

**Transforming Turkey into Europe's China:  
The Industrial Strategy of Turkey**

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## Introduction

At the beginning of 2011, Ministry of Industry and Commerce launched an industrial strategy for Turkey: *Industrial Strategy Document (TISD)*. The document determines the way of the restructuring of Turkish industry: it has been planned to build a new industrial structure, in order to produce higher value added commodities with high technology content, to take a larger share from world trade through increasing competitiveness and industrial productivity. Recent employment strategy documents were introduced to build the labour conditions for this restructuring process.

However, a few months later, former Minister Zafer Çağlayan (2012b) said; “labour intensive sectors such as the garment industry have the highest female employment’s rate. We will transform some determined provinces of east and southeast of Turkey into a region which could compete with China, Bangladesh and Vietnam.”

The Minister implies that the government will keep supporting labour intensive sectors, such as garment industry. Does his speech contradict with new industrial strategy which aims to increase labour productivity? Of course not. We understand that the low wage strategy has not been abandoned altogether, but this is not officially confessed.

Besides, he shows that the neoliberal policies are essentially not gender blind; on the contrary, his speech signifies that these policies transform women into a subject and a means of the international restructuring of capital. He, in the mean time, puts forward an explicit goal: To build the ‘China of Turkey’ in the determined provinces of southeast. 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 southeast region, where Kurdish people live.

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Hence, we can say that there are two interrelated aspects of the industrial restructuring process as reflected in the strategy plans. Alongside the general shift to high-tech industries, cheap labour power policies are reserved for some low-tech sectors, especially textile and garment, through a regional industrial restructuring process. Nevertheless, I will just focus on regional restructuring of the industry and make a few words about increasing labour productivity, as for I have already discussed the latter elsewhere (see Yaman, 2016).

The need for this transformation has arisen from, alongside the chronic trade deficit problem, the difficulty in maintaining the wage advantage of manufacturing exports under the new global conditions. As in other developing countries, Turkey has her competitive power in

low skill, low paid, labour intensive industries, notably textile and garment manufacturing. Textile and garment has been the driving force of Turkey's exports for the last 35 years (Eraydın and Erendil 1999; Köse and Öncü 2000); and it still keeps its importance during the restructuring process of the industry, in terms of balancing the trade deficits and keeping competition advantage.

The paper argues that, regional restructuring aims keeping export industries, particularly the traditionally labour intensive textile and garment sector, competitive in the global markets. Due to its cheap -female- labour potential, it is planned to turn the southeast region of Turkey into 'Turkey's China', a region to export especially textile and garment, under the name of 'regional development'. Since 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, policies targeting low wages do not lose significance.

In the first chapter, I will briefly introduce recent industrial and employment strategies. Then I will discuss the regional restructuring of the industry in the next chapter. In this chapter, I will show that the textile and garment manufacturing is a significant export sector for exports and the southeast region of Turkey provides cheap-female-labour for export industries such as textile and garment.

### **The Target of Industrial and Employment Strategies**

These strategies were designed to increase the export power of manufacturing through increasing labour productivity, with the explicit target of 'transforming Turkey into Europe's China'. The state plays a fundamental role in this process, providing investment and logistics supports and infrastructural improvements; promoting university industry collaboration and subsidizing R&D facilities; and providing industrial and employment strategy documents for the industrial transformation.

TISD provides solutions for two main problems of manufacturing in recent years: One is Turkish capital's integration with the global economy without a strategy; the other is the lack of institutional arrangements in maintaining labour productivity increases.

Accordingly, the employment strategy aims to increase labour productivity in order to increase the export power of manufacturing in these circumstances, by increasing knowledge and skills of the workers as well as focusing on research and development activities, as is stated in the *National Employment Strategy Document (NESD)* (MLSS, 2014a).

It is planned to develop human capital, to activate labour market, and to increase technology and innovation capacity through productivity oriented policies (MD, 2013: 60). These policies can be grouped in two: One is associated with labour itself and aims to increase qualifications of the labour force. The other, directed to the conditions of labour, aims to develop a technology intensive production (see Yaman, 2016).

### **Regional Restructuring of the Industry**

Cheap labour policies are accompanying productivity oriented policies without being officially declared in the industrial and employment documents. 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 second, cheap labour power zones can be created. Regional restructuring of industry comprises both mechanisms; in other words, it aims to create a cheap labour zone in the *southeast* region in which wages are already low, with the *incentives* that makes further reduction in labour costs.

In this regard, textile and garment manufacturing is a prominent sector. This sector is an essential export industry for the industrial restructuring process because of its net trade surplus. Since the trade deficit increases in the transformation process, it is required to balance it by exporting some goods. In other words, some sectors with trade surpluses can ‘finance’ the import of intermediate inputs and machinery as Ronald Munck (1985: 32) says. To balance the trade deficit, textile and garment manufacturing seems as the most favourable candidate. During the 2000s, it has been the most lucrative sector with net export returns. Hence, textile and garment manufacturing has been supported to keep on creating a trade surplus to ‘finance’ more technology intensive production.

#### ***The significance of textile and garment manufacturing for exports***

Although the share of textile and garment decreased, it still makes the largest manufacturing and export sector of Turkey (MLSS, 2014b). Today, it constitutes almost 10 per cent of the GDP, and creates almost 2 million jobs (formal or informal) which equals 9.3 per cent of Turkey’s total employment and 28.6 per cent of the industrial employment (TTSIS, 2015: 13). Garment is indeed at the top and textile is at the fourth place among manufacturing sectors in terms of competitive power (TSKB, 2014). Textile and garment production had a share of 19.8 per cent in the manufacturing exports in 2014 (calculated using Turkstat, 2016). As the sector production contracted, export share in their production was increasing. Taking 2005 as the base year, the production index of garment decreased to 97.4,

while its export index increased to 138.5 in 2014. Similarly, as production index of textile fluctuated around 100, its export index increased to 185 in the same period. Hence, textile and garment increasingly exported their products. Today, 44 per cent of textile and 71 per cent of garment production are oriented to exports (TSKB, 2014).

Turkey is one of the major textile and garment exporters in the world. According to WTO (2015), Turkey ranked fifth in the world textile exports and seventh in garment in 2014. The biggest export market of Turkey is EU with a share of 61.6 per cent (MLSS, 2014a: 54). Turkey exported 43.8 per cent of textile products, and 75.7 per cent of garment products to the EU countries in 2012 (MD, 2014b: 48). After China, Turkey is the biggest garment supplier, the biggest home textile producer and the second big shoe maker of EU (MLSS, 2014b).

Textile and garment manufacturing plays a crucial role in balance of payments. Trade deficit has been one of the major macroeconomic problems of Turkey for decades. The problem of trade deficit originates from the structure of industrial production that is specific to late industrialization, which includes the excessive dependence of manufacturing to imported intermediate inputs and machinery (see Munck, 1985; Weeks, 1977). It is the most lucrative sector with net export returns. It made significant contributions to foreign exchange inflows during the 2000s (Table 1).

**Table 1** - Manufacturing deficits and textile and garment surpluses by years (million \$)

	1999	2000	2005	2010	2011	2012	2013	2014	2015
<b>Manufacturing Deficit</b>	-9978	-18683	-25395	-39900	-57968	-33041	-55465	-40676	-63268
<b>Textile and Garment Surplus</b>	7996	7912	13999	13154	14925	17479	18865	20435	18441

**Source:** Calculated from Turkstat 2016.

Export/import ratios of textile and garment show the course of its contributions. During the 2000s, export/import ratio for textile did not change significantly, fluctuating around 250 per cent (Table 2). By contrast, that of garment gradually decreased during the 2000s, from 2839 per cent to around 500 per cent. Even so, this is still the highest value among the export/import ratios recorded by the manufacturing sectors in 2014.

**Table 2**– Export / Import ratios of textile and garment by years (per cent)

	1999	2000	2007	2011	2012	2013	2014	2015
<b>Textile</b>	277	249	203	188	243	251	257	266

<b>Garment</b>	2839	2034	869	423	524	470	500	487
<b>Manufacturing</b>	71	58	75	68	81	72	78	81

Source:Turkstat 2016.

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

How textile 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 textile and garment depends primarily on low wages; and women supply cheap and ample labour power for the sector. While textile and garment became one of the major export industries in the developing countries, such as Thailand, Indonesia and South Korea, in the 1970s and 80s, female employment grew rapidly in this sector. It was far more profitable to employ female labour in textile and garment manufacturing which is considered as ‘women’s work’ due to patriarchal relations (Pearson, 1994). In similarity with the South Asian experience, textile and garment manufacturing has also heavily depended on female labour in Turkey after 1980 (Çağatay and Berik, 1991: 154). Despite this fact, women are mostly invisible in the official employment statistics, since they are usually employed informally, through subcontracted and home based piecework (Dedeoğlu, 2010: 2).

Today, textile and garment manufacturing is the most female labour intensive sector. In the garment manufacturing, 75 per cent of the employed are women (ISO, 2012, xii). Garment has the highest share in the manufacturing employment of women; however, its share decreased from 37.4 per cent in 2003 to 32.8 per cent in 2009. The share of women in the formal textile and garment employment is nearly 45 per cent. But, in fact, women are invisible in these records due to their mostly informal participation in production. According to the official estimates, the ratio of informal employment in the sector is 59 per cent (MLSS, 2014b: 56).

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Although textile and garment manufacturing of Turkey has been quite ‘successful’ for the last three decades, it seems that it is about to lose its competitive power. First, the fact that it is a low-tech sector with insufficient research and development facilities (Küçükiremitçi, 2011: 89) and it depends on developed countries for production technologies, makes difficult

to compete with developed countries such as the US and the EU countries. The export growth recorded between 2007 – 2012 seems to essentially originate from price competition rather than quality improvements (TUSIAD, 2014: 81). During the 2005-2012 period, labour productivity in textile decreased by 4.4 per cent indeed (ISO, 2014: 10); but garment was marked by an improvement in this respect (TUSIAD, 2014: 73).

Second, although the wages in textile and garment in Turkey are much lower than that of the EU and the US, they seem a little high compared to developing countries. According to ILO (2014), while minimum monthly wage was around 230 dollars in China, 125 dollars in India and 120 dollars in Vietnam in 2014, it was nearly 500 dollars in Turkey. Hence, it is getting more and more difficult for Turkey to compete with them (MSIT, 2014: 74). Although there is a limited increase in labour productivity, the increase in wages deteriorates the competitive power of the sector.

Global circumstances has certainly sharpened the rivalry between developing countries. China is the leader in global markets, carrying out 11.7 per cent of world total exports. In the textile and garment productions, China's share is about 35,6 and 38,6 per cent respectively (WTO, 2015). India and Vietnam are other prominent competitive developing countries. After the termination of both The Agreement on Textiles and Clothing (ATC) in 2005 and 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, 2014: 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, marketing in textile and garment manufacturing (General Directorate of Industry, 2010: 8). Among them, China has the lowest wages while South Korea has the highest labour productivity. Turkey is at the medium, regarding both wages and productivity. According to main stream analyses, in order to maintain its competitive power, Turkey should keep wages at low levels and increase labour productivity (General Directorate of Industry, 2015).

And now, in order to keep textile and garment manufacturing, the industry has been restructured in Southeast Anatolia, under the notion of 'regional development'. Regional development is determined as a national strategy by the *Regional Development National Strategy* (RDNS) in Turkey (MD, 2014a).

The notion of 'regional development' is typically used to legitimate the mobilization of regional sources for capitalist accumulation. The notion of 'regional development' emphasizes *region* as well as *development*. Similarly, 'development of the east' in the

statements of official documents has dual emphases. First, through ‘development of *east*’ (*regional* development), the state will provide fruitful investment and production opportunities for the capitalists investing in the southeast provinces for export. Thus, through *regional* reorganization of production, the export power of manufacturing will increase. Second, ‘*development of east*’ (*regional development*), refers implicitly to the ‘common good’ and implies that everyone, namely, workers as much as capitalists, women as much as men, 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 gender and ethnic conflicts that the accumulation process itself creates and/or reproduces.

### ***The significance of southeast region for exports***

Southeast Anatolia, namely the Kurdish region, where nearly 60 per cent of the population live under poverty line, is the poorest region in Turkey (Keyder and Üstündağ, 2006). While the average annual disposable income was 19.062 TL in Istanbul in 2014, it was a mere 7.568 TL in Southeast Anatolia (Turkstat, 2014b). Moreover, the participation rates of women and men to employment are also the lowest. While the participation rate of men was 67.1 per cent in the region, which was 4.4 points below Turkey’s average (71.5 per cent), that of women was 14.9, almost 16 points below the average (30.8 per cent) in 2013 (KSGM, 2014: 25). However, the rate of unemployment was around 21 per cent in the region in 2013, while it was 9.7 per cent in Turkey (Turkstat, 2013). These data reveal why the southeast region is chosen, why female labour intensive textile and garment industries are put forward and why regional wage is deadly requested. As a matter of fact, female and male workers have actually been employed informally in many workshops with quite low wages in the region. What have capitalist demanded that this actual, but informal work to be legalized.

**Figure 1.** The Map of Regions of Turkey



In brief, the primary stimulus for the regional reorganization of capital is low wages, since, ‘relative wage differences may have an impact on the site selection decisions for the



production process' (MD, 2013: 19). The southeast region is the most suitable candidate for this: Wages are at a minimum level in the southeast of Turkey (MD, 2014a: 57). While hourly average gross wage was 8.8 TL in Istanbul, it was 5.4 TL in southeast Anatolia in 2010 (Turkstat, 2010).

David Harvey (2006: 397) argues that the state establishes regional planning strategies and makes legal and administrative regulations to promote accumulation during the spatial reorganization of capital. In order to mobilize the cheap labour power of the southeast for export manufacturing, government directed specific incentives to the region, especially for female labour intensive textile and garment industries. Finally, 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 (MD, 2014a, 2014b), apparently to abolish regional differences. In fact, regional development has come to the fore to legitimize the fact that export industries benefit from these regional differences, especially the wage differentials.

The New Incentive System provides such a means for the regional restructuring of capital. Previously, there had already been region oriented incentives between 2004 and 2011. But, the new system is much more complicated, in terms of means and regional supports (TUSIAD, 2013: 36-37). In the new incentive system, Turkey is divided into six regions and more incentives are given to less developed ones. Sixth region, to which most of the incentives are directed, consists of the east and southeast provinces. Special incentives, such as support for income tax withholding and support for employer's national insurance contribution, are given to the region. Incentives for garment manufacturing are also given for only this region; thus, the 'Sixth region will become the most advantageous region of Turkey in terms of labour cost' (Çağlayan, 2012a). While the Minister's words are terribly clear, the actual meaning of the goals of the incentive package is indeed quite different than it was claimed. For example, the goal 'to decrease the regional differences' (Official Gazette, 2012) actually means that, these -wage- differences will themselves be used to create a cheap-female-labour zone; and, cheap female labour power will be channelled into the global markets. Namely, it is aimed to increase the export power of manufacturing through forming different control mechanisms over labour at different regions.

State incentives and cheap female labour power, together, would lead capitalists make an export boom through textile and garment industries of southeastern Turkey. Capitalists employ women in the factories and workshops, and as home based workers. A survey (Aslan,

2012) carried out in Batman which is a city located in the southeast Turkey, indicates that the region has already become a manufacturing unit of garment for export. The survey draws attention to tough working conditions: Daily working hours do not decrease below nine hours; in some ateliers it even increases to eleven hours. There are a large number of unrecorded firms and informal work is quite widespread. According to a survey, average monthly salaries in factories and workshops were 196 and 130 Euros respectively in 2013. The minimum wage was 252 Euros at that time, while the subsistence level for minimum monthly income for a family of four was around 1002 Euros (CCC, 2014: 30).

The incentive system has been approved by investors, and there has been increase in the number of incentive certificates by 79 per cent, in fixed capital investments by 269 per cent and in additional employment by 183 per cent, while Turkey's averages are 22, 62, 59 respectively. Regarding textile and garment manufacturing, these figures jump to 514, 848 and 292 in the region (Ministry of Economy, 2013: 48). Moreover, although female industrial employment is still weak in the Kurdish region, there is a surprising increase in the number of female workers: the share of industry in female employment increased from 1.5 per cent to 13.4 in TRC3 between 2004-2014, due to the regional restructuring of industry (Turkstat, 2014a).

This considerable increase in investments and employment proves that the region is considered as very favorable for textile and garment investments. Indeed, it is planned to transform poor cities, having a potential for 'development' -namely cheap labour power potential- of the southeast, into a 'Regional Attraction Centre' in RDNS (MD, 2014a: 4). 'Supporting Attraction Centres Program' is introduced in several eastern cities, namely Diyarbakır, Erzurum, Şanlıurfa and Van, to accelerate the development of the centres (MD, 2014a: 108-9).

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Restructuring production always means reorganizing labour-capital relations. Therefore, any policy aiming to increase profitability reorganizes the labour processes. Policies to increase labour productivity, provide capitalists new tools to control labour. Similarly, the restructuring of capital at a spatial scale is not a mere technical organisational change; since, changes at the regional level have been associated with changes in the 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 southeast region is viewed in terms of the potential labour

power of poor Kurdish women. Hence, the industrial strategies presented as mere technical documents to reorganize the production processes are in fact associated with the restructuring of labour processes and have an impact on class, gender and ethnic relations.

Transforming the southeast 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 designed for them is, a working life with long hours and without social security, in the houses as well as in the workshops. However, this process is also a moment of ethnic struggles. While regional development is a project of mobilizing – female- labour to export oriented accumulation, it cannot be dissociated from the 'Kurdish question'. As regional development consolidates the existing gender and ethnic inequalities, through class conflicts, Kurdish movement will also be mediated by class struggles. As a result, 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 industrial transformation, mediated by textile and garment: It aims to help keeping textile and garment competitive and, hence, brings trade surpluses. However, it also immediately supports the industrial transformation, by providing cheap labour force for industries with higher technology themselves.

### **Conclusion**

It can be concluded that there are two kinds of transformations in the industry: One aims shifting to high-tech manufacturing, the other aims regional restructuring of the industry. I focused on only the latter in this paper.

Textile and garment manufacturing is an essential export industry in this regard. Since transformations in the industrial and export production have been accompanied with the increase in trade deficits, textile and garment manufacturing is considered to balance deficits, because of its net trade surplus. Hence, it can be said that low wage policies are introduced to keep export industries, particularly textile and garment, 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 directed to build an industry with higher labour productivity and cheaper labour power lead capitalists build new control mechanisms on labour, through technology, educational system and regional inequalities.

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