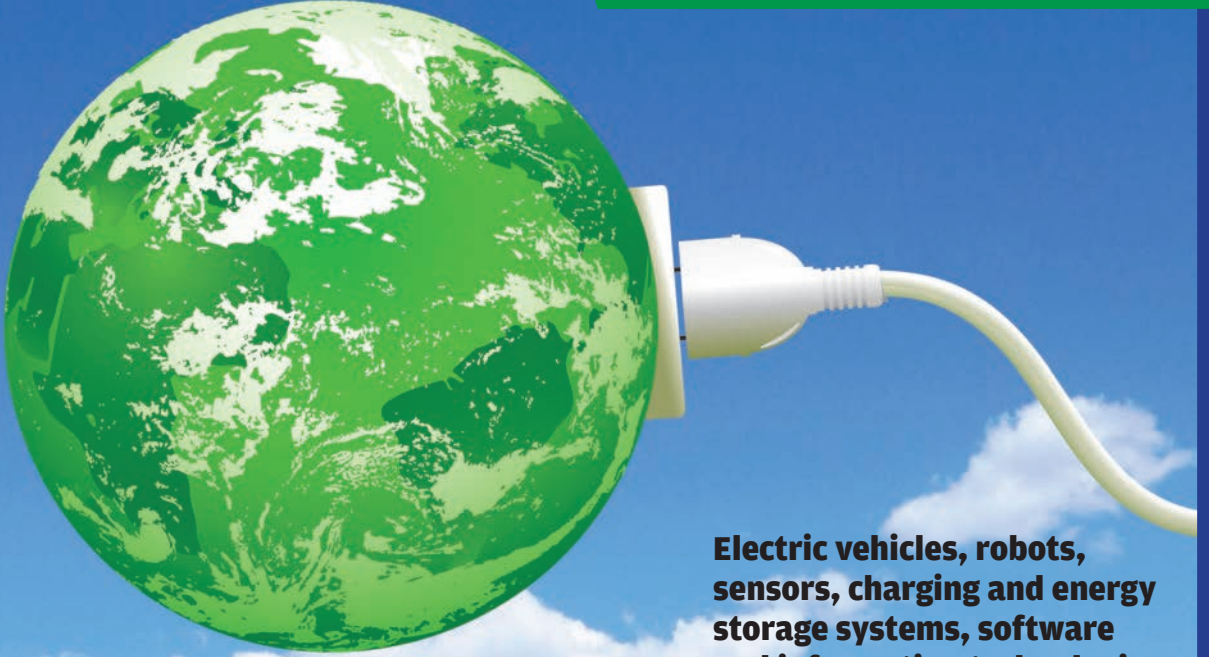


Corridor to bring Northern Europe closer to the South Eastern Asia will connect the railways in Azerbaijan, Iran and Russia together with each other. In the first stage, 5 million tons of cargoes are planned to be transported on the corridor and this is planned to increase over 10 million

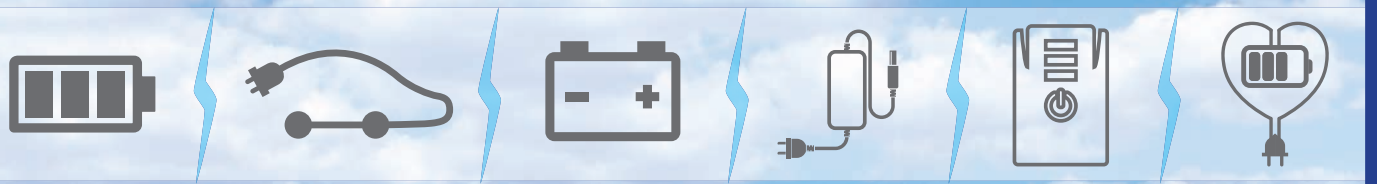
tons in future. Moreover, making statements to Mehr News Agency, Iranian Railways Company General Manager Mr. Sait Muhammedzade said that the first freight train setting off from Azerbaijan will enter Astara in Iran in two months. Regarding "Astara-Astara Railway Line Project" from Iran to Azerbaijan, Mr. Muhammedzade announced that: "The first freight train setting off from Azerbaijan will enter Astara in Iran in 2 months."

Mr. Muhammedzade also said that "When the Northern-Southern and Southern-Western railway projects are completed, high amounts of goods will be transported to the Northern Asian, Commonwealth of Independent States (CIS) and European countries over Iran and this will provide great benefits to Iran in terms of economy." Noting that the Azerbaijan government has made an investment of 60 million dollars in the project, Mr. Muhammedzade said that Astara in Iran has a significant potential for sea and rail transports.

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..... TURKEY'S RAILWAYS STATISTICS

Year	Length of Railways (km)	Number of Passenger (Thousand)	Freight Amount (Tonne) (Thousand)	Train-Kilometer (Thousand)	Passenger-kilometer (Thousand)	Tonne-Kilometer (Thousand)
1977	8.139	112.607	13.938	38.280	5.087.257	7.633.592
1978	8.139	115.665	13.204	37.517	5.600.163	6.648.948
1979	8.132	126.563	12.427	37.411	6.802.359	5.814.018
1980	8.193	113.938	10.489	35.473	6.010.878	5.167.337
1985	8.400	136.354	14.263	45.038	6.488.988	7.958.963
1990	8.429	139.089	13.426	44.190	6.410.064	8.030.575
1995	8.549	104.635	15.271	43.355	5.797.247	8.631.928
2000	8.671	85.343	18.524	45.624	5.832.577	9.895.346
2005	8.697	76.306	19.195	45.395	5.036.000	9.152.000
2010	9.594	84.173	24.355	39.025	5.491.000	11.462.000
2014	10.087	78.404	28.747	43.006	4.393.000	11.992.000
2015	10.131	95.317	25.878	41.873	4.828.000	10.474.000
2016	10.131	89.038	25.886	42.233	4.325.000	11.661.000

Source: General Directorate of Turkish State Railways

Türk-Rail Container Train Reaches Austria in 96 Hours

Türk-Rail Demiryolu Taşımacılık has put into operation a new container line to serve from/to İstanbul and Wien. The first train set off on July 14 and reached Wien on July 18. With the trains from Halkalı Terminal every Friday and from Wien Wiencont terminal every Thursday, the transit takes 96 hours in total.

The new line offers daily connections to not only Austria, Slovakia and Czech Republic terminals but also from Wiencont-Wien to Western Europe terminals and ports

such as Duisburg, Herne, Hamburg, Bremerhaven, Wilhelmshaven, Rotterdam, Zeebrugge, and Antwerp. It has been established only to serve logistics and transport companies.

An Alternative for Asia-Europe Connection

With Marmaray project, a railway connection has been established between Asia and Europe. However, due to the heavy use of the line for passenger transport, freight trains have not been used on the line yet. However, the infrastructure of

the 3rd Bosphorus Bridge opened in 2016 was designed for railway use. Therefore, the trains can use the new bridge to go to Europe without going through İstanbul. With this line, an important section for Europe-China railway connection will be completed.

2023 is the 100th anniversary of the foundation of Republic of Turkey. It is therefore very important to finalize the planned project until 2023. The goal is to make an investment of 23.5 billion dollars to the railways and to increase the total length of airlines to over 130.000 kms by 2023. ■

COUNTDOWN TO BECOME A GLOBAL HUB FOR AIR CARGO

► While the speed dependent supply traffic increases in the world, the only option to satisfy this demand is the 'air transport'. Despite its higher cost as compared to other transport mode, the increasing speed of trade tolerates such costs. Preferring the air transport a lot both for passenger and goods transport, Turkey does its best to reach European standards. The number of passengers who use airport transport increased from 713 thousand in 1960 to 173 million in 2016. While only 13 thousand tons of goods were transported by air, this figure has reached 3 million tons in 2016.

Turkey has ensured provision of air transport services to nearly all domestic destinations but the main goal is to become a global hub. To achieve this goal, the capacity and infrastructure of 3rd İstanbul Airport is of great importance.

Cargo City Starts to Emerge in New Airport

Site allocation agreements have been concluded by and between New İstanbul Airport and 6 companies for the Cargo City and Ground Services Campus. MNG, PTT, Çelebi Air Service, HAVAI, System Logistics and Bilin Logistics will provide services in the Cargo City while MNG, Çelebi Air Service and HAVAŞ will provide services in the Ground Services Campus. Those agreements will be valid throughout the operation time and will worth of around 250 million euros.

Giving a speech at the signature ceremony, İGA Airport Operations

CEO Mr. Hüseyin Keskin made the following remarks: "The strategic location of Turkey, serious investments of Turkish Airlines in cargo and the developing economy of Turkey ensure that Turkey gradually becomes an important center in air cargo transport. Ground services are of great importance for an effective airline operations management. We as İGA have concluded our first agreements for cargo and ground services to place İstanbul being the meeting point of civilizations for years to the center of aviation and to provide an uninterrupted service. We are very happy about this. We have signed site allocation agreements worth of 250 million euros with 6 large companies. We have concluded the duty free agreements last year. We will finalize the agreements for the food court and will tender the advertisement allocation areas in next months. In the current situation, we have rented 50 percent of all rentable



AIR TRANSPORT STATISTICS OF TURKEY

	2002	2005	2010	2015	2016
Number of aircrafts	138	202	332	489	540
Seat capacity	25.114	38.600	57.899	90.259	100.365
Freight (cargo+mail+baggage) carried domestic lines (tonne)	181.198	315.858	554.710	871.327	857.335
Freight (cargo+mail+baggage) carried international lines (tonne)	698.935	933.697	1.466.366	2.201.504	2.219.579
Domestic air traffic (unit)	157.415	264.805	497.862	832.958	886.228
International air traffic (unit)	218.626	286.867	421.549	623.715	566.767
Number of passengers domestic lines	8.700.839	20.502.516	50.575.426	97.041.210	102.499.358
Number of passengers international lines	25.054.613	35.042.957	52.224.966	84.033.321	71.244.179

Source: Directorate General of Civil Aviation and General Directorate of State Airports Authority

areas. Agreements have been signed with nearly one hundred companies. I believe that the trade volume to arise from the investments to be made by those companies to the airport will make significant contributions to the Turkish economy. I also think that they will increase the commercial power of Turkey and will increase the economic development trend with butterfly effect. All companies to serve at New İstanbul Airport conclude those agreements with the awareness that they contribute to the Turkish economy and with the aim to further develop the Turkish aviation sector.

A Cargo City with an Area Equal to 200 Soccer Fields

New İstanbul Airport will have an area of 150 thousand square meters in total for the ground services. The cargo city, on the other hand, will have an area of 1,4 million square meters in total with its cargo flight

park positions. This equals to the size of 200 soccer fields at international standards. The Cargo City will allow the simultaneous operation of 35 wide-bodied cargo aircrafts.

First Phase Cargo Capacity to Reach 2,5 Million Tons

Emphasizing that the cargo capacity of Atatürk Airport was 918 tons in 2016 and is expected to reach 1 million tons by the end on 2017 according to the General Directorate of State Airports Authority, Mr. Hüseyin Keskin has told that: "New İstanbul Airport can improve this capacity. The airport will have a cargo capacity of 2,5 million tons when it is opened. In the current situation, Hong Kong Airport has the highest cargo movements and cargo volume with a volume of slightly over 4.5 million tons. When all phases are completed, New İstanbul Airport will have a capacity of 5,5 million tons." Noting that the negotiations with the global brands of the air cargo

sector upon a question asked during the press meeting, Mr. Keskin told that since the agreement to be concluded with Turkish Airlines is very comprehensive, they have not concluded it yet and will be signed soon.

To re-establish the Silk Road on the air, New İstanbul Airport aims to provide its services with the passenger experience in the forefront. Within this scope, all services both at passenger terminals and the apron will be equipped with the most developed techniques using technology and will make the passengers to feel themselves privileged. While more than half of the construction works have been completed, commercial agreements are continued to be signed for New İstanbul Airport. After the signing of the duty free agreement, the food corner tender was completed in the first half of 2017 and the advertisement allocation site tender will be made in future.

2 New Runways for Sabiha Gökçen

2 new runways will be established at Sabiha Gökçen on the Asian side of İstanbul. To be realized with an investment of TL 950 million, the project is planned to be completed in July 2019. ■



TURKEY TO BECOME A SAFE HARBOUR SOON

The goods handled at Turkish ports were around 190 million tons in 2003 and increased to 430 million tons in 2016. The number of handled containers was around 2.5 million TEUs in 2003 but increased by 251% to 8.8 million TEUs in 2016.

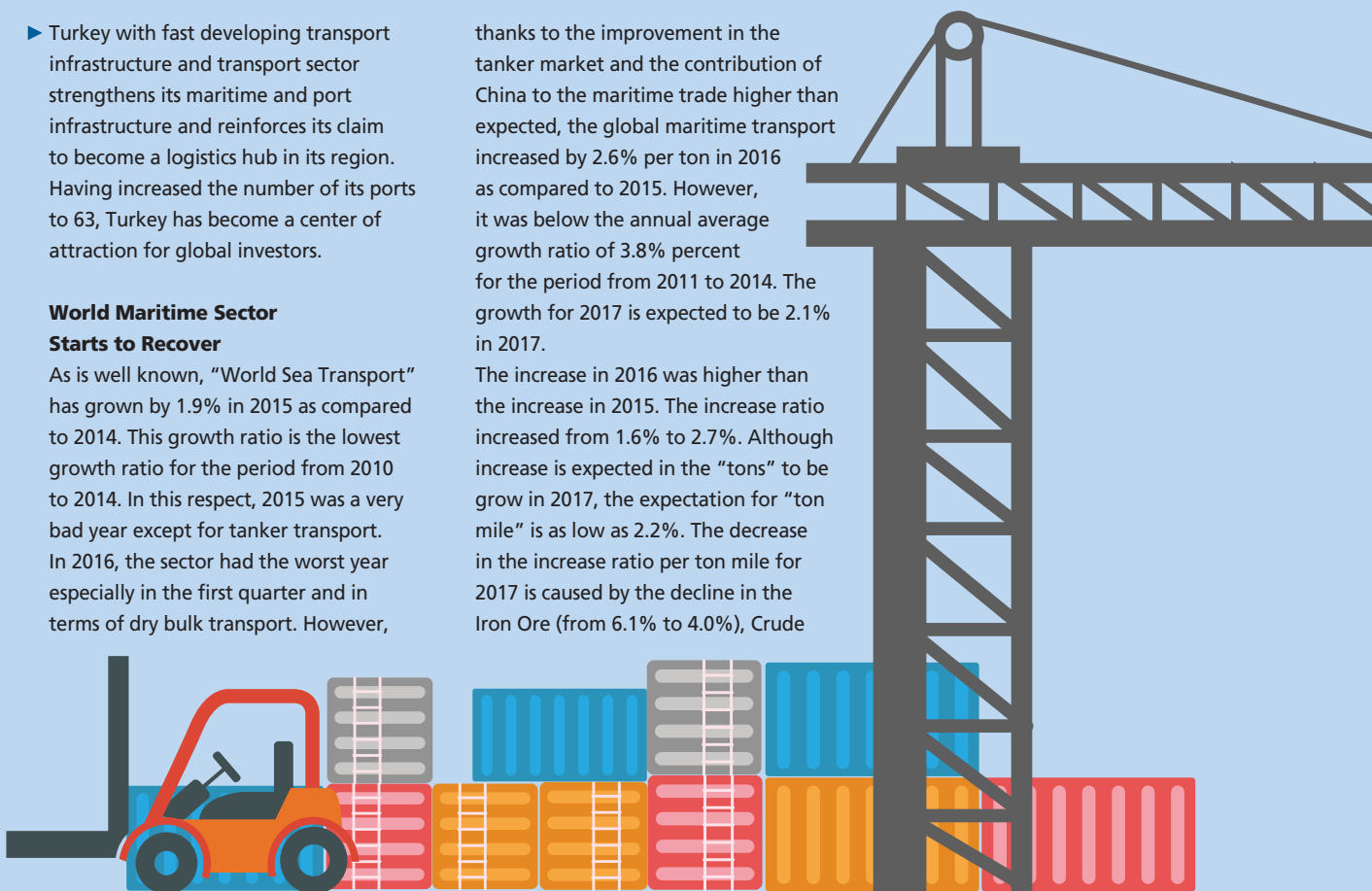
- Turkey with fast developing transport infrastructure and transport sector strengthens its maritime and port infrastructure and reinforces its claim to become a logistics hub in its region. Having increased the number of its ports to 63, Turkey has become a center of attraction for global investors.

World Maritime Sector Starts to Recover

As is well known, "World Sea Transport" has grown by 1.9% in 2015 as compared to 2014. This growth ratio is the lowest growth ratio for the period from 2010 to 2014. In this respect, 2015 was a very bad year except for tanker transport. In 2016, the sector had the worst year especially in the first quarter and in terms of dry bulk transport. However,

thanks to the improvement in the tanker market and the contribution of China to the maritime trade higher than expected, the global maritime transport increased by 2.6% per ton in 2016 as compared to 2015. However, it was below the annual average growth ratio of 3.8% percent for the period from 2011 to 2014. The growth for 2017 is expected to be 2.1% in 2017.

The increase in 2016 was higher than the increase in 2015. The increase ratio increased from 1.6% to 2.7%. Although increase is expected in the "tons" to be grow in 2017, the expectation for "ton mile" is as low as 2.2%. The decrease in the increase ratio per ton mile for 2017 is caused by the decline in the Iron Ore (from 6.1% to 4.0%), Crude



Oil (from 4.2% to 0.3%) and Petroleum Derivatives (from 3.9% to 1.8%). But this is only an estimation.

Remarkable Increase in the Handled Goods Amount

The goods handled at Turkish ports were around 190 million tons in 2003 and increased to 430 million tons in 2016. The number of handled containers was around 2.5 million TEUs in 2003 but increased by 251% to 8.8 million TEUs in 2016. The goods handled as part of coastal trade were around 29 million tons in 2003 and increased by 86% to 53 million tons in 2016. The number of vehicles transported on coastal trade lines with regular line licenses was 6,2 million in 2003 and increased to around 12,8 million with an increase of 5 percent in 2016. While 220

thousand vehicles were transported on the international regular Ro-RO lines in 2003, this figure has increased by 5 percent to 452 thousand vehicles. The number of cruise ships calling at Turkish ports was 887 in 2003 but decreased by 33% to 590 in 2016.

The Trend in Maritime Sector in Figures

A significant increase has been achieved in every field of the maritime sector in the last fourteen years. The number of Turkish ships of 1000 GRT and over was 571 in 2003 but increased to 1.547 at the end of 2016. The Turkish ships of 1000 GRTC and over was ranked as 18th in the world in 2003 with 8,9 million DWT but ranked 15th with a capacity of 29,3 million DWT at the end of 2016. The tonnage increased by around 229% in

the last 14 years. The total amount of goods transported as part of foreign trade activities by sea was 149 million tons including exports of 46 million tons and 73 million tons in 2003 but it reached 310 million including exports of 95 million and imports of 215 million in 2016. The share of maritime sector in total foreign trade activities increased by around 250% in term of monetary value in 2016 as compared to 2003. It was worth of 57 billion dollars in 2003 but increased to 199 billion dollars in 2016.

Key Countries and Sectors in Transports

The top groups of goods handled as part of foreign trade transports in 2016 are: machinery, transportation equipment, components and various parts and containers of 89 million tons; petroleum product group of 66 million tons; solid mineral fuels of 40 million tons; ore and metal wastes of 30 million tons and metal products of 27 million tons. The top countries to which highest amount of foreign trade transports are made are Italy (60.040.621 tons), Russian Federation (42.494.521 tons), Egypt (27.081.468 tons), USA (18.734.077 tons) and Columbia (16.885.714 tons).

Current Investments

Foreign Trade General Manager Mr.Cemalettin Şevli made the following remarks regarding port investments: "Thanks to its geographical location on the transport routes of three countries, Turkey is on the focal point of a transport network extending to Strait of Gilbatrar and the Atlantic Ocean, the Suez Canal and Arabian Peninsula and the Indian Ocean, and to Eurasia and the Far East with the connection of Turkish Straits to Black Sea and Mediterranean. The leading port terminal operators of the world have made important investments in



Marmara Sea, Mersin, Aliğa and Gulf of İzmir. Moreover, the increasing number of world's leading container operators call at ports indicates that Turkey becomes a logistics and transit center in its region.

To become one of the major ports of Europe, Çandarlı Port construction is currently ongoing and is an important regional project together with Alsancak Port. Filyos Port with a final capacity of 25 million tons per year to become the exit gate of Black Sea will decrease the burden of Marmara Ports and Straits and will ensure that the foreign trades from Central Asia and Black Sea to reach the South and the Middle East via our railway network. Tendered with the Build-Operate-Transfer model, Karasu Port welcome the first ships and handling activities have started at the Port. Moreover, the constructions of Antalya Gazipaşa Yacht Port, Datça Yacht Port, Dalaman Yacht Port and Fast Ferry Berth, Haliç Yacht Port and Complex and Tekirdağ Yacht Port tendered with the Build-Operate-Transfer model without using public resources are currently ongoing. The route of İstanbul Canal project, being the project of the century, is about to be finalized and zoning and finance model works are currently ongoing. While the port projects of the public continue, the port investments of the private sector increase at high speed and this is well received. The investments of Yilport Gempport with a capacity of 660 thousand TEUs, DP World Yarımca with

a capacity of 1,3 million TEUs, Apm Terminals Petlim Aliğa with a capacity of 1,5 million TEUs and MSC Asyaport Tekirdağ with a capacity of 2,5 million TEUs can be given as examples for private sector investments. Moreover, Turkey has started to operate ports at many locations in Turkey and the world and the Ministry monitors such operations. Maximum efforts are made to resolve the problems of the port operators.

The quality management systems of nearly all ports in Turkey have been certified by international companies and caused taking national capital to abroad. With the "Green Port Project", the Ministry signed a protocol between the Ministry and the Turkish Standards Institute (TurkStat) and according to the signed protocol, the quality management systems are required to be certified by TurkStat to ensure that the Turkish capital should not be allowed to be taken to abroad. Having filed an application to the Ministry in terms of the Green-Eco Port application terms and criteria, Marport has become entitled to get the first Green Port Certificate as a result of audits made. The Green Port certification process has been also completed for Evyap, Kumport, Borusan Logistics Container Port; Solventaş, Aksa Petkim Liquid Bulk Port; Egeport, Bodrum Cruise Port and Ford Otosan Vehicle Port. The green port sector audits of such ports will be made annually. "

Ship Exports Have Increased

The ship and yacht exports increase at a great speed. Having increased its exports in last May by 230 percent,

the ship constructors have continued their success also in June and increased their exports by 178 percent. The share of the sector in total exports has exceeded 1 percent in June for the first time in its history. The increase trend has continued in July and its exports increased by 300 percent. The total exports for 7 months have increased by 88.6 percent to 734 million dollars. Not exceeding the dollar threshold of 1 billion dollars last year, the sector is expected to exceed it this year.

A Port Gate Opening from Sakarya to World

IC Karasu Port, the port of İstanbul and Marmara Region in Black Sea, has been put into operation. Being close to Marmara Region - one of the admiral ships of Turkish economy-, IC Karasu Port will make a great contribution to the trade activities between Turkey and the countries on the Black Sea coast.

Noting that IC Karasu Port is a leading port



opening from Black Sea to the world with the large hinterland it serves, its capacity and the multimodal transport advantages, IC İtaş Infrastructure Group Chairman Murat Soğancıoğlu told that: "The increasing trade and production in Turkey in turn has increased the new port needs. İstanbul and Marmara Region now have a port in Black Sea". Stating that the first phase includes an annual capacity of 1.8 million tons of general cargo / bulk goods and of 65 thousand TEUs of containers, Mr. Soğancıoğlu remarked that Karasu Port was constructed with an investment of 76 million dollars.

Interest of Australian IFM Investors in Mersin Port

Akfen has sold its share of 40

percent in Mersin Port to the Australian IFM Investors. Holding 50 percent of Mersin Port before sale, Akfen Holding will earn an income of 869 million dollars from the sale of shares of 40 percent. The share of Akfen in Mersin Port will decrease under 10 percent. After the sale, the total value of Mersin Port is set as 172 million and 500 thousand dollars. The other partner of Akfen Holding in Mersin Port is PSA Group which holds a share of 50 percent.

Having transferred its shares of 33 percent in Akfen Yenilenebilir Enerji to EBRD and IFC and its shares of 8.1 percent in TAV Airports Holding to Aéroports de Paris based in France in 2017, Akfen Holding has succeeded in attracting another major foreign investment to Turkey and signed a share transfer agreement with the Australian infrastructure fund IFM Investments for the transfer of 40 percent of its 50 percent share in Mersin International Port.

"We Made a Total Investment of 1 Billion and 208,5 Million Dollars in Mersin Port in 10 Years"

Akfen Holding Board Chairman Mr. Hamdi Akin underlined

the Mersin International Port has become one of the most important ports of the region

after the investment of 1.2 billion dollars and made the following remarks: "Together

with our partner PSA International based in Singapore, one of the largest port operators in the world, we have started our investments in Mersin International Port after the privatization process. Since 2007 when we have obtained the operation license from the Privatization Administration for 36 years against 755 million dollars, we have turned Mersin Port into a Mediterranean HUB and increased its capacity by 8 times higher by spending 1 billion and 208,5 million dollars including the additional investment of 453,5 million dollars. Today the number of handled goods reached 1.600.000 TEUs, meaning that it has increased by 4 times in 10 years. We still have available capacity. We have increased the capacity of the port to host international mega-transport ships. The conventional cargo handling has been doubled and increased from 4.1 million tons to 8 million tons. We have also started to provide Ro-Ro services and the total handling has reached 74 thousand. We have developed Mersin International Port into one of the most important international ports of not only Turkey but also the region.

International Investors Believe in Turkey

Acting as the financial consultant of Akfen Holding during the sale process, ÜNLÜ & Co Corporate Finance Executive Director Mr. İbrahim Romano said that: "This transaction is an important indicator that confirm the belief of international investors in the long term growth potential of Turkey. We are very proud to intermediate this important partnership with our investment banking services." ■



► Logistics require the coordination of transport, storage, customs brokerage, insurance, packaging and added value services, orders and stock management, inspection/expertise activities. According to NACE Rev.2 used by the Turkish Statistical Institution, the Logistics Sector is defined under group H "Transporting and Storage". Group "H" covers the sub-groups of 49 (land transport, rail transport, transport via pipelines), 50 (water transport), 51 (air transport), 52 (warehousing and support activities for transportation) and 53 (postal and courier activities). Passenger transport activities are also covered under these sub-groups. Thanks to her population of around 80 million, a surface area of 783.542 kilometers, being located at the junction of three continents and being surrounded by sea from three sides, Turkey is a candidate country for becoming a logistics hub in her region. The Gross Domestic Product (GDP) of Turkey is 2 trillion and 590 billion and 517 million TLs as of 2016 and aims for becoming one of the top ten largest

economies of the world in 2023. The Turkish Logistics Sector is estimated to worth of around TL 311 billion (around 12% of the Gross Domestic Product) (PwC). Half of this figure is realized by the logistics sector and the other half by the production/trade companies. Turkey maintains her potential to become the logistics hub of her region thanks to her geographical location, economic development, EU Customs Union membership, quality workforce, international relations, mega transportation projects and infrastructure works. Forming the goods based logistics sector of Turkey, 3PL (third party logistics) companies were established in 2000 and have increased their growth speed throughout the time. Outsourcing activities have shifted from transportation and customs transactions to the logistics since 2000. The service diversity and quality in the sector have increased and investments have been made in combined transport (multimodal, intermodal and combine) solutions and modern

warehouse investments. Turkish logistics companies (3PL) can provide various services over large geographies and continue with their partnership and cooperation with foreign logistics companies.

Transport Corridors

Turkey is a part of TEN-T, TRACECA, VIKING, TINA, SILK ROAD and TEM corridors. These corridors are suitable for large transports between continents and countries. Therefore, the World currently faces a corridors war. The countries located on the corridors with the highest transport amount will be the countries with the highest advantage in the logistics sector. That is because Regional Consolidation/Deconsolidation Centers will be present at the countries over such corridors. Among the corridors from Far East countries including especially China to the European Continent, Silk Road Medium Corridor passes through Turkey. The medium corridor first passes through the Caspian Sea, then Turkey and then

Europe. The northern corridor passes through Russia while the southern corridor uses the Suez Canal. The North Pole corridor has emerged as a new corridor with the meltdown of the icebergs. Attention should be paid to this corridor because of its significant importance in terms of distance. Turkey has to effectively connect TEN-T and Silk Road Central Corridor and operate in the most efficient way. Those corridors are west-east corridors and the connection of north-south corridors such as Viking with the west-east corridors is of great importance.

World Bank Logistics Performance Index

Taking as basis the World Bank Logistics Performance Index (LPI), the logistics sector in Turkey has a stable trend in terms of development in the recent years. She was listed as 34th with a score of 3,15 in 2017, 39th with a score of 3,22 in 2010, 27th with a

score of 3,51 in 2012 and 30th with a score of 3,50 in 2014.

Turkey is the most unsuccessful in the "Ability to track and trace shipments" criterion by being listed as 43th with a score of 3,39. This shows how bad the use of information technologies in the logistics sector. That is because mainly land logistics activities are carried out in Turkey and rail and water transport are not sufficiently used.

Logistics and Trade

Logistics and trade trigger each other. The trade is comprised of external and internal trade components. Therefore, the logistics goals should be set in accordance with the external and internal trade goals and should be in harmony with each other. An important part of foreign trade activities in Turkey is carried out via water. The share of railways is very low. The share of land transport in exports is higher than its share in



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imports. This shows that the imports are mostly carried out via waterway as compared to exports. Therefore, the integration of water - rail transport



for imports should be considered as the most important factor for the increase of railway freight transport. For passenger transport, air-speed train transport integration comes to the forefront. On the other than, when the China-Europe Iron Silk Road corridor is opened, both the goods and passenger transport values will increase. Turkey has reached the saturation point in terms of the total length of roads. The next step is to increase the length of double roads and highways. For domestic transportations, the share of goods transport by road should be decreased from 90% to 75%, just like in the European Union member states. This can be only achieved with the smart rail transport investments.

The rail transport is more suitable for the heavy goods with low value such as mine, forestry and agricultural products.

Looking at the foreign trade figures in EU (28) member countries according to transport modes, the share of railways is 1,2% in terms of billion euros and 3,7% in terms of million tons. Four transport modes are compared in the following table. As can be seen from the table, the rail transport has the lowest share in terms of "goods value/goods amount" criterion. This ratio is of importance in terms of determination of the target goods. In order to understand the dimensions of the logistics operations across Turkey in details, the foreign trade

date should be analyzed and not only the import and export data but also the transit goods going through Turkey should be taken into consideration. In terms of logistics, both the location of the export regions and the transport mode are significantly important. The exports of Turkey are mostly carried via waterway. The following table shows the export values (in \$) according to the transport modes over the years. One can see from the table how low (0.5%) the use of railways as alternative as of 2016. Serious works should be carried out regarding the goal of balance between modes and the railway transport, being one of the main components of the combined transport. As of 2016, the mostly used



modes are as follows: 1st - water (55.0%), 2nd - land (31,4%) and 3rd - air (12.5%).

The following table, on the other hand, shows the imports of Turkey (in \$). According to the table, the water is the most preferred mode in imports (60,6%) as of 2016, just like the exports. The second is land (17.3%), the third is air (11.6%) and the fourth is other modes (9,8%). Like the exports, the railway is the last with a very low value (0.7%). Increasing the speed in rail transport is an important metric for the competition between modes. For this purpose, double line and high speed train investments should be made. Thanks to being surrounded by sea from three sides and her straits,

Turkey has a major competitive edge in water transport. The coastline of Turkey is 8,333 kilometers in length. Port projects are ongoing in Çandarlı, Filyos and Mersin. The integration of these ports with railways should be prioritized. Moreover, other important developments are Sakarya Karasu Port and Channel İstanbul and İstanbul North Port planned to be established on the Black Sea side of the channel. Apart from the transports on the west-east axis, the transports on the north-south axis should be also examined. The air transport develops at a great speed in Turkey. The number of aircrafts, seat capacity and the number of goods and passengers transport continuously increase. Turkish Airlines fly to a high number of destinations in the world. İstanbul IGA International Airport under construction will become the airport with the highest passenger capacity and will become a competitor to Frankfurt and Dubai airports. The integration of airports with high passenger capacities with high speed train lines is of great importance. Moreover, the airport will also become the air cargo hub of the region.

Programme for Transferring Transport to Logistics in Turkey

The important developments in the sector depend on the completion of the ongoing transport investments and the realization of the "Programme and Action Plan for Transferring Transport to Logistics" under the 10th Development Plan. The goals of the programme are as follows:

- Ensuring logistics costs to compete with the rest of the world.
- Decreasing the logistics costs burden in the total costs of industry products.
- Increasing the contribution of the logistics in the satisfaction of the exports, growth and sustainable development goals of Turkey
- Strengthening the international



position of Turkey in logistics

- Decreasing the time of delivery of products to customers
- Becoming one of the top 15 countries in the Logistics Performance Index.

The transport investments and projects of the government such as new sea and air ports, İstanbul-İzmir and Northern Marmara highway, double highways, Channel İstanbul and High Speed Train are currently ongoing. The completion of those investments and projects will make positive contributions to the logistics sector. Such investments should be made based on the scientific and economic principles not subject to any political pressure and an integrated plan.

Logistics Centers

One of the important agenda items of the sector is Logistics Villages/ Centers. Turkey has initiated logistics center/village investments with the public, private and public-private sector initiatives. The responsibilities regarding establishment and operation of logistics centers/villages are stated in the Decree Laws regarding the establishment of the Ministry of Transport, Communications and Maritime Affairs, Ministry of Economy, Ministry of Science, Industry and Technology, Ministry of Customs and Trade. The Ministry of Transport, Communications and Maritime Affairs is responsible for Turkish State Railways; the Ministry of Science, Industry and Technology is responsible for Logistics Specialized Organized Industrial Zones and the Ministry of Economy is responsible for the Logistics



Free Zones. Currently there is no cooperation until this structure. This should be clarified with the National Logistics Master Plan and a Logistics Law. The Turkish State Railways are shown in the following picture: No cooperation has been achieved in the Logistics Village/Center in Turkey. The Turkish State Railways continue the works for establishing logistics center in 21 provinces. These centers will become idle if they are not established according to a realistic request analysis. Although many trials have been made for Logistics Specialized Organized Industry Zones (OIZ), no single Logistics Specialized OIZ has been established yet. The permission to establish the Logistics

Specialized OIZ is given by the Ministry of Science, Industry and Technology but the expert is the Ministry of Transport, Maritime Affairs and Communications. No Logistics Free Zone under the authorization of the Ministry of Economy and Customs Logistics Centers under the authorization of the Ministry of Customs and Trade have not been established. The only logistics center established by the private sector is Ankara Logistics Hub which has a customs administration but not a railway connection. The first logistics terminal established in an OIZ is Manisa OIZ terminal. The construction works for Samsun Logistics Center, the first center established under the

partnership of the public and private sector, are currently ongoing. As is understood, the works for establishing different types of logistics centers at different locations are currently ongoing. It is a must that a regulation should be prepared for the logistics centers. Construction of railway connections for such centers will positively affect the logistics sector.

Conclusion and Recommendations

The growth of the logistics sector depends entirely on the growth of the industry and trade sectors. The transport and storage sector - in other words, the logistics sector - has tried to only survive in the recent years. Only attempts to carry out activities



on new foreign trade routes have increased and institutionalization works have been continued. However, the main problems are the problems in the Middle East, the stagnation in the foreign trade volume, cost increases caused by effectiveness and inefficiency and low profits. The international and national integrated combined transport infrastructure has not been established yet. The main problems behind the inefficiency is illegal economy, insufficient infrastructure and small sized and non-corporate companies. There is unfair competition regarding working without a certificate of authorization, non-standard vehicle, fuel supply etc.

Despite the increase in the audits, the expected level of effectiveness could not be achieved yet.

The main problems of the logistics sector are as follows:

- The land transport is most dominant transport mode in Turkey (90%) and is mostly used for individual transports. Besides, the training level is low, idle capacity is high and the existing fleet is old. The land transport have a high number of breakdowns and is comprised of a large number of companies. No scale economy can be achieved. The competition focuses on fees rather than quality.
- The free market economy rules are not implemented at many locations.
- Port and railway infrastructures are not sufficient and the combined transport infrastructure has not been established yet. No scale economy can be achieved. The size of ports is not sufficient.
- No world class logistics villages have been established.
- There are problems in the training, research, standardization and certification. Logistics training and profession standards should be established. Logistics service system standards should be established and the companies which do not provide services at the expected standards should not be allowed to work.
- Foreign trade and logistics should be planned together.
- The national coordination has not been established for the logistics yet.
- The companies in the sector do not have a professional management.
- The sector has not reached the desired corporate level yet.
- There are unfair competition conditions caused by illegal economy.
- Despite the positive developments, the customs practices still increase the logistics costs (specialized customers, single gate etc.). Customs services should be provided without stopping



the movements of the goods.

- The international conventions (ATP etc.) have not been fully complied with. The main principles regarding the development of the logistics sector are Increasing the Fullness of Vehicles, Decreasing Transport Times, Decreasing Costs, Increasing Goods, Vehicle and Employee Security and Environmental Sensitivity.

The geographical advantage is not solely sufficient for the country logistics and the physical and corporate infrastructures are of great importance just like the geography. Therefore, Turkey needs a Logistics Master Plan based on a well-structured Logistics Structure. The Logistics Master Plan, on the other hand, requires preparation of an industry and trade inventory and projections, determination of the goods outflows and then, identification of infrastructure and superstructure needs. This is the only way to determine the location, functions and sizes of the logistics region. It should be kept in mind that logistics have a more extensive perspective as compared to transport. If a logistics road map is not made, Turkey might get a lower rank in LPI in future.

Many separate master plan and logistics center feasibility works are performed in Turkey in the logistics and transport fields and most of them cannot be transferred into investment. Especially the Turkish Logistics and Transport Master Plans should be completed in integration with each other and only then regional and provincial plans should be made. ■





INTERMODAL TRANSPORT, MULTIMODAL TRANSPORT, COMBINED TRANSPORT

► I am sure that Turkish is one of the richest languages in terms of words in the world. The words borrowed from Arabic, Persian, French and English languages are rephrased in Turkish with the works of Turkish Linguistic Society and we can now use both the old and new words. The use of both words during the transition period makes the language richer. In time, one of them is selected by the public and it becomes a common word. The ones who can remember the times when we first used the word "computer". We first read it as "kompüter" and then we started to use "bilgisayar" and now it is the common use. Likewise, "logistics" has become the common use in Turkish as "lojistik".

We will use it without any problem until we find a better word for it. The words in the dictionary are only suggestions and are included in the dictionary for revision when necessary. Their contents will be agreed upon and their use will be common. I would like to explain the differences between 3 words that we use wrong or think they are the same or that are confused with each other. Intermodal, Multimodal and Combine Transport are known as "kombine taşımacılık" (combined transport) in Turkish. According to the definitions by the United Nations (UN) and European Conference of Minister of Transportation (ECMT), all these words have different contents even though they are used to mean the same

thing in Turkey. Therefore, I would like to first define them.

Intermodal transport means the transport of the products in a single shipment and in the same unit with more than once transport methods without touching the products. This means container transport or the transport of the trailers without trucks by road, rail or sea without opening them. The goal is to open the closed unit at the destination. The transport of empty containers or trailers is called intermodal.

Multimodal transport, on the other hand, means the transport of the goods with minimum two different transport methods. The United Nations International Multimodal

Transport convention has later defined the multimodal transport as the transport of the goods loaded with a transport system in one country to another country with a different transport method. With this definition, intermodal transport has become a special practice of multimodal transport. "Combined Taşımacılık" or "Kombine taşımacılık" in the daily common use (combined transport) was first understood intermodal transport. But then, combined transport is defined by ECE with the recommendation no. 19 as the use of transport method using energy together with another method not using energy. This definition covers the trailers loaded to the Ro-Ro ships with their trucks and automobiles or the trailers loaded to the trains with their trucks.

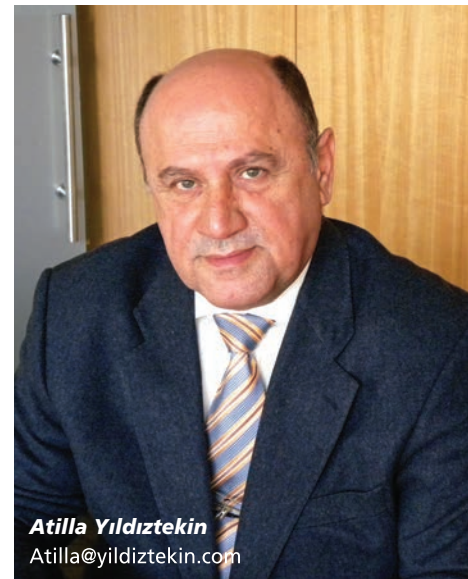
The European Union defines combined transport - its shipment policy - as "intermodal transport of the goods mostly by train or via water and minimum by road between the starting and end points".

When we look at the use of all transports in Turkey, we see that they have not sufficiently developed. Despite all innovations and improvements throughout time, the road transport has not lost its importance in Turkey. The road transport is the most advantageous transport today for a distance of 300 kms. When the distance is over 300 kms, sea and railway shipments become more advantageous. In a country like Turkey with a large surface area and surrounded by sea from three sides, a balanced income distribution and an economy with production and consumption extended over the entire country, it is expected in theory that the ton-km ratio for transport modes should be 50% for road transport, 25% for sea transport and 25% for rail transport. However, the current ton-km ratios for transport modes in Turkey

are 90% for road transport, 2% for sea transport and 8% for rail transport. We use the most inefficient and expensive transport mode; i.e. the road transport. We use high amounts of fuel per ton-km. The exhaust emissions give the highest harm to the air and the environment. Although it is better now with double highways, the insufficient and poor quality road network causes traffic accidents. Due to the low number of vehicle fleets, the road transport vehicle can sometimes work inefficiently and as unscheduled. As it decreases the traffic speed, the system is unsafe for loss of goods, the supply part waste is high and return goods are not balanced, the share of road transport should be decreased and the course of shipments should be turned to the sea and rail transports. This will ensure that the transport modes other than road transport can be used more and can be economically operated on a larger scale. This can be achieved with the removal of obstacles regarding ship operation and port service before sea transport in inland waterways, privatization of the railway operations, improvement of services and infrastructure, use of high speed train systems as soon as possible and rendering stations suitable for handling goods, completion of the intermodal goods transfer centers of the Turkish State Railways, promotion of Ro-Ro transport and establishment of logistics villages.

Today this is called as "intermodal transport". "Intermodal transport" being the most common and modern shipment method; "multimodal transport" and "combined transport" being different versions of intermodal transport is the transport of the goods with different transport methods without slowing down their transport speed and changing its scale. In this system, the goods loaded from a point in containers or trailers are transported

and delivered by sea in Ro-Ros and by rail and road in Ro-Las without opening the containers or the gates of trailers. This requires real time online control on the shipped goods. This transport method also requires the simplification of the documents, the customs operations and information flow and their standardization for all countries. I recommend that the transport companies should establish an intermodal transport department and research about this new transport mode, recommend it to their customers and cooperate with the institutions that use it. In order not to repeat the mistakes we have made and not to experience the problems we have had in road shipments, we should support the companies that will invest in intermodal services and will create the necessary infrastructure for such services. I wish that the harsh competition experienced previously in the road transport sector should not be witnessed in the intermodal transports and the added value to be created with the cooperation of sea, air and road transports should become the first milestones in the growth and development of all sectors. ■



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WHY IS ONE BELT ONE ROAD PROJECT PLANNED AND WHAT WILL IT CHANGE?

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► As a precaution to the “New Globalization Model” triggered by Industry 4.0, China has announced the One Belt One Road (OBOR) project to establish a road and sea silk road to cover over 60 countries that are located on the Asia-Europe road and sea trade line and constitute around 30% of the global economy. With OBOR strategy, China aims for establishing a transport infrastructure, trade and investment connection for effective access to the European market. In other words, China recreates the transport routes. As part of this project, infrastructure investments are made in the countries who want to be part of the project, commercial goods flows are facilitated with bilateral agreements and the commercial activities between the participating countries are reinforced. According to the estimations in the

AIIB February Report, the Asian countries will need an investment of 22.6 to 26.2 trillion US dollars from 2016 to 2030 for OBOR. This means an annual infrastructure investment of around 1.5 - 1.7 trillion dollars. The physical infrastructure investments can be divided into four: (1) Transport-road, railways, ports and airports, (2) Power facilities (power) production, transmission and distribution, (3) Telecommunications and (4) Water supply and sanitation. Power supply and transport take the biggest shares - respectively 52% and 35% - from the investments.

However, there is something that needs special attention at this point. The OBOR project is not a support project aiming to reinforce the infrastructures of the member countries or a foreign direct investment

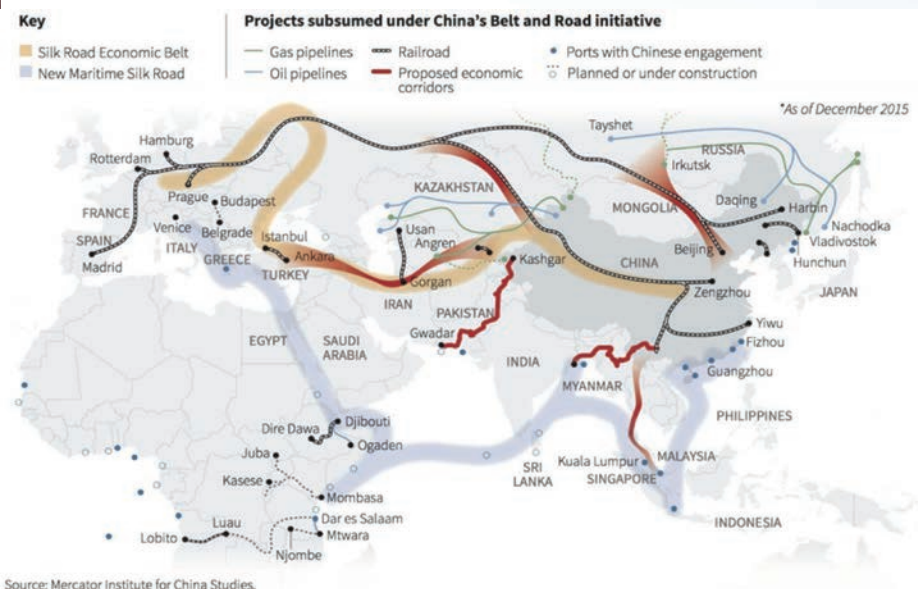
(FDI) of China. China offers project finance loans for such investments via the Asian Infrastructure Investment Bank (AIIB) and works with large public institutions for construction and its giant production capacity for the supply regarding the projects. Therefore, China provides direct economic benefit from OBOR investments in other countries. The road section of this initiative is called "Silk Road Economic Belt" while the sea section is the "Silk Sea Road". Considering the investments and projections made up until now, the investments mostly focus on the

the Baktbilisi-Kars railway project expected to be completed in 2017, Turkey will be added to the existing railway routes and competitions will arise between the railway lines. On the other hand, China also wants to become the biggest maritime power in the world. The bottleneck of China in this respect is its ports. Therefore, special focus is on the ports within the scope of OBOR project. Moreover, COSCO-China Shipping consortium is expected to become the largest global terminal operator in near future by overcoming its competitors. Especially with new port projects in Pakistan, Sri

Pire and Kumport port investments are made in Mediterranean - at the end of the Sea Silk Road. Finally, COSCO, a subsidiary of China, purchased 51% of Noatum Port in Spain in June 2017 in consideration of 228 million dollars and has increased its power in the Mediterranean. Besides, an off-shore terminal investment of 1 billion dollars planned in Venice/Italy is also planned. With these investments, China will change the current balances on the Far East - Europe route being the most important sea trade route of the world and will become the dominant power. In addition to the Far East - Europe main sea trade route, Turkey is also a part of Black Sea - Mediterranean sea trade route. The total capacity of Turkish ports operated by Global Terminal Operations exceed 15 million TEUs including the ongoing projects. Turkish ports have already been integrated into international trade. With the purchase of Kumport, China has already included Turkey in OBOR route. Taking into consideration other ports, the current and planned capacities will be sufficient in the medium term. As can be seen, what Turkey can do for the Road is limited. However, there are many things to be done for the Belt. Within the completion of Baku-Tbilisi-Kars railway project, an important alternative will be created for the current China-Europe railway lines passing through the north of the Caspian Sea. This line should be supported with the existing logistics village projects. This will ensure further reinforcement of the ports and our strategic location. ■

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Belt. Especially important agreements have been concluded with Kazakhstan. Only the agreement announced in June 2017 includes an investment of 8 trillion dollars. The main purpose of the Belt agreements is to reach the European market with effective railways within 12 to 15 days. Concrete railway projects are realized. As of 2016, the trade volume of over 500 thousand tons will increase fast and even the railway transports between China and Europe are expected to reach 7.5 million TEUs by 2022. With

Lanka, Myanmar, Kenya and Malaysia, important alternatives are developed for Singapore. In other words, China designs its own route.

Kra Isthmus Canal currently planned to be constructed in Vietnam is expected to connect Gulf of Thailand and Andaman Sea and offer a distance advantage of 1200 km². With this Canal, it is aimed to bypass Straits of Malacca and Singapore. Moreover, feasibility studies for new ports and sea transport infrastructures are currently ongoing in Indonesia and Georgia.

EXPORT TRANSPORTS OF TURKISH VEHICLES

COUNTRY	2015	2016	CHANGE	JAN.-SEP. 2016	JAN.-SEP. 2017	CHANGE
AFGHANISTAN	2.020	2.531	25%	1.613	2.150	33%
ALBANIA	3.256	3.252	0%	2.393	2.508	5%
AUSTRIA	7.417	7.514	1%	5.642	5.531	-2%
AZERBAIJAN	35.207	26.553	-25%	19.017	22.915	20%
BELARUS	2.207	9.267	320%	5.805	6.213	7%
BELGIUM	7.216	7.963	10%	5.851	6.084	4%
BOSNIA HERZEGOVINA	3.216	3.279	2%	2.450	2.252	-8%
BULGARIA	13.145	15.169	15%	10.944	11.141	2%
CROATIA	1.416	1.671	18%	1.211	1.217	0%
CZECH REPUBLIC	4.426	5.319	20%	3.918	3.955	1%
DENMARK	2.415	2.951	22%	2.127	1.924	-10%
FINLAND	683	1.071	57%	791	909	15%
FRANCE	29.652	31.142	5%	22.810	22.426	-2%
GEORGIA	36.475	43.338	19%	32.042	29.386	-8%
GERMANY	89.970	94.404	5%	70.100	71.395	2%
GREECE	15.965	17.640	10%	13.002	13.527	4%
HOLLAND	12.845	13.100	2%	9.574	10.104	6%
HUNGARY	5.085	6.792	34%	4.707	5.670	20%
IRAN	38.669	48.385	25%	31.049	35.561	15%
IRAQ	473.997	436.364	-8%	303.408	354.855	17%
ITALY	43.222	43.120	0%	32.340	33.749	4%
JORDAN	65	428	558%	281	427	52%
KAZAKHSTAN	5.514	4.701	-15%	3.318	3.935	19%
KOSOVO	989	2.536	156%	1.787	2.153	20%
LEBANON	2.869	4.282	49%	2.873	3.926	37%
LUXEMBURG	288	303	5%	248	165	-33%
MACEDONIA	4.187	3.987	-5%	2.870	2.339	-19%
NAHCIVAN	33.920	57.567	70%	43.128	27.787	-36%
POLAND	11.131	13.792	24%	10.115	9.644	-5%
PORTUGAL	469	601	28%	436	586	34%
ROMANIA	23.229	29.307	26%	20.866	23.766	14%
RUSSIA	11.620	300	-97%	148	3.384	2186%
SAUDI ARABIA	4.433	2.576	-42%	2.075	1.616	-22%
SERBIA	4.353	5.386	24%	3.773	4.379	16%
SLOVAKIA	2.128	2.173	2%	1.660	1.589	-4%
SLOVENIA	1.515	1.896	25%	1.308	2.620	100%
SPAIN	14.106	15.393	9%	11.298	13.824	22%
SWEDEN	5.285	5.538	5%	3.992	4.433	11%
SWITZERLAND	3.636	3.991	10%	2.890	3.120	8%
SYRIA	168.287	154.330	-8%	103.226	107.655	4%
TAJIKISTAN	2.290	2.355	3%	1.418	1.755	24%
TRNC	4.136	4.516	9%	3.223	4.357	35%
TUNIS	288	230	-20%	172	75	-56%
TURKMENISTAN	32.844	28.052	-15%	19.235	19.809	3%
UK	17.608	20.456	16%	14.832	15.215	3%
UKRAINE	2.569	5.039	96%	3.120	3.601	15%
UZBEKISTAN	6.907	9.048	31%	5.942	8.325	40%

Source: Republic of Turkey Ministry of Transport, Maritime and Communications

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