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Economic Commission for Europe**Inland Transport Committee****Working Party on Intermodal Transport and Logistics****Fifty-ninth session**

Geneva, 31 October-1 November 2016

Item 8 (b) of the provisional agenda

Annual themes on Intermodal Transport and Logistics:**Follow-up to the 2014 Theme: Role of freight forwarders
and logistics in intermodal transport chains****Survey of the freight forwarders market****Note by secretariat****I. Mandate**

1. In accordance with ECE/TRANS/254, para. 156 of the Inland Transport Committee (ITC) report and its programme of work for the period 2016–2017 (ECE/TRANS/2016/28/Add.1, Cluster 6, 6.1), the Working Party on Intermodal Transport and Logistics decided at its fifty-sixth session, that the theme for substantive discussion in 2014 was to be “Role of freight forwarders and logistics in intermodal transport chains”. The discussions were prepared at a workshop, hosted by the Government of Belgium (12 and 13 June 2014, Brussels).

2. At its fifty-seventh session, the Working Party decided, based on the outputs of this workshop, that a study should be prepared by the secretariat on the role of freight forwarders in different countries. This study should be based on a questionnaire which will address all the relevant issues. The questionnaire was discussed at the fifty-eighth session of the Working Party and approved (with amendments). The survey was sent out in April 2016. This document presents the response from Turkey.

II. Survey response from Turkey

<i>Questions</i>	<i>Responses</i>
1 What is the role of freight forwarders in your country?	Freight forwarding activities in Turkey are regulated by "Road Transport Regulation" which was enacted in 2004. The name of the freight forwarder is reflected in the Regulation as "Transport Operations Organizer". The definition of such profession is available as follows: "the corporate bodies, who prepare transport invoices by having transport performed on their own behalf and account including combined transport, making use of the opportunities, skills and capacities of the real and corporate bodies, who have obtained licenses under this regulation being accepted as transporters within the frame of the obligations and liabilities imposed on the ones acting under the title of transporters by the law, this regulation and other relevant legislation"
2 Does your country require freight forwarders to be registered?	<p>In order for freight forwarders to function in the market (domestically and internationally), they must be duly licensed by the Ministry of Transport on the basis of certain general and particular conditions. Those conditions are enumerated as General Conditions to obtain FF License (R type license):</p> <ul style="list-style-type: none"> a) being nationals of Turkey b) firms must be established in compliance with the laws of Republic of Turkey and registered at the Turkish Trade Registrations Office c) persons engaged in FF activities must not be convicted to any freedom – limiting penalty due to crimes such as smuggling, fraud, false bankruptcy, falsification, misuse of belief, narcotics and gun smuggling, human trafficking and etc. (good repute) d) license fee must be paid <p>Special conditions to get FF license are the following ones:</p> <ul style="list-style-type: none"> a) company must have a minimum capital of 100 thousand Euros; b) company must have proper office place to run its business
3 Do you plan to introduce any form of regulation on freight forwarders?	Please see the answers for Q1 and Q2

<i>Questions</i>	<i>Responses</i>
4 If so, what are the views of freight forwarders in your country to this subject?	Freight Forwarding Companies in Turkey are quite happy with the legal rules which regulate access to the market and access to the profession. They think that with the introduction of certain qualitative criteria contained in the legal framework, freight forwarding activities are being performed by more experienced, knowledgeable persons and companies in the sector are much more institutional with corporate managerial skills and with high percentage of accountability. However, they are complaining about the certificate fees which are seen very expensive and there is a perception that high rate of fees undermine financial capacity of the FF firms
5 If regulations have not been introduced, why not?	-
6 Does your country offer tax relief or other incentives to freight forwarders? (National/Regional)	Not yet. Draft Combined Transport Freight Regulation is being reviewed by relevant governmental bodies and private sector foresees some specific administrative and financial incentives that stimulate FF companies by incentivising especially shippers who opt for combined transport solutions for their cargo
7 Can you provide statistics on the freight forwarding industry in your country?	
Number of freight forwarders	278 FFs are engaged in international transport activities while 971 FFs are dealing with domestic transport (as of September 2016)
Total volume of activity	Total of nearly 1.250 FFs are handling (data 2016). In the future it is going to be compulsory for each FF to introduce their yearly activity logbook to the Ministry; by then it will be able to get the whole picture and figure out total volume managed by the FFs and break them down types of cargo handled
Percentage of domestic and international traffic	Aproximately 4 out of 5 FFs are dealing with international transport; at least 70% of the FF's activities are dedicated to international traffic
Type of cargo forwarded	FFs in Turkey usually organizes transport plans which include road+rail or road+maritime multimodal transport operations; these sorts of operations demand unitised transport operations, therefore type of cargo handled by FFs is much more suited to container or swap body transport units