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AUTHORS: Karatas Çimen ÇETİN,Özer Didem ÇAYLAN

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## THE PLACE OF PORTS IN DEVELOPMENT PLANS OF TURKEY: A STRATEGIC ANALYSIS FOR THE YEARS 1985-2010

Çimen KARATAŞ ÇETİN\*  
Didem ÖZER ÇAYLAN\*\*

### Abstract

*Ports are essential infrastructural elements in terms of their role as an integrator of national economy with the world economy. They affect the efficient use of maritime transportation. In addition to the provision of infrastructure for international transportation, ports have an important role in the transit transportation and logistics as well.*

*In terms of its geo-strategic position, Turkey owns considerable advantages and potentials for the port sector. However, Turkish ports cannot make sufficient use of these advantages as the port sector in Turkey is not well developed enough. From such a perspective, important policies have been established to solve the problems faced at Turkish ports, including solution-focused legislation and strategy application.*

*The purpose of this study is to strategically assess Turkish ports for the last 25 years since 1985 within the scope of loading-unloading development and port planning and investment issues.*

**Keywords:** Strategic Management, Development Plans, Turkish Ports.

## TÜRKİYE'DE KALKINMA PLANLARI KAPSAMINDA LİMANLARIN YERİ: 1985 – 2010 YILLARI ARASI STRATEJİK BİR ANALİZ

### Öz

*Limanlar ülke ekonomisinin dünya ile entegrasyonu açısından çok önemli bir altyapı unsuru olup, denizyolu taşımacılığının etkin kullanımını etkilemektedir. Limanlar, uluslararası taşımacılığa altyapı teşkil etmelerinin yanı sıra aktarma, transit taşımacılık ve lojistik açısından da çok önemli işleve sahiptirler.*

*Geo-stratejik konumu itibarıyla Türkiye limancılık açısından çok büyük avantajlara ve potansiyele sahip olmasına rağmen, limancılığın yeterince gelişmemesi nedeniyle bu avantajlarını değerlendirememektedir. Bu açıdan Türkiye limanlarında yaşanan sorunlar için önemli politikalar oluşturulmuş, çözüm odaklı kanunlar çıkarılmış ve stratejiler uygulanmıştır.*

\* Yrd. Doç. Dr., Dokuz Eylül Üniversitesi, Denizcilik Fakültesi, Denizcilik İşletmeleri Yönetimi Bölümü, cimen.karatas@deu.edu.tr

\*\* Yrd. Doç. Dr., Dokuz Eylül Üniversitesi, Denizcilik Fakültesi, Denizcilik İşletmeleri Yönetimi Bölümü, didem.ozel@deu.edu.tr

*Bu çalışmanın amacı, 1985 yılından itibaren Türkiye limanlarına ilişkin 25 yıllık stratejik değerlendirmeyi yükleme-boşaltma gelişimi ve liman planlama ve yatırım konusu kapsamında incelemektir.*

**Anahtar Kelimeler:** Stratejik Yönetim, Kalkınma Planları, Türkiye Limanları.

## INTRODUCTION

The fundamental step for cargo and passenger transportation starts and ends with ports, the activities of which are embodied within the most crucial issues of shipping industry. Therefore ports are the major nodal points and elements in maritime transportation. Ports as the entrance gates of the countries are primary points with both their economic and social impacts for the development of their country and their region.

In the globalized world, ports have had a key position for all countries because of the growth of economy, technological advances, diversification of production and raw material centers and the economies of scale in sea transportation. This key position contains several related businesses and thus a variety of related institutions and stakeholders are involved in such a large range of port-related activities and developments, which eventually brings about a considerable variety of problems encountered at ports. Capacity, modernization, accessibility through the hinterland, employing qualified personnel, infrastructure and superstructure, port management, bureaucracy, privatization process, effective pricing can be listed among these problems.

In order to provide solutions to such problems, countries in general and port managements in particular have been implementing various strategies and policies. Having considered its critical geo-strategic position, since its foundation, Turkey has also adopted certain important policies; put them into action the solution-focused legislations and implemented strategies within the effortful struggles against those problems encountered by ports.

### Turkish Port Policy and Relevant Developments

After the enactment of dated 14 April 1925 and numbered 618 Act of Ports, Turkish State began to focus on ports as a public service. The 8<sup>th</sup> article of this act authorizes the government for “*foundation of a Turkish Joint Stock Company at every port, whose stocks are written to the name, so that loading, unloading, water and coal distribution can be performed at ports and for providing part of company capital from the state budget*”. Based on this authority, port companies were founded in Istanbul (1925), then in İzmir and Mersin, and in Trabzon (1927); in addition, İzmir Dock Company was acquired in 1933. The law gave the management, operation and maintenance activities of all Turkish ports to the joint stock companies that would be established with the contribution of both private and state capital. The law however imposed that the provision of control and public administration would be carried out by the responsibility of the State.

The article regarding the safety and security comprises as follows (Topuz, 2010: 134);

**Article 2 of numbered 618 Act of Ports** -All ships calling Turkish ports are obliged to comply with the port related regulations issued and published by the State embodying the measures to be taken concerning port safety and security including but not limited to anchorage areas, berthing regulations, loading and discharging points and the periods of staying at ports, all of which are apt to differ from port to port depending upon the specific conditions of each port.

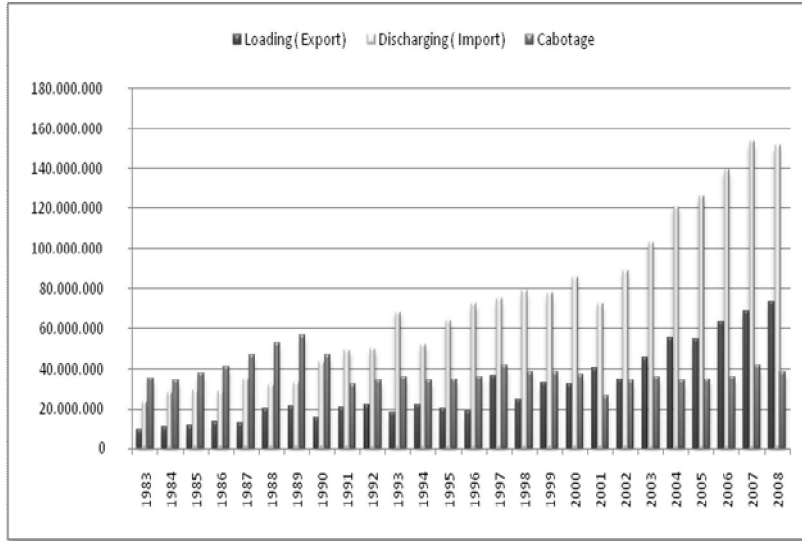
Current port policy in Turkey has been shaped and constituted by such main relevant acts as Act no. 618 on Ports (1925), Act no. 815 on Cabotage (1926), Act no. 362 on Coasts and Act no 4046 on Privatization (Oral et al., 2007: 172). Within such legislative framework, ports as the final points of national transportation system are considerably effective on the economic, social and commercial structure of Turkey which is remarkably appropriate for sea transportation in its aim for reaching international markets. In recent years with the globalization, ports are no longer only places that serve the cargoes of a certain region exclusively; they rather have developed to become the ports of the diversified regional cargo traffic as a whole. Recently ports are organizing their structures so as to receive bigger shares from the transit cargos in their region (Chamber of Shipping, 2009).

Turkey performs almost 90% of its international trade (import and export) through sea, and 79,041,845 tons of cargoes were handled in 1985 at Turkish ports and piers. In the following strategic period of 25 years, this number almost increased fivefold by 2008, including transit transport, when 314 millions of cargoes were handled in Turkish ports (Undersecretariat for Maritime Affairs, 2009). In recent years, however, cargo handling rates have decreased due to the impact of the economic crisis. In 2009, the total amount of cargo handled was 309,436,706 tons (Undersecretariat for Maritime Affairs, 2010a: 26). However, with a rapid increase in 2010, the amount of cargoes handled reached 348.6 million tons (Undersecretariat for Maritime Affairs, 2011a). The number of containers handled which had decreased by 13.5% compared to the previous year and become 4.5 million TEUs in 2009; with a rapid increase in 2010 (29.7%) reached 5.8 million TEUs (Port Operators Association of Turkey, 2011).

As can be seen from Figure 1, the cabotage cargo handled at ports is at its highest level in 1989. Import cargo, on the other hand, has increased in years and reached its maximum level in 2007 with 153,399,349 tons. When increased international trade volume and Turkey's export target 500 billion dollars for the year 2023 are considered, the importance of existing policies and new strategies in port planning and investment increases. From this perspective, the scope of the study is to evaluate the strategies and policies related to Turkish ports determined within the last 25 years after 1985.

In addition to loading-unloading, certain developments have taken place in recent years regarding port privatization as well. Within the scope of the privatization which was introduced at Turkish Maritime Organization (TMO) ports in 1997, the aim was to generate revenue from ports which had played an important role in container transportation in Turkey. Turkish State Railways (TSR) ports, which were no longer able to respond to the increased speed and needs of transportation, initiated with Port of Mersin, were also included in privatization agenda in 2004. Mersin, İzmir, İskenderun, Samsun, Bandırma and Derince ports, operated by Turkish State Railways, were taken into privatization agenda with the resolution of Privatization Supreme Board dated 30.12.2004 and numbered 2004/128. As a result of the tender conducted with the purpose of privatizing with “transfer of operating rights” method, Port of Mersin was transferred for 36 years to the joint venture group of PSA Akfen on May 11, 2007 (Chamber of Shipping, 2009).

**Figure 1.** Developments in Loading – Discharging Figures at Turkish Ports (excluding transit)



**Source:** Prepared based on the data in Chamber of Shipping, Maritime Sector Reports published from 1992 to 2009 and official website of Undersecretariat for Maritime Affairs.

The impact of 2008 financial crisis showed itself in Turkey as port privatization process, which was a development parallel to other ports of the world (Yemeniciler, 2009: 7). In particular, the undue extension of privatization process of Port of İzmir and the ill consequences of the crisis being better felt in the markets caused Hutchison Port Holdings (HPH) to withdraw from the process due to economic instability. Other developments in privatization applications in Turkish ports are in Table 1.

**Table 1:** Privatization Applications in Turkish Ports

Port	Tender date/period	The firm that won the tender	Privatization price (\$)	Last situation
Mersin	2005/36 years	PSA/Akfen Joint Venture Group	755.000.000	Port has been transferred
İzmir	2007/49 years	Global Hutchison-Ege Union of Exporters	1.275.000.000	Cancelled
Derince	2007/36 years	Türkerler Joint Venture Group	195.250.000	Cancelled
Bandırma	2008/36 years	Çelebi Joint Venture Group	175.500.000	Port has been transferred
Samsun	2008/36 years	Ceynak Lojistik ve Ticaret A.Ş.	125.200.000	Port has been transferred
İskenderun	2007/36 years	Limak Yatırım Enerji Üretim İşletme Hizmetleri ve İnşaat A.Ş.	372.000.000	Port has been transferred

**Source:** Privatization Administration, 2011, [www.oib.gov.tr](http://www.oib.gov.tr).

A general evaluation related to the port privatization policies in Turkey is as follows (Undersecretariat for Maritime Affairs, 2010b: 19-20):

- Although the privatizations cover the operation right of ports, 36 or 49 year contracts are rather long periods,
- With the exception of TSR Mersin port, contracts lacked sufficient details,
- The required investment amounts are not sufficient,
- In case of the ports which are regional monopolies, regional port sector activities could be left to the hands of the firm that won the tender,
- As privatization contracts concluded between the transferor, transferee and Privatization Administration are evaluated within private law norms, laws and other legislations aimed at public interests could not be smoothly implemented to these privatization procedures.

## THE PLACE OF PORTS IN DEVELOPMENT PLANS

Since 1960, with the aim of accelerating economic, social and cultural developments in Turkey, providing harmony and convergence between the implemented policies, directing cultural and societal transformations compatibly and securing rational state interference in the economy, the idea of preparation and implementation of Development Plans has been favored. With 1961 Constitution, it was ruled that development plans would be prepared so as to ensure economic, social and cultural developments through democratic means. In line with these purposes, State Planning Organization was founded on 30 September 1960 under Prime Ministry. The role of State Planning Organization is to help for and to provide consultancy services to the government in the determination of economic, social and cultural policies and targets and coordination of activities related to economic policy. The 1982 Constitution also ruled that planned development should be the norm and these plans would be prepared by the State (State Planning Organization, 2010a). One of the transportation – related subunits and the main service units of State Planning Organization is “Directorate General of Economic

Sectors and Coordination” where experts in sea transportation prepare plans and evaluate implementation. Port planning and investment, which is evaluated in economic terms, is examined by this unit, projects are evaluated, and handled in relation with general development plans. State Planning Organization, in which strategic plans of Turkey are prepared and policies are expressed in coherence with targets, is an essential body concerning port investment and planning.

Loading and unloading figures in Turkish ports were 6,397 thousand tons in 1963 when the first development plan was prepared (State Planning Organization, 1972: 20). Following 1963 strategic targets for each period related to the developments in maritime transportation and ports are given below (State Planning Organization, 2010b).

#### **First Five-Year Development Plan (1963-1967)**

The first five-year development plan was prepared covering the years from 1963 to 1967. Port-related policies and strategies adopted within this plan are as follows (State Planning Organization, 1962):

- Under the heading “Ports and Piers”, in the “*measures*” section (State Planning Organization, 1962: 396):
  - Ports will be gathered under one hand.
  - Necessary measures will be taken to ensure that Haydarpaşa port is used more widely for goods sent from Istanbul to Anatolia.
  - Free zones or ports: The issue of free zone or port, which plays an essential role in transit trade, will be emphasized and related works must be done for establishment in appropriate port cities.

#### **Second Five-Year Development Plan (1968-1972)**

According to the second development plan which covered the years from 1968 to 1972, port- related policies and strategies adopted within this plan are as follows (State Planning Organization, 1968):

- Under the heading “Transportation”, in the “*measures*” section (State Planning Organization, 1968: 581), it reads that “Directorate General of Ports” will be founded as a separate institution under the Ministry of Transportation, which will ensure that “with the exception of construction, services related to ports will be performed by one organization”
- Under the heading “Investments”, it reads that “in sea transportation, pending port and shelter constructions will continue and existing bottlenecks will be overcome”.

#### **Third Five-Year Development Plan (1973-1977)**

According to the third five-year development plan, which covers the years 1973-1977, port- related policies and strategies adopted within this plan are as

follows (State Planning Organization, 1972);

- Under the heading “Third Plan Objectives”, in the “*capacity*” section, it reads that “parallel to the expansion of the fleet capacity, dredging vehicles and loading-unloading equipments at ports will be improved” (State Planning Organization, 1972: 602).

#### **Fourth Five-Year Development Plan (1979-1983)**

According to the fourth five-year development plan, which covers the years 1979-1983, port-related policies and strategies adopted within this plan are as follows (State Planning Organization, 1979);

- Under the heading “Transportation”:
  - *Targets* (State Planning Organization, 1979: 413, 416): Article 1508: “it will be made sure that completion of the addition of second mole to Haydarpaşa port, constructions, supplementations and other works ongoing at Hopa, Mersin, İskenderun, Antalya, Trabzon, Samsun, İzmir, Derince and Bandırma ports will be concluded in this period.”
  - *Principles and Policies* (State Planning Organization, 1979: 416,418): (15). Article: “in creating new port capacities, its effectiveness in accelerating export and import activities, characteristics of sea transport, local passenger and cargo potential, transit traffic and the conjuncture of world ports will be taken into consideration; if necessary, regional complexes will be formed that will include transit traffic and ship repair shipyards. The relations between organized industrial zones and regional complexes will be reinforced.”
- Under the heading “Tools for Economic Aims” (State Planning Organization, 1979: 662);
  - Article 21, “insufficient infrastructure not only acts as a bottleneck that prevents economic growth; it also causes a decrease in the efficiency of the current status of economy as well. For this reason, the fourth five-year development plan period will be a period for overcoming other infrastructure insufficiencies as in the case of energy. By this means, a) ports will be expanded so as to accelerate exportation and importation, b) storage and loading facilities at ports and production sites will be expanded and improved.”

#### **Fifth Five-Year Development Plan (1985-1989)**

According to the fifth five-year development plan, port- related policies and strategies adopted within this plan are as follows (State Planning Organization, 1984);

- Under the heading “Transportation”, in the “*targets*” section (State Planning Organization, 1984: 112):



- Article 398: During the 5<sup>th</sup> plan period, the investments ongoing at Samsun, Trabzon, İzmir, Mersin, İskenderun ports, which play an important role in foreign trade and transit transportation, will be completed; in addition, the tool-equipment shortages will be solved and capacities will be increased. Necessary regulations, terminal constructions and tool-equipment provisions will be performed so that these ports become convenient for container activities.
- Article 406: Ongoing port expansion activities will be completed within this period. Investments which will meet the need for a new port in Marmara region will also be initiated within this period. In addition, projects for construction of container terminals at some ports which are significant for international transportation will also be handled shortly and thus enable them to contribute to national economy.
- Article 407: The first project for improvement of ports, overcoming tool-equipment shortages and modernization will be completed in 1984 and the second part of the project will be initiated in 1985. Therefore, port capacities will be improved and service level will be raised.
- In the “*principles and policies*” section (State Planning Organization, 1984: 116). Article 6: “investments, legal and administrative regulations will be made so that our ports can have an efficient and modern management understanding and structure”.
- Under the heading “Policy Fundamentals”, in the “*transportation*” section (State Planning Organization, 1984: 197), there are two relevant articles:
  - necessary facilities will be provided for shifting the transit transportation, which at present passes through our country through roads, to railways and ports,
  - a new port will be constructed around Marmara Region.

#### **Sixth Five-Year Development Plan (1990-1994)**

According to the sixth five-year development plan, port-related policies and strategies adopted within this plan are as follows (State Planning Organization, 1989);

- Under the heading “Seaway”, in the “*targets*” section (State Planning Organization, 1989: 273):
  - Article 664: it is estimated that at the end of the period loading-unloading activities at ports will reach 130 million tons, 80 million tons of which will be represented by foreign trade and transit transportation.
  - Article 667: A research will be carried out to specify the social, economic and environmental characteristics of Turkish Coasts, industrial, commercial and tourism sectors, the existing port capacities as well as the potentials of coasts proper for industrial developments.

- Article 668: Efforts will be made to adopt autonomous port administration practices in order to increase the effectiveness of activities in important foreign trade ports.
- Article 669: necessary initiatives and administrative regulations will be conducted so as to ensure specialization of activities in public ports; implementation will begin with pilot projects.
- Under the heading “Transportation”, in the “principles and policies” section (State Planning Organization, 1989: 270) Article 652 reads: “in order to make better use of potential of railways and ports in the transit transportation conducted through Turkey, regulations will be made in infrastructures and superstructures and tariff systems of railways and ports that will stimulate pass-through.
- Under the heading “Policy Fundamentals”, in the “*transportation*” section (State Planning Organization, 1984: 197), there are two relevant articles:
  - potential of railways and ports will be better utilized in transit transportation through our country,
  - a comprehensive research will be conducted that will determine the characteristics of shores that are convenient for port construction by specifying the features and importance of shores in terms of industry, commerce and tourism.

#### **Seventh Five-Year Development Plan (1996-2000)**

According to the seventh five-year development plan, which covers the years 1996-2000, port- related policies and strategies adopted within this plan are as follows (State Planning Organization, 1995);

- Under the heading “Transportation”, in the section “*purposes, policies and principles*” (State Planning Organization, 1995: 146) it reads “the basic purpose is to establish a transportation infrastructure which will provide economic, fast and safe service through the coherent integration it will develop between transportation modes and thus make the maximum contribution to reaching the adopted development plans, which is also in coherence with the environment”. The following articles were provided in order to reach the mentioned target:
  - Programmed investments at ports and airports will be accelerated, it will be ensured that new capacities be created at necessary locations.
  - Priority will be given to the construction of roads which will integrate the existing highways, ports and airports with the main axes of railroad and roads for their effective use.
  - It will be secured that port management be equipped with a structure coherent with developments in international and national trade in a contemporary understanding and port capacities be utilized at the utmost

level and our country receive the share that it deserves due to its geographical location (State Planning Organization, 1995: 148).

- Parallel to the increase in container traffic, new container terminal investments will be conducted in Derince and Iskenderun primarily. At the end of the period it is expected that container traffic at our ports will exceed 1 million pieces.
- Under the heading “Legal and Institutional Regulations” (State Planning Organization, 1995: 151) it reads: “port management will be prepared for international competition by means of establishment of an autonomous structure or privatization”.

#### **Eighth Five-Year Development Plan (2001-2005)**

According to the 8<sup>th</sup> five-year development plan, which covers the years 2001-2005, port-related policies and strategies adopted within this plan are as follows (State Planning Organization, 2000);

- Under the heading “Maritime Transportation”; in the “*purposes, policies and principles*” section, the following articles can be found (State Planning Organization, 2000: 157-158):
  - Article 1484: In the 8<sup>th</sup> plan period, combined transportation, which is the transportation mode of 21<sup>st</sup> century, will affect Turkey, which is a transit country, in terms of ports and other transportation infrastructures. Taking into consideration the results of National Ports Master Plan, which will be completed in 2000, it is aimed that they will be developed so as to provide service in the quality and quantity that will allow for handling of Turkey’s exportation and importation cargoes, as well as their modernization and capacity increase; they will also be equipped with a characteristic as the passage corridor of traffic in transit transportation activities. Our ports will be restructured in terms of such measures as size, pattern of management, service understanding which will create focus/artery within global transportation roads.
  - Article 1488: it will be ensured that, following a management policy coherent with EU and other international port sector strategies, our ports will be operated within modern management principles based on competition with regional ports and in coherence with legislations and technological developments.
  - Article 1489: it is expected that container handling at our ports will reach 1,900,000 TEUs at the end of the period. Parallel to the increase in container traffic, Northern Marmara Port and İzmir Port Dredging and Extension projects will be conducted with BOT (build-operate-transfer) model, construction of Derince Container Port will begin and Northern Aegean Port survey will be completed.

- In the “*legal and institutional regulations*” section of the same heading, following articles can be found (State Planning Organization, 2000: 158):
  - Article 1492. In addition to the contracts that we are party to as regards port state controls, it will be ensured that the amendments and protocols that will be developed later will be approved in a timely manner. Thus, an effective control and supervision mechanism will be established.
  - Article 1496. Port management will earn an autonomous structure and get prepared for international competition.

#### **Ninth Five-Year Development Plan (2007-2013)**

According to the 9<sup>th</sup> five-year development plan, which covers the years 2007-2013 and is in force currently, port-related policies and strategies adopted within this plan are as follows (State Planning Organization, 2007);

- Under the heading “Reinforcement of Energy and Transportation Infrastructure”:
  - In the “*transportation*” section (State Planning Organization, 2007: 70) Article 415 reads “the system will be handled in an integrated manner in establishment of a balanced, rational and effective transportation infrastructure where modes of transport are used at the most appropriate places in technical and economic terms; policies that ensure shifting cargo transport to railroads and developing important ports as logistic centers and that bring to the fore safety in transportation modes will be followed.”
- Under the same heading, in “*seaway*” section (State Planning Organization, 2007: 71) three important articles can be found:
  - Article 425: In addition to the fact that ports are points of loading-discharging operations, the railroad and road connections of all main ports will be completed in line with the objective of turning them into logistic centers that can conduct combined transportation.
  - Article 426: port capacities will be increased in especially İzmir area, Marmara and Mediterranean regions. Relatedly, Mediterranean region will be supported in order for it to become an important logistic centre of the Eastern Mediterranean.
  - Article 427: vessel and port investments that will increase short-distance maritime transportations in the sea will be given priority.
- Under the heading “Ensuring Adoption of High Added-Value Production Structure in Industry and Services”, in the “*commercial services*” sub-section of the “Services” (p.83) section, it reads:
  - Article 559, “in order to increase effectiveness in commercial services, intended for cargo transportation, it will be ensured that combined transportation will be adopted through logistic centers that can be defined as

cargo starting and ending points where all parties related to collection and distribution phases come together, containers are stored, classified, and transfer between transportation modes is ensured, bureaucratic procedures are simplified at a single location and solved. First, logistic centers will be established at certain centers starting from important ports.”

## **STRATEGIC ANALYSIS OF TURKISH PORTS**

Strategy refers to either the plans made or the actions taken, in an effort to help an organization to fulfill its intended purposes (Miller and Dess, 1996: 5). However, by examining and reviewing the development plans, this paper is dealing with the plans, actions and strategies established for “Turkish port industry” instead of just one “organization” namely each port as given in the definition.

As the first stage of the strategic management process, strategic analysis encompasses external, social, task and internal environmental analysis and the analysis of structure, culture and resources of an organization (Efil, 2004: 307). However, in most of the studies (Miller and Dess, 1996; Sherman, Rowley and Armandi, 2006: 115, 201; Hill and Jones, 2008: 41, 75) it is stated that, strategic analysis covers two main parts: external environment and internal environment analysis. While the essential purpose of the external analysis is to identify strategic opportunities and threats in the organization’s operating environment; the main goal of the internal analysis is to identify the strengths and weaknesses of the company (Hill and Jones, 2008: 16, 18).

Strategic analysis is able to provide organizations in uncertain environments with a clear framework without getting lost in the chaos of change. This balancing act of utilizing past experiences, solving immediate problems, and preparing for the future by detecting patterns or threats requires the ability to manage strategic change (Ncube and Wasburn, 2008: 17). An effective strategic analysis ensures that the organization effectively manages environmental changes and protects competitive advantage in the market (BNET Business Dictionary, 2008).

This paper has a macro-viewpoint and is concerned with the strategic situation and importance of ports in the maritime transport of Turkey. Therefore, strategic analysis is not based on organizational (port) level but it covers the whole Turkish port industry. While the best known and most widely used approach to strategic analysis is SWOT framework which classifies the various influences on a firm’s strategy into four categories: strengths, weaknesses, opportunities and threats (Grant, 2005: 13); as yet there have been various studies related with the external and internal assessment of Turkish port industry. Based on these studies and reports (Ministry of Transport, 2009:52, Port Operators Association of Turkey, 2007: 104-107; Port Operators Association of Turkey, 2010: 114-118) Turkish ports’ major strengths can be summarized as follows:

- provision of qualified port services at international standards,
- provision of a variety of port services and fast and alternative solutions for diverse service proposals,
- possessing customer-focused qualified port personnel,
- low labour costs,
- accelerating private port investments, increase in port expansion and development projects,
- compliance with the safety and security standards in ports,
- advancements regarding equipment and information technologies at ports and increasing investments to IT systems.

The geo-strategic position of Turkey which is located in the intersection of the main transport and energy corridors, north-south and east-west axes, serving to a hinterland composed of landlocked countries and also existence of many natural port locations can be stated as the main opportunities for Turkish ports. Concerning the labor market in Turkey, the ease of finding qualified or experienced workforce, by the effect of increase in foreign investments the acceleration in private sector port investments, developments in the economy and the dynamism of Turkish economy, industry and trade create opportunities for the port industry as well.

Basic threats in front of Turkey for developing effective strategies related to ports and the major weaknesses of Turkish public and private ports can be listed as follows (Akça and Doğan, 2006: 657; Port Operators Association of Turkey, 2010: 99; Undersecretariat for Maritime Affairs, 2011b: 57);

***Threats;***

- port investments can be made upon permission of several institutions and the commercial contributions or impacts of investments to the country or region are not taken into consideration,
- due to the lack of a port authority model, different agencies interfere with port management issues,
- unplanned port construction and lack of long-term planning for ports,
- problems faced in port privatizations during the process and after privatization,
- deficiencies in legislation related to pilotage and towing services,

***Weaknesses;***

- infrastructure problems of public ports, inability to conduct port dredging at public ports due to the high costs,
- infrastructure problems of private ports and lack of railroad connection,
- the fact that most private ports have not still gained an institutional structure,

- low efficiency levels of port equipments,
- insufficient number of qualified workforce to work at ports.

In order to produce fast and effective solutions to the problems encountered at Turkish ports, parallel to the practices in the ports of the world and many European countries, a port authority model that regulates and controls port services and determines objectives and strategies is needed in Turkey as well (Undersecretariat for Maritime Affairs, 2011b: 57).

In addition to the problems related to port planning and investment, there have been some developments in terms of loading and unloading activities of ports as well. More than 90% of global cargo transport is conducted through seaways, whereas in Turkey 51.57% of exports and 69.68% of imports were made through seaways in 2010 (Turkish Statistical Institute, 2011). Within this scope, when the amounts of cargo handled at Turkish ports are examined, according to the strategic plans of Undersecretariat for Maritime Affairs (2011b: 50). It is expected that;

- exports will reach 90 million tons at the end of 2012,
- imports will reach 180 million tons at the end of 2012.

When the increased foreign trade volume and exportation targets of Turkey for the year 2023 are considered together, it is inevitable that handling capacities of ports will improve.

From these perspectives, the evaluation of the 25 years of Turkish ports since 1985 can be examined under two basic areas:

- Development of loading-unloading figures in Turkish ports,
- Port planning and investment in Turkey.

Concrete policy objective identified especially in the sixth five-year development plan for the *development of loading-unloading figures at Turkish ports* (See Table 2) is “loading-unloading activities at ports will reach 130 million tons by the end of the period”. In 1994, which represents the last year of this planning period, 109 million tons of cargoes were handled (Chamber of Shipping, 1995). Container handling aimed in the eighth five-year development period remained below estimations (1,900,000 TEU) and became 1,567,142 TEU at the end of 2005 (Chamber of Shipping, 2006). No strategic targets were stated as regards loading-unloading at ports in the ninth five-year development plan. However, the amount handled from 2005 to 2008 became 314,261,085 tons, which is equal to an increase by 50% (Chamber of Shipping, 2009). As a result of the crisis handling figures decreased in 2009 to 309,436,706 tons (Undersecretariat for Maritime Affairs, 2010a: 26). Despite the effects of the crisis, it is expected that the port sector will increase its capacity by four times and achieve a capacity of 1.2 billion tons by 2020 (Port Operators Association of Turkey, 2010: 122).

Very detailed policy targets were given in development plans in the subject of *port planning and investment* in Turkey (see Table 2). As regards the provision of equipment-tools defined in the fifth five-year development plan, “port construction and equipment modernization” project was conducted in 1992 (Chamber of Shipping, 1993). As a weakness of the ports in Turkey, operational performances of mostly public ports are still low because of the equipment insufficiencies and old technology. However, privately operated ports especially container ports are started using advanced equipment and information technologies.

Autonomous port management, which was described in the sixth development plan, has still not been implemented and seems not in the near future because of the intense privatization process. Privatization which was expressed in the seventh five-year development plan in 1996 was initiated in 2004 by privatization of TSR ports, especially Port of Mersin. Besides Mersin, ports of Bandırma, Samsun and Iskenderun and Samsun, which belonged to TSR, were privatized and transferred. The latest concrete development as regards the construction of Derince port, which was mentioned in the eighth development plan, was the contract signed in 1999 as a result of the tender which was conducted based on Build-Operate-Transfer (BOT) model. Concerning İzmir Alsancak port, where the privatization process has been cancelled, there have been plans to restructure and operate the port in the form a passenger terminal and a container terminal (Privatization Administration, 2011).

Together with the two major strategic areas (loading-unloading and planning and investments) regarding Turkish ports taken place in the development plans, other major strategic points focused in the government and political party programmes, reports of the Ministry of Transport (Ministry of Transport, 2009) and sectoral reports (Port Operators Association of Turkey, 2007; 2010) can be summarized as follows (Özer, 2010: 282):

- Transport infrastructures and connections,
- Coordination between modes of transport,
- Changing role of ports as logistics centers,
- Increasing port investments and the importance of transshipment and specialized ports,
- Capacity expansions,
- Financial incentives for the private sector port investments,
- Port privatizations,
- The establishment of a port authority model,
- Researches on the potential of Turkish coasts for the new port investments.



**Table 2.** Strategies and Policies Expressed for Turkish Ports within the last 25 Years Since 1985

DEVELOPMENT PLANS	Strategies and policies related to loading-discharging	Strategies and policies for planning and investments of Turkish ports
<b>5th Five-Year Plan</b> 1985- 1989	No target has been provided for loading-unloading activities at ports within this plan.	The investments ongoing at Samsun, Trabzon, İzmir, Mersin, Iskenderun ports, which play an important role in foreign trade and transit transportation, will be completed; in addition, the tool-equipment shortages will be solved and capacities will be increased. Necessary regulations, terminal constructions and tool-equipment provisions will be performed so that these ports become convenient for container activities.
<b>6th Five-Year Plan</b> 1990- 1994	It is estimated that at the end of the period loading-unloading activities at ports will reach 130 million tons, 80 million tons of which will be represented by foreign trade and transit transportation	Efforts will be made to adopt autonomous port administration practices. Necessary initiatives and administrative regulations will be conducted so as to ensure privatization of activities in public ports; implementation will begin with pilot projects. A comprehensive research will be conducted that will determine the characteristics of shores that are convenient for port construction by specifying the importance and features of shores in terms of industry, commerce and tourism.
<b>7th Five-Year Plan</b> 1996- 2000	It will be ensured that port capacities be utilized at the utmost level and our country receive the share that it deserves due to its geographical location.	Programmed investments at ports and airports will be accelerated, and it will be ensured that new capacities be created at necessary locations. Port management will get prepared for international competition by means of establishment of an autonomous structure or privatization.
<b>8th Five-Year Plan</b> 2001- 2005	It is expected that container handling at our ports will reach 1,900,000 TEUs by the end of the period.	It is aimed that ports will be developed so as to provide service in the quality and quantity that will allow for handling of Turkey's export and import cargoes, and that they will get modernized with further increased capacity and that they will get equipped with characteristics convenient for passage corridor of traffic in transit transportation activities. Parallel to the increase in container traffic, Northern Marmara Port and Port of İzmir Dredging and Extension projects will be conducted through BOT (build-operate-transfer) model, and the construction of Derince Container Port will begin and Northern Aegean Port survey will be completed.
<b>9th Five-Year Plan</b> 2007- 2013	No target has been provided for loading-unloading activities at ports within this plan.	Policies that ensure shifting cargo transport to railroads and developing important ports as logistic centers and that bring to the fore safety in transportation modes will be followed. In addition that ports are points of loading-unloading, railroad and road connections of all main ports will be completed in line with the objective of turning them into logistic centers that can conduct combined transportation.

**Source:** Arranged from Özer, D. (2010). *Türkiye'de Deniz Ulaştırma Politikaları Oluşturma Süreci ve Stratejik Analizler*.

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## **CONCLUSIONS AND RECOMMENDATIONS**

As a key point of global trade, ports are among the essential infrastructural elements which are affected by international trade, economy, legal and administrative regulations, strategies and policies. Healthy development of ports, the attractive powers of national economy, will make sure that economy will grow healthily as well.

From this perspective, long-term strategies and policies have to be determined so that port sector as a driving force of industry and foreign trade in Turkey, not only makes contributions to the national economy with its services but also gains strength in international competition. Whether they are operated by private sector or public sector, ports provide public service. For this reason, in the subject of port investments and the future of existing ports, government should have long-term plans.

The results obtained from implementation of the strategies and policies developed since 1985 are summarized and some recommendations regarding the policy issues are given in this section. These results have intersection points with a previous study of one of the authors. According to this study (Karataş Çetin, 2012: 419), it can be inferred that the major strategies of Turkish ports to adapt themselves to the new competitive landscape and changing conditions in the market, focus on the investments to infrastructure projects and transport connections, investments on equipment and information technologies, investments on the human capital, professionalism and organizational restructuring, adopting modern management principles and customer-oriented marketing practices.

Loading-unloading levels at Turkish ports are increasing. Considering the steadily increasing container traffic in Turkish ports and the aim of reaching 30 million TEUs by 2023 (Port Operators Association of Turkey, 2007: 108) it seems critical to invest highly on new container terminals and reconstructing or renewing existing terminals in the major ports of Turkey. It can be stated that by being aware of this necessity major private container port investments are being maintained especially in Marmara, Aegean and Mediterranean regions. However, the important point that should be taken into consideration during investments is effective coastal planning. Port areas in Turkey are extremely insufficient. A standard has to be determined in terms of the selection of the construction site of the port in planning dimension. For this, some steps have been taken. The project of the coastal facilities master plan (Yüksel and Belde Project Joint Venture, 2010) has been prepared for the planning of the ports in terms of location, capacity, cargo traffic, etc. With the proper planning of the ports in the coastal regions and the financial incentives given to the private sector, it is expected that the private port investment and projects will accelerate. However, besides planning, proper implementations of the master plans are necessary to position the ports in the development plans of the regions.

An important point focused in the ninth and the last five-year development plan period is the changing role of ports from the traditional loading-unloading places to the logistics centers. Major European container terminals and port authorities take cooperative actions to involve in the hinterland transportation facilities and in some examples they invest to inland terminals. Considering the developments in the world's major ports, especially Turkish container ports should be restructured to serve as multimodal transport centers and for this should be equipped with modern technology and sufficient transport infrastructure to provide seamless intermodal connections with their hinterlands. Most of the private ports in Turkey have no direct railway links with their hinterlands. For Turkish ports to be structured as international logistic centers, infrastructure and superstructure insufficiencies must be corrected and the road and railway connections of the major ports should be ensured. There are major steps taken by the privatized and private ports regarding the logistics center role of the ports. For instance, by adopting door-to-door philosophy, Çelebi Bandırma Port got involved in the hinterland transport facilities and by the use of its land transport fleet, aimed to provide integrated logistics services to its customers.

An important policy subject regarding the private investments is the decreasing role of public sector in the port industry and thus the privatization process ongoing in Turkish ports. Privatization is a concrete development in Turkey in the fields of port planning and investment, but it has not been brought to the desired level yet and some contractual problems have been encountered during the privatization of some ports. The terms and conditions in the concession contracts should be more thoroughly investigated before the takeover begins. Another point is that when compared with the privatization practices taken place at the world's other ports, the concession periods of 36 and 49 years seem longer in Turkey. By the acceleration of the port privatizations, besides Haydarpaşa all major public ports are foreseen to be privatized in the near future. This situation reinforces the role of private investors in the port industry.

Presently, a prominent strategy of the private port sector discussed in the sectoral reports is the specialization strategy. Most of the ports in Turkey are conventional ports which serve to various cargo types. However, specialized ports such as container terminals in Ambarlı region and Nemrut Bay, Ro-Ro terminals and car terminals in Marmara region are increasing in number. In parallel with the developments in the world's major ports, Turkish ports should be specialized in specific cargo types and if necessary new specialized ports should be established to compete in Mediterranean and Black Sea markets.

Equipment and information technologies are important concerns for specialized ports especially. While modern cargo-handling equipments are necessary for the operational efficiency of the ports, investments on port information systems are also increasing to speed up cargo and information flows. Although some major ports developed their own IT systems, the data transfer

between these systems are not possible (Keçeli, 2011: 156). Because of such problems, development of a port management information system is a major policy concern for Turkish port business. Major steps have been taken to establish a port community information system including the parties such as public institutions, agencies, customs, port and terminal operators, etc. This system would enable minimization of transport costs by the acceleration of transactions electronically and coordination among parties. Development of a port community information system will put forward the importance of cooperation and coordination between different ports and terminals. Besides the usage of common IT systems; ports can implement cooperation strategies like the joint supply and usage of equipments, common marketing and promotion facilities, cooperation regarding vessel traffic systems, pilotage and towage facilities, port security, safety and environmental protection practices.

In a more macro-level, public organizations taking place in the transport and port industry should cooperate and coordinate. Collecting the authority related to port sector industry in one hand and avoiding inter-agency complications and the bureaucracy which causes time loss is essential. It is also essential that legislation which caused problems in especially application dimension as regards ports should be simplified and updated and the authorization areas of port administrations should be extended.

Concerning the port administration, the most prominent policy subject is the establishment of a port authority model to enable the coordination during the investment and operating periods of Turkish ports and the provision of insights for the strategic and logistics investments that broaden the port market. However, port authority model should fit the requirements of Turkish port industry and should be country and industry specific.

As a conclusion, national port policy should be revised and a policy specific to Turkish ports should be formulated considering the major policy subjects such as port traffic levels, port investments and capacity expansion projects, infrastructure and transport connection investments to position the ports as logistics centers, adoption of the modern equipment and information technologies, privatization practices and procedures, port administration and establishment of a proper port authority model and port labor policies. Concerning the points mentioned long-term and stable national and international port strategies have to be developed in Turkey.

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