

WORLD TRADE ORGANIZATION

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Negotiating Group on Maritime Transport Services

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COMMUNICATION FROM TURKEY

Response to Questionnaire on Maritime Transport Services

The following communication is circulated at the request of Turkey to members of the Negotiating Group on Maritime Transport Services.

I. Market Structure

Vessels

1.

STRUCTURE OF NATIONALLY OWNED OR OPERATED FLEET				
Type of Vessels	Number of Vessels		Deadweight Tonnages	
	National Flag	Foreign Flag	National Flag	Foreign Flag
Oil Tankers	99	-	1,666,577	-
Liquified Gas Carriers	5	-	13,409	-
Chemicals Tankers	26	-	74,733	-
Combination Carriers	8	-	916,893	-
Ore-Bulk Carriers	-	-	-	-
General Cargo	479	-	1,468,784	-
Container Ships	1	-	4,800	-
Refrigerated Carriers	-	-	-	-
Specialized Cargo	-	-	-	-
Ro-Ro	14	-	78,618	-
Ferries and Passengers	45	-	14,681	-
Other	370	-	4,238,495	-
All Vessels	1.047	-	8,515,048	-

Trade

2. 85 per cent of total 54,764,875 tonnes trade of Turkey is carried by sea.
3.
 - a) The total exports of Turkey: 15,871,318 tonnes
 - b) The total imports of Turkey: 38,893,557 tonnes
4.
 - a) The total exports of Turkey carried by national-flag vessels: 47,5 %
 - b) The total exports of Turkey carried by foreign-flag vessels: 52,5 %
 - c) The total imports of Turkey carried by national-flag vessels: 51,8 %
 - d) The total imports of Turkey carried by foreign-flag vessels: 48,2 %
5. Transportations by Turkish Maritime Fleet in Cross-Trade in 1993;

Dry Bulk:	69,452,659	65.89 %
Liquid Bulk:	21,955,868	20.83 %

Organization of Cargo

6. The distribution of external trade carried by sea (type of cargo) 1993

Type of Cargo	Export			Import		
	Total	National-Flag	Foreign-Flag	Total	National-Flag	Foreign-Flag
Dry Bulk						
Grain	1,425,718	624,935	800,783	2,102,055	228,968	1,873,087
Ore	2,200,304	509,555	1,690,749	3,189,603	1,166,551	2,023,052
Coal	66,847	3,634	63,213	7,797,581	3,247,307	4,550,274
Sub-Total	3,692,869	1,138,124	2,554,745	13,089,239	4,642,826	8,446,413
Liquid Bulk						
Crude-Oil	13,195	-	13,195	20,942,556	12,635,763	8,306,793
Petroleum Products	3,071,249	211,478	2,859,771	4,297,393	921,666	3,375,727
Liquefied Gas	116,679	8,329	108,350	1,450,761	18,210	1,432,551
Other Liquids	186,123	107,896	78,277	1,272,288	146,417	1,125,871
Sub-Total	3,387,246	327,703	3,059,543	27,962,998	13,722,056	14,240,942
Industrial products	10,032,268	6,969,817	3,062,451	19,428,000	5,993,612	13,434,388
Agricultural products	353,287	36,405	316,882	440,486	28,345	412,141
Other Cargoes	622,821	157,365	465,456	1,509,337	301,264	1,208,073
TOTAL	11,008,376	7,163,587	3,844,789	21,377,823	6,323,221	15,054,602

7. Figures are not available.

8. D.B. Turkish Cargo Lines is a member of Conturcon Conference on Continent Line and it has 40 % share of this Conference.

9. Not available.

10.

CONTAINER TRAFFIC (As of the end of November 1994)							
LOADING				UNLOADING			
20'		40'		20'		40'	
EMPTY	FULL	EMPTY	FULL	EMPTY	FULL	EMPTY	FULL
97,018	39,716	68,214	11,974	66,152	50,811	38,078	31,850

11. Figures are not available.

Ports and Auxiliary Services

12. The major ports which have international importance of Turkey are Aliaga, Iskenderun, Istanbul, Izmir, Izmit, Mersin, Nemrut, Samsun and Karadeniz Ereğlisi.

HANDLING SITUATION ON TURKISH MARITIME ORGANIZATION (TDI) PORTS (TON)			
Ports	1992	1993	1994 (for 9 months)
Hopa	67,718	64,589	8,144
Trabzon	104,443	171,823	80,418
Giresun	38,798	91,134	86,272
Tekirdag	1,673,758	1,257,919	1,274,697
Antalya	364,272	324,369	404,275
Izmir (Dikili & Güllük)	769,252	865,649	555,245
Istanbul	Closed to the cargo traffics		131,744
Total	3,018,241	2,775,483	2,540,795

Goods exported and imported at TDI ports in the last three years:

Ports	1992		1993		1994	
	Export (Tons)	Import (Tons)	Export (Tons)	Import (Tons)	Export (Tons)	Import (Tons)
Hopa	49,751	17,967	12,237	52,352	60,000	8,080
Trabzon	8,554	95,889	10,915	160,908	17,661	62,757
Antalya	232,390	131,882	193,843	130,526	274,695	129,580
Giresun	26,788	12,010	49,691	41,443	36,612	49,760
Tekirdag	1,265,062	408,696	693,847	564,072	923,081	351,616
Total	1,582,245	666,444	960,533	949,301	1,312,049	601,793

13. Foreign Agencies dealing with cargo and passenger transportation are listed as follows:

1. RECA Handels GmbH und REISE AGENTHUR/Stuttgart - GERMANY
2. ANADOLU - Actief Reizen/Rotterdam - HOLLAND
3. MEDTRANS/Piraeus - GREECE
4. BASSANI S.P.A/Venise - ITALY
5. SUNGUEST Holiday Ltd./London - ENGLAND
6. RECA Handels GmbH/Basel - SWITZERLAND
7. ÖSTERREICHISCHES Verkehrsbüro/Wien - AUSTRIA
8. WORMS Services Maritimes/Marseille - FRANCE
9. TRANSCOMA/Barcelona - SPAIN
10. ALLOLOUF/Halifa - ISRAEL

Container Station and Depot Services: Yes

Maritime Agency Services: Yes

Maritime Freight Forwarding Services: No

Maritime Cargo Handling Services: Yes

Storage and Warehousing Services: Yes

Customs Clearance Services: No

Maintenance and Repair of Vessels: Yes

14. Loading and unloading operations at Tekirdag, Dikili and Güllük ports, are provided by private companies in accordance with the contracts made between the port authorities and companies.

II. Regulatory Structure

General

1. The following Authorities may regulate matters concerning the maritime transport sectors:

- a) Undersecretariat for Maritime Affairs
- b) Ministry of Foreign Affairs
- c) Turkish Maritime Organization
- d) D.B.Turkish Cargo Lines
- e) General Directorate of Turkish State Railways
- f) Chamber of Shipping

5. Port services at Hopa, Rize, Trabzon, Giresun, Ordu, Sinop, Istanbul, Tekirdag, Canakkale, Dikili, Cesme, Kusadasi, Güllük, Marmaris, Antalya, Alanya ports are provided by Turkish Maritime Organizations which is a public entity, and also General Directorate of State Railways (TCDD).

Loading and unloading operations at Tekirdag, Dikili and Güllük ports are provided by private companies in accordance with the contracts made between the port authorities and companies.

6. The definition of international maritime transport is the transportation of persons and/or goods by sea from any Turkish port to any foreign country or vice versa. Cabotage is excluded.

7. The expression "national shipping enterprise" is defined as an enterprise which has ownership of ships or engages in the management of ships and transport by sea.

Market Access

8 - 11. N.A.

National Treatment

12. N.A.

Access to and Use of Port Facilities

13. Pilotage, towing and tug assistance, provisioning, fuelling and watering, garbage collecting and ballast waste disposal, navigation aids, shore-based operational services essential to ship operations, including communications, water and electrical supplies, emergency repair facilities, anchorage, berth and berthing services are provided at TDI and TCDD ports.

14. Loading and unloading operations at Tekirdag, Dikili and Güllük ports are provided by private companies in accordance with the contracts made between the port authorities and companies.

15. All vessels have access to the services for which licences have been issued by Harbour Masters. However, priority is given to the important ships with respect to their cargoes and passengers ships with tariffs.

16. All TDI and TCDD ports are opened to foreign-flag vessels.

17. There are no discriminatory measures between national and foreign vessels with respect to the access and use of port and harbour facilities.

NATIONAL-FLAG PASSENGER VESSELS AND FERRIES OF TDI			
Type of vessels	Name of Vessels	Deadweight Ton	Gross Ton
Passenger	Akdeniz	3,536	8,809
Passenger	Mavi Marmara	524	4,142
Passenger	Ayvalik	632	1,926
Passenger	Avsa	209	1,901
Passenger	Uludag	209	1,901
Ferries	Ankara	1,790	10,520
Ferries	Samsun	1,788	10,583
Ferries	Iskenderun	1,788	10,583
Ferries	Truva	650	3,422
Ferries	Tekirdag	963	3,213
Ferries	Bandirma	963	3,213
Ferries	Bozcaada	420	1,905
All Vessels	12	13,471	62,118

18. There is no discrimination between national and foreign flag vessels with respect to the access and use of port facilities.

19. None.

Most-Favoured-Nation Treatment

20-26. N.A.

Government Procurement

27-28. N.A.

Competition Law

29. N.A.

Shipping Conferences

30. Conturcon Conference is an enterprise which International Companies are member of this conference. All companies can participate to this conference.

31-34. N.A.

Shipper/Carrier Relations

35. The relations between shippers and carriers are administered according to the free market conditions.

36. This is done under the free market conditions.