

Dear Participants,

SLIDE 1 (GİRİŞ SLAYTI); I am the General Secretary of UTIKAD which is the international freight forwarding and logistics service providers association of Turkey. UTIKAD is the official representative of FIATA and CLECAT in Turkey.

I will try to summarize the logistics capabilities, developments in the logistics sector in Turkey and transport corridors connected with Turkey.

SLIDE 2 (TURKEY); As all you know very well, Turkey is located at a focal geo-strategic location that all around three sides of the country surrounded with seas. Turkey's total coastline extended to 8,333 kilometers and one fifth of this coastline is encircled by the Black Sea. Also, the country's land boundary is 2,750 kilometers..

SLIDE 3 (FOREIGN TRADE 2011); In 2011, Turkey's total export volume is approximately USD 135 Billion. Import volume is approximately USD 240 Billion According this data the total foreign trade reached approximately USD 375 Billion.

SLIDE 4 (FOREIGN TRADE IN 2023); Turkey targets to reach USD 500 Billion export volume and 1,2 trillion USD of foreign trade volume as of year 2023 which is the 100th anniversary of the foundation of the Turkish Republic. Also Turkey targets to take place among the top 10 economies in the world by the year 2023. Today, Turkey is the 16th largest economy in the world.

SLIDE 5 (TURKEY'S EXPORTS BY TRACECA COUNTRIES); Here are the data during 2011 that illustrates exports by Turkey to the TRACECA Countries

SLIDE 6 (TURKEY'S IMPORTS BY TRACECA COUNTRIES); In addition to that, here are the imports by Turkey to the TRACECA Countries.

SLIDE 7 (GROWING SECTORS) The main growing sectors are transport and logistics, telecommunications, environment, iron & steel, automotive, textiles, defense, tourism, energy, and IT.

SLIDE 8 (FOREIGN TRADE - TRANSPORT MODES 2011); The portion of the transport modes according to Turkey's foreign trade amounts; sea transport carry 55% of Turkish foreign trade on value basis, road transport 25,3%, air transport 8% ,rail transport 1,2% and the others %10,5.

SLIDE 9 (DEVELOPMENTS IN TURK LOGISTICS SECTOR); There some important developments in Turkish Logistics Sector.

Turkey & Georgia-Joint Management of Customs Checkpoints: Georgian and Turkish sides signed an agreement on joint management of customs checkpoints (Sarpi, Vale, Kartsakhi checkpoints) on the border of the two countries. Practical side of this agreement implies development of economic ties and the transport corridor. To say it very simply, the agreement decreases the procedures at customs checkpoints by 40%.

Entry Summary Declaration: ENS is the statement of goods and transportation vehicle submitted electronically before arrival to entry customs office with the purpose of making a risk analysis of the cargo entering into Customs Territory of Turkey in terms of safety and security. New ENS system forced into since 1 January 2012.

Kars Logistics Hub: Kars logistics hub that located at the crossroad of the Iron Silk Route will meet the logistics needs of the region. Moreover, the railway project and the Kars logistics hub project when completed is expected to lead a growth in freight volumes.

Last of all, with the integration of the near ports that are Trabzon and Samsun ports, Turkey will increase its freight volumes to Caucasus and even more far destinations.

Multimodal Transport: The direct railway connection between the Zonguldak-Samsun and Mersin-Iskenderun Ports raises the importance of these ports. This means direct connection between Black Sea and Mediterranean.

SLIDE 10 (LOGISTICS MASTER PLAN) Importers, representatives of public and private sector -including UTİKAD- started to work a logistics master plan for Turkey. It acts as a guideline for strategic action in the field of transport policy and shows how an efficient infrastructure can be ensured. Also, it will help to achieve 2023 targets.

SLIDE 11 (TRANSPORTATION AND LOGISTICS RESEARCH CENTER); Maritime, Transport and Communications Ministry of the Republic of Turkey established new organization which name is Transportation and Logistics Research Center. This organization improves sectoral programs between Turkey and its neighboring with developing countries. For this purpose it makes new collaboration with international organizations.

SLIDE 12 (TRANS-ASIAN RAILWAY ROUTES); The project was initiated in the 1960s, with the objective of providing a continuous 8,750 miles (14,080 km) rail link between Singapore and Istanbul, Turkey, with possible further connections to Europe and Africa. Progress in developing the TAR was hindered by political and economic obstacles throughout the 1960s, 1970s and early 1980s. By the 1990s, the end of the Cold War and normalization of relations between some countries improved the prospects for creating a rail network across the Asian continent. By 2001, the four corridors had been studied as part of the plan and Turkey is located in Southern Corridor which will go from Europe to Southeast Asia, connecting Turkey, Iran, Pakistan, India, Bangladesh, Myanmar, and Thailand, with links to China's Yunnan Province and, via Malaysia, to Singapore. Lake Van-Tatvan ferry line which only railway connection Turkey to Central Asia will be finished in 2013.

SLIDE 13 (PAN-EUROPEAN TRANSPORT AREAS AND CORRIDORS); Pan-European transport corridors, which pass through geographical zones in many countries, some of them EU members, and others undergoing a process of negotiation for example Turkey. There are 10 corridors and Turkey is located in Corridor 4. The alignment of Corridor 4 links the following main cities: Dresden/Nurnberg – Praha – Vienna/Bratislava – Budapest – Arad – Bucharest – Constanta/Craiova – Sofia – Thessaloniki/Plovdiv – Istanbul. This multi-modal Corridors assures a Northwest – Southeast transport link, which with the realization of the developed by Turkey Bosphorus Tube Tunnel Project will connect Europe to Asia not only by road but also by rail.

SLIDE 14 (ASIAN HIGHWAY – AH); AH project is a cooperative project among countries in Asia and Europe and the United Nations Economic and Social Commission for Asia and the Pacific (ESCAP), to improve the highway systems in Asia. There are 87 routes of Asian Highway and Turkey is located in 6 route.

SLIDE 15 (INTEGRATED TRANSPORT SYSTEM IN THE ARAB MASHREQ-ITSAM);

The concept of ITSAM is based on the fact that the transport sector, including land, sea and air modes, has a strategically significant role to play in fostering and sustaining the socioeconomic development of the ESCWA countries and in promoting their integration, notably by enhancing flows of trade and tourists among them and between countries in the region and the rest of the world.

ITSAM integrate with TEN on southeast of Turkey for ESCWA Countries..

SLIDE 16 (TRACECA); Turkey is the member of TRACECA since 2002 and it has very strategic position - located at a focal geo-strategic location between Europe, Middle East and Asia- at TRACECA Corridors. There are some completed and ongoing projects which included Turkey at TRACECA Action Plan.

2002-2005; Completed Projects

- Unified Policy on Transit and Tariffs
- Harmonization of Border Crossing Procedures
- Capacity Development for Senior Transport Sector Officials
- Improvement of Maritime Links Between TRACECA and TENs Corridors

2005-2006 Completed Projects

- Analysis and forecasting of traffic flows for the TRACECA countries and interregional transport integration
- Strengthening of Transport Training Capacity in NIS Countries
- International Logistic Centers
- Motorways of the Sea for the Black Sea and the Caspian Sea
- TRACECA Civil Aviation Safety and Security

2006-2007 Ongoing Projects

- Development of Common Security Management System and Cooperation in the Area of Maritime Safety and Ship Pollution Preventing for the Black Sea and the Caspian Sea
- Land Transport Safety and Security
- Logistic Center and Motorways of the Sea 2
- Transport dialogue and interoperability between the EU and its neighboring countries and Central Asian countries

SLIDE 17; THANK YOU...