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Introduction

Maritime transportation represents an enormous part of global transportation links. Indeed, it is through the oceans that the majority of goods are transported across the world. The sea has always been an important area to further strengthen trade since times immemorial, as in the Mediterranean Sea in Antiquity. It has also been a major means in economic, cultural and geopolitical expansion for great powers. Indeed, it is by means of the sea that European and other great powers colonised important chunks of the world. Nowadays, the sea represents an ever growing frontier in the expansion of trade. Since the EU was founded, it accorded great importance to maritime transportation. The EU has some of the largest ports in the world and continues to be a great maritime power. It aims at strengthening its maritime policy through a strategy which includes a comprehensive modernisation of the sector. In contrast, Turkey is also a country surrounded by the seas and it also represents a major area for the transportation of its exports.

EU Maritime Policy

Thanks to its geography, maritime transportation is a key element for the survival and the economic prosperity of the European continent. Indeed, the continent is surrounded by two oceans (Atlantic Ocean and Arctic Ocean), several seas (Mediterranean Sea, North Sea), and is crossed by many rivers (Danube, Rhine). Since Antiquity, Europeans use the sea to move and trade through important ports such as the Piraeus (Greece), Rotterdam (the Netherlands) and Hamburg (Germany). 75% of EU trade (by weight) is carried by sea.

The European continent, after dominating global maritime trade in the past, saw its share decline rapidly. Indeed, European flags are currently facing fierce foreign competitors, favoured by more flexible rules, state aid and cheaper workforce. At the same time, Europe is suffering a severe financial crisis since 2008 which has weakened European trade and speed up the off shoring of shipping activities consequently. For example, Rotterdam was the largest seaport in the world during the second half of the twentieth century and is now largely behind Far Eastern ports. In 2013, on the world's top 20 container ports, only 3 are in the EU (Rotterdam in Netherlands, Hamburg in Germany and Antwerp in Belgium)¹. The efficiency and the quality of shipping is essential for the competitiveness of the European economy at the global level, for the development of multimodal European transport system and for the decongestion of crowded land routes and for the reduction of the environmental footprint.

In this context, the European Commission presented the 29th January 2009 a communication entitled “*Strategic goals and recommendations for the EU’s maritime policy until 2018*”². The communication refers to two main issues about European maritime transport policy:

- ✓ Increase competitiveness through a generation of employment and value in EU maritime industries;
- ✓ Increase sustainability through a cost-efficient maritime transport service suitable for a sustainable economic growth.

The Maritime Transport Strategy 2018 is part of two broader EU policies³: EU Integrated Maritime Policy (also known as the “Blue Paper”)⁴ and EU Transport Policy (also known as “Keep Europe moving: a transport policy for sustainable mobility”)⁵. It is divided in six different chapters, as explained below.

¹ World Shipping Council, <http://www.worldshipping.org/about-the-industry/global-trade/top-50-world-container-ports>

² Eur-Lex, Europa, COM (2009) 8 <http://eur-lex.europa.eu/legal-content/FR/ALL/?uri=CELEX:52009DC0008>

³ European Commission, *Maritime Transport Strategy 2018*, 2012, http://ec.europa.eu/transport/themes/strategies/2018_maritime_transport_strategy_en.htm

⁴ COM(2007) 575, 10.10.2007.

⁵ COM (2006) 314, 22.6.2006.

Maritime Transport Strategy 2018

✓ **Shipping trends & business conditions**

As previously mentioned, the European maritime industry suffers a strong international competition from emerging countries and from an economic crisis still ongoing. Their global market share has thus significantly declined. The EU should plan actions to develop a competitive and stable framework (allowing environmental and innovation investments), in order to harmonise competition rules as regards maritime transport policy, and to support international maritime trade.

✓ **Human resources**

The EU aims to fight against the shortage of marine professionals. It requires improving the reputation of the sector by valuing maritime careers and skills, developing training centres, encouraging labour mobility and enhancing working conditions.

✓ **Quality shipping**

The improvement of the quality of shipping requires greater security. The 3rd maritime package was adopted by the European Parliament the 11th March 2009; this package aims to increase the pressure of owners of sub safe-standard ships⁶. There is also an objective of strengthening the power of EMSA (European Maritime Safety Agency) set up in 2003. The EU aims at creating cross-border surveillance system of vessels and an information management system. The quality of maritime transport covers also the environmental issue, through the reduction of emissions and the promotion of alternative fuels and ecological shipping.

✓ **International Scene**

The EU will increase its involvement at the IMO⁷ (International Maritime Organisation), ILO (International Labour Organisation) and WTO (World Trade Organisation). The EU should also reinforce its collaboration with its partners, to promote shipping safety.

✓ **Short-sea shipping**

Short-sea shipping represented 40% of intra-European freight in 2009; it is expected to increase in the future. The EU will focus on the attractiveness of Short Sea Shipping⁸, through the removal of administrative barriers ("European maritime transport space without barriers⁹"), improvement of services of the ports (fair competition, cost-efficiency etc.) and their environmental footprint, the reinforcement of EU programmes such as TENs (Trans-European Networks), etc.

⁶ European Commission, *Third Maritime Safety Package*, 2014, http://ec.europa.eu/transport/modes/maritime/safety/third_maritime_safety_package_en.htm

⁷ IMO website, <http://www.imo.org/pages/home.aspx>

⁸ European Shortsea Network website, <http://www.shortsea.info/>

⁹ European Commission, *Towards a European maritime transport space without barriers*, 2011, http://europa.eu/legislation_summaries/transport/waterborne_transport/tr0014_en.htm

✓ **Research and innovation**

The EU will develop a R&D policy in order to improve the security and the ecological framework of the maritime transport by new ship design and equipment, in order to fully enhance the logistics system of the transport chain, and to develop monitoring tools and telecommunication system.

The 5th and the 6th June 2015, the Council gave the conclusions on the Mid-Term Review of the EU's Maritime Transport Policy until 2018 and Outlook to 2020¹⁰, during the Transport, Telecommunication and Energy Council meeting held in Luxembourg. Within that framework, the EU's maritime transport policy is developed in conformity with the principle of inter-modality and with the objectives of further market liberalisation and strengthening the EU's global leadership as regards maritime technologies.

Turkish Maritime Transport Policy

Turkey is located at the crossroads between Europe and Asia. Turkey has thus great potential in terms of intermodal transportation thanks to its key geographical position between European, Central Asia and Middle Eastern countries. Its geographical location enables Turkish ports to handle significant amount of cargo between the Western and the Eastern sides. Cargo coming from Europe and Americas are handled in transit to Black Sea countries, the Balkans, and the Middle East countries and vice versa. The Turkish Straits are the only water way from the Black Sea and the Mediterranean Sea. Its situation shows the great importance of Turkey in term of cabotage, transit and international transport. The length of Turkey's coastal borders is 8,400 km. Throughout its history; Turkey has always attached great importance to its maritime sector.

The maritime policy of the Ministry of Transport, Maritime Affairs and Communications has several aims which can be described as follows:

- ✓ Developing the maritime sector;
- ✓ Increasing the share of Turkey's maritime sector and maritime trade;
- ✓ Ensuring that Turkey reaches its deserved position in the international arena;
- ✓ Improving cruise transport;
- ✓ Improving yacht tourism in order to increase the number of yacht ports;
- ✓ Developing Turkish ship making yards;
- ✓ Increasing safety in the Turkish seas and straits;
- ✓ Carrying out R&D activities in order to improve the maritime sector.

From the 1960's onward, the Turkish government adopted a five-year development plan which aimed at further developing and improving its maritime sector.

¹⁰ Council of the European Union, *Council conclusions on the Mid-Term Review of the EU's Maritime Transport Policy until 2018 and Outlook to 2020*, 5 and 6 June 2014, <http://ec.europa.eu/transport/modes/maritime/consultations/doc/2015-mts-review/council-conclusions-on-mid-term-review-of-eu-maritime-policy.pdf>

First five-year development plan (1963-1967): This first plan aimed to strengthen the capacity of the maritime sector by, for example, by improving services and by decreasing costs. It aimed also to create free zones for transit trade and to modernise Turkish merchant fleet.

Second five-year development plan (1968-1972): The plan aimed at “coordinating all the transportation areas on one hand” and “displaying the general policy of transportation”. The government thus aimed at modernising the maritime transport sector, including management, administration, organisation, planning and technical features.

Third five-year development plan (1973-1977): The goals were to make plans and project studies, to expand some Turkish harbours and fleets. At the same period, there has been a steady increase in the price of fuels at the global level. Furthermore, the plan also aimed at changing the taxation of transportation, tariff and subventions.

Fourth five-year development plan (1979-1983): The rapid increase of the fuel price forced the Fourth plan to focus on fuel issue. In order to minimise dependency in foreign sources, the plan aimed to diminish fuel consumption by using the most suitable transportation systems. Therefore, the government emphasised the importance of the maritime and railway sectors respectively in that respect and implemented policies aiming at further strengthening the national transport share of the maritime sector.

Fifth five-year development plan (1985-1989): The Plan underlined the improvement of the service capacity, the safety and effectiveness, including the capacity of ports and ships. The aim was also to improve passenger ships, for touristic and local transport purposes. Finally, the government further envisaged a decline in the share of road transport in favour of maritime transport.

Sixth five-year development plan (1989-1994): The targets were to develop the transportation by taking into consideration the growing external debt of the country, to ease international trade, to deal with “integration with the EU” through a harmonisation of the transportation policies. Finally, the first studies about privatisation were achieved.

Seventh five-year development plan (1996-2000): The goals of the plan were to develop an environmentally friendly transportation infrastructure in order to increase the effectiveness and to develop the idea of the privatisation through harbours under autonomic structure.

Eighth five-year development plan (2001-2005): The beginning of the 21st century showed that the increasing trend is in the combination of various means of transportation. The Plan aimed to improve, modernise and increase the capacities of Turkish ports according to the “National Harbours Master Plan” completed in 2000, in order to attribute Turkey as a transit hub as regards maritime transportation.

Ninth five-year development plan (2007-2013): This plan focused into the neighbourhood of Turkey, especially former Soviet Republics such as Azerbaijan, Kazakhstan, Turkmenistan, Uzbekistan and Kyrgyzstan. Indeed, because of increased trade between these countries and Turkey, the government envisaged to further

strengthen the maritime dimension of these relations. One of the over-arching aims of the plan was to transport the products of these countries through the Caspian Sea to Baku (Azerbaijan) and then to the Black Sea or the Mediterranean by RO-RO links. Furthermore, the question of a Trans-Asia way was also envisaged. Trade between the EU and landlocked Central Asian republics is carried out over the Rhine-Main-Danube Canal and the Black Sea, Marmara Sea and the Turkish Straits. The aim was to develop and to invest the Turkish harbours of the Black Sea and to make maritime transportation safer.

Tenth five-year development plan (2014-2018): At the occasion of the Paris Memorandum, significant improvements have been achieved in areas of port and coastal state control. Thanks to these achievements, a white flag has been awarded to Turkey in that respect. Furthermore, during this time frame, the Turkish Government envisages to put effectively in practice an Automatic Identification System regarding maritime transportation. Furthermore, the Mersin Container Port and the Port of Filyos projects have been completed and the construction of a port at Çandarlı has already started.

Latest Developments in Turkish Maritime Transport Policy and the EU

The latest developments regarding Turkey's Maritime Transport Policy are included within the framework of the Transport Chapter within the 2014 Progress Report prepared by the European Commission. In the report, it is explicitly mentioned that the Commission welcomes Turkey's ratification of the Ballast Water Management Convention, the Convention on Facilitation of International Maritime Traffic and the International Convention for the Prevention of Pollution from ships. Furthermore, Turkey's completion of its voluntary participation to the International Maritime Organisation (IMO) is also welcomed¹¹. Moreover, whilst the report explains that Turkey has realised partial harmonisation in the sector but it also calls upon the Turkish authorities to further increase institutional capacity and security within the framework of Turkish maritime transport policy. Nonetheless, the report also explicitly mentions the obstacles that are still encountered by GCASC (Greek Cypriot Administration of Southern Cyprus) ships entering Turkish waters and thus calls upon the Turkish authorities to work towards a credible solution in that respect, adding that the current situation renders tremendously difficult the possibility of opening to negotiations the Transport Chapter¹². As for Turkey, within the framework of its National Action Plan drafted by the Minister of EU Affairs, it spells out clearly EU legislations it envisages to transpose into Turkish law. In that respect, there are two draft legislations that are being prepared as regards maritime transport policy: Law Regarding the Approval of the Maritime Labour Convention and Law Regarding the Foundation of Emergency Response Centres against Oil and Other Dangerous Substances' Pollution in the Sea. Regarding the first draft legislation, it is envisaged to implement EU Directive 2009/13/EC regarding the 2006 Maritime Labour Convention. Once it is implemented,

¹¹ European Commission, *Turkey Progress Report*, October 2014, http://ec.europa.eu/enlargement/pdf/key_documents/2014/20141008-turkey-progress-report_en.pdf

¹² Ibid.

the legislation aims at providing security fair and safe working standards to all ship personnel. The draft legislation is scheduled to enter into force the second semester of 2015. As regards the second draft legislation, it aims at increasing Turkey's intervention capacity in order to tackle the pollution which may stem from maritime accidents in the realm of its territorial waters and exclusive economic zone. The draft legislation is expected to entry into force in 2017¹³.

Conclusion

In conclusion, one can see that maritime transportation is a fundamental part of transportation policies for both the EU and Turkey. Taking into account the fact that a major part of trade between nations is achieved through sea routes, this shows again the strategic importance of strengthening and modernising sea transportation infrastructures. The EU, through the implementation of its Maritime Strategy 2018, is indeed aware of this strategic dimension and thus plans to increase the infrastructure and influence of its maritime sector. Similarly, Turkey, which has already achieved numerous developments through its five-year development plans, aims at strengthening the container capacity of its respective ports and building new ones at the same time. Moreover, Turkey has actively strived to increase the capacity of its transport, yacht and fishing facilities and has further developed security systems in the vicinity of its coastal areas.

Nonetheless, the Transport Chapter has yet not been opened to negotiations. Whilst the screening period of the chapter has been completed in 2006, there still remain tremendous political obstacles towards its opening. Irrespective of these political obstacles, Turkey has continued with decisiveness and determination to modernise its maritime infrastructures and change its national legislation in that respect. In 2014, the Combined Transport Strategy Document entered into force and can be described as a significant step towards the harmonisation of Turkish legislation with EU legislation in the field of maritime policy.

Furthermore, thanks to its key geographical location at the crossroads of Europe, the Middle East and Central Asia, Turkey has the ambition of becoming a key transit hub both in terms of logistics and energy policy. One may add that if Turkey uses to the fullest its potential in that particular sector, its global ranking will undoubtedly increase in the next years.

¹³ Minister of EU Affairs of the Republic of Turkey, *National Action Plan for EU Accession: Second Phase June 2015-June 2019*, 2014.