



## **SCREENING CHAPTER 21 TRANS-EUROPEAN NETWORKS**

### **AGENDA ITEM I: TRANSPORT**

**Country Session: The Republic of TURKEY  
29 September 2006**

## CONTENT

- Overview
- Public Investment Process
- Strategy Documents Regarding Transport
- Public Expenditure and Investments
- TINA Project (Transport Infrastructure Needs Assessment)

## Overview

### Main Institutions in Transport Infrastructure

- Ministry of Transport
  - General Directorate of Railways, Ports and Airports Construction (DLH)
  - Turkish State Railways (TCDD)
  - General Directorate of State Airports Administration (DHMI)
  - Undersecretariat for Maritime Affairs (UMA)
- Ministry of Public Works and Settlement
  - General Directorate of Highways (KGM)
- Undersecretariat of State Planning Organisation (SPO)

## Overview (CONT'D) / Road Network (01.01.2006):

Road Type (Km)	Asphaltic Concrete	Surface Treatment	Stone Block	Stabilized	Earth	Other	Total
Motorways	1 775	-	-	-	-	-	1 775
State Roads	6 199	24 541	42	254	86	249	31 371
Provincial Roads	881	25 761	91	1 953	1 243	639	30 568
Total	8855	50 302	136	2 207	1 329	888	63 714

Dual Carriageway	Km
State Roads	8 847
Provincial Roads	594
Motorways	1 775
Total	11 216





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TRANS-EUROPEAN NETWORKS  
AGENDA ITEM I: TRANSPORT



## Overview (CONT'D) / Road Network:



## Overview (CONT'D) / Railway Network (2005):

Type	Length (Km)	Total (Km)
Electricified	2.336	10.984
Non- Electricified	8.648	
Signalised	3.111	10.984
Non- Signalised	7.873	

Type	Length (Km)	Total mainlines (Km)
Single Lines	8.257	8.697
Double Lines	440	



## Overview (CONT'D) / Railway Network:





## MAJOR PRIVATE & PUBLIC PORTS





A map of Turkey showing the locations of various airports. The map is color-coded by region: orange for the western and southern coastal areas, pink for the central and eastern inland areas, and light blue for the northern coastal areas. The Black Sea is to the north, the Aegean Sea to the west, and the Mediterranean Sea to the south. Neighboring countries are labeled: Bulgaria, Greece, Georgia, Armenia, Iran, Iraq, and Syria. Airports are marked with colored airplane icons: red for domestic and international traffic, green for domestic and unscheduled international traffic, and blue for domestic traffic only. The airports shown are: Çorlu, Atatürk, S.Çarşamba, Trabzon, Kars, Erzurum, Agri, F.Melen, Siirt, Mardin, Ş.Ürfa, G.İzmir, Adana, Antalya, Dalaman, M.Bodrum, D.Çardak, Uşak, A.Menderes, Konya, N.Kapadokya, Kayseri, K.Maraş, Sivas, Tokat, Erzincan, Elazığ, Malatya, Adıyaman, D.Bakır, Muş, B.Yenişehir, Çanakkale, Körfez, S.Gökçen, and Esenboğa.

**Legend:**

- Red airplane icon: DOMESTIC&INT.TRAFFIC
- Green airplane icon: DOMESTIC&UNSCHEDULED INT.
- Blue airplane icon: DOMESTIC

## Public Investment Process

Public investment process is applied for all projects independent of sectoral variations.

- Development Plan
  - prepared for 7 years
- Medium-Term Programmes
  - 3 years rolling documents
- Annual Programmes
  - prepared annually according to the Medium-Term Programme

## Public Investment Process

### ➤ Investment Circular issued

- Its annex 'Investment Programme Preparation Guide' includes:
  - investment proposal ceilings,
  - sectoral and regional priorities,
  - priorities on project basis,
  - and the parameters.

## Public Investment Process (CONT'D)

### ➤ Projects Proposals

- Investing institutions being acquainted with their own indicative budget ceilings gather project proposals from:
  - regional and local administrations,
  - public authorities,
  - NGOs and
  - citizens etc.
- Proposals should comply with the Development Plan, Medium-Term Programme and Annual Programme



## Public Investment Process (CONT'D)

### ➤ Projects analysed by SPO

Projects submitted by the investing institutions to SPO for the following analyses:

- Financial
- Economic
- Social
- Institutional
- Environmental
- Regional

## Public Investment Process (CONT'D)

- SPO submits a budget investment proposal to High Planning Council (HPC) after having analysed the project proposals and compromised with the institutions on the project proposals in cooperation with Undersecretariat of Treasury and Ministry of Finance
- Draft Budget being approved by the HPC sent to Turkish Grand National Assembly (TBMM)
- Ceilings being discussed in the TBMM Planning & Budgeting Commission

## Public Investment Process (CONT'D)

- Budget being approved by latest at the end of the year and the budgets of the institutions finalised after the budget becomes law.
- Projects to be included in investment programme according to the final ceilings and investment programme issued until 15th of January.

## Public Investment Process (CONT'D)

➤ Investment Programme contains projects with the following information:

- annual allocations and their sources (budget type),
- cumulative expenditure until that year,
- costs,
- locations,
- characteristics,
- start-end dates,

listed on sectoral and institutional basis.



## Strategy Documents Regarding Transport

- **9<sup>th</sup> Development Plan (2007-2013)**
- **Medium Term Programme (2007-2009)**
- **Annual Programme**
- **Investment Programme**
- **Other Documents**

## Strategy Documents Regarding Transport

### ➤ 9<sup>th</sup> Development Plan (2007-2013)

#### ▪ Ad Hoc Committee Reports

- For the preparation of sectoral analysis, 9<sup>th</sup> Development Plan Ad Hoc Committee Reports have principally been used.
- Ad Hoc Committees mainly meet for the discussion of the specific sectors and produce inputs for the preparation of Development Plans.
- In 2006, Ad Hoc Committees were set up for 57 different sectors and subsectors.
- All public, private and other stakeholders were largely included within these Committees and had the opportunity to come together

## Strategy Documents Regarding Transport (CONT'D)

### ➤ 9<sup>th</sup> Development Plan (2007-2013)

#### ▪ Ad Hoc Committee Reports

8 Ad Hoc Committees related to Transport sector in 2005:

#### Transport Modes

- Railway Transport
- Maritime Transport
- Air Transport
- Road Transport
- Urban Transport

#### Manufacturing Industry

- Shipbuilding Industry
- Rolling Stock Industry
- Aerospace Industry

# Strategy Documents Regarding Transport (CONT'D)

## 9<sup>th</sup> Development Plan (2007-2013)

### ➤ New Approach

- Wider Framework, not Detailed
- Focus on Basic Development Axes
- Framework Document
- Monitoring and Appraisal Mechanism



## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

- Approved on 1 July 2006, Official Gazette No:26215
- Development Axes:
  - *Increasing Competitive Power*
    - ✓ **Transport**
  - Increasing Employment
  - Empowering Human Resources and Social Solidarity
  - Obtaining Regional Development
  - Increasing Quality and Efficiency in Public Services

## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

- Strategic Goal for Transport : Establishment of rapid and safe transport infrastructure that will increase the competitive power of the country
  - Transport Policy Thematic Subjects:
    1. Establishment of an Efficient Transport System
    2. Improved Safety and Security
    3. Integration with Europe and Neighbouring Economies
    4. Environmental and Financial Sustainability

# Strategy Documents Regarding Transport (CONT'D)

## 9<sup>th</sup> Development Plan (2007-2013)

### 1. Establishment of an Efficient Transport System

- Building of a homogenous transport data base system that includes externalities.
- Performance criteria set up for all public sector organizations for monitoring and evaluation.
- An intermodal transport system to provide cost-effective movement of people and goods
- Integrated approach to project selection – feasibility studies carried out on a corridor basis
- Modal shift of freight transport from roads to railways and/or maritime transport

# Strategy Documents Regarding Transport (CONT'D)

## 9<sup>th</sup> Development Plan (2007-2013)

### 2. Improved Safety and Security

- priority given to roads
- increased traffic safety in all modes of transport
- preservation and efficient usage of existing transport infrastructure.



## **Strategy Documents Regarding Transport (CONT'D)**

### **9<sup>th</sup> Development Plan (2007-2013)**

#### **3. Integration with Europe and Neighbouring Economies**

- priority given to connections to TEN-T corridors
- projects to strengthen the connections with Caucasian, Central Asian and Middle Eastern economies

# Strategy Documents Regarding Transport (CONT'D)

## 9<sup>th</sup> Development Plan (2007-2013)

### 4. Environmental and Financial Sustainability

- For large infrastructure projects' finance, priority is given to Public-Private-Partnership (PPP) models.
- Energy efficient modes of transport.

## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

Sub-sectoral Priorities within Thematic subjects:

#### ➤ Railway Transport Priorities:

- Improvement of private sector train operation to make freight transport predominantly by railway
- Restructuring TCDD to decrease its financial burden on the Public
- Realisation of railway connections by PPP models and private sector vehicle investments.

## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

#### ➤ Railway Transport Priorities

- Realisation of high-speed train passenger transport on the railway network whose center will be Ankara (İstanbul-Ankara-Sivas, Ankara-Afyonkarahisar-İzmir, Ankara-Konya)
- Utilisation of PPP models in construction and operation of the lines on high-speed train network.



## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

#### ➤ Maritime Transport Priorities

- Improvement of port capacities within EU transportation networks (especially in surroundings of İzmir, Marmara and Mediterranean regions)
- Completion of road and rail links of main ports in line with the aim of making the ports logistic centres
- Increasing investments for ports and ships to improve Short Sea Shipping
- Improvement of Flag and Port State control

## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

#### ➤ Air Transport Priorities

- Improvement of capacity of terminals and airside structures in major airports
- Modernization and Harmonisation of ATC (Systematic Modernisation of ATM Resources in Turkey-SMART)
- Improvement of safety and security measures
- Development of regional air transport

## Strategy Documents Regarding Transport (CONT'D)

### 9<sup>th</sup> Development Plan (2007-2013)

#### ➤ Road Transport Priorities

- Traffic Safety
- Improved Mobility and Accessibility
- Establishment of an environmentally sound sector
- A sustainable competitive market structure.

# Strategy Documents Regarding Transport (CONT'D)

## Medium Term Programme (2007-2009)

- Macroeconomic Policies and Goals (Growth and Employment, Financial Policies, Fiscal Policies, Balance of Payments)
- Development Axes in the Programming Period
- Sectoral Policies



## **Strategy Documents Regarding Transport (CONT'D)**

### **Medium Term Programme (2007-2009) / Transport Objectives**

1. Financing models that increase the participation of the private sector will be developed.
2. Efforts for integrating Turkey's transport network, which links EU countries with Caucasian countries, the Central Asia, South Asia and the Middle East Countries, to TEN-T Network will be accelerated.
3. The existing highway infrastructure will be improved by the completion of the ongoing dual carriageway projects and by upgrading their standards.
4. Traffic safety in highways will be increased.

## **Strategy Documents Regarding Transport (CONT'D)**

### **Medium Term Programme (2007-2009) / Transport Objectives**

5. In freight transport, the share of maritime and railways will be increased.
6. High-speed passenger trains will be put into service
7. Turkish State Railways will be restructured in order to increase the quality of service and railways' share in the sector and to reduce its financial burden on the Public.
8. Ports will be developed as logistics centers where combined transport is realised and port capacities will also be increased.
9. Capacity will be increased in congested airports.
10. Regional air transport will be improved.

## Strategy Documents Regarding Transport (CONT'D)

### Annual Programme

In the Annual Programme, measures have been identified under the objectives of the Medium-Term Programme (2007-2009).

Example:

Priority / Measure	Responsible Body	Institutions for Cooperation	Start / End Date	Operation / Explanation
<b>Priority: Traffic safety in highways will be increased</b>				
<b>Measure 1: Elimination of "black spots"</b>	<b>DG Highways</b>	<b>DG of Security TCDD</b>	<b>2006-2008</b>	<b>100 'black spots' will be eliminated every year according to the priorities. Railway level crossings at state and provincial roads will have automatic barriers.</b>

## Strategy Documents Regarding Transport (CONT'D)

### Investment Programme

- shows the projects' annual allocations and their sources (budget type), cumulative expenditure in the past, costs, locations, characteristics and start-end dates, listed on sectoral and institutional basis.



## Strategy Documents Regarding Transport (CONT'D)

### Investment Programme

Example:

Project Number	: 2005E010150
Project Title	: Ankara-Konya High-Speed Train
Place	: Ankara, Konya
Characteristics	: Construction of High-Speed Train Line and Supply of Rolling Stock
Start-End Year	: 2005-2008
Project Cost	: 762.600.000 (YTL)
Investment in 2006	: 42.000.000 (YTL)

## Strategy Documents Regarding Transport (CONT'D)

### Other Strategy Documents:

- Urgent Action Plan
- Transport Master Plan Strategy
- Railway Action Plan (2003-2008)
- Ports Master Plan
- General Study for Air Transport
- Development of Cabotage Transport (Ongoing)
- Highway Strategic Plan (Ongoing)
- Shipyards Master Plan (Ongoing)
- Development of Turkish Coaster Fleet (tender stage)

## Public Expenditure and Investments

(Million Euro, current prices)

<b>Investment in Transport Sector</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006*</b>
Public	2.787	3.422	4.550	5.056
Private	3.997	6.461	8.522	10.055
<b>Total</b>	<b>6.784</b>	<b>9.884</b>	<b>13.072</b>	<b>15.111</b>
Euro/YTL	1,687	1,767	1,669	1,65

\*Projections

Source: Main Economic Indicators: SPO

Transport figures include transport and communication sectors.

## Public Expenditure and Investments (CONT'D)

<b>% Share of Transport Sector in Total Investments</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>	<b>2006</b>
Public	27	34	31	31
Private	17	19	19	19
Total Transport Investments	20	22	22	22

Source: Main Economic Indicators: SPO

Transport figures include transport and communication sectors.





## Public Expenditure and Investments (CONT'D)

### Public Investment Programme (2006)

	%
Share of transport in public sector's total project cost	31,9
Share of transport sector in 2006 budget allocations	30,8

Transport figures include road, rail, air, maritime and pipelines sectors.



## Public Expenditure and Investments (CONT'D)

### Public Investment Programme (2006)

(million Euro)

		Project Cost		Allocation for 2006	
		Foreign	Total	Foreign	Total
<b>Railways</b>	33	5606	11914	593	807
<b>Maritime</b>	41	147	492	15	51
<b>Air</b>	44	1993	2343	432	529
<b>Roads</b>	197	6583	21165	742	1592
<b>Pipelines</b>	21	2127	2802	232	291
<b>Transportation Total</b>	336	16455	38717	2013	3270
<b>Public Sector Total</b>	2525	39454	121442	3583	10802

Euro=1.6501 YTL

## Public Expenditure and Investments (CONT'D)

### Public Investment Programme (2006)

From the above table it can be inferred that:

- In the public investment programme, road and railway sector's investments receive the majority of budget allocations.
- Foreign funding is extensively used in railway.



## Public Expenditure and Investments (CONT'D)

### Public Investment Programme (2006)

% Share	Railways	Maritime	Air	Roads	Pipelines
Total Cost of Transport projects	31	1	6	55	7
Total Annual Allocation for Transport projects (2006)	25	1	16	49	9

Transport figures include road, rail, air, maritime and pipelines sectors.





## Public Expenditure and Investments (2007-2013)

Sectors	2006 (Current Prices)		2013 (Current Prices)		2007-2013 (2006 Prices)	
	Mill. Euro	% Share	Mill. Euro	% Share	Mill. Euro	% Share
Agriculture	833	7,7	3.054	11,8	10.471	10,2
Mining	388	3,6	691	2,7	3.342	3,3
Manufacturing	270	2,5	102	0,4	919	0,9
Energy	1.533	14,2	1.571	6	10.757	10,5
<i>Transport-Communication</i>	3.439	31,8	6.657	25,6	26.679	26
Tourism	29	0,3	120	0,5	465	0,5
Housing	66	0,6	236	0,9	794	0,8
Education	1.511	14	5.696	21,9	19.638	19,1
Health	768	7,1	2.244	8,6	8.662	8,4
Other Services	1.965	18,2	5.599	21,6	20.990	20,4
-Economic	1.047	9,7	2.542	9,8	9.469	9,2
-Social	918	8,5	3.057	11,8	11.522	11,2
<i>Total</i>	10.802	100	25.971	100	102.717	100
1 Euro=1.6501 YTL						

## Public Expenditure and Investments (2007-2013)

### 9<sup>th</sup> Development Plan (2007-2013)

**Strategic Goal:** Establishment of rapid and safe transportation infrastructure that will increase the competitive power of the country.

#### **Objectives:**

	2006	2013	2007-2013
Railway Mainline Length (km.)	8257	9195	938
Total Length of Dual Carriageways (km.)	9441	15000	5559
Asphaltic Concrete Pavement State and Provincial Roads (km.)	7500	14500	7000
Air Transport Passenger Traffic (million passenger)	60	110	50

## **TINA Project (Transport Infrastructure Needs Assessment)**

### **Overall objective of the project:**

- TINA study aims to initiate the development of a multi-modal transport network within Turkey for the extension of the European Union's TEN-T to Turkey to enable sustainable transport mobility across Europe.

## TINA Project (CONT'D)

- TINA project is considered as an important input for the negotiations between Turkey and the EU in defining the future Trans-European Transport Networks in Turkey.
- TINA Project will also provide an important input in drafting the Transport Operational Programme for IPA (Instrument for Pre-Accession, 2007-2013).



## TINA Project (CONT'D)

### Following results will be achieved by the Consultant:

- A transport databank using GIS technology
- A traffic forecasting model
- Transport network analysis, transport infrastructure needs assessment and project prioritization
- Assessment of administrative infrastructure and recommendations for necessary changes regarding the implementation of TINA study

## TINA Project (CONT'D)

### Project Progress:

- Kick-off meeting was held on 2 December 2005.
- Reporting (by September 2006):
  - Inception Report (Delivered)
  - Interim Report 1 (Delivered)
  - Interim Report 2 (Delivered)
  - Draft Interim Report 3 (Delivered)
  - Interim Report 4
  - Final Report
- Project closure is scheduled for the end of November 2006.
- Preliminary Network for Railways and Roads including ports and airports has been identified in the Study.

## TINA Project (CONT'D)

- TINA project is in the last quarter of implementation and Interim Report 3 was delivered in August 2006, which gives the preliminary results of traffic forecasts for 2020.
- The results of the Interim Report 3 are provisional. Turkish side is currently evaluating the Interim Report 3 and its results.

## TINA Project (CONT'D)

- Final Report shall be valid only after the approval of the Steering Committee on behalf of Turkey, European Commission and CFCU.
- The ultimate decision-maker of the study on behalf of Turkish side will be the High Planning Council.