

***“One rarely recognises what
has already been achieved;
the focus is always on, what
is left to be done.”***

Marie Curie, French Nobel Laureate

TIME TO IMPLEMENT!...

- European Transport Systems must confront a serious modal imbalance which has upto now, favored the development of the most polluting and congested modes of transport.
- This requires a change in strategy which puts users at the centre of the system guaranteeing their right to:
 - efficient,
 - safe,
 - affordable,
 - environment- friendlymode of transport.



SHORT SEA SHIPPING

&

ROAD TRANSPORT:



**SUSTAINABLE SYNERGY IN
INNOVATIVE INTERMODALITY**

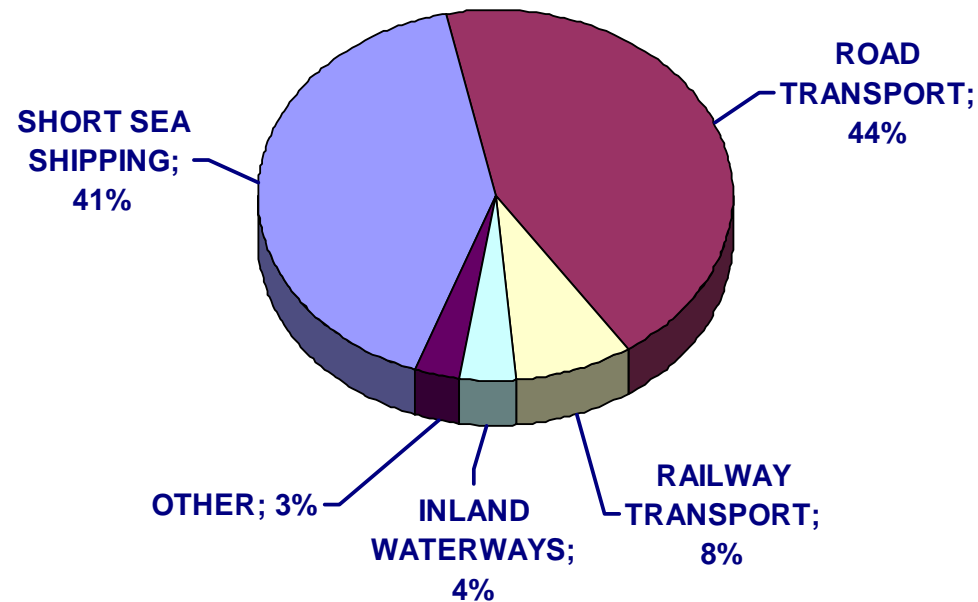
- TRANSPORT SECTOR IS RESPONSIBLE FOR 28 % OF EMISSIONS OF CO₂; THE LEADING GREEN HOUSE GAS,
- ROAD TRANSPORT ACCOUNTS FOR 84% OF CO₂ EMISSIONS ATTRIBUTABLE FOR TRANSPORT,



- IF NOTHING IS DONE, THE COSTS ATTRIBUTABLE TO CONGESTION ON ITS OWN WILL INCREASE BY 142% BY THE YEAR 2010 TO REACH €80 BILLION ANNUALLY = 1% OF EU15 GDP
- EXTERNAL COST (CONGESTION, POLLUTION, ACCIDENTS) OF ROAD TRANSPORT = 4% OF GDP OF EU.

- 7.500 KM (10% OF ROAD NETWORK) IS AFFECTED BY TRAFFIC JAMS.
- 16.000 KM OF RAILWAYS (20% OF RAILWAY NETWORK) CLASSSED AS BOTTLENECKS.
- DELAYS CAUSING CONSUMPTION OF AN EXTRA 2,1 BILLIONS OF LITRES OF FUEL; 6% OF TOTAL ANNUAL CONSUMPTIONS.

PRESENT SHARE OF COMMERCIAL TRANSPORT MODALITIES IN EU



SOLUTION:

- INTERMODALITY: MAXIMUM USAGE OF OTHER TRANSPORT MODES AVAILABLE (RAIL, SSS),
- DECOUPLING OF TRANSPORT AND ECONOMIC GROWTH TO THE EXTENT POSSIBLE,
- PROVISION OF COMMUNITY SUPPORT PROGRAMS (MARCO POLO).

INTERMODAL TRANSPORT ACTIVITY BETWEEN TURKEY AND EUROPE

HISTORY:

- VISIONARY GROUP OF INTERNATIONAL ROAD TRANSPORTERS COMING TOGETHER TO FORM A RO-RO COMPANY IN 1994 AS A RESULT OF INTERNAL CONFLICTS IN FORMER YUGOSLAVIA.
- USERS AT THE CENTRE OF THE SYSTEM. 210 SHAREHOLDERS: ALL TRANSPORT OPERATORS.

HENCE; “USERS AT THE CENTRE OF THE SYSTEM”

- THIS VISION CREATED JUST OVER A DECADE AGO, TODAY IS THE MOST SUCCESSFULLY IMPLEMENTED INTERMODAL PROJECT IN EUROPE. FIRST IN MEDITERRANEAN AREA, THIRD IN THE WORLD.

Currently, our companies own 13 vessels operating in the Med area. Turkey- Europe Mediterranean Ro-Ro Line is the fastest growing intermodal activity in the world.

**Total level of Investment:
€700 million**



INTEGRATED INTERMODAL ENVIRONMENT



FLOW OF GOODS

Constructed by UN Ro-Ro, the new Ro-Ro terminal in Istanbul was opened for service in 29 April 2005 with an annual handling capacity of 120.000 vehicles.



**Total Level of Investment:
65 mio USD**

PENDİK RO-RO TERMINAL: FULL COMPLIANCE WITH THE ISPS RULES

- 7/24 Security Team, Constant monitoring by Video
- Two Berths for simultaneous enmbarking/disembarking
- 110,000 sq.meters of open space
- Gamma Ray Inspection, Radioactive Material Inspectio



PENDİK RO-RO TERMINAL GAMMA RAY INSPECTION

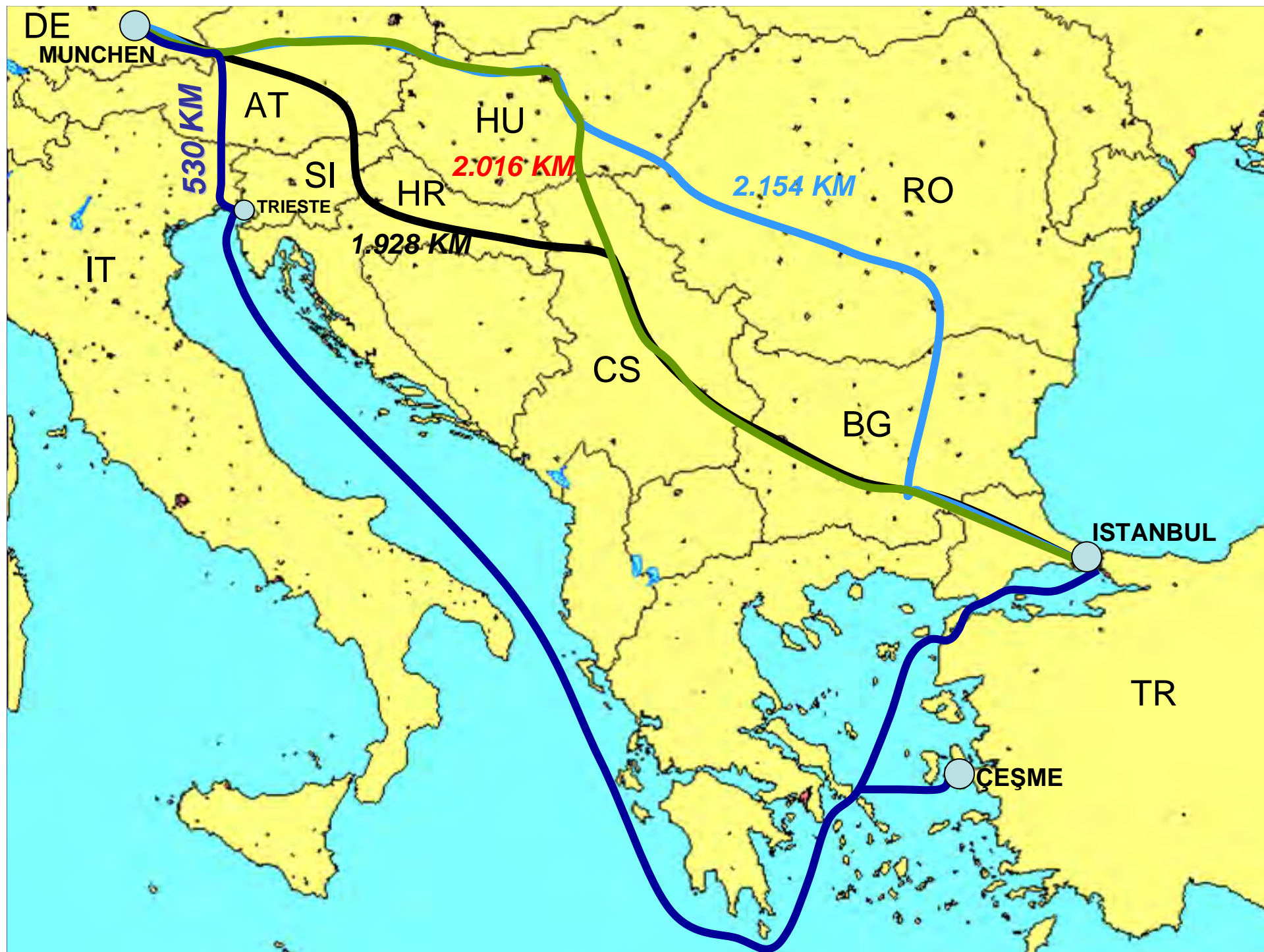
UIRR/ÖKOMBI/ICA CONGRESS, 22 June 2006 – Vienna



INTERMODAL ASPECTS : SSS



SEAMLESS INTERMODAL CHAIN: INTERMODAL LINE BETWEEN TURKEY AND EUROPE SUPPORTS GENERAL OBJECTIVES OF SUSTAINING MOBILITY AS DESCRIBED IN WHITE PAPER 2001: “TIME TO DECIDE”



CURRENT CONFIGURATION OF RO-RO VESSELS

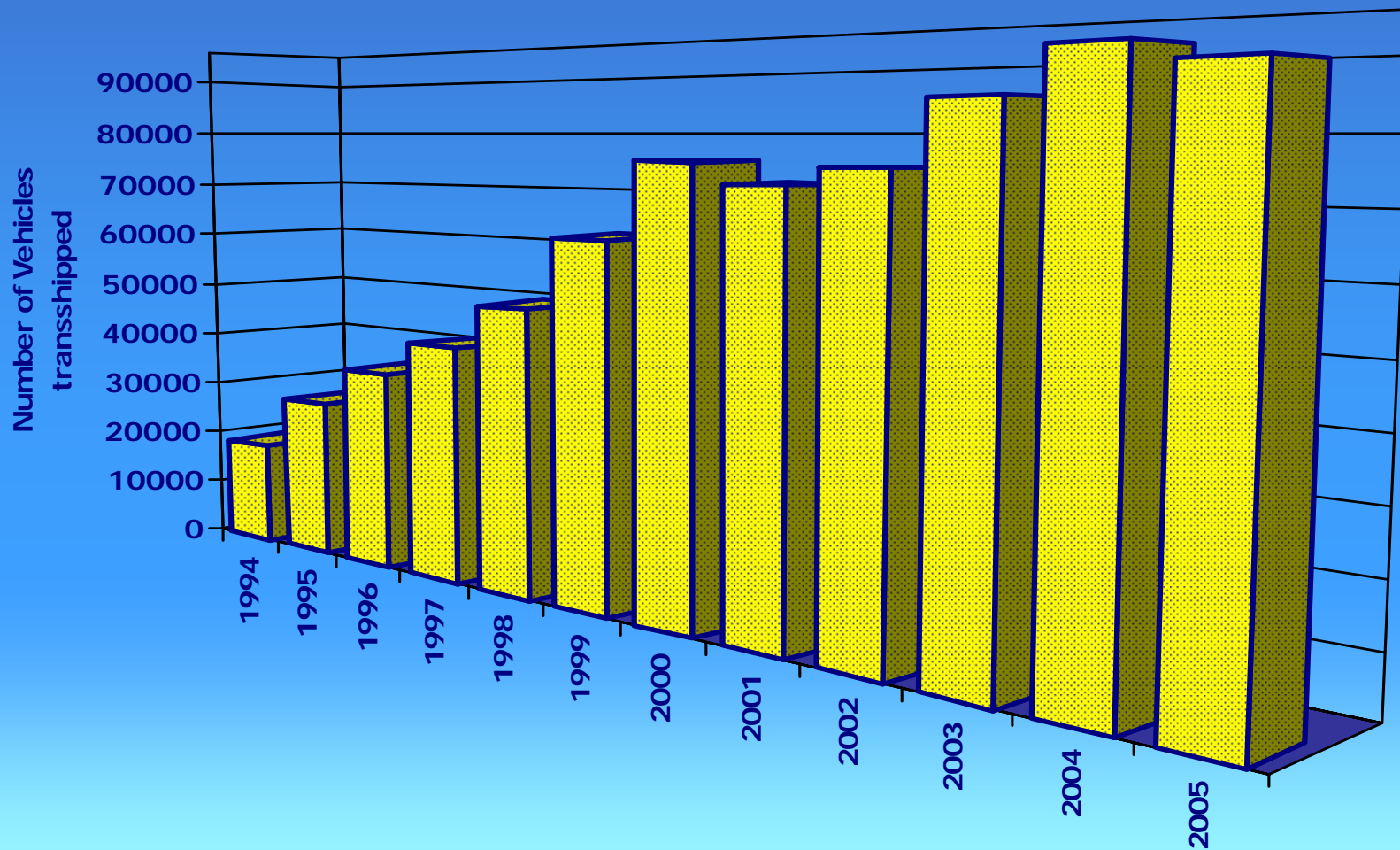
Vessel Name	Employed in	LoA	Lane Meter	Gross Tone	Capacity (Vehicles)	SPEED (KNOT)
Un Adriyatik	Pendik-Trieste	193	3.214	22.900	200	21,6
Un Atılım	Pendik-Trieste	193	3.214	22.900	200	21,6
Un Marmara	Pendik-Trieste	193	3.735	29.004	230	21,5
Saffet Ulusoy	Pendik-Trieste	193	3.735	29.004	230	21,5
Un Pendik	Pendik-Trieste	193	3.735	29.004	230	21,5
Un Trieste	Pendik-Trieste	193	3.735	29.004	230	21,5
Un Denizcilik	Pendik-Trieste	183,14	2.060	21.213	130	19
Un Birlik	Ambarlı-Trieste	193	3.214	22.900	200	21,6
Un Ege	Ambarlı-Trieste	193	3.214	22.900	200	21,6
Un Hayri Ekinci	Ambarlı-Trieste	183,14	2.060	21.213	130	19
Ulusoy 6	Çeşme-Trieste	163,47	1.669	12.259	105	15,5
Ulusoy 5	Çeşme-Trieste	163,8	2.760	19.689	145	16
Saffet Bey	Çeşme-Trieste	163,8	2.760	19.689	145	16

NUMBER OF VEHICLES

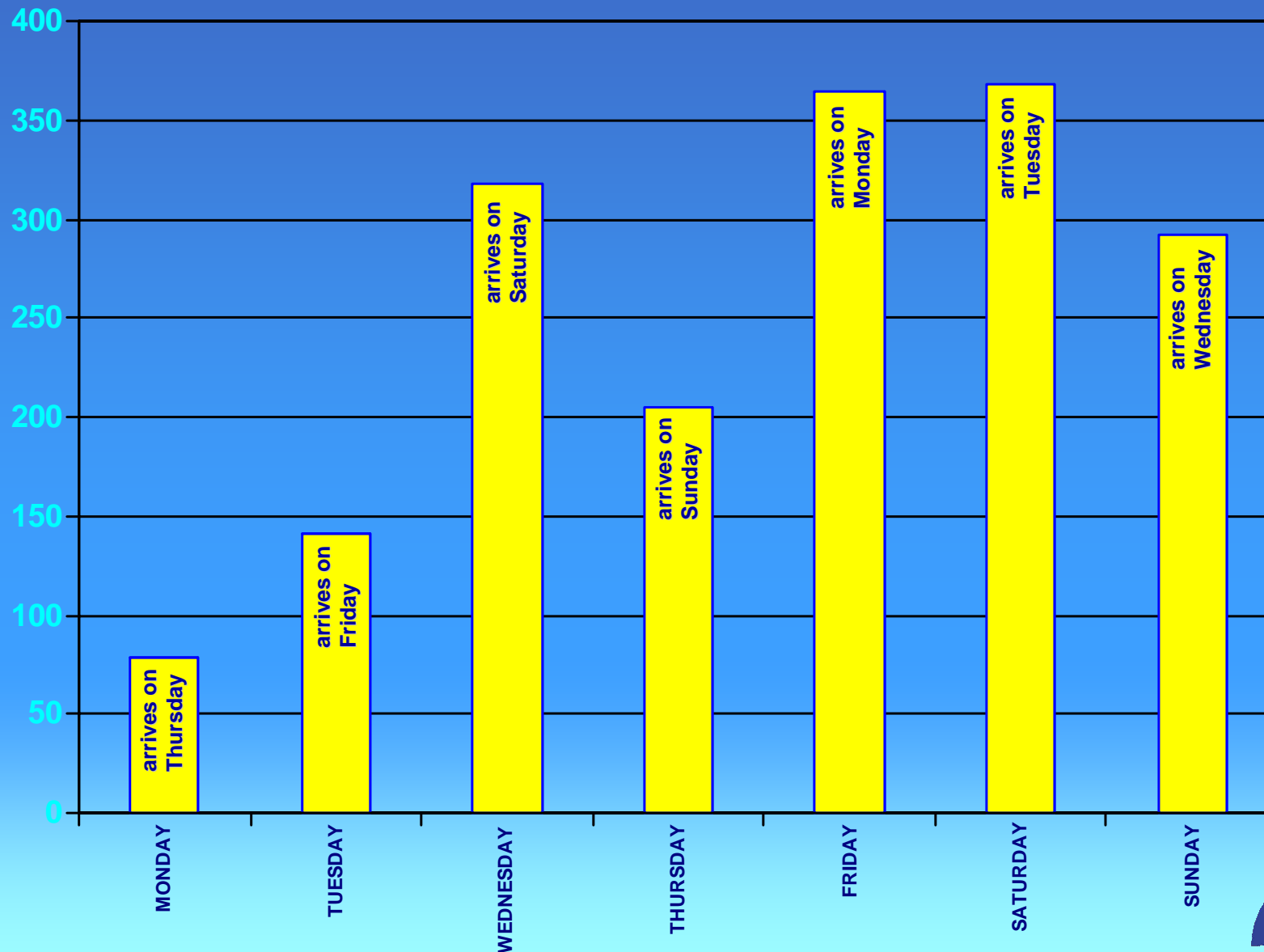
(TURKISH+FOREIGN) TRANSSHIPPED (ONE WAY)

Line	2001	2002	2003	2004	2005
Pendik–Trieste	40.568	44.595	54.047	55.606	53.629
Ambarlı–Trieste	24.040	18.349	17.040	19.987	18.592
Çeşme–Trieste	9.339	12.072	13.898	16.222	17.240
TOTAL	73.947	75.016	84.985	91.815	89.461

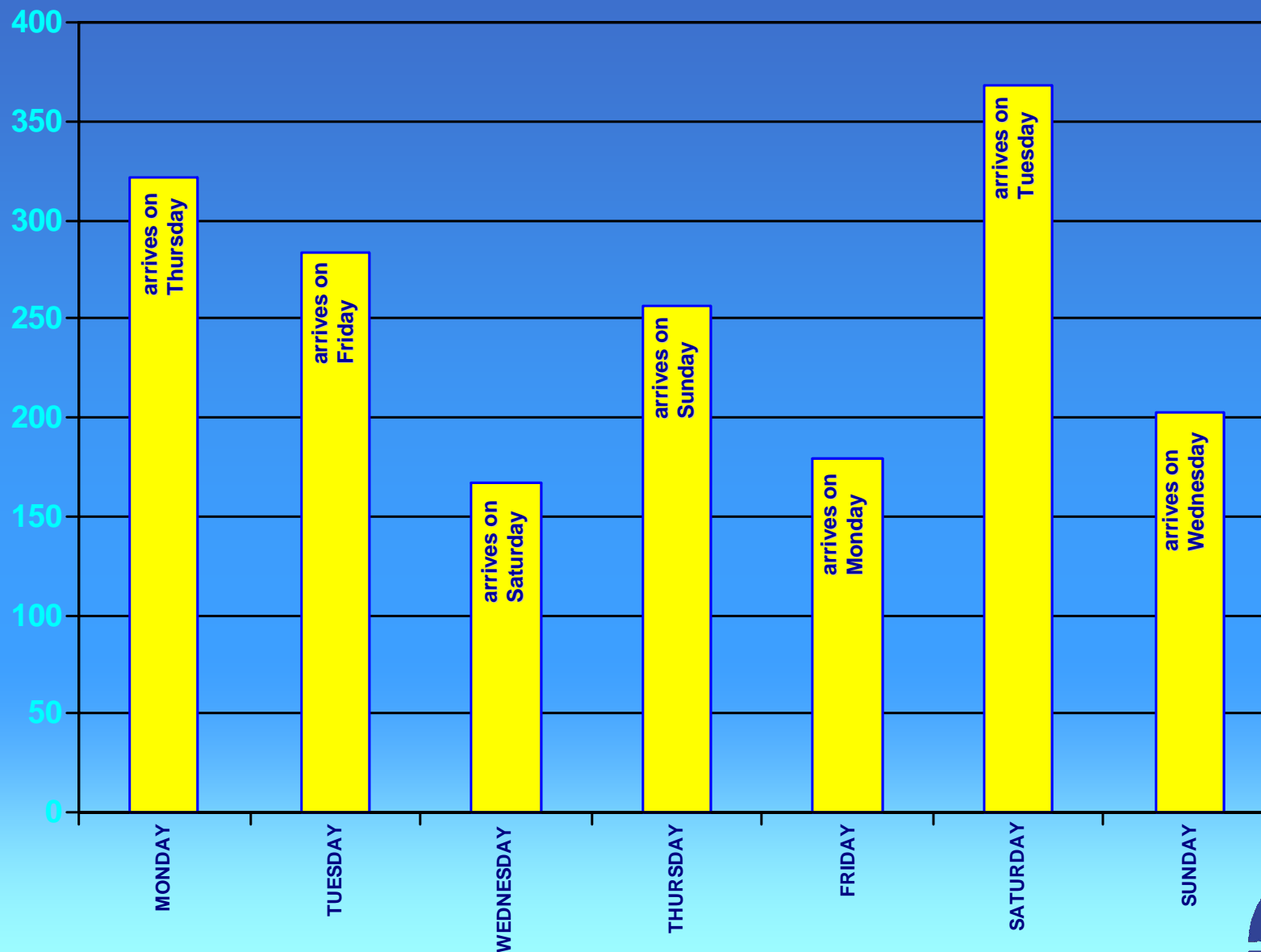
DEVELOPMENT OF TURKEY-ITALY RO-RO LINES



AVERAGE NUMBER OF VEHICLES TRANSHIPPED FROM TURKEY TO TRIESTE PER DAYS IN 2005



AVERAGE NUMBER OF VEHICLES TRANSHIPPED FROM TRIESTE TO TURKEY PER DAYS IN 2005



EFFICIENT TRANSPORT

Semi-Trailer Activity

Year	No. of Semi-Trailers	Complete Units	Total	Semi-Trailer Ratio (%)
1997	20.869	21.408	42.277	49,40
1998	26.182	24.147	50.329	52,00
1999	26.796	35.986	62.782	42,70
2000	37.589	38.043	75.632	49,70
2001	38.748	35.199	73.947	52,40
2002	39.833	35.183	75.016	53,10
2003	48.271	36.714	84.985	56,80
2004	52.408	39.407	91.815	57,08
2005	53.172	36.289	89.461	59,44

Trieste Ro-Ro Terminal



ROLLING ROAD – COMBINED TRANSPORT

Months (2005)	Trieste- Salzburg	Salzburg- Trieste
FEBRUARY	873	652
MARCH	994	950
APRIL	1393	1369
MAY	1395	1176
JUNE	1377	1352
JULY	1270	1279
AUGUST	1015	935
SEPTEMBER	1376	1208
OCTOBER	1426	1295
NOVEMBER	1220	1024
DECEMBER	1148	1100
TOTAL	13.487	12.340

**ACCOMPANIED TRANSPORT
TRieste-SALZBURG.**



ADVANTAGES OF INTERMODAL TRANSPORT

JUST IN TIME OPERATIONS

- Sailing Time 50-52 hrs.
- Knowledge of Cargo whereabouts at all times by the Consignee/Consignor
- Interoperable freight management System
- User Friendly Web Site for Tracking of vehicles

AVOIDANCE OF DIFFICULTIES ENCOUNTERED IN BORDER CROSSINGS OVER ROAD ROUTE

- Crossing over 6 borders before reaching EU territory on the land Route.
- Varying Customs formalities and bureaucratic procedures

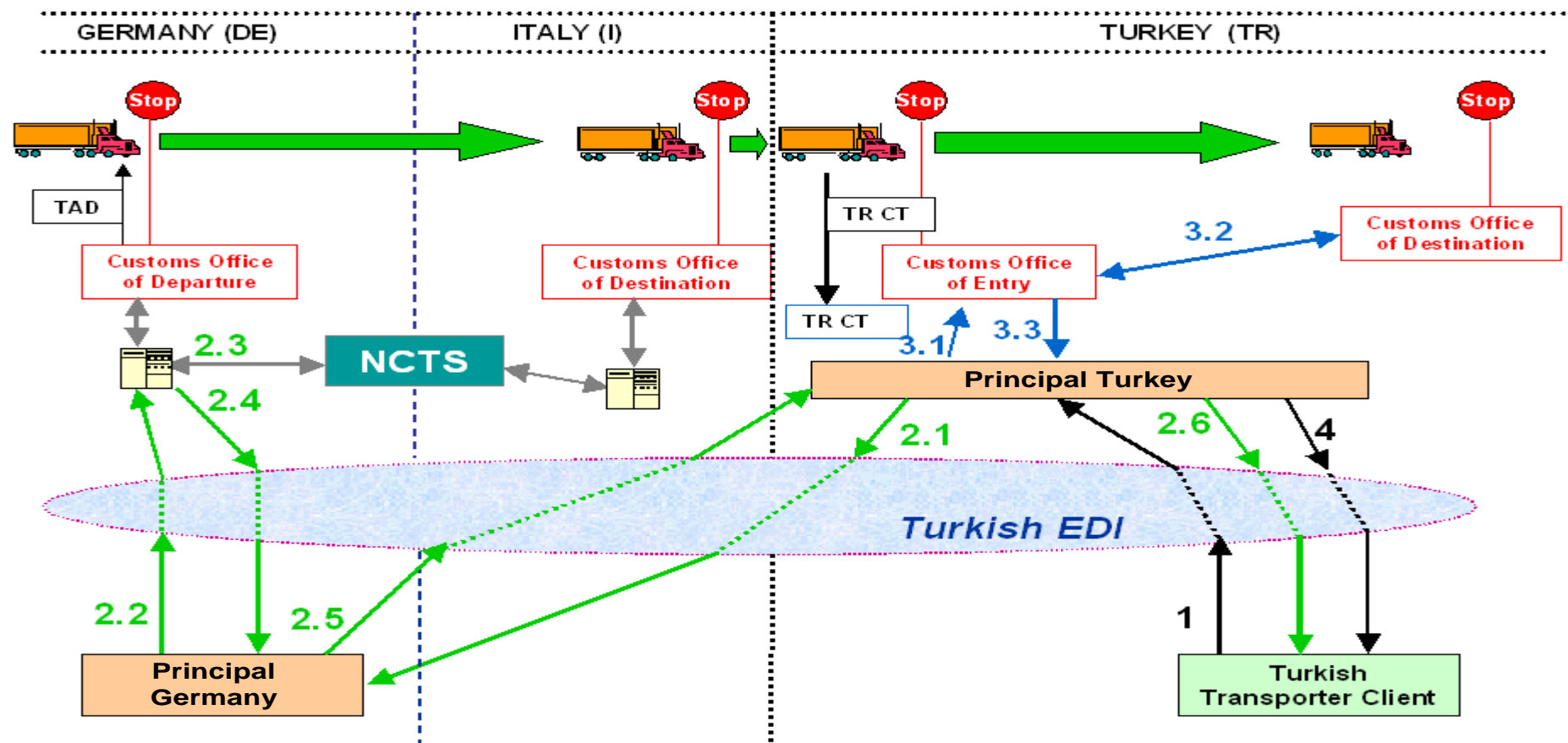
SAVINGS REALIZED OVER ROAD USER CHARGES/TAXATION AND OTHER CHARGES

- Charging systems (time based/distance based)
- Other Charges: Customs formality costs, Parking fees, Fees charged over crossing of bridges, tunnels etc.
- Disinfection fees

OTHER OPERATIONAL SAVINGS AND ADVANTAGES

- Savings over Depreciation and Maintenance Costs
- Savings on capital Investment for vehicles
- Savings over Insurance Costs (Kasko,CMR upto 20%)
- Savings over Visa Costs
- Opportunity to use alternative Transit Regimes (Common Transit-NCTS)

•PROVISION FOR ALTERNATIVE CUSTOMS TRANSIT REGIMES (to be lodged very soon)



ELECTRONIC LODGING OF CUSTOMS TRANSIT DECLARATIONS ON ROUTE TO/FROM EUROPE

UIRR/ÖKOMBI/ICA CONGRESS, 22 June 2006 – Vienna



- **SOCIAL ASPECTS:**

- **MORE REST TIMES FOR DRIVERS,**
- **LESS ACCIDENT RISKS.**

LOGISTICS: THE ONLY PROJECT IN THE WORLD THAT ENCOMPASSES 5 TRANSPORT MODES AT THE SAME TIME.

- **ROAD**
- **SSS**
- **RAIL**
- **PASSENGER – ROAD**
- **PASSENGER – AIR**





Project prepared by RODER: Winner of the 2005 Best Intermodal Freight Project in Europe.



MODAL SHIFT ACTIONS

- TOTAL SHIFT FROM ROAD IN TON X KM = 4 BILLION TON-KM/YEAR

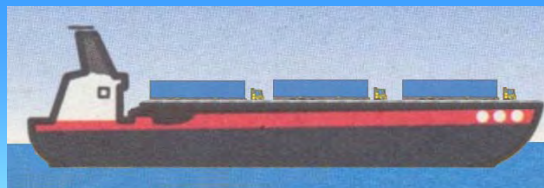
- MONETIZED ENVIRONMENTAL AND SOCIAL BENEFITS = 77,4 MILLION €/YEAR



ROAD TRANSPORT

**4 Billion
Ton-km**

- ENVIRONMENTAL EFFICIENCY = 0,01 €/TON-KM. SOCIETY BENEFITING 1 CENT FOR EACH TON-KM OF FREIGHT SHIFTED AWAY FROM 1 KM OF ROAD.



Short Sea Shipping



Rolling Motorway

CONCLUSION

- **CREATED JUST OVER A DECADE AGO, THE INTERMODAL LINE PLAYS A VITAL ROLE IN TURKEY'S ECONOMIC INTEGRATION WITH EUROPE.**
- **PROVIDES A COMPETITIVE EDGE FOR SECTOR IN GENERAL.**
- **EXTERNAL COSTS OF TRANSPORT MINIMIZED.**
- **PUBLIC SYMPATHY WITH SUPPORT FROM POLICY MAKERS.**

THANK YOU