*Melda Yaman*

# ‘Our own China’: a review of Turkey’s industrial and employment strategy documents

***Abstract***

*Turkey’s export-oriented economy was primarily dependent on low wages and imported capital goods until recently. In the last few years, the result of the competitive pressure of giant manufacturing countries like China and India was that Turkey’s export industries went through a two-dimensional structural transformation: a shift to high-tech production combined with regional restructuring of industry. These processes promise an increase in the competitive power of Turkey’s export industries as well as a solution to the trade deficit problem. Recent industrial and employment strategy documents express the desire to increase labour productivity with the explicit target of ‘transforming Turkey into Europe’s China’. However, the low wage strategy has not been abandoned altogether. In fact, the aim is also to establish Turkey’s own China in the south-east region, in which Kurdish people live, by mobilising a cheap female labour force for textile and garment manufacturing. This article discusses these two dimensions of industrial transformation and their impact on labour.*

***Keywords:*** *Industrial strategy, employment strategy, developing countries, regional restructuring of industry, female labour.*

## Introduction

Turkey’s export industries have been through a two-dimensional structural transformation, based on a shift to high-tech production combined with a regional restructuring of the industries themselves. These processes manifestly promise an increase in the competitive power of Turkey’s export industries and a solution to the problem of the trade deficit.

One of the major macroeconomic problems of Turkey over the decades has been the trade deficit. Turkey has been integrated into the international capitalist system, through mostly labour-intensive manufacturing, since the early 1980s. By that date, the import substitution process that had lasted for nearly three decades had been replaced by an export-oriented model. Subsequently, and in contrast to expectations, the import dependency of production increased.

In order to overcome this difficulty, Turkey increased medium-tech production at the beginning of the 2000s (Yükseler and Türkan, 2008; Sönmez, 2005; TUSIAD, 2013; Öztürk, 2011), without official strategic guidance. The shares of some traditional labour-intensive industries declined, but the shares of technology-intensive industries in manufacturing increased over time. This earlier transformation in industri-



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

al production was reflected in exports, and the share of products with a medium technology content, in terms of total exports, increased significantly.

However, the share of high technology products is still very low (TUSIAD, 2013: 3). Despite continuing efforts, there has still been no significant improvement in Turkey's relative position in the global economy (Taymaz *et al*. 2011: 19). Moreover, due to the high import dependence of medium-tech production (TUSIAD, 2013; Yükseler and Türkan, 2008), the earlier industrial transformation has resulted in increasing trade deficits, which jumped from $14bn to $106bn in the 1999-2011 period (calculated using Turkstat, 2016). Hence, Turkey has not yet recorded a complete success in the restructuring of its manufacturing industry.

According to conventional thought, export-oriented industrialisation would not lead to trade deficits. However, for a developing country, the attempt to promote export-oriented manufacturing results in an aggravation of the trade deficit (Patnaik, 1989; Akyüz, 2005). This has been a result of a structure of industrial production which is specific to late industrialisation, including an excessive dependence of manufacturing on imported intermediate inputs and machinery (Munck, 1985; Weeks, 1977). Moreover, developing countries are often involved in technology-intensive, high value-added export manufacturing, using technology-intensive parts and components imported from more developed countries (Akyüz, 2005: 27). This is the case for Turkey.

Turkey's export-oriented industries have recently been going through a new structural transformation. The need for this transformation has risen from, on top of the problem of a chronic trade deficit, a difficulty in maintaining the wage advantage of manufacturing exports in the new global conditions. Building a new industrial structure has been in the planning, in order to produce higher value-added commodities with a high technology content, so as to take a larger share of world trade through increased competitiveness and industrial productivity.

A number of industrial and employment strategy documents have been produced in recent times to determine the conditions for this. These strategies have been designed to increase the export power of manufacturing through increased labour productivity, with the explicit target of 'transforming Turkey into Europe's China'. The state is playing a fundamental role in this process, providing investment and logistical support as well as infrastructure improvements; promoting university-industry collaboration and subsidizing R&D facilities; and providing industrial and employment strategy documents for the industrial transformation.

The low wage strategy has not been abandoned altogether, but this is not officially confessed. Nevertheless, some policies – such as the recent incentive system and the regional development strategy, together with the emphasis on shifting to a regional minimum wage and abolishing severance pay (Ministry of Labour and Social Security, 2014a: 31; TUSIAD, 2010: 30; ASO, 2005: 3) – were, directly or indirectly, associated with the provision of cheap labour power for export industries. In this context, the aim is not only to turn Turkey into Europe's China, but also to establish Turkey's own China in the south-east region, where Kurdish people live. Kürşat Tüzmen, former State Minister, once acknowledged:



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

> Turkey has to build its own China… by mobilising a cheap labour force in the south-east region. (Hürriyet, 2007)

In order to mobilise the cheap labour power of the south-east for export manufacturing, specific incentives were directed towards the region, especially for the substantially female, labour-intensive textile and garment industries. Ultimately, the Regional Development Plan introduced by the government at the end of 2014 complements this perspective. 'Regional development' is officially argued for in several plans (Ministry of Development, 2014c, 2014b), on the face of it to abolish regional differences. In fact, regional development has come to the fore as a means of legitimising the benefit that export industries receive from these regional differences, especially wage differentials.

This article discusses two inter-related aspects of the industrial restructuring process as reflected in the strategy plans: i.e. increasing labour productivity and decreasing wages. Alongside the general shift to high-tech industries, cheap labour power policies are reserved for some low-tech sectors, especially textiles and garments, through a regional industrial restructuring process.

The article argues that regional restructuring aims to keep export industries competitive on global markets, particularly the traditionally labour-intensive textiles and garment sector. Due to its cheap, female labour potential, it is planned to turn the south-east region of Turkey into 'Turkey's China', a region from which to export especially textiles and garments, in the name of 'regional development'. It is becoming more and more difficult to compete with other developing countries, such as China, Vietnam, India and Bangladesh, due to their low wage advantages, with the result that policies targeting low wages do not lose in significance.

The restructuring of production always means a re-organising of labour-capital relations. Therefore, any policy aimed at increasing profitability re-organises labour processes. Policies to increase labour productivity provide capitalists with new tools to control labour. Similarly, the restructuring of capital on a spatial scale is not a mere technical organisational change; changes at the regional level have been associated with changes in relations between capital and labour. However, this:

> Class struggle is a moment of gender and ethnic struggles. (Gough, 2004: 199)

Gender and ethnic issues, as well as class struggles, are quite apparent in the case of Turkey because the south-east region is viewed in terms of the potential labour power of poor Kurdish women. One of the aims of this article is to show that the industrial strategies, presented as mere technical documents to re-organise production processes, are, in fact, associated with the restructuring of labour processes and have an impact on class, gender and ethnic relations.

In the first section, changes in export industries since the 2000s will be displayed while the following section introduces recent industrial and employment strategies. It will be claimed that the primary target of these strategies has been an increase in the export power of manufacturing through increased labour productivity. The main subject of the third section is the regional restructuring of the textiles and garments in-



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

dustry. In this section, it is shown that textiles and garment manufacturing is a significant export sector; that the south-east region of Turkey provides cheap, female labour; and that investment in export industries, such as textiles and garments, in this region is promoted by the state.

## The early industrial transformation

Industrial transformation basically means shifting from labour-intensive industries to medium-tech and high-tech industries (Storm, 2015: 674). According to mainstream consideration, during the course of export-oriented industrialisation, developing countries are predicted to begin with textiles and garments and then move on to more sophisticated commodities which require higher inputs of skills and technological sophistication (Balassa, 1979). However, data for the 1980s do not support this conclusion. It seems that only a few developing countries, such as Malaysia, Thailand and the Philippines, have followed this path (Athukorala, 1989: 101); for the majority of other countries, the predominance of traditional sectors such as textiles and garments has continued without further significant diversification (Athukorala, 1989; Akyüz, 2005). Similarly, Turkey has substantially held its competitive power for years in low-skill, low paid, labour-intensive industries (Özler, 2000; Taymaz *et al*. 2011).

Industrial transformation in the early 2000s resulted in changes in the composition of manufacturing. The share of traditional industries declined over time, but the shares of some technology-intensive industries increased. For example, the total share of textiles and garments in manufacturing decreased from twenty per cent to fifteen per cent between 2004-2009 (calculated using ISO, 2014: 6 and ISO, 2012: 4). The production index of manufacturing increases over the years, while that of textiles and garments decreases (Table 1). The index of food and beverages increases; yet it is below the average for manufacturing as a whole. However, the indices for machinery and equipment and for motor vehicles record substantial increases. These figures show that, as the relative weights of food and beverages and textiles and garments decreased between 1997 and 2008, that of machinery and equipment and motor vehicles increased.

**Table 1 – Production index for selected manufacturing sectors (1997= 100)**

| | 1997 | 2000 | 2002 | 2004 | 2006 | 2008 |
|---|---|---|---|---|---|---|
| Total manufacturing | 100 | 102.1 | 102.5 | 123.7 | 136,8 | 138.5 |
| Food and beverages | 100 | 104.1 | 104.6 | 112.2 | 126.1 | 132.0 |
| Textiles | 100 | 95.7 | 102.3 | 102.9 | 89.8 | 72.0 |
| Garments | 100 | 108.7 | 108.8 | 114.8 | 95.5 | 87.0 |
| Machinery and equipment | 100 | 92.4 | 89.2 | 143.2 | 176.7 | 170.5 |
| Motor vehicles | 100 | 115.9 | 80.7 | 182.6 | 219.5 | 251.1 |

*Source: Turkstat, 2014a: 309-310.*



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

Industrial transformation also means 'skills development and productivity growth' (Storm, 2015: 674), so there has also been a significant growth in labour productivity: growth in the average productivity of labour almost doubled in the 2000s compared to the 1990s. Between 2002-2010, the average annual growth in labour productivity was 3.2 per cent. According to the Penn World Tables, productivity growth in Turkey in the 2000s was quite high relative to many central European and Latin American countries, but below that of Romania, India and China (TUSIAD, 2013: 7).

What was the impact of these changes on exports? Firstly, it seems that manufacturing sectors increasingly directed their production towards exports. Zafer Yükseler and Ercan Türkan (2008: 29, 31) found that the export/production ratio for manufacturing increased between 1997 and 2007 from 15.5 per cent to 36.9 per cent. Secondly, the share of labour-intensive sectors decreased in manufacturing composition, but the share of sectors with medium-tech increased. For example, the export share of textiles and garments halved from 41.0 to 19.8 per cent between 1999 and 2014, while that of motor vehicles doubled, from 6.7 to 13.1 per cent (Table 2).

**Table 2 – Export share of selected manufacturing sectors**

| | 1999 | 2000 | 2007 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|
| Food and beverages | 8.5 | 7.2 | 5.1 | 7.1 | 6.6 | 7.5 | 7.6 | 7.6 |
| Textiles and garments | 41.0 | 39.3 | 22.4 | 19.5 | 17.6 | 19.4 | 19.8 | 19.4 |
| Machinery and equipment | 5.1 | 5.4 | 7.9 | 8.8 | 8.3 | 9.0 | 9.2 | 9.0 |
| Motor vehicles | 6.7 | 6.8 | 16.8 | 13.5 | 11.3 | 12.9 | 13.1 | 13.8 |

*Source: calculated from Turkstat, 2016.*

Thirdly, the result of these developments is that the weight of technology-intensive products in exports increased. The share of products with medium-tech in total exports increased from 24 to 38 per cent (Ministry of Development, 2014c: 10). These figures reveal that there have been substantial developments in manufacturing exports.

In addition to this, Turkey also recorded a remarkable increase in export volumes in the 2000s. Between 1999 and 2014, manufacturing exports increased from $24bn to $147bn, while manufacturing imports increased from $34bn to $188bn (Turkstat, 2016). Nowadays, Turkey's manufactured exports cover a large region from Europe to the middle east and north Africa.

However, the performance of the Turkish economy in the last decade does have limitations. The export share of high-tech products is still very low, at 3-5 per cent (TUSIAD, 2013: 26-27). Hence, Turkey has not yet recorded full success in the restructuring of its manufacturing industry. The integration of Turkey into the global economy has led to a transformation in manufacturing, resulting in a structure with medium, but not high, technology (Ministry of Development, 2014c: 17). In mainstream thought, this situation is associated with a lack of institutional and legal arrangements that would maintain increases in labour productivity. Rifat His-



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

arcıklıoğlu (2008), President of the Union of Chambers and Commodity Exchanges of Turkey (TOBB), once complained that, during the integration of Turkish capital with the global economy:

> Everyone is fumbling, no one has the formula.

Moreover, industrial transformation has brought about an increase in the trade deficit: the manufacturing deficit increased from $5.8bn to $10bn dollars between 1990-1999; and from $10bn to $40bn between 1999 and 2014 (calculated from Turkstat, 2016). This was the result of the increasing dependency of Turkey's export-oriented industries on imported intermediate inputs and machinery during the 2000s (Taymaz *et al*. 2011; Yükseler and Türkan, 2008; TUSIAD, 2013). Specifically, in late industrialisation, a lack of technology and the means of production compels developing countries to import these things from developed countries (Munck, 1985; Bina and Yaghmaian, 1991). Consequently, manufacturing imports have increased faster than manufacturing production: between 1997 and 2007, the average annual increase in the manufacturing index was 3.7 per cent while that of the manufacturing import index was 11 (Yükseler and Türkan, 2008: 38). This increase in the import dependency of manufacturing and exports resulted in an increase in the import of intermediate goods, especially for machinery and equipment and motor vehicles (TUSIAD, 2013: 32). Yükseler and Türkan (2008: 39) found that the import/production ratio of manufacturing increased from 32.9 to 65.3 during the same period.

These figures show that the weight of imported goods has increased in manufacturing production. We can see a reflection of this in imports, as total imports increased from $40.7bn to $189.2bn, while the import of capital goods and intermediate goods also increased, with their respective shares fluctuating around 16.5 and 70 per cent (Table 3).

**Table 3 – Composition of imports (%)**

| | Capital goods (%) | Intermediate goods (%) | Imports ($bn) |
|---|---|---|---|
| 1999 | 21.5 | 66.0 | 40.7 |
| 2001 | 16.8 | 73.2 | 41.4 |
| 2003 | 16.3 | 71,7 | 69.3 |
| 2005 | 17.4 | 70.1 | 116.8 |
| 2007 | 15.9 | 72.7 | 170.1 |
| 2009 | 15.2 | 70.6 | 140.9 |
| 2011 | 15.5 | 71.9 | 240.8 |
| 2013 | 14.6 | 73.0 | 251.7 |
| 2015 | 16.7 | 69.3 | 189.2 |

*Source: Calculated from Turkstat, 2016.*



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

These problems created the need, on the part of the bourgeoisie, for a complete industrial strategy. The next section will deal in a bit more detail with the industrial and employment strategies which have been developed in response.

## The target of industrial and employment strategies

Industrial strategies have a pre-eminent role in creating the conditions for capitalist development in developing countries (Wade, 1990; Jenkins, 1991). States in developing countries promote export-oriented industrialisation by an industrial strategy, providing industrial incentives, export promotions, cheap labour facilities and technological infrastructure. They play a critical role in promoting, guiding and supporting manufacturing sectors to encourage entry to global markets.

> Not only have states in late-industrializing countries intervened by protecting infant industries, they also have intervened by providing private investors with a battery of incentives that, simplified, boil down to subsidies. The subsidy, which includes tariff protection and financial incentives, epitomizes the struggle to industrialize. (Amsden, 1992: 13)

At the beginning of 2011, the Ministry of Industry and Commerce launched such a strategy for Turkey: the Turkish Industrial Strategy Document. This sought to provide solutions for the two main problems which had been experienced by manufacturers in recent years: one was the integration of Turkish capital with the global economy without a specific strategy; the other being the lack of institutional arrangements in maintaining increases in labour productivity (Ministry of Development, 2007). Of itself, the document was an answer to the first issue: Turkish capitalists were provided with the 'road map' which they had been requesting over a long period (Yaman Öztürk and Öztürk, 2011: 34). The document determined primary industries and the action plans to promote them. The industrial strategy resembled east Asian 'effective' industrial policies in terms of selectivity, the favouring of particular industries and an emphasis on promotion rather than regulation.

Regarding the second issue, the goal behind the need for increased labour productivity was declared as the vision of the document:

> To be the production base of Eurasia for medium and high technology products. (Ministry of Science, Industry and Technology, 2014: 10)

It was planned to build a new industrial structure producing high technology goods, and which took a bigger share of world trade, through increased competitiveness and industry productivity. In order to achieve these goals, an 'export-oriented manufacturing strategy' was introduced. It was assumed that this strategy would help decrease the import dependency of industry through increased production of the means of production and, hence, decreasing the import of intermediate goods and capital goods (Ministry of Science, Industry and Technology, 2014: 70).

The circumstances which created the need for an industrial strategy were also formed by global developments. It is written in many official documents that sharp global competition forces firms to adapt to changing environments (TUSIAD, 2010; Ministry of Development, 2013, 2014b, 2014c).



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

There is a critical emphasis in this statement that would help us grasp the economic and ideological background of the industrial strategy: 'changing environments'. Much as these environments are the result of the stage that global capitalist accumulation has reached in the last thirty years, they also point to the limits of such accumulation processes at that stage. Its effects are somehow contained, but the global crisis of 2008-2009 is still not over. Indeed, a complete restructuring programme against the global crisis has not yet been proposed and it is thought that the crisis will deepen in the upcoming period. The World Bank, for example, decreased its growth expectation for 2015 from 3.4 to 3.0 per cent; because, according to the Bank (2015: 3):

> The global economy is still struggling to gain momentum as many high-income countries continue to grapple with the legacies of the global financial crisis [while] emerging economies are less dynamic than in the past.

In Turkey itself, the previous Vice Prime Minister of Turkey, Ali Babacan, explained in October 2014 that the 2014 growth rate had been decreased to 3.3 from 4 per cent (Haber7, 2014).

The employment strategy of Turkey was designed under these conditions. States create the conditions for capital accumulation and restructure labour processes in the direction which is required by capitalist development at particular points in time (Jenkins, 1991: 224). Accordingly, the employment strategy aimed to increase labour productivity in order to increase the export power of manufacturing in those circumstances, by increasing the knowledge and skills of workers as well as focusing on research and development activities, as stated in the National Employment Strategy Document (Ministry of Labour and Social Security, 2014a).

This planned to develop the stock of human capital, activate the labour market and increase the capacity for technology and innovation through productivity-oriented policies (Ministry of Development, 2013: 60). These policies can be grouped into two: one associated with labour itself, aimed at increasing the skills of the labour force; while other policies, directed at the conditions of labour, aimed to develop a technology-intensive production base. In order to co-ordinate these policies, the Productivity Increase Programme was introduced in a Development Plan (Ministry of Development, 2013: 150).

*Transforming the workers: qualified labour force training*

According to the industrial bourgeoisie, one of the crucial deficiencies of Turkish industry is its reserve of unskilled labour (MUSIAD, 2010; TUSIAD 2012). The National Employment Strategy Document associates the issue with the Turkish education system. According to this, neither the formal education system nor vocational training meets the needs of the business world (Ministry of Labour and Social Security, 2014a: 22-3). The Action Plan behind the National Employment Strategy was designed with this perspective: the education system as a whole would be restructured in such a way that it fulfilled the needs of capital. Thus, public sector education institutions would mobilise their knowledge, labour force and technical equipment



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

for the needs of capital. This means that schools would be the grounds of capitalist accumulation itself; and, moreover, that children would be educated in accordance with capitalist requirements. This would undoubtedly lead capitalists to a position of controlling workers since the time of their childhood. In fact, this is an advanced stage of the oppression of labour by capital.

Regarding women, the 'deficiency' in knowledge and skills is a much more apparent issue. According to education statistics, 9.4 per cent of women in Turkey are still illiterate while only 18.5 per cent are graduates of nothing more than primary schooling (Turkstat, 2015). In a survey of female workers from different textiles factories located in five provinces of Turkey, it was observed that most participants were unskilled workers and that 69.2 per cent had only primary schooling (Kocacık and Ayan, 2013: 472), This shows that the most poorly-educated women are generally employed in textiles manufacturing and do the most 'unskilled' tasks.

Consequently, what is being aimed at with these policies is making women much more 'profitable' for capital accumulation by giving them particular training. Women are seen as favourable candidates for 'human capital' investment because of their low education levels and low skills. This approach originates from a typical neoclassical assumption:

> The marginal benefits of education decline with increasing education and thus adding to already higher levels of male education … will have a lower social benefit than adding to the lower levels of female education. (Klasen, 2005: 247)

Furthermore, according to the 'Main messages' of the 2012 World Development Report, under the title of *Gender Equality and Development*:

> Productivity will be raised if [women's] skills and talents are used more fully. (World Bank, 2011: xx)

The World Bank is asserting that women could be subordinated to capital much more intensely through developing their human capital.

The target of employment policies is the same: a report from the Ministry of Labour and Social Security (2014c) asserts that, in order to increase women's skills and female employment in industry, active labour market policies need to be developed, employment incentives for women who participate in the labour force for the first time need to be maintained, and that part-time working opportunities for women need to be more widespread.

The Institution for Providing Jobs and Employees (İŞKUR), a public institute which aims to fulfil the mission of meeting the labour force needs of developing industry, carries out facilities associated with active labour market programmes such as vocational training courses, on-the-job training programmes, entrepreneurship training programmes and public works (İŞKUR, 2014). In 2014, some 218 814 people participated in 34 240 courses which were implemented in these four areas. More than one-half of the participants (52 per cent) were women, with a highest participation rate of 56 per cent in vocational training courses (İŞKUR, 2014: 3-6).



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

*Transforming industry: technology intensive production*

In order to shift industry to high value-added, technology intensive production, it is projected that R&D investments will be supported and technological infrastructure strengthened. This is not about pushing the technology frontier but changing the structure of production towards activities with higher productivity, and this means absorbing existing technologies (Storm, 2015: 674). In fact, in the last decade, the financial and human resources reserved for R&D have increased: the ratio of R&D expenditure to GDP increased from 0.6 to 0.86 per cent in the 2006-2011 period (Ministry of Development, 2013: 84).

In this regard, the goal of the Tenth Development Plan was 'to commercialise technology'. One of the crucial components of this is a consolidation of university-industry collaboration. However, integrating the resources of universities with the value creation of capital implies a commercialisation of the university. This is carried out through a:

> Systematic conversion of intellectual activity into intellectual capital and, hence, intellectual property. (Noble, 2003: 34)

What is crucial is that universities provide the grounds for the accumulation of capital as well as becoming a part of it. This transformation of universities also leads to capitalists establishing new ways of dominion over labour. The means that are developed to increase productivity and competitiveness could be used to substitute disobedient workers if need be; while the means used to control labour processes could be designed by universities themselves (Narin, 2012: 8). Another striking point regarding commercialisation is the increasing share of the private sector in R&D investment, which rose to 43.2 per cent from 37 per cent between 2006-2011 (Ministry of Development, 2013: 86).

The result is that, through these strategies, it was thought that industry would be able to shift to an R&D and innovation-based structure in manufacturing, both of the end products as well as of the intermediate inputs (ASO, 2011: 24).

All these policies aimed at increasing labour productivity are accompanied by policies designed to keep wages low. This goal is achieved through regional development of industry so as to keep the major export industries competitive in global markets. In the next section, this second aspect of the industrial transformation, namely regional development strategies, will be discussed. It is here that the importance of textiles and garment manufacturing and the regional restructuring of that industry will be considered.

## Regional restructuring of industry

Cheap labour policies accompany productivity-oriented policies without being officially declared in industrial and employment documents. However, capital groups have explicitly asked for reductions in labour costs in their reports and statements (TUSIAD, 2010, 2012; Oran, 2008). There are two main mechanisms associated with cheap labour policies: on the one hand, incentives and legal arrangements can be restructured to decrease labour costs; on the other, zones of cheap labour power



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

can be created. The regional restructuring of industry comprises both mechanisms; in other words, it aims to create a cheap labour zone in the south-east region, in which wages are already low, with incentives aimed at the further reduction of labour costs.

In this regard, textiles and garment manufacturing is a prominent sector. This sector is an essential export industry as regards the industrial restructuring process because of its net trade surplus. The trade deficit increases in the transformation process, so this must be balanced by the export of some goods. In other words, some sectors with trade surpluses can 'finance' the import of intermediate inputs and machinery (Munck, 1985: 32). To balance the trade deficit, textiles and garment manufacturing appears as the most favourable candidate. In the years since 1999, it was the most lucrative sector in terms of net export returns. Hence, textiles and garment manufacturing has been supported so as to retain the creation of a trade surplus to 'finance' more technology-intensive production.

*The significance of textiles and garment manufacturing to exports*

The share of textiles and garment might have decreased, but it still constitutes Turkey's largest manufacturing and export sector (Ministry of Labour and Social Security, 2014c). Today, it constitutes almost ten per cent of GDP and creates almost two million jobs (formal or informal), equalling 9.3 per cent of Turkey's total employment and 28.6 per cent of industrial employment (TTSIS, 2015: 13). In terms of competitive power, garment manufacture is indeed at the top and textiles is in fourth place among manufacturing sectors (TSKB, 2014). Textiles and garment production took a share of 19.8 per cent in manufacturing exports in 2014 (calculated using Turkstat, 2016). Furthermore, the export share taken by production has increased even while sector production contracted. Taking 2005 as the base year, the production index of garment manufacturing decreased to 97.4 in 2014 while its export index increased to 138.5. Similarly, the production index of textiles fluctuated around 100 in the same period, while its export index increased to 185. Hence, textiles and garments have increasingly exported their products. Today, 44 per cent of textiles and 71 per cent of garment production is oriented towards exports (TSKB, 2014).

Turkey is one of the major textiles and garment exporters in the world. According to WTO (2015), Turkey ranked fifth in the world in 2014 in terms of textiles exports and seventh in garments. The biggest export market of Turkey is the EU, which takes a share of 61.6 per cent (Ministry of Labour and Social Security, 2014a: 54). In 2012, 43.8 per cent of Turkey's textiles exports and 75.7 per cent of its garments exports were to EU countries (Ministry of Development, 2014b: 48). After China, Turkey is the biggest garments supplier, the biggest home textiles producer and the second biggest shoe manufacturer for the EU (Ministry of Labour and Social Security, 2014c).

Textiles and garment manufacturing is the most lucrative sector in terms of net export returns, and it has made significant contributions to foreign exchange inflows since 1999 (Table 4).



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

**Table 4 – Manufacturing deficits and textile and garment surpluses, by year ($m)**

| | Manufacturing deficit | Textile and garment surplus |
|---|---|---|
| 1999 | -9,978 | 7,996 |
| 2000 | -18,683 | 7,912 |
| 2005 | -25,395 | 13,999 |
| 2010 | -39,900 | 13,154 |
| 2011 | -57,968 | 14,925 |
| 2012 | -33,041 | 17,479 |
| 2013 | -55,465 | 18,865 |
| 2014 | -40,676 | 20,435 |
| 2015 | -63,268 | 18,441 |

*Source: Calculated from Turkstat, 2016.*

The export/import ratios of textiles and garments show the course of their respective contributions. In the years since 1999, the export/import ratio for textiles did not change significantly, fluctuating around 250 per cent (Table 5). In contrast, that of garments has gradually decreased, from 2,839 per cent to around 500 per cent. Even so, this is still the highest value among export/import ratios recorded in the manufacturing sector in 2014.

**Table 5 – Export/import ratios of the textiles and garment sector, by year (%)**

| | 1999 | 2000 | 2007 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|
| Textiles | 277 | 249 | 203 | 188 | 243 | 251 | 257 | 266 |
| Garments | 2839 | 2034 | 869 | 423 | 524 | 470 | 500 | 487 |
| Manufacturing | 71 | 58 | 75 | 68 | 81 | 72 | 78 | 81 |

*Source: Turkstat, 2016.*

We may grasp the contribution of textiles and garments more clearly from its relative position in manufacturing exports. In 2015, textiles and garments made a trade surplus of $18.442bn, which is greater than the sum of the contributions made by the other six manufacturing sectors ($15.224bn).

How textiles and garment manufacturing has still kept its competitive power is basically related to the labour-intensive character of the sector. The competitive power of developing countries in textiles and garments depends primarily on low wages; and women supply cheap and ample labour power for the sector. In the 1970s and 1980s, textiles and garments became one of the major export industries in developing countries, such as Thailand, Indonesia and South Korea, and female employ-



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

ment grew rapidly in this sector (Segiuno, 2000). It was far more profitable to employ female labour in textiles and garment manufacturing, which is considered to be 'women's work' as a result of patriarchal relations (Pearson, 1994). Similar to the south Asian experience, textiles and garment manufacturing also depended heavily on female labour in Turkey after 1980 (Özler, 2000; Çağatay and Berik, 1991: 154). Despite this, women are mostly invisible in official employment statistics, since they are usually employed informally through sub-contracted and home-based piecework (Dedeoğlu, 2010: 2).

Today, textiles and garment manufacturing is the most female labour-intensive sector. In garment manufacturing, 75 per cent of those employed are women (ISO, 2012: xii). Garments has the highest share of women in employment across the whole of manufacturing, although its share decreased from 37.4 per cent in 2003 to 32.8 per cent in 2009. The share of women in formal employment in textiles and garments is nearly 45 per cent. However, women are in fact invisible in these records due to their mostly informal participation in production. According to official estimates, the ratio of informal employment in the sector is 59 per cent (Ministry of Labour and Social Security, 2014c: 56).

It is possible to say that success in exports in the garment sector is essentially dependent on women's cheap labour in the poor suburbs of the cities. For most women who were released from agriculture and then migrated to cities, the only possible alternative for employment is home-based work, especially in garment manufacture. For example, the hand embroidery of factory-made blouses and shirts is mostly carried out in houses. Home-based production is usually seen as part of informal work; however, such examples can be directly connected to export factories (Pearson, 1994: 52). These women work in houses without job security and social security, and with irregular working hours. The number of women who work from home in the textiles and garments sector stood in 2013 at 34.2 per cent of all female home-based workers and at 2.3 per cent of total female employment (KSGM, 2014: 20).

Textiles and garment manufacturing in Turkey has been quite 'successful' over the last three decades, but it seems that it is about to lose its competitive power.

Firstly, that it is a low-tech sector with insufficient research and development facilities (Küçükkiremitçi, 2011: 89), and dependent on developed countries for production technologies, makes it difficult to compete with developed countries such as the US and EU countries. The export growth recorded between 2007 and 2012 seems essentially to originate from price competition rather than quality improvements (TUSIAD, 2014: 81). In the 2005-2012 period, labour productivity in textiles indeed decreased by 4.4 per cent (ISO, 2014: 10), although garments was marked by an improvement in this respect (TUSIAD, 2014: 73).

Secondly, wages in textiles and garments in Turkey are much lower than those found in the EU and the US, but they appear a little high when compared to developing countries. According to the ILO (2014), the minimum monthly wage in 2014 was around $230 in China, $125 in India and $120 in Vietnam in 2014, but nearly $500 in Turkey. Hence, it is getting more and more difficult for Turkey to compete with them (MSIT, 2010: 74). According to Yükseler and Türkan (2008: 18), there has



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

been a limited increase in labour productivity, but the increase in wages is deteriorating the competitive power of the sector.

Global circumstances has certainly sharpened the rivalry between developing countries. China is the leader in global markets, responsible for 11.7 per cent of world total exports. In textiles and garment production, China's share is about 35.6 and 38.6 per cent, respectively (WTO, 2015). India and Vietnam are the other prominent competitive developing countries. After the termination of the Agreement on Textiles and Clothing (ATC) in 2005 and the ending of all the restrictions against China in 2008, it became more difficult for Turkey to compete on the basis of low wages in global markets (MSIT, 2010: 198). According to the French Fashion Institute's 2005 report, China, Turkey and South Korea are the most competitive countries in terms of wages, raw materials and marketing in textiles and garment manufacture (General Directorate of Industry, 2010: 8). Among these, China has the lowest wages while South Korea has the highest labour productivity.

Turkey occupies a medium position regarding both wages and productivity. According to mainstream analyses, in order to maintain its competitive power Turkey needs to keep wages at low levels and increase labour productivity (General Directorate of Industry, 2015).

In order to retain a textiles and garment manufacturing industry, the industry has been restructured in south-east Anatolia under the notion of 'regional development'. Regional development has been determined as a national strategy within the scope of the Regional Development National Strategy in Turkey (Ministry of Development, 2014b). The notion of 'regional development' is typically used to legitimate a mobilisation of regional resources for capitalist accumulation. For example, a few years ago, the former President of the Assembly of the Textiles and Garment Industry within TOBB, proposed a project, named as 'Seven Proposals in order to Develop the East' (Oran, 2008). He claimed that shifting labour-intensive sectors to the east of Turkey should be promoted by a regional minimum wage, cheap credit, logistical support, etc. Of all these, the 'regional minimum wage' is the most crucial. Several business associations have asked for a regional minimum wage over the years (ASO, 2005; TUSIAD, 2010). The international organisations of capital, such as the IMF (2007) and the OECD (2015), have also advised Turkey not to increase the minimum wage any further, and to differentiate it by region.

The notion of 'regional development' emphasises 'region' as well as 'development'. Similarly, the 'development of the east' in Oran's statement has dual emphases. Firstly, through 'development of the east' (regional development), the state will provide fruitful investment and production opportunities for capitalists investing in the south-east provinces with exports in mind. Thus, through a regional re-organisation of production, the export power of manufacturing will be increased. Secondly, the 'development of the east' (regional development) refers implicitly to the 'common good' and implies that 'everyone' – namely, workers as much as capitalists; women as much as men; and Kurdish people as much as Turkish people – will benefit from it. Hence, it serves the purpose of covering up the class struggle as well as the gender and ethnic conflicts created and/or reproduced by the accumulation process itself.



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

*The significance of the south-east region for exports*

In brief, the primary stimulus for the regional re-organisation of capital is low wages since:

> Relative wage differences may have an impact on the site selection decisions for the production process. (Ministry of Development, 2013: 19)

The south-east region is the most suitable candidate for this: wages are at a minimum level in the south-east of Turkey (Ministry of Development, 2014b: 57). In 2010, the hourly average gross wage was 8.8 Turkish Lira in Istanbul, but just 5.4 TL in south-east Anatolia (Turkstat, 2010).

South-east Anatolia, namely the Kurdish region, where nearly 60 per cent of the population live below the poverty line, is the poorest region in Turkey (Keyder and Üstündağ, 2006). In 2014, the average annual disposable income was 19 062 TL in Istanbul in 2014; but a mere 7 568 TL in south-east Anatolia (Turkstat, 2015). Moreover, the participation rates of women and men in employment are also the lowest: in 2013, the male participation rate was 67.1 per cent in the region, 4.4 points below Turkey's average (71.5 per cent), while that of women was just 14.9, almost 16 points below the average (30.8 per cent) (KSGM, 2014: 25). However, the rate of unemployment was around 21 per cent in the region in 2013, compared to a figure of 9.7 per cent across Turkey (Turkstat, 2013).

These data reveal why the south-east region has been chosen, why female labour-intensive textile and garment industries have been put forward and why a regional minimum wage is being urgently requested. It is the case that both female and male workers have actually been employed informally in many workshops in the region, with quite low wages. What capitalists are demanding is that this actual, but informal, work be legalised.

Most of these requests were satisfied by the New Incentive System of 2012. David Harvey (2006: 397) argues that the state should establish regional planning strategies and make legal and administrative regulations to promote accumulation during the spatial re-organisation of capital. The New Incentive System provides such a means for the regional restructuring of capital. Previously, i.e. between 2004 and 2011, region-oriented incentives had already been in place. However, the new system is much more complicated, both in terms of the means and the regional supports provided (TUSIAD, 2013: 36-37). In the new incentive system, Turkey is divided into six regions, with greater incentives given to the less-developed ones. The sixth region, to which most of the incentives are directed, consists of the east and south-east provinces. Special incentives, such as support for the withholding of income tax and for employer national insurance contributions, are given to this region. Incentives for garment manufacturing are also given only to this region; thus, the:

> Sixth region will become the most advantageous region of Turkey in terms of labour costs. (Çağlayan, 2012a)



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

The Minister's words are terribly clear, but the actual meaning of the goals of the incentive package is indeed quite different than claimed. For example, the goal 'to decrease regional differences' (Official Gazette, 2012) actually means that these – wage-based – differences will themselves be used to create a cheap female labour zone. Furthermore, cheap female labour power will be channelled into global markets. Namely, it is intended to increase the export power of manufacturing through the formation of different control mechanisms over labour in different regions. Minister Zafer Çağlayan has previously said (2012b):

> Labour intensive sectors such as the garment industry have the highest female employment rate. We will transform some determined provinces of east and south-east into a region which could compete with China, Bangladesh and Vietnam.

The Minister is implying that neo-liberal policies are essentially not gender blind; on the contrary, his speech signifies that these policies have transformed women into a subject of, as well as a means of, the international restructuring of capital. In the meantime, he is putting forward an explicit goal: to build the 'China of Turkey' in the specified provinces of the south-east.

State incentives and cheap female labour power, together, would lead capitalists to an export boom through the textiles and garment industries of south-eastern Turkey. Capitalists employ women in factories and workshops, and as home-based workers. One survey (Aslan, 2012), carried out in Batman (a city located in the south-east Turkey), indicates that the region has already essentially become a unit manufacturing garments for export.

This survey draws attention to the tough working conditions being experienced: daily working hours do not decrease below nine and, in some workshops, even increase to eleven. There are a large number of unrecorded firms and informal work is quite widespread. According to another survey, the average monthly salary in factories and workshops in 2013 was, respectively, €196 and €130. At that time, the minimum wage was €252, while the subsistence level for a family of four implied a minimum monthly income of around €1,002 (CCC, 2014: 30).

The incentive system has gained the approval of investors: there has been an increase in the number of incentive certificates of 79 per cent; in fixed capital investments of 269 per cent and in additional employment of 183 per cent. These compare to Turkey's averages of 22, 62 and 59 respectively. Regarding textiles and garment manufacturing, these figures jump to 514, 848 and 292 in the region (Ministry of Economy, 2013: 48). Moreover, female industrial employment is still weak in the Kurdish region, but there has been a surprising increase in the number of female workers: the share of industry in female employment increased from 1.5 to 13.4 per cent in the Mardin sub-region of south-east Anatolia between 2004-2014 as a result of the regional restructuring of industry (Turkstat, 2014c).

This considerable increase in investments and employment proves that the region is considered as highly favourable to investments in textiles and garments. Indeed, the Regional Development National Strategy plans to transform the poor cities of the south-east which have a potential for 'development' – i.e. those with cheap labour



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

power potential – into a 'Regional Attraction Centre' (Ministry of Development, 2014a: 4). The 'Supporting Attraction Centres Programme' has been introduced in several eastern cities – namely Diyarbakır, Erzurum, Şanlıurfa and Van – to accelerate the development of the centres (Ministry of Development, 2014a: 108-9). It is intended to focus on leading industries, to extend the labour force and to build logistical centres in the provinces and, hence, to increase the export capacity of the centres.

It may be seen that the re-organising of capital on a spatial scale is not a mere technical organisational change. Transforming the south-east region into a production unit will transform poor men and 'housewives' into cheap value creators for capital. Women will undoubtedly continue doing housework as well. The probable future being designed for them is of a working life with long hours and without social security, in houses as well as in workshops.

However, this process is also occurring at a moment of ethnic struggles. Regional development is a project of mobilising the – largely female – labour force to export-oriented accumulation, but it cannot be disassociated from the 'Kurdish question'. In fact, the Kurdish Resolution Process, or Peace Process, plays a critical role for the accumulation process of capital. On the one hand, it prepares the conditions for the 'industrialisation' of the region; on the other, it paves the way to integrate all the resources of the region, notably women's labour, in its export industries. We can expect in the near future that industrialisation will speed up in the region.

And it should be added that, in the recent period, refugees from Syria are seen as a new low wage labour pool. In fact, according to a survey carried out by TİSK (Turkish Confederation of Employer Associations) and Hacettepe University (Erdoğan and Ünver, 2015), there are already 300 000 Syrian refugees who are working informally, as at December 2015.

Regional development consolidates the existing gender and ethnic inequalities, through class conflicts, so the Kurdish movement will also be mediated by class struggles. The result is that Kurdish female workers are exposed to a triple exploitation: by capital; by the patriarchal system; and by the ethnic exclusion mechanism.

The low wage strategy associated with the regional restructuring of capital, then, supports this industrial transformation, as mediated by the textiles and garments industry: it aims to help keep textiles and garments competitive and, hence, brings trade surpluses. However, it also immediately supports the industrial transformation itself, by providing a cheap labour force for industries with higher technology. Zafer Çağlayan (2012) referred explicitly to this issue in his speech:

> One of the benefits of 'regional development' is its role in shifting labour-intensive industry to a knowledge-intensive industry by keeping wages low.

## Conclusion

The trade deficit has been a crucial problem for Turkey for decades. This has been a result of the structure of an industrial production which is specific to late industrialisation, including an excessive dependence of manufacturing on imported intermediate inputs and machinery. In order to overcome this difficulty, Turkey has witnessed an industrial transformation since the end of the 1990s. The composition



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

of industry and exports has changed in favour of medium-tech industries, but the import dependency of production has increased. Moreover, there has not been a complete transformation in terms of the degree of sophistication of manufacturing and a shift to high-tech industries.

Additionally, the competitive pressure of giant manufacturing countries, such as China and India, in the last few years has forced Turkey to increase the labour productivity of its export industries. Recent industrial and employment strategies aim at a transformation of industry into a further stage, providing the conditions for high-tech manufacturing. However, it seems that low wage policies have not yet been abandoned. This article has sought to trace the clues of a continuance of low wage policies in official documents, in the statements of government authorities and in the reports of capital organisations. It was observed that policies aiming to increase labour productivity are accompanied by low wage policies, even though these are not explicitly mentioned in official documents. However, the New Incentive System and the Regional Development National Strategy show that, due to its cheap female labour potential, the south-east region of Turkey is planned to be transformed into 'Turkey's own China'.

Hence, it can be concluded that there are two kinds of transformations going on in industry: One aims at a shift to high-tech manufacturing; the other aims at a regional restructuring of industry.

Textiles and garment manufacturing is an essential export industry in this regard. Transformations in industrial and export production have been accompanied by an increase in trade deficits, and so textiles and garment manufacturing is considered to balance the deficits because of the net trade surplus these sectors demonstrate. Hence, it can be said that low wage policies have been introduced to keep such export industries, and particularly textiles and garments, competitive in global markets because they are traditionally labour-intensive sectors.

However, the restructuring of industry is not a mere technical organisational change. All the policies which have been developed are directed at the building of an industry with higher labour productivity and cheaper labour power, allowing capitalists to build new control mechanisms on labour through technology, the education system and the persistence of regional inequalities.

## References

Akyüz, Y (2005) Trade, Growth and Industrialisation: Issues, Experiences and Policy Challenges Third World Network.

Amsden, A. H (1992) Asia's Next Giant: South Korea and Late Industrialization Oxford University Press.

Aslan, A (2012) Azgelişmişlik ve Kalkınma Sorunsalı Kıskacında: Sermayenin Mekânsal Örgütlenişi ve Batman Örneği Yayımlanmamış Yüksek Lisans Tezi: Marmara Univ.

ASO (Ankara Chamber of Industry) (2005) İşsizlik ve Bölgesel Gelir Dağılımı Eşitsizliği ile Mücadele İçin Yerel Asgari Ücret Uygulaması.



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

ASO (2011) Asoforum, Temmuz-Ağustos.

Athukorala, P (1989) 'Export Performance of 'New Exporting Countries': How Valid is the Optimism?' Development and Change 20: 89-120.

Balassa, B (1979) 'The Changing Pattern of Comparative Advantage in Manufactured Goods' Review of Economics and Statistics 61 (2): 259-266.

Bina, C and B. Yaghmaian (1991) 'Post War Global Accumulation and the Transnationalisation of Capital' Capital and Class 43: 107-130.

Çağatay, N and G. Berik (1991) 'Transition to Export-led Growth in Turkey: Is There a Feminisation of Employment?' Capital and Class 43: 153-177.

Çağlayan, Z (2012a) 5 Milyon TL Yatırıma, 5.8 milyon TL Devlet Desteği http://www.haberturk.com/ekonomi/makro-ekonomi/haber/731547-5-milyon-tl-yatirima-58-milyon-tl-devlet-destegi [last accessed 6 April 2015].

Çağlayan, Z (2012b) Doğu and Güneydoğu Bizim 'Çin'imiz Olacak Vatandaş Kahve Köşesinden Kurtulacak http://www.hurriyet.com.tr/ekonomi/19679921.asp [last accessed 14 April 2015].

Dedeoğlu, S (2010) 'Visible Hands–Invisible Women: Garment Production in Turkey' Feminist Economics 16 (4): 1-32.

Erdoğan, M. M and C. Ünver (2015) Türkiye İş Dünyasının Türkiye'deki Suriyeliler Konusunda Görüş, Beklenti ve Önerileri TİSK.

General Directorate of Industry (2010) Tekstil, Hazır Giyim, Deri ve Deri Ürünleri Sektörleri Raporu.

General Directorate of Industry (2015) Türkiye Tekstil, Hazırgiyim ve Deri Ürünleri Sektörleri Strateji Belgesi ve Eylem Planı.

Gough, J (2004) 'Changing Scale as Changing Class Relations: Variety and Contradiction in the Politics of Scale' Political Geography 23: 185-211.

Gündoğdu, I (2009) 'Sermayenin Bölgesel Kalkınma Eğilim(ler)i: Kalkınma Ajansları Yasası Üzerine Tarihsel-Coğrafi Materyalist Bir İnceleme' Praksis 19: 267-302.

Haber7 (2014) Ekonominin Yeni Yol Haritası Açıklandı http://ekonomi.haber7.com/turkiye-ekonomisi/haber/1208564-ekonominin-yeni-yol-haritasi-aciklandi [last accessed 17 April 2015].

Harvey, D (2006) Limits to Capital Verso.

Hisarcıklıoğlu, M. R (2008) 7. Sanayi Stratejisi Toplantısı Konuşma Metni, http://www.tobb.org.tr/Documents/Konusmalar/sanayistratejisitoplantisi.doc [last accessed 3 June 2011].

Hürriyet (2007) Tüzmen: Çin Türkiye'ye Verdiği Hiçbir Sözü Tutmadı http://www.hurriyet.com.tr/index/ArsivNews.aspx?id=338278 [last accessed 1 June 2015].

ILO (2014) Wages and Working Hours in the Textiles, Clothing, Leather and Footwear Industries.



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

IMF (2007) Unlocking Turkey's Labour Potential https://www.imf.org/external/pubs/ft/survey/so/2007/CAR0726A.htm [last accessed 2 March 2015].

İŞKUR (2014) İl İstihdam ve Mesleki Eğitim Kurulları 2014 Yılı Faaliyet Raporu.

ISO (2012) Giyim Eşyası İmalatı Sanayi Raporu.

ISO (2014) Tekstil İmalatı Sanayi Raporu.

Jenkins, R (1991) 'The Political Economy of Industrialization: A Comparison of Latin American and East Asian Newly Industrializing Countries' Development and Change 22(2): 197-231.

Klasen, S (2005) 'Bridging the Gender Gap to Promote Economic and Social Development' Journal of International Affairs 58(2): 245-255.

Kocacık, F and S. Ayan (2011) 'Türkiye'de Tekstil Alanında Çalışan Kadınlar ve Sorunları: İstanbul – Adana – Denizli – Sivas and Tekirdağ' Uluslararası İnsan Bilimler Dergisi 8(1): 464-483.

KSGM (Women's Labour and Employment Initiative Platform) (2014) Türkiye'de Kadın İşgücü Profili ve İstatistiklerinin Analizi Proje Yürütücüsü: A. Gülay Toksöz.

Küçükkiremitçi, O (2011) 'Türkiye Sanayi Strateji Belgesi Temelinde İmalat Sanayinin Yapısal Analizi' Memleket Siyaset Yönetim Dergisi 53-95.

Ministry of Development (2007) Dokuzuncu Kalkınma Planı (2007-2013) Özel İhtisas Komisyonu Raporları: Sanayi Politikaları.

Ministry of Development (2013) Onuncu Kalkınma Planı (2014-2018).

Ministry of Development (2014a) Bölgesel Gelişme Ulusal Stratejisi (2015-2023).

Ministry of Development (2014b) Onuncu Kalkınma Planı Özel İhtisas Raporu: Tekstil – Deri-Hazır Giyim.

Ministry of Development (2014c) Onuncu Kalkınma Planı, Özel İhtisas Raporu: İmlat Sanayiinde Dönüşüm.

Ministry of Economy (2013) Yeni Teşvik Sistemi Yıllık Değerlendirme Raporu.

Ministry of Labour and Social Security (2012) Asgari Ücretin Net Hesabı ve İşverene Maliyeti https://www.csgb.gov.tr/media/1687/2012_ikincialtiay.pdf [last accessed 10 June 2015].

Ministry of Labour and Social Security (2014a) Ulusal İstihdam Strateji Belgesi (2014-2023).

Ministry of Labour and Social Security (2014b) İşgücü Piyasasında Güvence ve Esnekliğin Sağlanması Temel Politika Ekseni Raporu, II. Dönem.

Ministry of Labour and Social Security (2014c) Ulusal İstihdam Stratejisi (2014-2023): Tekstil ve Hazır Giyim Sektörü Raporu, II. Dönem.

Ministry of Science, Industry and Technology (2014) Türkiye Sanayi Stratejisi Belgesi.



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

Munck, R (1985) Politics and Dependency in the Third World: The Case of Latin America Zed Books: London.

MUSIAD (Independent Industrialists' and Businessmen's Association) (2010), Türkiye Ekonomi Raporu (2010): Ekonomide ve Demokraside Yükselme Zamanı.

Narin, O (2012) 'Bilimin Metalaştığı Bir Toplumda, Krizin Üniversiteleri, Üniversitenin Krizi' in Üniversite, Üniversitelerimiz, Üniversite Nereye? 10. Ulusal Mantık, Matematik and Felsefe Sempozyumu Bildiri Kitabı: İstanbul Kültür Üniversitesi Yayınları.

Noble, D (2003) 'Digital Diploma Mills', in B. Johnson, P. Kavanagh and K. Mattson (Eds.) Steal This University: The Rise of The Corporate University and The Academic Labour Movement Routledge: New York.

OECD (2015) Economic Policy Reforms 2015: Going For Growth.

Official Gazette (2012) Yatırımlarda Devlet Yardımları Hakkında Karar http://www.resmigazete.gov.tr/eskiler/2012/06/20120619-1.htm [last accessed 12 January 2015].

Oran, U (2008) TOBB'dan Doğu'yu Kalkındıracak 7 Öneri http://www.haber10.com/ekonomi/tobbdan_doguyu_kalkindiracak_7_oneri-128520 [last accessed 12 January 2015].

Öztürk, Ö (2011) Türkiye'de Büyük Sermaye Grupları: Finans Kapitalin Oluşumu ve Gelişimi, SAV Yayınları.

Patnaik, P (1989) 'BOP Problems of Developing Countries and International Division of Labour: Some Theoretical Comments' Economic and Political Weekly 24(30): 91-93.

Pearson, R (1994) 'Gender Relations, Capitalism And Third World Industrialization' in L. Sklair (Ed.) Capitalism and Development Routledge: London, pp. 339-359.

Sönmez, M (2005) Türkiye İhracatının İthalata Bağımlılığı: 2000-2005 http://www.bagimsizsosyalbilimciler.org/Yazilar_Uye/SonmezOct05.pdf [last accessed 12 January 2011].

Storm, S (2015) 'Structural Change' Development and Change 46(4): 666-699.

Taymaz, E, E. Voyvoda and K. Yılmaz (2011) Uluslararası Üretim Zincirlerinde Dönüşüm ve Türkiye'nin Konumu TUSIAD.

TSKB (Turkey Development and Investment Bank) (2014) Tekstil ve Hazır Giyim http://www.tskb.com.tr/i/content/729_1_Tekstil_Giyim_Sektorel_Gorunum.pdf [last accessed 1 June 2015].

TTSIS (Union of Turkish Textile Industry Businessmen) (2015) Tekstil and Hazır Giyim Sanayiinin Türk Ekonomisindeki Yeri.

Turkstat (2010) Average Working Hours and Monthly Average Gross Wage http://www.tuik.gov.tr/PreTablo.do?alt_id=1008 [last accessed 3 May 2015].



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.

Turkstat (2013) Main Labour Force Indicators by Province, 2013.

Turkstat (2014a) Statistical Indicators (1923-2013).

Turkstat (2014b) Income and Living Conditions Survey.

Turkstat (2014c) Economic Activity by Region, Years and Sex.

Turkstat (2015) Istatistiklerde Kadın.

Turkstat (2016) Foreign Trade Statistics http://www.tuik.gov.tr/PreTablo.do?alt_id=1046.

TUSIAD (Turkish Industrialists' and Businessmen's Association) (2010) İş ve Yatırım Ortamının İyileştirilmesine Yönelik TUSIAD Önerileri.

TUSIAD (2012) 2050'ye Doğru Nüfusbilim ve Yönetim: İşgücü Piyasasına Bakış (Demography and Management Towards 2050: Labour Market Outlook).

TUSIAD (2013) Structural Change and Industrial Policy in Turkey.

TUSIAD (2014) İmalat Sanayi Sektörleri Verimlilik Göstergeleri Raporu.

Wade, R (1990) Governing the Market: Economic Theory and the Role of Government In East Asian Industrialization Princeton University Press.

World Bank (2011) World Development Report 2012: Gender Equality and Development.

World Bank (2015) Global Economic Prospects: Having Financial Space and Using It.

WTO (2015) International Trade Statistics 2014: Merchandise Trade https://www.wto.org/english/res_e/statis_e/its2015_e/its15_merch_trade_product_e.htm [last accessed 2 February 2015].

Weeks, J (1977) 'Backwardness, Foreign Capital and Accumulation in the Manufacturing Sector of Peru: 1954-1975' Latin American Perspective 4(3): 125-145.

Yaman Öztürk, M and Ö. Öztürk (2011) 'Türkiye Sanayi Stratejisi Belgesi Üzerine Gözlemler' Memleket Siyaset Yönetim Dergisi 15: 24-52.

Yükseler, Z and E. Türkan (2006) Türkiye'nin Üretim and Dış Ticaret Yapısında Dönüşüm: Küresel Yönelimler and Yansımalar: TUSIAD.



https://doi.org/10.5771/1435-2869-2016-1-67 - Generiert durch IP 216.73.216.36, am 18.01.2026, 07:03:58. © Urheberrechtlich geschützter Inhalt. Ohne gesonderte Erlaubnis ist jede urheberrechtliche Nutzung untersagt, insbesondere die Nutzung des Inhalts im Zusammenhang mit, für oder in KI-Systemen, KI-Modellen oder Generativen Sprachmodellen.