ECONOMIC IMPACT ASSESSMENT OF GIDEM PROJECT

GAP Entrepreneur Support Centers Project
July, 2007

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GAP GİDEM Projesi Avrupa Komisyonu tarafından finanse edilmekte olup, Birleşmiş Milletler Kalkınma Programı tarafından GAP Bölge Kalkınma İdaresi ile işbirliği içinde yürütülmektedir.

GAP GİDEM Project is financed by the European Commission and executed by the United Nations Development Programme in strong cooperation with GAP Regional Development Administration.

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GIDEM	Girişimci Destekleme Merkezi (Entrepreneur Support Centres)
GAP	South-Eastern Project
PMCU	Project Management and Co-ordination Unit
GDP	Gross Domestic Product
EC	European Commission
UN	United Nations
EU	European Union
KOSGEB	Turkish SME Development Agency
OIZ	Organized Industrial Zone
TOR	Terms of Reference of the Assignment
ABIGEM	Avrupa Birliği İş Geliştirme Merkezi (Turkish Business Centres)
TRY	New Turkish Lira

PREFACE

Dear Reader,

The present report is an outcome of a five month study, conducted by an independent team of researchers and assessors with a view to estimating the economic impact of SME Development in the Southeast Anatolia Project, which is widely known as the GAP-GIDEM Project.

Project Management Body of Knowledge, published by Project Management Institute defines a project as "a temporary endeavor undertaken to create a unique product, service or result". A project can also be defined as a "temporary management environment, created to deliver a specified outcome according to a defined business justification". In due course, success or failure of a project is usually assessed by reviewing whether or not it has generated the outcome(s) that it was designed to deliver. In that sense, the projects run in the corporate world are relatively easy to assess: "Has the new service line generated the targeted amount of revenue?" Although a simple 'yes or no' answer is usually not deemed satisfactory by the management, in fact it would demonstrate whether the project was a success or a failure. On the other hand, a project that is designed to generate certain social and/or economic impacts would usually not lend itself for easy assessment. First of all, economic and social impacts are often not immediately visible; secondly, spill-over effects, and negative and positive externalities cannot be measured with ease. These are only a few of the many problems that make it quite hard to assess the impact of a project like GAP-GIDEM, which aimed at increasing the regional competitiveness of the Southeast Anatolia Region -one of the least developed regions of Turkey.

Although assessing the economic impact of the GAP-GIDEM Project has been a challenging task, it has provided us with an estimation of the economic value that we have been able to create over the last five years; and that is better than having no idea at all.

Monitoring the performance indicators and assessing the impact have always been considered an integral part of the GAP-GIDEM Project's management approach. As far as monitoring the performance indicators are concerned, the main tool that we utilized was a 2-page "logical framework". This simple tool can be very powerful, if used with the required level of commitment and perseverance. An online management information system, which was established towards the end of the second year of the Project, provided us with the opportunity to monitor the progress of the Project almost in "real time". As such, GAP-GIDEM Project had no difficulty in providing the policy makers with exact and updated data.

The Project's impact was initially assessed by using a model that was developed by the Technical Assistance Team. This model used the data that was provided by the local GIDEM offices on a semi-annual basis. Although the model was found scientifically plausible by the academicians that were asked to provide comments, there was a clear need to commission an independent economic impact assessment. Accordingly, UNDP mobilized a team of independent assessors and researchers in late 2006. The team was provided with full liberty in terms of developing the methodology of assessment and selection of the sample, so as to ensure the outcome of the assessment be considered as an independent view.

As the report demonstrates, the GAP-GIDEM Project has created an economic value of 10 Liras for each Lira spent for the Project activities. Clearly, different evaluation methods might have come up with different figures –some less and some more than the indicated amount. However, readers of the report will also realize that the assessment team has preferred to act with a healthy level of conservativeness in reaching their conclusions. As such, we would be surprised to see an assessment that would estimate less value added. An important issue, which we should also highlight, is that the scope of the present assessment did not cover the social impact of the Project. The GAP-GIDEM Project had a visible social impact; however it was simply not possible to put a value on the boosted self-esteem of the young university students (mostly girls) that we took to Istanbul for internship or on the improved social capital in Adıyaman as evidenced by the success of the clustering initiative that GAP-GIDEM had launched almost 3 years ago.

We are heavily indebted to M. Melih Pınarcıoğlu who coordinated the assessment study. We are also thankful to the research team, composed of H. Özlem Edizel, Hediye Nur Hasırcı, F. Süphan Nakiboğlu and Yalkın Romano, and the research associates Ekrem Ayalp, Ceren Balkanay, Özgün Balkanay, Burcu Gündoğan, Ersan Koç, Duygu Mert, S. Gökçe Okulu, Güçlü Şekercioğlu and Umut Yıldız.

We also owe special thanks to our clients. Naturally, the reliability of the results of the present assessment would have been seriously jeopardized, if our clients had not cooperated with the assessment team.

We will use the findings of the present report to draw lessons, which can be used during the formulation and implementation of future SME and entrepreneurship development projects, not only in the Southeast Anatolia Region, but also in other parts of Turkey and in the countries where EC and/or UNDP provides similar assistance to national and local governments.

Kindest regards,

Murat Gürsoy
Chief Technical Advisor
GAP-GIDEM Project
UNDP

YÖNETİCİ ÖZETİ

i. Ekonomik etki analizi çalışmasının genel amacı, GİDEM hizmetlerinin ekonomik büyüme ve kalkınma üzerindeki etkilerini değerlendirmektir. Özel amaçları ise,

1. Belirlenen ilkeler doğrultusunda GİDEM'in ekonomik büyüme ve kalkınmadaki etkisini değerlendirmek üzere bir metodoloji tanımlamak
2. GİDEM tarafından sunulan hizmetlerin ekonomik etkisini tahmin etmek" olarak belirtilebilir.

ii. **Raporun birinci bölümünde** GİDEM Projesi kısaca özetlenmiştir. GİDEM Projesi, Avrupa Komisyonu-GAP Bölgesel Kalkınma Programı içerisinde "Küçük ve Orta Ölçekli İşletmeler (KOBİ) Kalkındırma Bileşeni" olarak tanımlanmıştır. 2002 yılında Güneydoğu Anadolu Projesi'nin KOBİ Kalkındırma Projesi bileşeni olarak kurulan GİDEM'ler, Mart 1997 ve Mart 2002 yılları arasında faaliyet gösteren GAP GİDEM Projesi'nin devamı olarak da nitelendirilebilirler. Proje, Avrupa Komisyonu tarafından finanse edilmekte, Birleşmiş Milletler Kalkınma Programı ve GAP Bölgesel Kalkınma İdaresi Başkanlığı tarafından yönetilmektedir.

iii. GİDEM'in kurumsal hedefleri iki ana kategoride hizmet vermek üzere planlanmıştır:

1. Eğitim, bilgilendirme ve danışmanlık hizmetlerini içeren İş geliştirme hizmetleri
2. Fırsat pencereleri, kümelenme ve uluslararasılaştırma programlarını içeren yerel ekonomik kalkınma inisiyatifleri.

iv. **Raporun ikinci bölümü** GİDEM'in hizmet vermekte olduğu bölgenin genel özelliklerini içermektedir. GİDEM illeri, (Adıyaman, Mardin, Diyarbakır ve Şanlıurfa) göreceli olarak ülkenin en az gelişmiş bölgelerinden biri olan GAP Bölgesinde yer almaktadır. Güneydoğu Anadolu Bölgesi, demografi, işgücü, sanayi, finans, sağlık, eğitim ve tarıma yönelik göstergelerin tamamı ile yapılan bir değerlendirme sonucunda, Türkiye'nin yedi coğrafi bölgesi içerisinde altıncı sırada yer almaktadır.

v. KOBİ'ler, ulusal ekonomide olduğu gibi, GAP Bölgesi ekonomisinde de büyük öneme sahiptir. KOBİ'lerin Türkiye genelinde tüm girişimcilerin %96,63'ünü kapsayan varlığı, GAP bölgesine de aynı ölçekte yansımakta ve Türkiye ölçeğinde yer alan tüm firmaların %5,18'i yine bu bölgede yer almaktadır. Ancak, bu illerin genel ekonomik kalkınmaya etkisi ve bu bölgedeki KOBİ'lerin büyüme oranları, Türkiye'nin batısında kalan diğer iller ile karşılaştırıldığında, özellikle sermaye birikimi ve girişimcilik kapasitesi gibi eksikliklerden dolayı daha geri plandadır.

vi. Girişimcilik endeksi, bir ildeki iş potansiyeline yönelik 15 farklı göstergenin bir arada değerlendirilmesi sonucunda oluşturulan kapsamlı bir araçtır. Buna göre, endeks sonuçları Türkiye'deki illeri beş farklı grupta toplayarak değerlendirmekte ve elde edilen sonuçlar, iller arası ciddi farklılıkların varlığını ortaya koymaktadır. Sondan ikinci grupta yer alan Güneydoğu Anadolu Bölgesi'ni ele aldığımızda ise, kendi içerisinde farklılaşmalara sahip olmasına rağmen son yıllarda kalkınma adına yol kat edilmekte olduğu görülmektedir. Ancak, ekonomik anlamda kalkınma adına alınan bu yolun, beşeri kalkınma alanında elde edilemediği açıktır.

vii. GİDEM ofislerini etkilemekte olan dışsal faktörlerin bir değerlendirilmesi yapıldıktan sonra, **raporun üçüncü bölümünde** etki değerlendirme analizi metodolojisi geliştirilmiştir. GİDEM hizmetleri etki değerlendirmesi dört ana adımda gerçekleşmiştir;

1. Kaynak araştırması
2. Potansiyel etki alanlarının tanımlanması ve sayısal göstergelerin belirlenmesi
3. Saha Araştırması
4. Etki Analizi

viii. Kaynak araştırmalarının bir sonucu olarak, GİDEM hizmet alanları detaylandırılmış ve potansiyel etki alanları belirlenmiştir. Belirlenen etki alanları;

1. yurtiçi satışlar
2. ihracat
3. verimlilik
4. yeni yatırımlar
5. kurumsallaşma
6. gelecek beklentileri

olarak sıralanabilir. Altı farklı etki alanını ölçmeye yönelik belirlenen göstergelerin

- sayısallaştırılabilir
- ölçülecek etki için geçerliliğe sahip
- ölçülecek faaliyetin yapısına özel olmasına

dikkat edilmiş; tüm bunların sonucunda, alternatif veri toplama yolları da göz önünde bulundurularak olası en uygun bilgiler derlenmiştir.

ix. Veri toplama aşaması anket sorularının hazırlanması ve uygulanmasından oluşmaktadır. "Kümelenme örneklemesi" bu çalışmanın amacına en uygun örneklem metodolojisi olarak seçilmiş ve uygulanmıştır. Kümelenme örneklemi araştırma evreninde (iller, sektörler gibi) doğal gruplar belirgin olduğu zaman başvurulan bir tekniktir. Araştırma evreni kendi içinde homojen, aralarında heterojen kümelere ayrılır ve bu şekilde tüm evreni temsil edecek nitelikte kümeler oluşturulur. Bu aşamadan sonra araştırmanın yapılacağı küme rastlantısal örneklem yöntemi ile seçilir.

x. Çalışma kapsamında, TOBB'un kapasite kullanım raporları yardımı ile araştırma evreni içerisinden işletmenin konum, büyüklük ve sektörüne odaklanarak kümeler geliştirilmiş ve geliştirilen kümelerin, ildeki bütün sektörel dağılımı temsil etmesine dikkat edilmiştir. Aynı zamanda, hizmet alan firmaların büyüklükleri (ciro, çalışan sayıları), sektörleri ve adresleri GİDEM ofislerinden temin edilmiştir. Sadece imalat sanayisini içeren TOBB kapasite raporlarındaki firma listesi pratikte GİDEM'in müşteri listesiyle uyuşmasına rağmen GİDEM'in listesi bu firmaların yanısıra hizmet sektöründeki firmaları ve bazı dernekleri de içermektedir. Bu da dikkate alınarak, GİDEM'in hizmet alan firma listesi TOBB kapasite kullanım raporlarındaki bilgiyle karşılaştırılmış ve müşteriler büyüklük ve alt sektörlerine göre gruplandırılmışlarıdır. Örneklemin sonunda, 20 yedek firmayla birlikte 111 müşteri istatistiksel araştırma için bir örneklem oluşturmuştur.

xi. Niceliksel araştırmaların yanı sıra, istatistiksel verilerin tamamlayıcısı olarak bir dizi niteliksel araştırma da sürdürülmüştür. Bu amaçla, GİDEM'den hizmet alan firmalar içerisinden sekiz, hizmet almayan firmalar içerisinden ise dört firma yetkilisi ile derinlemesine görüşme ve bilişsel haritalama yöntemleri uygulanarak bilgi elde edilmiştir. Hizmet almayan firmalar, ildeki sektörel dağılıma bağlı kalınarak rastlantısal seçim yöntemi ile seçilmiştir. Bu firmalarla görüşmelerin nedeni temelde GİDEM algılarını anlamaktır. Bunun yanısıra, GİDEM ofislerinin kaynakların birleştirilmesi aracılığı ile pek çok kurum ile işbirliği içerisinde yer aldığı göz önünde bulundurularak illerdeki yerel dernekler, odalar ve kamu kurumları ile derinlemesine görüşmelerde bulunulması araştırma ekibi tarafından uygun görülmüştür. Bu görüşmelerde, kurumların GİDEM ile ilişkileri ve GİDEM hakkındaki görüşleri olası en kapsamlı biçimde elde edilmiştir

xii. Saha araştırması kapsamında 100 adet hizmet alan firmayla anket uygulanırken, bunlardan sekizi ile derinlemesine görüşme gerçekleştirilmiş ve ek olarak dört hizmet almayan firma da derinlemesine görüşmeye dâhil edilmiştir. Bunların yanı sıra, GİDEM ofisleri de dâhil olmak üzere yukarıda da belirtildiği üzere pek çok yerel kurum ile derinlemesine görüşmeler gerçekleştirilmiştir. Toplamda, yedek listelere de başvurmak yolu ile bölgedeki tüm firmaların %9,7'si ile (1034'de 100 müşteri ile) anket çalışması yapılmıştır. Niteliksel araştırmaya ilişkin ise 12 si firmalarla, 29'u yerel kurumlarla olmak üzere toplamda 41 görüşme sağlanmıştır.

xiii. Saha araştırmasında karşılaşılan ana zorluklardan birisi kat'î sayısal veriye ulaşma önündeki engeller olmuştur. Örneğin, firmaların çoğu yeterli finans ve yönetim raporlama sistemine sahip olmamalarından dolayı doğru bilgiyi araştırma ekibine aktaramamışlardır. Diğer yandan kimi firmalar gizli kalması gerektiğine inandıkları, özellikle satış ve yatırımları ile ilgili bilgilerini araştırma ekibi ile paylaşmak istememişlerdir. Saha araştırması öncesi az çok öngörülebilen bu engellerin yanı sıra, öngörülemeyen bir engel, GİDEM'in iyi yapılandırılmış hizmet yapısına rağmen firmaların bu yapıyı yansıtamamaları ve aldıkları hizmetleri adlandırmakta yaşadıkları güçlükler olmuştur. Ancak, araştırma ekibinin hizmetlere ilişkin bilgisi ile bu açık büyük ölçüde giderilebilmiştir.

xiv. **Raporun dördüncü bölümünde** istatistiksel analizlerin sonuçlarına yer verilmiştir. Analizler sonucunda, GİDEM öncesi ve sonrası dönemler arası firmaların yurtiçi satışlar ve ihracat gelirlerinde pozitif bir değişim olduğu ortaya koyulmuştur. Yurtiçi satışlar konusunda GİDEM etkisinin yarattığı ivme diğer dışsal faktörlerden daha az olmasına karşın, ihracatta bu pozitif artışın temel nedeni GİDEM'ler olarak gösterilebilmektedir. Sırasıyla, yurtiçi satışlar ve ihracat gelirlerinde olan ortalama değişim çalışan başına 61.423 YTL ve 37.320 YTLdir.

xv. Yatırımlara dair analizlerde ise GİDEM tarafından yaratılan net bir etki gözlemlenememiştir. Muhatap firmaların büyük bir çoğunluğu (%82'si) son beş yıl içerisinde yeni yatırım yaptıklarını belirtirken,%72'si bu yatırımlarda GİDEM'in her hangi bir katkısı bulunmadığını belirtmiş, ve ancak %15'lik bir kesim GİDEM'in kısmen etkisi bulunduğunu bildirmiştir.

xvi. On farklı parametrenin bir arada değerlendirilmesi sonucu oluşan "kurumsallaşma endeksine" göre tüm hizmet alan firmalar dört kurumsallaşma seviyesi altında gruplandırılmıştır:

1. Tamamen kurumsallaşmış,
2. Kısmen kurumsallaşmış,
3. Az kurumsallaşmış
4. Hiç kurumsallaşmamış.

Bulgular bize tüm hizmet alan firmalardan % 48'inin kısmen, %31'inin az, % 13'ünün tamamen kurumsallaşmış ve %8'inin hiç kurumsallaşmamış olduğunu göstermiştir.

xvii. Etki değerlendirme girişiminin karşılaştığı zorluklardan en önemlisi bazı hizmetlerin etkilerinin henüz ortaya çıkmamış olmalarıdır. Bu durum ankete "müşteri beklentilerine" yönelik soruların eklenmesi ile büyük ölçüde aşılmıştır. Bu sorulara verilen cevapların analizi bize gelecekte GİDEM etkisi beklemeyen firmaların bekleyenlere kıyasla görece daha çok "kurumsallaşmış" firmalar olduğu sonucunu vermiştir. Bunun yanı sıra tüm etki alanları içinde en çok etki beklenen alanın "uluslararası ve ulusal pazarlara katılım" olduğu tespit edilmiştir.

xviii. **Raporun beşinci bölümünde**, GİDEM'lerin en çok etki yarattığı müşteri tipini tanımlamak amacı ile "en iyi müşteri tipolojileri" geliştirilmiştir. Bu amaçla müşterilerin etki beklenti dereceleri, aldıkları hizmetlerden memnuniyetleri ve satışlarındaki değişim; müşterilerin büyüklükleri, sektörleri ve kurumsallaşma seviyeleri ile çapraz karşılaştırılarak bir sonuca varılmıştır. Analizlerin sonucunda GİDEM için en uygun müşteri tipinin "kısmen kurumsallaşmış" "küçük veya orta ölçekli", "ildeki lider sektörlerden birinde hizmet vermekte olan" bir firma olduğu sonucuna varılmıştır. Bahsedilen lider sektörler ise, Diyarbakır için 35 (Kimya, Kimya Sanayi, Petrol, Kömür ve Plastik) Mardin için 31 (Gıda İçki ve Tütün Sanayi), Urfa için 31 (Gıda İçki ve Tütün Sanayi) ve 32 (Tekstil, Konfeksiyon ve Deri İmalatı), Adıyaman için ise 32 (Tekstil, Konfeksiyon ve Deri İmalatı) olduğu tespit edilmiştir.

xix. **Raporun altıncı bölümünde,** GİDEM'in bölgesel ekonomiye son beş yıl içinde sağladığı toplam katma değerin hesaplanması amaçlanmış ve oluşturulan "genel model" ile bu değer 74.023.812 YL olarak tahmin edilmiştir. Belirtilen 74 milyonluk katma değer, GİDEM ofislerinin bütçesi dikkate alındığında, GİDEM hizmetleri için harcanan her YTL'nin, yaklaşık 10 YTL lik bir ekonomik etki sağladığını göstermektedir. Buna rağmen, böyle bir sonucun değerlendirmesinde ülke ekonomisindeki makro ekonomik eğilimlerin dikkate alınması ihmal edilmemelidir.

xx. Metodoloji kısmında da değinildiği üzere, iş geliştirme hizmetlerinin etkilerinin görünür ve ölçülebilir olması her zaman kısa sürede gerçekleşen bir olay değildir. Bu tür durumlarda, derinlemesine görüşmeler ve açık uçlu sorulara başvurulmasında yarar vardır. Bu bağlamda, **raporun yedinci bölümü** firmalarla ve çeşitli kurumlarla yapılan derinlemesine görüşmeler ve açık uçlu sorulardan elde edilen sonuçları ortaya koymaktadır.

xxi. İşadamlarına GIDEM'in başarılarına ilişkin fikirleri sorulduğunda, elle tutulur katkılara ek olarak, GİDEM'i en çok, yerel işadamlarının ufkunu genişletmesi, onlara cesaret ve destek vermesi açısından başarılı bulduklarını belirtmişlerdir. Fakat bazı işadamları devlet merkezli bir desteği daha değerli bulduklarını belirterek, aynı şeklide GİDEM'lerin de daha müdahaleci bir yapıda olmaları gerektiğini savunmuşlar ve bu çerçevede sorumluluk alma konusunda isteksiz olduklarını gözler önüne sermişlerdir. Bunun yanısıra, hizmet alan firmalara göre GİDEM çalışanlarının sayısının yetersiz olması GİDEM'in en önemli eksikliklerinden birisi olarak gösterilmiştir. Bir diğer eleştiri ise, GİDEM'in her sektörü eşit derecede desteklemediği ve bazı sektörleri ihmal ettiği yönündedir.

xxii. GİDEM'den hizmet alan 100 firmaya en fazla almak istedikleri hizmetler sorulduğunda bazı hizmetler belirgin olarak öne çıktığı görülmektedir. En fazla talep edilen hizmetler "satış ve ihracat kapasitesinin arttırılması" ve "pazar stratejileri"ne yönelik iken; "araştırma-geliştirme aktiviteleri", "teknolojik süreç", "yeni yatırımlar için destek", "ulusal ve uluslararası ortaklıklar ve ihalelere katılım" ve "yazılım ve e-ticaret ihtiyacı" konuları en az talep edilen hizmetler arasında yer almaktadır.

xxiii. Derinlemesine görüşmelerde, hizmetlerin ücretlendirilmesi konusuna ilişkin iki karşıt görüş belirmiştir. GİDEM'le daha yakın ilişkileri olan firmalar hizmetlerin ücretlendirilmesini olumlu bulurken; GİDEM'in sadece bir ya da iki hizmetine katılmış olan firmalar ise hizmetlerin ücretsiz olarak devam etmesinden yana görüş belirtmişlerdir. Ücretli ya da ücretsiz herhangi bir hizmet almayı tercih etmeyen firmaların gerekçeleri hizmet almada yönündeki isteksizlikleri ve daha önemlisi GİDEM'in onlar için tam olarak neler yapabileceğini bilmemeleri olmuştur.

xxiv. GİDEM ofisleriyle yapılan görüşmelerde, bölgede baskın olan kapalı iş kültürü ve firmaların değişime karşı negatif yaklaşımları önemle vurgulanmıştır. Buna rağmen, GİDEM personeli son yıllarda genel durumun iyiye gitmekte olduğunu da belirtmektedir. Bu fikri destekleyen çeşitli dernek yetkilileri, girişimcilerin perspektiflerinin son yıllarda genişlediğini ve bu konuda GİDEM hizmetlerinin belirgin bir katkısı olduğunu vurgulamaktadır.

xxv. GİDEM'in kadın girişimciliği konusundaki etkisini ölçmek için istatistiksel anlamda yeterli veri olmadığından bu konudaki değerlendirmeler derinlemesine görüşmeler üzerinden yapılmıştır. Kadın dernekleri, ve GİDEM ofisleri ile yapılan derinlemesine görüşmelere göre Diyarbakır GİDEM ofisinin kadın girişimciliği konusunda bütün bölgeyi etkileyecek çapta hizmetleri olduğu görülmektedir. Bunun yanısıra, GİDEM illerinde aktif olarak çalışan birçok kadın derneği bulunduğu ve bu derneklerin GİDEM'ler tarafından desteklendiği, fakat bu derneklerin kadın girişimciliği konusunda etkisiz olduğu belirtilmiştir. Kadın dernekleri ve GİDEM ofisleriyle yapılan görüşmeler doğrultusunda, kadın girişimciliği önündeki en büyük engelin yeterli kredi mekanizmalarının bulunmaması olduğuna dikkat çekilmiş, ve bu tür bir finansman sıkıntısının, yöre kültürü gereği kadınların mülk edinme oranlarının düşük olması ve dolayısıyla kredi almak için gösterebilecekleri herhangi bir teminata sahip olmamaları gerçeği ile daha da büyüdüğü söylenmiştir. Bunun yanı sıra, her ne kadar iş fikirleri elişi, restoran işletmeciliği ve bebek bakıcılığı ile sınırlı da ols;

araştırma ekibi, özellikle Diyarbakır ve Mardin'de yatırım yapmak isteyen girişimci kadın sayısında artış olduğunu gözlemlemiştir.

xxvi. Kasım 2007 itibariyle, GİDEM projesi beşinci ve son yılını tamamlamaktadır. Bu çerçevede, GİDEM ofisleri yeni organizasyon yapılanması sürecine girmiş ve iki model ön plana çıkmıştır:

- şirketleşme
- dernekleşme

modeli. Her iki modelde dahilinde de, GİDEM'ler daha ciddi bir müşteri kitlesine daha profesyonel hizmet vermeyi amaçlamakta ve geçmişteki yapılarına nazaran daha fazla kâr getiren bir kurum olmayı amaçlamaktadırlar. Fakat tüm GİDEM ofisleri, ücretli hizmetlerin tek başına GİDEM hizmetlerini ayakta tutmada yeterli olmayacağı kanısını paylaşmaktadırlar.

xxvii. **Raporun sekizinci ve sonuç bölümünde,** GİDEM'in hizmetlerini devam ettirecek sürdürülebilir bir kurum için bazı politika önerileri geliştirilmiştir. Temelde, bölgedeki düşük kurumsal yoğunluğa, yerel aktörlerin düşük üstlenme ve artan yoksulluk seviyelerine tarafımızdan dikkat çekilmiş ve GİDEM'in bu konuları dikkate alan kararlı politikalar üretmesi gerektiği belirtilmiştir.

xxviii. Hiç şüphesiz, yoksullukla mücadele bölgesel gelişiminin en önemli bileşenlerinden birisidir. Son dönemlerde artan yoksulluk seviyeleri ve yoksulluğun büründüğü yeni tanımlar, bununla birlikte ekonomik büyümenin yoksulluğu her zaman ortadan kaldıramadığı gerçeğinin anlaşılması, yoksulluğu herhangi bir kalkınma girişiminde ele alınması gereken en önemli olgulardan birisi haline getirmiştir. Aynı şekilde, her ne kadar bölgesel ekonomi yakın gelecekte bir büyüme kaydedecek ve GİDEM'ler bölgesel gelişmeye dair en temel katklarını istihdam arttırmaya yönelik aktiviteleri aracılığıyla gerçekleştirmiş olacak olsa da, böyle bir ekonomik büyüme yoksulluğun tamamen ortadan kalkmasına neden olmayabilir. Bu kapsamda gereken; kalkınmayı, yoksulluk karşıtı hale getirecek bazı politika düzenlenmesidir. Yoksulluk karşıtı politikalar GİDEM aktivitelerinin ana hedefinin dışında olsa dahi, GİDEM'in bu noktada iki farklı konuda önemli katkıları bulunabilir. Üretime yapılan yatırımların arttırılması yolu ile yüksek nitelikli işgücü oluşturma fırsatları genişletilebilir. Böyle bir stratejinin merkezinde yoksulluk koşullarıyla mücadele edebilecek kapasiteye sahip olamayan düşük maaşlı niteliksiz elemanların değerlendirilmesinden ziyade; pazarın, teknik bilginin ve nitelikli elemanların geliştirilmesi yer almalıdır. Diğer bir deyişle GİDEM'ler gelecekte, yoksullara ayakta kalma stratejilerini veren gelişim fırsatlarına odaklanmalıdırlar.

xxix. Yukarıda bahsedildiği üzere, bölgede halen kadınları mutlak yoksulluğa hapseden cinsiyet kaynaklı eşitsizlikler vardır. Annelik ve itaatin esas erdem sayıldığı Güneydoğunun erkek egemen kültüründe, kadınların ekonomiye dahil olamadıkları görülmektedir. Bu nedenle kadınlar arasında iş hayatına katılım oranı çok düşüktür ve kadın odaklı yoksulluğun ortadan kaldırılmasında GİDEM'lerin daha somut politikalarla bu sorunu çözmeye çabalamaları gerekmektedir.

xxx. Türkiye yerleşmiş eşitsizliklerin, sosyal gruplar ve bölgeler arasında artan farklılaşmaların olduğu bir ülkedir. GAP Bölgesi de, her ne kadar son yıllarda ekonomik gelişmeler kaydetse de, bu Türkiye gerçeğini yaşamaktadır. Bu koşullar altında, GAP bölgesindeki GİDEM ofisleri kuruluşlarından bu yana kendilerini ekonomik gelişme açısından başarılı bir bölgesel kalkınma müdahalesi olarak temsil etmektedirler. Tabiî ki, başarı tek bir hamlede gerçekleştirilemez ve sonuç olarak GİDEM'lerin rolü eşitsizlikleri azaltmak için fazlasıyla sınırlıdır. Ancak, etki analizine gore GİDEM ofisleri projenin sınırlı bütçesine ragmen temelden gelen planlama yaklaşımı, girişimciliğin sınırlarının genişletilmesi ve iş kültürünün geliştirilmesi konularında çok önemli adımlar atmıştır. Sonuç olarak GİDEM, yerelden gelen planlama yaklaşımıyla birçok insana ümit veren ve kendisini büyüme konusunda bir katalizor olarak ispatlamış bir kurumdur.

EXECUTIVE SUMMARY

i. The overall objective of the economic impact assessment initiative is to estimate the impact of the GIDEM services on economic growth and development. The specific objectives of the assignment is

1. To "develop a methodology based on tried and tested economic principals to determine the impact of the Project on economic growth and development", and
2. To "estimate the economic impact of services delivered by the GIDEM offices"

ii. **In the first chapter,** the GIDEM project has been briefly explained. The GIDEM Project is the "Small and medium-sized enterprise (SME) Development Component" of the European Commission's (EC) GAP Regional Development Programme. GIDEMs were founded in 2002 as an SME Development Project and a component of South-eastern Anatolia Project (GAP). They can be perceived as the continuation of the previous GAP-GIDEM Project, inaugurated in March 1997, and ended in March 2002. The project is financed by European Commission and executed by United Nations Development Programme in cooperation with GAP Regional Development Administration.

iii. In line with their institutional objectives, GIDEMs provide their services under two broad categories:

1. Business development services; comprising training, information and advisory services
2. Local economic development initiatives; comprising sectoral opportunity windows, clustering and internationalisation programmes.

iv. **The second chapter** is devoted to the laying out of the context in which GIDEMs operate. GIDEM provinces, Adıyaman, Diyarbakır, Urfa and Mardin are located in GAP Region, relatively a least developed region, which actually ranks at the sixth among seven geographical regions of Turkey, according to a mix set of indicators on demography, employment, education, health, industry, agriculture, and finance.

v. SMEs play a significant role in Turkish economy, as well as in the local economy of GAP region. 99,63% of all enterprises fall into the category of SMEs in Turkish context, and a similar ratio can be anticipated in the GAP region. Besides, GAP region hosts 5,18% of all SMEs in manufacturing sector. However, when compared to western parts of Turkey, SMEs' scope for growth and contribution to development is more limited in the region due to lack of capital accumulation, entrepreneurship, managerial capacities, etc.

vi. An entrepreneurship index, developed as an aggregate product of 15 selected variables, can be referred as indicative in revealing the characteristics and the potentials of business at provincial level. The index results that introduce five groups of provinces in terms of entrepreneurship all over Turkey shows a dramatic disparity at which GAP Region stands at the dark side of the scale, yet presents a substantially heterogeneous structure in terms of economic development. It would not be wrong to indicate that although some provinces in the region have been relatively quick on the uptake of economic opportunities, the region as a whole seems to have an undesirable track record in terms of human development.

vii. After tackling the context as well as the external factors that affect GIDEM offices, an impact assessment methodology has been developed and presented in the third chapter. The impact assessment of GIDEM services has been accomplished in four major steps:

1. Secondary Research;
2. Development of potential impact areas and related indicators;
3. Primary Research;
4. Impact Assessment.

viii. In the secondary research, GIDEMs service lines have been analysed in order to determine potential impact areas. In this analysis, six potential impact areas have been ascertained, namely

1. domestic sales,
2. export
3. productivity
4. investment
5. institutionalisation
6. future expectations.

For those impact areas, several measurable indicators have been adopted. Each indicator has been checked whether it is

- quantifiable
- relevant to the impact that is going to be measured, and
- specific to the nature of activity,

whose impact is going to be measured. Finally and most important of all, the availability of the data is assured, bearing in mind some alternative ways of obtaining them.

ix. The primary research basically includes the development of a questionnaire and the execution of the survey. Cluster sampling has been considered as the best type of sampling technique that can be applied within the scope of the assignment. The cluster sampling is used when "natural" groupings (e.g. provinces, sectors) are evident in the population. The total population is divided into clusters which are supposed to be as homogeneous as possible internally, and heterogeneous among each other. In other words, each cluster should be a small-scale version of the total population in a way that they are mutually exclusive and collectively exhaustive. A random sampling technique is then used to choose which clusters to include in the study.

x. Within the population, by using the capacity utilization reports of TOBB, the research team have developed clusters based on the location, size and sectoral focus of the enterprises. In developing the clusters, the research team have ensured that the sectors included in the sampling represent the sectoral distribution of the whole industry in a given province. At the same time, local GIDEMs have been asked to provide their client databases, which include information on the sizes (turnover, number of employees), sectors and addresses of GIDEM clients. The firm list complied from TOBB capacity reports that only enumerate firms in manufacturing sector, practically match the GIDEMs' client list, however GIDEMs' list also include firms in service sector as well as some associations. Client lists of GIDEMs have been cross-referenced with the information extracted from the TOBB capacity utilization reports, and the clients have been grouped in accordance to their size and subsectors. At the end of the sampling, a sample of 111 clients (main list) along with 20 substitute clients has been composed for quantitative research.

xi. As supplementary to quantitative part of the research composed of questionnaires, a qualitative research has also been executed. In doing so, eight in-depth interviews and cognitive mapping study have been conducted among questionnaire respondents. Meanwhile, the qualitative study has been expanded to cover interviews with non-clients who have been selected randomly among firms in the dominant sectors of each province. The main purpose of those interviews, tracing "outsider views", has been to understand how non-client firms conceive GIDEMs and their services. In addition, considering the two-tier provision of GIDEM services in terms of pooling of resources with other local institutions, the research team have also decided to carry out in-depth interviews with them paying attention to their opinions about and relations with GIDEM offices.

xii. In the primary research, 100 clients have been subject to the questionnaires, of which eight firms have also been subject to in-depth interviews and cognitive mapping study. On top of that, four non-client firms have been added to the qualitative analysis as well. Furthermore, the research team have had in-depth interviews with several institutions as mentioned above. In the end, the research team have been able to access 100 clients for questionnaires, which constitute approximately 9,7% of whole population. Concerning qualitative analysis, 41 interviews have been carried out in total, 12 of which are with firms and 29 of which with local institutions, including GIDEM offices.

xiii. The main challenge in the primary research has been related to the collection of accurate numeric data. For instance, many of the individual enterprises have not been able to provide accurate information, as they apparently do not have decent financial and operational database and reporting systems. Although some SMEs seem to have updated figures on sales and investments, they have been, to a large extent, reluctant to express them to the surveyors, as they reckon somehow, the data are deemed confidential. An unexpected challenge has been observed when the clients were asked to list the types of services that they had received. Despite the well-categorized service structure of GIDEMs, a similar level of clarity could not be observed at the client level.

xiv. **The fourth chapter** has plunged straight into the findings of statistical analyses regarding the post and pre-GIDEM periods with particular attention to linear and logistic regression techniques. The first finding in those quantitative analyses indicates that there is a significant positive change in domestic sales and exports. Related to the change in domestic sales, the role of GIDEMs seems to be less effective than the other factors, whereas on the export side the contribution of GIDEMs appears to be much more effective. As a matter of fact, the average changes in domestic sales and exports per employee are TRY 61.423 and TRY 37.320 respectively.

xv. In investment analysis, "no particular impact" has been observed. Even though the majority of the respondents (82%) have, in fact, indicated that they have made new investments in the last five years, 72% of those have, unfortunately, expressed that GIDEM has had "no impact" on their investment decisions, whereas only 15% of them have bespoken of "a partial contribution" of GIDEMs to their investment decision.

xvi. According to the institutionalisation index developed as an aggregate product of 10 parameters, the clients have been categorized under four institutionalisation levels, namely (1) fully institutionalised, (2) partially institutionalised, (3) slightly institutionalised and (4) not institutionalised. The findings indicate that among all clients 48% is "partially", 31% is "slightly", 13% is "fully" and 8% is "not" institutionalised.

xvii. A major challenge of the impact assessment initiative was the relatively short history of GIDEMs. To cope up with this challenge the questionnaire that has been developed for surveys included questions to measure the expectations of clients. Considering all services received, it is remarked that those clients who are at the upper levels of institutionalisation has weaker expectations, while positive impact expecting clients are relatively less institutionalised. Among all impact areas, the area where highest impact is anticipated has been attained as "participation to new international and domestic markets".

xviii. **In the fifth chapter,** "best client typologies" have been developed in order to identify the clients on which the GIDEM services create the most impact. To this end, expected level of impacts, satisfaction level of firms, and change in sales are cross-referenced with size, sector and institutionalisation levels of clients. It has been identified that the best client for GIDEM services would be "a partly institutionalised", small- and/or medium-sized company" that operate in "the leading sectors of each province", which is sector 35 (Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber & Plastics) for Diyarbakır, sector 31 (Manufacture of Food, Beverages & Tobacco) for Mardin, sector 32 (Textile, Wearing Apparel & Leather Industries) and 31 (Manufacture of Food, Beverages & Tobacco for Urfa and sector 32 (Textile, Wearing Apparel & Leather Industries) for Adıyaman.

xix. **In the sixth chapter,** a general model has been developed by which the total value added of GIDEM to the regional economy in five years is estimated as TRY 74.023.812. Such a value added of TRY 74 million indicates that for every TRY spent for the services, GIDEMs managed to provide an economic impact of approximately TRY 10- considering the service budget of the GIDEM offices in the region. Yet, the macro economic trends in the national economy should be taken into consideration in the evaluation of such result.

xx. As mentioned in the methodology, the impacts of most business development services are not immediately visible and easily quantifiable. In such cases, in-depth interviews, and open-ended questions can be attended for a comprehensive understanding of the issues. Based on this argument, the 7th chapter unfolds the in-depth interviews and open-ended questions conducted with firms and several institutions.

xxi. Overall opinion of the firms related to success of GIDEMs is that, the tangible results aside, GIDEMs performance in total, have opened up new frontiers for local businessmen with full encouragement and support. Some interviewees, however, have overvalued top-down interventions, praising the good old days of state support systems on the one hand. With a similar motivation, some others have envisaged a more interventionist GIDEM, and preferred to be at the receiving side to the full extent without any liability. On the other, insufficient number of GIDEM staff occurs as one of the mostly indicated shortfalls of GIDEMs according to the clients. A grievance claiming that "every sector has not been promoted in equal degrees, in other words GIDEMs have ruled out some sectors from their service provision," appears to be another.

xxii. When all 100 clients have been asked about the services they would like to receive most, several types of services have ostensibly gained significance. While the most demanded services are related to "sales" and "new markets" including enhancement of export capacities and marketing strategies; the least demanded ones are "research and development activities", "technological progress", "support for new investments", "engagements in international/national collaborations and tenders", "the need for software and e-trade".

xxiii. According to the in-depth interviewees' answers, two opposite opinions exist about "payable services". While the clients who have worked more closely with GIDEMs have more positive attitude, the rest who have engaged in only one or two services with GIDEMs think otherwise. Among the non-clients, the most obvious justification for not receiving any services is the reluctance and not knowing exactly what GIDEMs could do for them.

xxiv. The in-depth interviews with GIDEM offices most significantly underline the dominant character of the business culture in the region that is conservative and resisting to change. Yet, the GIDEM staff, in our interviews, state that the overall picture has been ameliorating for the last years. Seconding that idea, the representatives of the associations, the team has interviewed, have also been in accord that GIDEM has considerable contributions to the entrepreneurs in widening their perspectives.

xxv. There are insufficient data to assess the actual impact of GIDEM services on women entrepreneurship in statistical terms. Nevertheless, the in-depth interviews suggest that there are distinguished efforts of Diyarbakır GIDEM office on women entrepreneurship, whose impact seems to reach all GAP Region. In addition, a considerable number of women associations, highly active at awareness raising about the better representation of women in the society, exist and being supported by GIDEM offices. As indicated in the in-depth interviews with GIDEM offices and women associations, the basic obstacle against women entrepreneurs is the lack of credit mechanisms, exacerbated by the cultural background that does not usually let women possess property in a way they can use as collateral. What the team observed during the survey is that especially in Diyarbakır and Mardin there is an increasing number of women entrepreneurs to venture in business, yet with undiversified business ideas limited to handcraft, restaurant and baby nursery.

xxvi. By December 2007, the GIDEMs are completing the 5th and the last year of their project cycle. In this respect, several GIDEM offices have already entered a new organizational structuring process. There are two actual future models at stake for GIDEMs, namely firm and association models. Within both models, they envisage a more professionalized service delivery with more serious clients, and expect to be more profitable than they could have been in the former structure. Yet, they still share the opinion that a considerable amount of local businessmen are still not ready to pay for consultancy services.

xxvii. Finally in the 8th chapter, some specific policy recommendations have been developed for a sustainable institution that is going to perpetuate GIDEM services. Basically, we have drawn attention to low institutional thickness in the region, low commitment level of the local agents, deepening poverty levels and suggested that GIDEM be more decisive in such policy issues.

xxviii. Fighting poverty, without a doubt, is an important component of the regional development process. The recent deepening poverty levels and engendering new forms and dynamics of poverty in the country and the region accentuate the importance of the phenomenon in any kind of economic development intervention, considering the fact that the fruits of economic growth do not automatically trickle down to the poor. The regional economy may grow in the foreseeable future and GIDEMs will surely make its contribution basically in term of their regional development interventions in general, of their activities aiming at increasing employment in particular. But, left to itself, economic growth may not automatically lead to poverty eradication. What is needed is some policy adjustments to make this growth pro-poor. Although taming the surging level of poverty through pro-poor policies is surely outside of the scope of the GIDEMs activities, they may make important contributions in two broad categories in this manner: High skilled employment opportunities should be widened by way of increasing productive investments with particular attention to a high road to development where upgrading of the market, know how and skilled labour are at the center of the strategy instead of a low road to development with low cost unskilled labour without any capability improvement for the poor to combat against their poverty conditions. GIDEMs in their future activities had better to focus on high road to development opportunities providing the poor with capability to generate survival strategies.

xxix. Furthermore, as mentioned above, the region has still had persistent gender-related disparities that pave the way for a depressing picture of absolute poverty conditions for women. In the men-dominated culture in the Southeast, the more likely it is for men to shut women out of the economic picture and the more likely it is to be proud for this practice where obedience and motherhood are the real virtues. In fact female participation to work ratio is very low since women are discouraged from being economically active. Thus, for women-based poverty eradication, GIDEMs should tackle the issue with more solid policy formulations.

xxx. It is possible to say that Turkey has been a country with large and entrenched inequalities and the distance between different social groups and regions have remained wide and persistent. The GAP region has of course experienced this grim reality despite a slightly significant improvement in aggregated social indicators in terms of economic development in the recent years. Under these circumstances, GIDEM offices in the GAP region, since their inception, have tried to constitute themselves a good brand of regional interventions for economic development. Of course, success cannot be forced at a single stroke and thus GIDEMs role may be highly limited to reduce the disparities. However, according to the impact analysis, GIDEM offices have apparently taken important steps for bottom up planning, widening up horizons of entrepreneurship, improving the business culture despites its limited project budget. In the end, it is the institution which can give hopes to many people for the bottom up planning, and which may prove itself as a catalyser of development.

TERMS OF REFERENCE

In the Terms of Reference the scope of the assignment is given as estimating the impact of the GIDEM project on economic growth.

Within the scope of the contract the Research Team is expected to ;

1. Analyse GIDEM services:

The analysis will include:
a. Meeting with the project staff in Ankara, and local GIDEM offices,
b. Review of service delivery mechanisms including after-delivery services,
c. Identification of economic impact metrics per activity/ service line,
d. Review of the service statistics,
e. Interviews with a group pf GIDEM clients,

2. Develop an Economic Impact Analysis Methodology: the consultants will develop an economic impact assessment methodology.

3. Collect Data: PMCU will provide the operational data that the consultants may deem necessary. In addition research team will collect the type of data that PMCU doesn't posses, through appropriate surveying methods .

4. Estimate the Economic Impact: the consultants will determine the economic impact of the services delivered by GIDEMs both on aggregate basis and per activity/ service line. In this scope, they are expected to asses the data to be collected, quantify the economic impact of GIDEM services.

Proposed outputs of the assignment are:

- An impact assessment methodology
- Data collection methodology
- Surveys
- Sample (list of SMEs in the sample)
- Answers to survey questions
- Economic impact assessment

INTRODUCTION

Failed development efforts on regional disparities are a too-common story in the regional planning history. It is a story that makes many professionals discontent themselves with the end results. Although this story may not give many the real jitters, it is surely frustrating.

In fact, the representation of regional development through plausible interventions has proven elusive in practice for a long time. Students of regional planning have always been aware of the gap between theory and practice. But the gap never offered an impasse as it does today.

Is it a mission impossible then? May be or may be not. But what is tenable here is that there would not be nation states, which are in the driving seat of such a mission anymore. A possible way to foster such efforts without running a foul of the sovereignty of the states appears to offer countries positive incentives with international political intention. In the secular trends of current globalism, efforts to sort out regional disparities would be in vain without a solid international intention. Of course, there are efforts of the international organisations in the field but in the conditions where international institutional political arrangements have truly lagged behind the globalisation of the economy, they seem to have not much to offer, if not to be parochial.

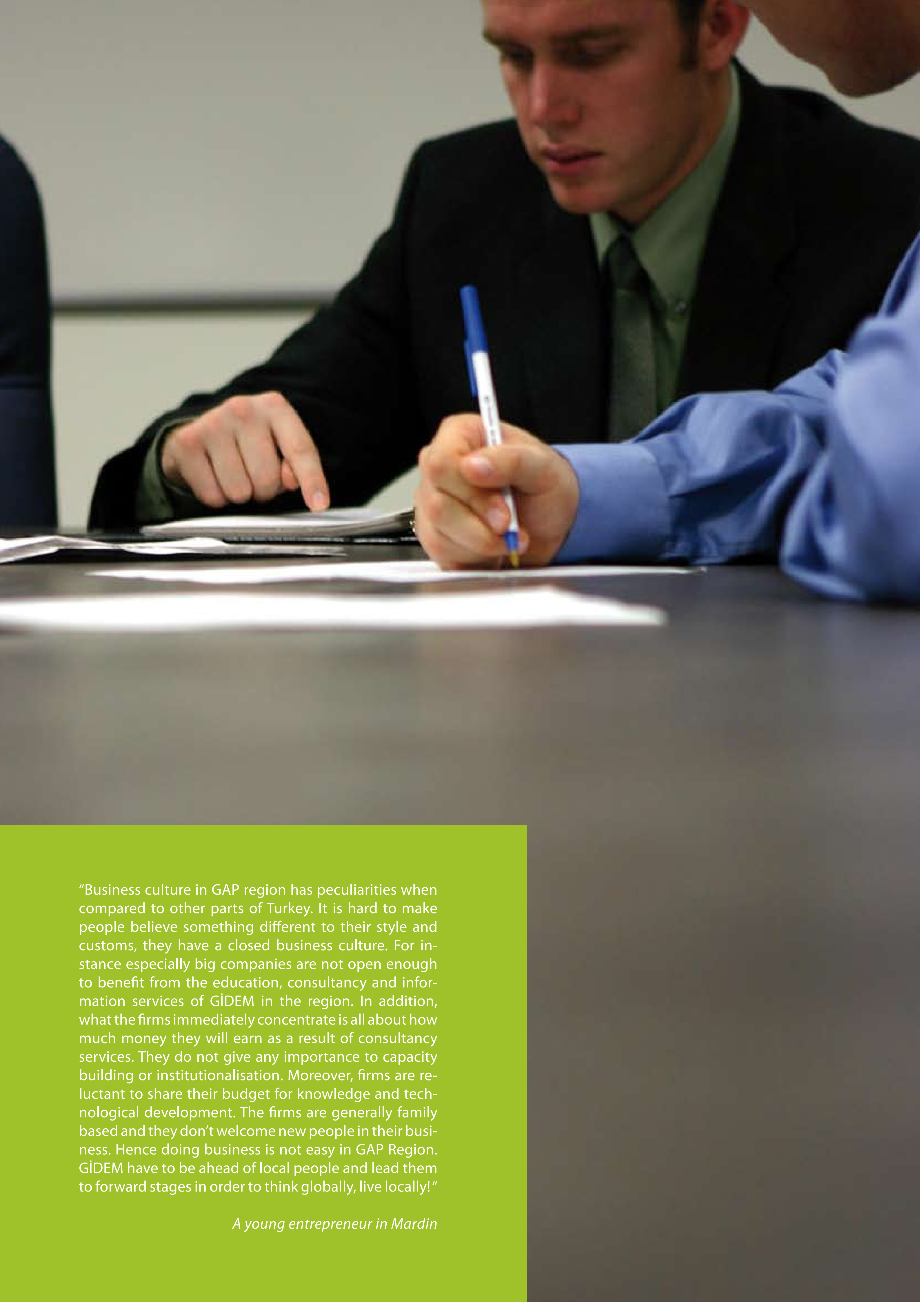
As everybody knows, the proof of the pudding is in the eating. In the case when the pudding apparently has not much taste, can we put some blame on the recipes then? Possibly, yes. We, however, are still wrestling come to terms with the fact that the theories are far away from a real guidance. Especially those theories feel themselves at sea and possibly impotent when they face stagnant regions to unlock the stalemate dynamics there. Perhaps, those theories may help developing regions without frozen dynamics but definitely not stagnant ones.

The current situation seems to fit to the business schemes of international consulting business efforts, seemingly getting of paramount importance thanks to the globalism that has now become a fully-fledged system with its regulative devices and intelligence now getting more-and-more dispersed distributed among a multiplicity of action units. The coordination of these actions units seems to emerge through the purposeful interactions of private individual actors besides the public ones. In fact, those private individual actors, personified in this case as international consulting business, have been getting a very important stake in the regional development practice and perhaps having the lion's share in the benefits of the international funds.

In the end, we have a picture of regional planning in the 21st century, which has not had a glorified history behind nor a bright future ahead. Under these circumstances, uneasiness and disturbance are practically the terms defining the mood of a regional planner, especially the one working on stagnant regions. Of course, in the course of the time, professional distortions and excuses, for a regional planner, may give an upper hand, but the memory remains.

Feeling this disturbance, however, GIDEM offices in the cloudy atmosphere of the GAP region, since their inception, have tried to constitute themselves a good brand of regional interventions, which gives hopes to many people for the bottom up planning, and to prove themselves as a catalyser of development.

Under these circumstances, the research team for this assignment having known the serious position in the Turkish regional development business try to generate a model to measure its impact on the region's development tracing possible paths for sustainable development for GIDEM offices as well as successful and sustainable development in the region.



"Business culture in GAP region has peculiarities when compared to other parts of Turkey. It is hard to make people believe something different to their style and customs, they have a closed business culture. For instance especially big companies are not open enough to benefit from the education, consultancy and information services of GİDEM in the region. In addition, what the firms immediately concentrate is all about how much money they will earn as a result of consultancy services. They do not give any importance to capacity building or institutionalisation. Moreover, firms are reluctant to share their budget for knowledge and technological development. The firms are generally family based and they don't welcome new people in their business. Hence doing business is not easy in GAP Region. GİDEM have to be ahead of local people and lead them to forward stages in order to think globally, live locally!"

A young entrepreneur in Mardin

1. AN OVERVIEW OF THE GIDEM PROJECT

GIDEM Project is the "Small and medium-sized enterprise (SME) development component" of the European Commission's (EC) GAP Regional Development Programme. GIDEMs were founded in 2002 as an SME Development Project and a component of South-eastern Anatolia Project. They can be perceived as the continuation of the previous GAP GIDEM Project inaugurated in March 1997, and ended in March 2002. The project is financed by European Commission and executed by United Nations Development Programme in cooperation with GAP Regional Development Administration.

GIDEM offices were set up and operated as flexible, client-oriented local operations and this highly contributed to their acceptance as part of the institutional structures in their respective provinces.

1.1 Objectives of the GIDEM Project

The overall objective of the project can be stated as improving the competitiveness of South-eastern Anatolia Region on national and international markets. In this scope, the purpose is to improve managerial, entrepreneurial and operational capacities of the entrepreneurs, and micro, small and medium-sized enterprises in the South-eastern Anatolia Region, and thereby contribute to economic and social development basically in four provinces; Adıyaman, Diyarbakır, Urfa and Mardin, where the offices are located. Objectives have implications for improvement of export capacities, employment, economic impact and added value creation, increase in sales and finally for integration of women in the economy. Adjoining to those objectives, GIDEMS also contribute to the improvement of institutional relations, and the development of a business culture that embraces collaborations.

1.2 Service Organization and Delivery

Project Co-ordination and Management Unit (PMCU) is responsible for planning, organisation, coordination, controlling and monitoring of the activities of the project. Besides, GIDEM annual work plans are developed by each province with coordinated actions of GIDEM offices, PMCU and project stakeholders including the provincial governorships, the municipalities, the chambers of trade & industry, several associations of businessmen and so forth. The locally raised demands are also taken in to account and necessary modifications are fulfilled in order to serve the needs of the target groups better, which are comprised of investors, entrepreneurs and businessmen in existing firms or start-up businesses.

In addition to collaborative agenda making, a two-tier provision can be observed in the delivery of GIDEM services. GIDEM offices work in close relationship especially with the Chambers of Trade and Industry, provincial governorships, provincial directorates, the Municipalities, NGOs, universities and Small and Medium-Sized Enterprises Development and Support Organization (KOSGEB). Moreover GIDEMs

Adıyaman Center for Vocational Training in Textile and Clothing Sector (ATEM)

"The objective of ATEM is to improve competitiveness of the local textile and clothing sector and thus contribute to the elimination unemployment in the province through establishment of a vocational training centre. The centre is a perfect example of effective collaborations between local institutions which have been coordinated by GIDEM office. The centre was officially started in December 2004 with the contributions of KOSGEB (National SME Development Agency). Municipality of Adıyaman assigned a 1000m2 building to ATEM and completed all necessary maintenance. Adıyaman Chamber of Commerce and Industry consigned a conference room for the theoretical education; on the other hand Association of Turkish Clothing Industrialist assigned the machines and studios where the practical education will go on. In addition, Governorate of Adiyaman financed various costs of the Center. Besides; UN, UNDP and Bursa Education Development Fund has supported the project. As of June 2006 the Centre has been taken over by Directorate of Education and salaries of trainers were started to be given by KOSGEB, finally sustainability of the Centre has been achieved."

ATEM President

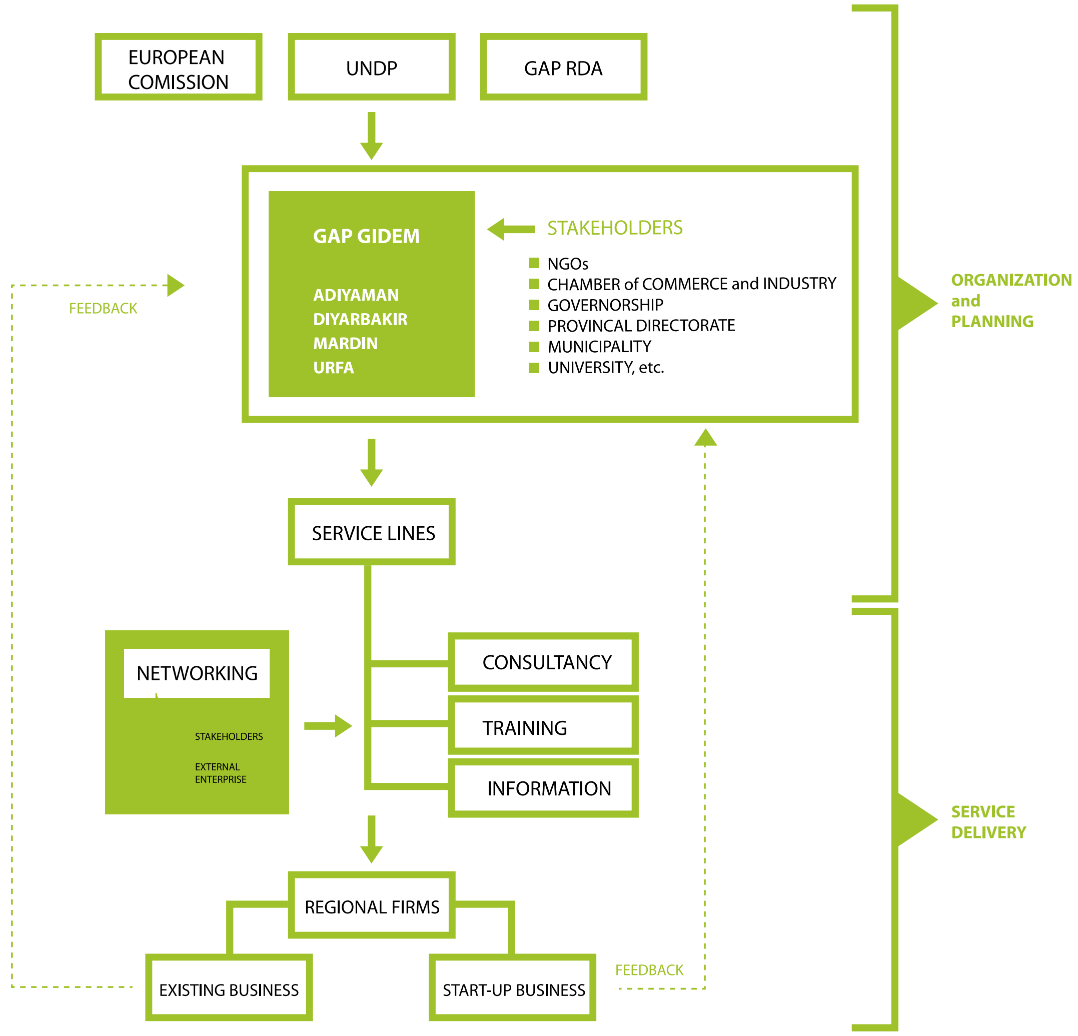


Figure 1.1. Gidem's Organization Of Activities and Service Delivery

Moreover GIDEMs establish professional relations with specialists outside GAP region and transfer their expertise in the region. Figure 1.1 is a general representation of service planning of GIDEMs and their delivery.

1.3 GIDEM Service Lines

In line with institutional objectives, GIDEMs provide their services under two broad categories:

1. Business development services; comprising training, information and advisory services;
2. Local economic development initiatives; comprising sectoral opportunity windows, clustering, internationalisation programmes.

While the former category aims to develop the individual capacities of firms; the latter aims to exploit the local dynamics and contribute to a development concept that builds formal and informal networks of social interactions.

1.3.1 Business Development Services

Business development services involve training, information and advisory services, which are designed for basically the capacity building of individual firms.

Compatible with the objective of *improving managerial, entrepreneurial and operational capacities of the entrepreneurs, and SMEs;* **training programmes** include trade and investment training; business management training, quality and standards training, sector trends training, investment plan training, capacity development training, etc.

In addition to relatively social product characteristic of training services, **consultancy services** are more professional ones that provide individual products to clients, including pre-feasibility report, business plan, investment plan as well as machinery and equipment selection, marketing survey conduction and productivity consultation.

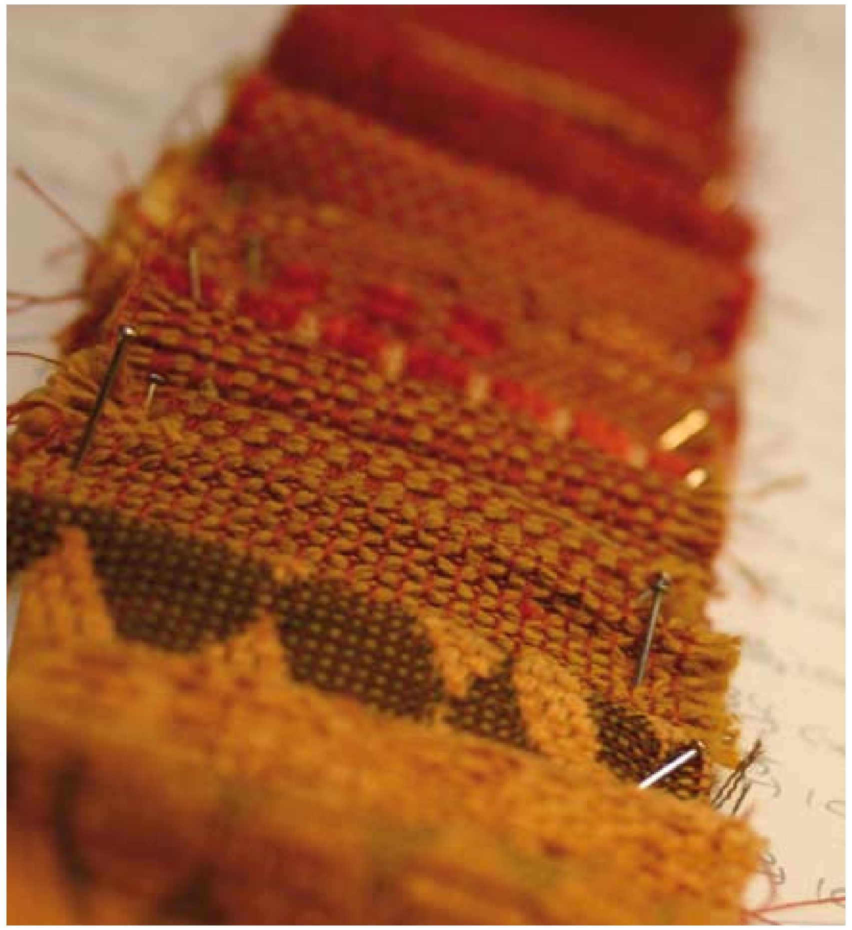
Finally, the most frequent way of service delivery of GIDEMs can be stated as **information services**. Information services are delivered via several communication channels such as telephone, fax, e-mail or face-to-face meetings. This type of services is mostly about legislation, financial resources, partner search, et cetera and can be depicted as most volatile ones due to their undocumented nature. All service lines of GIDEM are presented in Table 1.1.

"When big tankships arrive to the Bosphorous, they ask for a guide because they do not know where the shallow parts and chutes. This guide is called pathfinder. GİDEM is the pathfinder of the manufacturing industry in this region."

Pikasso Paint Company

Service Type	Service Lines
Training	Trade and Investment
	Business Management
	Quality and Standards
	Sector Trends
	Investment Plan
	Capacity Dev. in the Sector
	Project Cycle Management
	Women Entrepreneurship
Consultancy	Pre-feasibility Preparation
	Business Plan Preparation
	Marketing Survey
	Machinery & Eqp. Selection
	Productivity Consultancy
	Investment Plan Prep.
	Capacity Dev. in the Sector
	Specialist Support
Information	Legislation
	Financial Resources
	Investment Opportunities
	International Partner Search
	Sector Trends
	Publications
	Fair, Exhibition, Excursion

Table 1.1. Service Lines of GIDEM



1.3.2 Local Economic Development Initiatives

As mentioned in the first part, development requires establishing firm bounds in order to stimulate local dynamics within the localities. **Local economic initiatives** are motivated by such concern, and likewise, take the local dynamics into consideration as key factors for sustainable development. Local economic initiatives can be grouped under three categories: opportunity windows, clustering programmes and internationalisation.

"Women in GAP region are excluded in the business life. Besides, they do not have any idea about how to start up a business or manage the tasks. Even if they intend, they do not have access to necessary budget. Moreover, women can not use any other financial supports like credits because they do not hold any property. At this point, GAP-GİDEM has been successful in establishment of working relations with national women oriented NGOs and several institutions and developed pilot joint projects to support women entrepreneurship in the GAP region."

Anatolian Women Association President

The sectoral opportunity windows include development of projects stemming from local dynamics, and play a significant role in enhancing local partnerships. In accordance with its leading sectors Adıyaman has two opportunity centres; Adıyaman Centre for Vocational Training in Textile & Clothing Sector (ATEM) and Development of Agro based Garlic Industry. Şanlıurfa, in the same manner has three opportunity windows; Development of Dried Food Sector, Organic Agriculture Sector and Development of Agro-based Industries and Aromatic plants. As to Diyarbakır, there are two opportunity windows; Dicle University Entrepreneurship Centre (DÜGİMER) and Improvement of Marble Sector. Finally Mardin has three opportunity windows, which are Mardin House Wine, Development of Silver Telkari Sector, and Revitalization of Idol Investments. In addition to these opportunity windows, Supporting Women Entrepreneurship in the GAP Region is a common window for all provinces.

Within opportunity windows similar activities are realized as in business development services, however the most significant characteristic of these opportunity windows is the way they encourage the pooling of resources among NGOs, state organizations and private firms.

Clustering programmes are designed to promote the leading sector of a province. Accordingly in Adıyaman, textile and clothing cluster; in Şanlıurfa organic agriculture cluster; and in Diyarbakır marble cluster programmes have been launched. Having completed initial analyses and cluster mapping, all GIDEMs are either at the beginning of, or in the progress of cluster development.

The third component of local economic development initiatives is **internalisation programme.** The programme aims to strengthen the foreign trade basis of firms, and includes preparation of strategic business plans for improvement of production, finance, marketing and management. Business development services and local economic initiatives are presented in Table 1.2

PROVINCE	TYPE of ACTIVITY	LOCAL ECONOMIIC ACTIVITIES
ADIYAMAN	Clustering	Textile and Clothing Cluster
	Opportunity Window	Supporting Women Entrepreneurship in the GAP Region
		Adıyaman Centre for Vocational Training in Textile and Clothing Sector
		Development of Agro-Based Industries, Garlic
	Internalisation Programme	Preparation of Strategic Bussiness Plans
ŞANLIURFA	Clustering	Organic Agriculture Cluster
	Opportunity Window	Supporting Women Entrepreneurship in the GAP Region
		Development of Dried Food Sector
		Organic Agriculture Sector
		Development of Agro-Based Industries, Aromatic Plants
	Internalisation Programme	Preparation of Strategic Bussiness Plans
DİYARBAKIR	Clustering	Diyarbakır Marble Cluster
	Opportunity Window	Dicle University Entrepreneurship Centre (DÜGIMER)
		Improvement of Marble Sectorr
		Supporting Women Entrepreneurship in the GAP Region
	Internalisation Programme	Preparation of Strategic Bussiness Plans
MARDİN	Opportunity Window	Supporting Women Entrepreneurship in the GAP Region
		Mardin House Wine
		Development of Silver "Telkari" Sector
		Revitalization of Idol Investments
	Internalisation Programme	Preparation of Strategic Bussiness Plans

Table 1.2. Local Economic Development Initiatives

2.
GIDEM PROVINCES IN A TURKISH CONTEXT

2.1
Socio-Economic Characteristics of GIDEM Provinces

GIDEM provinces, Adıyaman, Diyarbakır, Urfa and Mardin are located in GAP Region covering the same area as South-eastern Anatolia Region(also known as GAP region), which is a relatively a least developed one in Turkey.

As can be observed (see the table 2.1), South-eastern Anatolia Region ranks at the sixth among seven regions according to a mix set of indicators on demography, employment, education, health, industry, agriculture, and financial aspects, compiled by State Planning Organization. As to the ranking of provinces (see table 2.2), the picture is more or less the same. Excluding Gaziantep, the average ranking of South-eastern Anatolia provinces is 68, which is a fairly low position out of 81 provinces. GDP indicators are also compatible with these data (see table 2.3). Although corrected, GDP per capita is still quite low for the region compared to Turkish average. Except Diyarbakır, all other GIDEM provinces fall even below the region's average.

Geographical Region	Ranking (among 7 regions)
Mamara	1
Aegean	2
Central Anatolia	3
Mediterranean	4
Black Sea	5
GAP	6
East Anatolia	7

Table 2.1
Socio-Economic Ranking of Geographical Regions of Turkey, 2003
Source: www.dpt.gov.tr

Geographical Region	Ranking (among 81 regions)
Adıyaman	65
Batman	70
Diyarbakır	63
Gaziantep	20
Kilis	54
Mardin	72
Siirt	73
Şanlıurfa	68
Şırnak	78

Table 2.2
Socio-Economic Ranking of GAP Provinces, 2003
Source: www.dpt.gov.tr

	1995	1996	1997	1998	1999	2000	2001
Turkey	5498	5938	6458	6629	6274	6816	6132
GAP Region	3020	3249	3461	3517	3217	3550	3389
Adıyaman	2464	2514	2662	2500	2442	2897	2623
Şanlıurfa	2497	2799	2938	3036	2721	3016	2879
Diyarbakır	3420	3586	3708	3914	3656	3919	3752
Mardin	2479	2752	2878	3178	2476	2668	2809

Table 2.3
Gross Domestic Product per Capita According to Purchase Power Parity ($)

South-eastern Anatolia region constitutes approximately 10% of Turkey's overall population. Not surprisingly, the average growth rate of the whole region is significantly above Turkish average. Among GIDEM provinces Şanlıurfa has the highest rate which is 30,62 %.

Proportion of urban population in total population can be referred as an indicator of urbanization rate. In this sense, Adıyaman and Mardin have experienced a more rapid urbanization than other GIDEM provinces, while for Urfa this indicator marks below Turkish average.

Health indicators, an important component of human development, don't display satisfactory figures for whole South-eastern Anatolian region when compared to Turkish average. While Diyarbakır represents a relatively better situation and exceeds region's average in some aspects, Mardin fall short of all other GIDEM provinces in terms of health indicators.

	1990-population	1990-density	2000-population	2000-density	Growth in 10 yrs(%)
Turkey	56473035	72	67803927	86	16,71
GAP Region	5157160	67	6608619	86	21,96
Adıyaman	510827	67	623811	82	18,11
Şanlıurfa	1001455	52	1443422	75	30,62
Diyarbakır	1096447	72	1362708	87	19,54
Mardin	558275	63	705098	80	20,82

Table 2.4
Total Population According To Population Census, And Population Density (People Per Square)

	1990	2000	increase rate
Turkey	59,65	64,9	8,8
GAP Region	55,86	62,69	12,2
Adıyaman	43,43	54,33	25,1
Şanlıurfa	55,08	58,34	5,9
Diyarbakır	54,98	60	9,1
Mardin	44,61	55,49	24,4

Table 2.5
Proportion Of Urban Population In Total Population (%)

	hospital beds	specialist physician	practitioner physician	dentist	phar-macist
Turkey	242	73	70	25	34
GAP Region	132	30	41	9	20
Adıyaman	122	19	41	5	17
Şanlıurfa	110	22	32	5	18
Diyarbakır	192	31	56	16	15
Mardin	78	15	29	4	14

Table 2.6
Number Of Hospital Beds, Health Personnel, Pharmacist Per 100000 Capita, 2005

Literacy is an important indicator to assess the human potential of a region. Unfortunately, South-eastern Anatolia region represents a desperate picture especially in terms of literacy among women. Regarding GIDEM provinces, Adıyaman is better off, but still under Turkish average.

Education is another important indicator for understanding a region's composition. Given that the number of enrolment per teacher is indicative for an effective education system, it can be concluded that in GAP region and specifically in GIDEM provinces education is not such effective. Moreover, an improvement cannot be observed in the situation regarding last six years. As to number of vocational and technical school enrolment the situation is better in the sense that the indicators are close to Turkish average.

	total	male	female
Turkey	87,30	93,85	80,62
GAP Region	73,09	85,87	59,51
Adıyaman	79,83	89,17	70,62
Batman	70,96	84,37	57,45
Diyarbakir	69,57	83,50	55,38
Gaziantep	83,78	92,58	74,98
Mardin	71,20	84,91	56,81
Kilis	80,41	89,94	71,10
Siirt	68,66	83,73	52,16
Şırnak	65,75	82,50	44,85
Şanlıurfa	67,67	82,15	52,26

Table 2.7
Literate Ratio, 2000 (6 Years Of Age and Over)

Higher education enrolment, which comprises under graduate, graduate and postgraduate studies, has implications for educated and skilled labour in a region. As can be observed (see table 2.10) all GIDEM provinces are ranking lower than the Turkish average. Moreover, it does not necessarily mean that this segment of population will stay in the region and not migrate to cities with better opportunities.

The involvement of women in the economy can be referred as an important indicator for the assessment of gender equality, which has indications for economic growth and poverty reduction. Referring to data provided below (see table 2.11) we can see that women involvement is higher in agriculture sector, however, in industry and service sector, which are more likely to accumulate in urban areas, the indicators are quite lower compared to male involvement. Amongst GIDEM provinces only Adıyaman and Diyarbakır exceeds region's average, nevertheless they are still quite under Turkish average.

	2000	2001	2002	2003	2004	2005	2006
Turkey	30	28	28	27	26	27	27
GAP Region				36	34	37	37
Adıyaman	30	28	26	27	25	27	26
Şanlıurfa	47	41	38	38	39	43	43
Diyarbakır	41	41	39	37	34	36	36
Mardin	41	34	35	35	36	39	38

Table 2.8. Number of Enrolment Per Teacher: Primary Education

	2000	2 005
Turkey		15
GAP Region	11	17
Adıyaman	11	12
Şanlıurfa	8	18
Diyarbakır	16	15
Mardin	12	17

Table 2.9. Vocational and Technical School, Number Teacher / Number of Students

	Total Enrolment	Ratio	Female Enrolment	Ratio	Female Enrolment	Ratio
Turkey	3 151 964	5,27	1 990 229	6,58	1 161 735	3,92
GAP Region	134 481	2,48	99 279	3,59	35 202	1,32
Adıyaman	14 435	2,73	10 958	4,16	3 477	1,31
Diyarbakır	30 313	2,70	21 744	3,84	8 569	1,54
Mardin	12 021	2,10	9 327	3,18	2 694	0,97
Şanlıurfa	24 885	2,12	19 390	3,19	5 495	0,97

Table 2.10. Higher Education Enrolment (Under Graduate, Graduate, Post Graduate) and Its Ratio in Whole Population, 2000

	Industry		Agriculture		Service	
	male	female	male	female	male	female
Turkey	81,7	18,3	38,2	61,8	81,2	18,8
GAP Region	93,3	6,7	39,2	60,8	90,9	9,1
Adıyaman	80,1	19,9	38,8	61,2	88,2	11,8
Şanlıurfa	96,1	3,9	44,5	55,5	93,2	6,8
Diyarbakır	90,3	9,7	38,0	62,0	88,5	11,5
Mardin	93,7	6,3	38,2	61,8	92,8	7,2

Table 2.11
The Involvement of Women in The Economy

Unemployment rate, however, indicates relatively close ratios for male and female. This can be explained with the fact that women are not actually seeking jobs as much as men, and in calculations they are not counted as "unemployed" although they may be. However, when whole region's average is compared with Turkey's, the difference is noteworthy.

Number of employed person per employer (see table 2.13) can be referred as one of the indicators for employment opportunities in a province, and has implications for unemployment rate. For instance, Gaziantep, that has higher indicators for number of employed per employer, has accordingly lower unemployment rate. All four GIDEM provinces fall under the region's average thanks to Gaziantep's contribution in the total.

	male	%	female	%	total	%
Turkey	1812414	9.9	734804	7.23	2547218	8.92
GAP Region	241841	16.5	51222	6.53	293063	13.01
Adıyaman	19930	14.7	6206	6.23	26136	11.11
Şanlıurfa	62790	19.6	9953	5.46	72743	14.49
Diyarbakır	52576	18	13398	7.76	65974	14.21
Mardin	26976	17.8	4911	5.25	31887	13.01

Table 2.12 Unemployement Rate in 2000

	total	male	female
GAP Region	1,3	1,7	0,5
Adıyaman	1,1	1,5	0,5
Batman	1,4	1,6	1,0
Diyarbakır	1,3	1,7	0,7
Gaziantep	3,3	4,3	0,8
Mardin	0,7	1,0	0,3
Kilis	1,5	2,3	0,1
Siirt	0,6	0,8	0,3
Şırnak	0,7	0,9	0,4
Şanlıurfa	1,1	1,6	0,3

Table 2.13
Employer/ Employed Ratio, 2000

Referring to the basic data provided in this section, it is most clearly observed that South-eastern Region in general, and GIDEM provinces specifically, fall short of Turkish averages in many aspects. Nevertheless, we should avoid generalizations as much as possible, having admitted the sovereign deficiencies in the region. With more focused approach, the following part scrutinizes SME profile in GIDEM provinces and try to reveal the peculiarities of provinces.

2.2 SME profile in GIDEM provinces

SMEs play a significant role in Turkish economy, as well as in the local economy of GAP region. Based on the fact that 99,63% of all enterprises fall into the category of SMEs in Turkish context, a similar ratio can be anticipated in its regions.

GAP region hosts 5,18% of all SMEs in manufacturing sector in Turkey. The largest share belongs to Gaziantep, followed by a GIDEM province Şanlıurfa. Except Mardin, GIDEM provinces represent a relatively better position compared to rest of the GAP provinces.

Scale (Person)	Number of Enterprises	%
Owner Alone	1509	0,61
1 - 9	220030	89,12
10 - 49	20325	8,23
50 - 99	2453	0,99
100 - 150	946	0,38
151 - 250	719	0,29
251	917	0,37
Total	**246.899**	**100**

Table 2.14 Number of Manufacture Enterprises in Turkey According to Scale, 2002
Source: www.kosgeb.gov.tr

	Manufacturing Sector Enterprise Number	%
GAP Region	13860	5,18
Adıyaman	1246	0,47
Diyarbakır	1664	0,62
Mardin	516	0,19
Şanlıurfa	2751	1,03
Gaziantep	6287	2,35
Siirt	327	0,12
Şırnak	143	0,05
Kilis	503	0,19
Batman	423	0,16
TURKEY	**267.338**	**100**

Table 2.15 Proportion of Manufacture Enterprises to Total Number of Enterprises
Source: KOSGEB, 2002

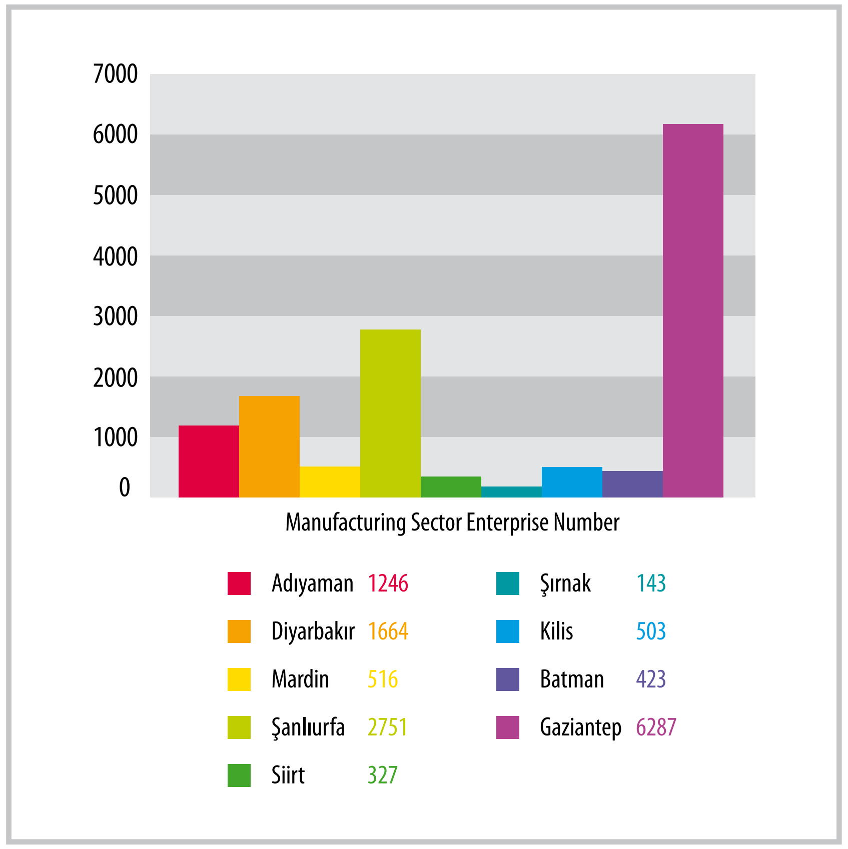


Figure 2.1 Distribution of Manufacture Enterprises

The SMEs are exploiting the chances well in terms of trading with neighbouring countries (mainly Syria and Iraq). Mardin demonstrates a remarkable distinction (see table 2.16) when compared to other GIDEM provinces, stemming from its advantageous location on international highways, with direct connection to Syria and Iraq. Consistently, the number of exporter firms is far much higher in Mardin then other GIDEM provinces. Nevertheless, the fact that the production and manufacturing practices are not aligned to the EU norms and international standards induce lack of access to national and international markets.

	2001	2002	2003	2004	2005	2006
Adıyaman	5.163.114	8.097.354	12.002.824	20.811.570	22.211.942	24.412.592
Şanlıurfa	9.950.209	6.983.774	10.200.190	14.810.325	32.432.586	40.063.432
Diyarbakır	7.895.001	6.810.669	11.959.830	36.046.831	57.763.009	64.458.933
Mardin	60.274.278	23.118.613	38.564.095	73.309.826	171.435.840	187.435.443

Table 2.16 Export Data Value (1.000 $)

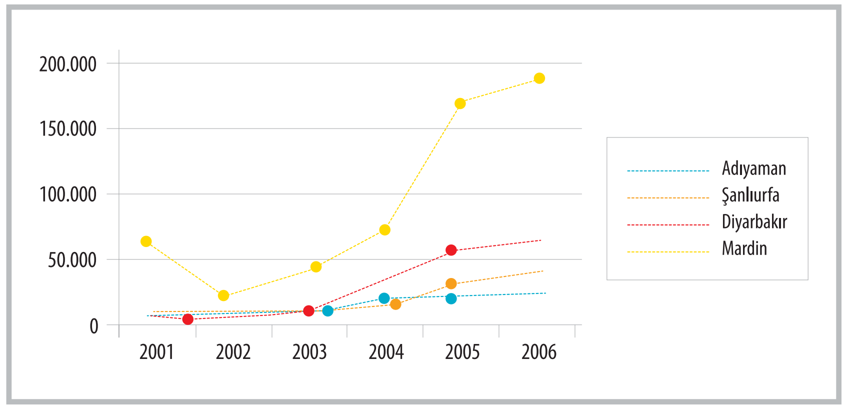


Figure 2.2 Export Trend in GIDEM Provinces

	2001	2002	2003	2004	2005	2006
Adıyaman	5	9	12	15	18	19
Şanlıurfa	50	42	44	50	68	71
Diyarbakır	18	17	32	56	83	82
Mardin	77	57	94	98	99	121

Table 2.17 Number of Exporter Firms

	Value TRY	Sector Share %	Growth Rate %
Adıyaman	104.887	22,2	-8,2
Diyarbakır	228.613	18,7	-8,9
Gaziantep	406.261	24,1	-6,3
Mardin	34.420	6,1	-11,3
Siirt	84.346	39,0	24,6
Şanlıurfa	113.059	9,1	-11,8
Batman	122.539	34,4	-5,4
Şırnak	3.423	2,6	-7,7
Kilis	20.376	10,8	-7,6

Table 2.18 Manufacturing Sector Share and Development Rate, 2001

Sectoral distribution of GIDEM provinces set forth a profile where agriculture sector is dominant. In addition, obvious distinctions can be observed in terms of distribution of other sectors. For instance Mardin represents higher figures in transportation and communication sector thanks to being a border province, while Diyarbakır concentrates on industry and trade. Although manufacture sector has important share in sectoral distribution in GIDEM provinces, the growth values mark negative values (Table 2.18).

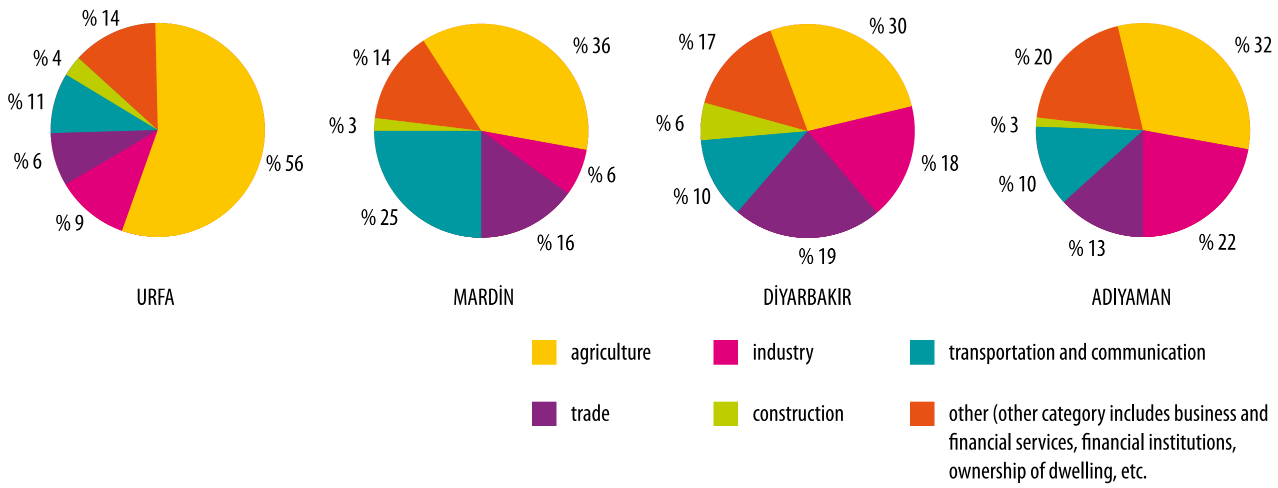


Figure 2.3 Sectoral Share in GIDEM Provinces

Sector Codes and Tables (ISIC Rev. 2)	Number of Firms			
	Adıyaman	Urfa	Diyarbakır	Mardin
11 Agriculture and Hunting	-	7	1	7
22 Crude Petroleum and Natural Gas Production	1	-	-	-
31 Manufacture of Food, Beverages and Tobacco	48	120	107	51
32 Textile, Wearing Apparel and Leather Industries	71	159	71	30
33 Manufacture of Wood and Wood Products, Including Furniture	5	-	7	-
34 Manufacture of Paper and Paper Products, Printing and Publishing	6	-	3	1
35 Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber and Plastic Products	8	37	37	38
36 Manufacture of Non-Metallic Mineral Products, Except Products of Petroleum and Coal	3	18	46	8
37 Basic Metal Industries	-	5	2	1
38 Manufacture of Fabricated Metal Products, Machinery and Equipment	12	20	22	10
39 Other Manufacturing Industries	-	-	-	1
41 Electricity, Gas and Steam	-	1	-	-
71 Transport and Storage	6	3	9	7
Other	1	-	-	-

Table 2.19 Sectoral Distribution in GIDEM Provinces
Source: TOBB Capacity Report

In GAP region Gaziantep has a significant better off position in terms of newly established firms (see table 2.7). Among GIDEM provinces Diyarbakır is distinguished as more vibrant one with higher and increasing number of firms. While the last three years seems to be fruitful for all GIDEM provinces, such amendment is not significant for Turkish overall averages. This remarks an uptrend pertaining to region itself.

	2000	2001	2002	2003	2004	2005	2006
Turkey	33 161	29 665	30 842	32 259	40 919	47 401	52 699
GAP Region	1 864	1 270	1 010	1 185	1 762	2 112	2 211
Gaziantep	379	399	403	489	605	624	730
Adıyaman	93	58	61	64	139	154	148
Diyarbakır	394	235	173	200	351	436	437
Mardin	174	109	56	99	122	208	197
Şanlıurfa	234	183	156	173	268	373	391

Table 2.20 Number of Establishing Firms

Among newly established firms, the ratio of join stock companies can be referred as an important indicator which has implications for institutionalisation level in a region, on the basis that a join stock company requires at least five shareholders bearing commercial title. Siirt, in this sense demonstrates unforeseen figures, and outpaces all other GIDEM provinces. Adıyaman is also distinguished with a relatively higher ratio. Referring to figures (table 2.5) it can be stated that among each 100 new establishing companies in GIDEM provinces only 3 firms are join stock companies.

Another important set of data related to SME profiles and their business perspectives is the application and registry number of firms to several chief certificates. This set of data help to get an insight on the inventorship and innovation capacities of the provinces (see table 2.22-2.23).

	Join Stock Companies	Total No. of Companies	%
TURKEY	2918	52999	5,54
GAP Region	71	2211	3,21
Gaziantep	29	730	3,97
Adıyaman	7	148	4,73
Kilis	1	31	3,23
Şanlıurfa	8	391	2,05
Diyarbakır	9	437	2,06
Mardin	7	197	3,55
Batman	1	122	0,82
Şırnak	4	112	3,57
Siirt	5	43	11,63

Table 2.21 Number of Newly Establishing Join Stock Companies and Their Share in Total Number of Establishing Companies, 2006

	Adıyaman		Diyarbakır		Mardin		Şanlıurfa	
year	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**
2000	44	11	1 8	13	12	11	59	45
2001	29	7	23	7	30	8	36	14
2002	21	24	24	18	34	12	56	31
2003	14	17	32	10	38	25	88	24
2004	30	9	86	20	34	12	84	44
2005	48	17	132	39	71	36	138	64
2006	66	25	140	93	83	51	152	91
total	**252**	**110**	**315**	**200**	**302**	**155**	**613**	**313**

Table 2.22 Brand Mark Applications and Registry

	Adıyaman		Diyarbakır		Mardin		Şanlıurfa	
year	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**
2000	0	0	0	0	1	0	0	0
2001	1	0	1	0	0	0	0	0
2002	0	0	0	0	0	0	2	0
2003	0	0	0	0	0	0	0	0
2004	0	0	0	0	0	0	0	0
2005	1	0	3	0	1	0	0	1
2006	0	0	4	0	0	0	0	0
total	**2**	**0**	**8**	**0**	**2**	**0**	**2**	**1**

Table 2.23 Patent Applications and Registry

	Adıyaman		Diyarbakır		Mardin		Şanlıurfa	
year	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**	**app.**	**reg.**
2000	0	0	0	0	0	0	1	0
2001	0	0	0	0	0	0	0	0
2002	0	0	3	0	0	0	0	0
2003	0	0	0	0	2	2	2	0
2004	0	0	0	0	0	0	0	2
2005	0	0	0	0	1	0	3	0
2006	0	0	1	0	0	1	2	1
total	**0**	**0**	**4**	**0**	**3**	**3**	**8**	**3**

Table 2.24 Useful Model Applications and Registry

	Adıyaman		Diyarbakır		Mardin		Şanlıurfa	
year	app.	reg.	app.	reg.	app.	reg.	app.	reg.
2000	0	0	0	0	0	0	4	5
2001	0	0	0	0	0	0	3	2
2002	0	0	0	0	0	0	3	3
2003	0	0	0	0	2	0	5	3
2004	2	2	0	0	1	3	6	7
2005	0	0	3	1	0	0	4	4
2006	0	0	3	5	2	2	7	5
total	**2**	**2**	**6**	**6**	**5**	**5**	**32**	**29**

Table 2.25 Industrial Design Applications and Registry

Brand mark applications aside; the applications for patent, useful model and industrial design do not display encouraging figures. Among applications, the approval rates are not satisfactory except for the registry rate of industrial design applications (see table 2.24-2.25). Evaluating overall applications, Şanlıurfa can be distinguished as the most diligent GIDEM province.

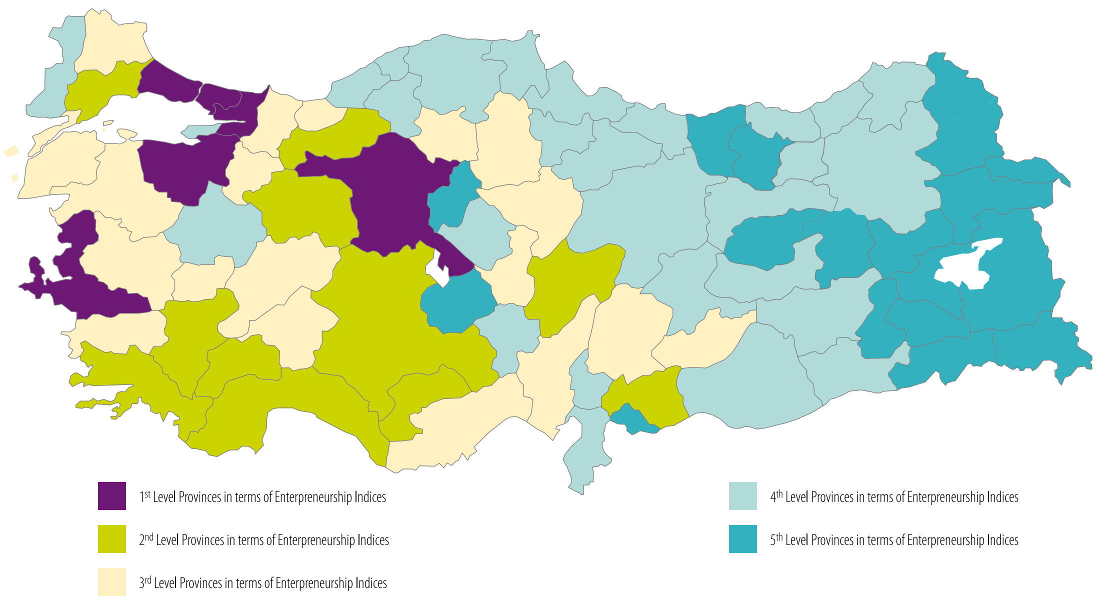
Considering all the data provided above, what we remark is the differing figures and peculiarities attached to each province. Despite their resemblance in terms of general human development perspective, each province presents its own dynamics for future development. However, when compared to western parts of Turkey, SMEs' scope for growth and contribution to development is more limited due to lack of capital accumulation, entrepreneurship, managerial capacities, etc. which are going to be scrutinized in the following section.

2.3 Regional Diversity of Entrepreneurship

By exploiting some of the basic data provided in the previous section, an entrepreneurship index can be developed. Entrepreneurship index is a representative one in the sense that it is an aggregate product of 15 selected variables that can be referred as indicative in revealing the characteristics, as well as the potentials of businesses in a province from a development perspective.

These 15 variables are handled under some data groups. First data group is on **export** that is comprised of the export value per capita, export growth rate and export diversification. Second data group, pertaining to **inventorship**, is comprised of research and development activities of firms, number of patent and useful model applications done by firms, number of business premises with quality and TSI certificates, number of the establishing and closing firms and sectoral distribution of the firms. As to **institutionalisation** the rate of joint stock companies were used as indicator. In addition the accumulation extent of the firms for service sector other than manufacturing industry and trade has also been looked upon as an essential measure. A final data group was on the **investment incentives** and the sectors in which these incentives are concentrated.

The index results introduce 5 groups of provinces in terms of "entrepreneurship" all over Turkey, as presented on **Map-1**. It can clearly be recognised from the map that Turkey's four biggest cities: İstanbul, Ankara, İzmir and Bursa, besides Kocaeli, which is one of the industrially most developed provinces, are also leading in means of entrepreneurship. Obviously, among these 5 cities İstanbul's superiority in all areas is indisputable. İstanbul is far ahead in ranking for measures such as export per capita, number of enterprises with quality certificates, enterprises established per capita; however it hangs back for indicators such as increase of exports, survival rate of opened enterprises and sum of investment incentive certificates per capita. It should also be emphasized as an interesting point that Ankara has a very high ranking especially for export variety and number of patent applications. Regarding the leading position, it can be comprehended that significant progress has eventuated in Ankara recently in technology intensive Research & Development alike sectors.



Map 1. Entrepreneurship Index

Alongside these provinces with immediate entrepreneurial development, it is observed that the cities belonging to the second group are mainly located in the Mediterranean and Southwest Aegean Regions, besides environs of Ankara. Muğla and Antalya which has risen to notice with particularly tourism investments, as well as Denizli, Kayseri and Gaziantep that have gained ascendancy in the past years also belong to this second group. Additionally, cities in a certain improving economic state like Konya and Eskişehir; aside from Tekirdağ, obtaining its share from the spreading manufacturing trade of İstanbul are also rated in this same group.

As to the third group, it can be remarked that the provinces, according to their principle attributes, do not set forth a homogenous outlook. In this group while there are provinces like Adana and Mersin, which are far away from laying out a brilliant performance and are moderately in a falling trend, with some kind of a bright history, there are also provinces like Manisa, Kahramanmaraş, Adıyaman and Çankırı; which have clearly demonstrated significant amendment recently and which are rather in an uptrend.

On the entrepreneurship index map, the essentially important point, which has to be significantly emphasized, is the fact that all provinces taking place in the fourth and fifth group, with just a few exceptions, are located in the Blacksea Region, East and Southeast Anatolian Regions. This group including on one side the whole Blacksea shoreline from Zonguldak to Artvin and on the other side a great section of East and Southeast Anatolian Regions, stretching from Ardahan to Mardin, holds a place amongst the provinces called as stagnant. Among these provinces, rather desperate ones in the 5th group -located mostly in East and Southeast Anatolian Regions- have to be given great accent. These provinces lack the required means to break the lock and initiate the development. In other words, the entrepreneurship index having such a low value in these provinces is a reason as much as it is a consequence. The important point here is the profoundly limited relations and processes that may unlock this seal and stimulate local actors.

When all 5 groups are considered a remarkably dramatic disparity situation comes on the scene and pushes itself forward as a principal problematic. In the same manner South-eastern Anatolia emerges to be a region that acquires a substantially different character within itself where both dynamics and stalemate conditions are experienced in terms of economic development. Nevertheless, when compared with East Anatolian Region, where development dynamics are considerably scarce and stalemate conditions are more intensive, it can be apprised that South-eastern Anatolian Region has come a long way in development. But this economic development in Southeast Anatolian Region is not coordinated with human development, as will be mentioned in the following section.

2.4 Breakdown of the GAP Region

Considering the GAP region as a unity within itself falls short of reality as the analysis in the previous section acknowledge likewise. GAP actually embraces sub-regions differing from each other in terms of economic and social indicators. That's why the existence of these different sub units is crucial for determining the extent of diversification for strategies and policies to be followed in this region. Therefore, bringing to light the diversities in the GAP Region should not be apprehended as a solely intellectual effort; on the contrary it should be perceived as a distinctively significant endeavour that may have decisive practical outcomes and that could help to differentiate GAP Region oriented policies.

The analysis mentioned in the previous section, have marked the actuality of fundamental variety in the context of entrepreneurship. The fivefold distinction within the context of entrepreneurship expressly puts forth that developed regions have a higher entrepreneurship capacity. While already developed regions may solve their problems in an easier way due to their high capability, on the other side there is an absolute deadlock. It is crystal clear that economically and socially poor developed zones have restricted competence and limited regional transformation capacities. Correspondingly, a vicious circle appears in which underdevelopment triggers underdevelopment.

When the picture is evaluated responding GAP provinces, an obvious disparity is recognised. For instance, there is a city like Gaziantep that has reached a considerable economic development level and caught an important standing of development, not only for GAP but also for Turkey. With a high entrepreneurship index, Gaziantep sustains completely different relations and confronts considerably different problems when compared with the other provinces. Besides, Adıyaman, Diyarbakır, Mardin and Şanlıurfa take place in the group following Gaziantep. Common characteristic of these provinces is that they have initiated a development and entrepreneurship process of which small and medium-sized enterprises are the major actors. It can also be declared that Adıyaman is one jump ahead of the other provinces as it has been acknowledged in the previous part where entrepreneurship classification executed for whole Turkey shows Adıyaman in the second group and Diyarbakır, Mardin, Şanlıurfa in the third group.

Below these two groups of provinces, there is a group where Batman, Siirt, Şırnak and Kilis provinces are included which we can define as stagnant provinces. These provinces, having a very low entrepreneurship index and being among the most underdeveloped regions of Turkey regarding all other social and economical indicators, face difficulties in changing their own situation and suffer catching the movement that might start the development process. On the other hand, the issues that these provinces face; such as ignorance, inadequate institutional intensity, being in the early stages of demographic transition process etc. foster all the other problems which result in an almost indistinguishable web of cause and effect relation.

Table 2.26 below depicts the characteristics of these three sub-regions defined in the GAP region according to the indicators described in the previous section. The most important result to be derived from this table is that the whole region, including the economically most developed province in this region; Gaziantep, strives serious problems related to social and human development. Although Gaziantep has realized an important economical development, for many other indicators of social and human development it has not reached a development level counterbalancing this economic maturation and has tailed away regarding especially education and institutional thickness. Certainly, this problem is more profound in the stagnant provinces and materializes as the main reason for not being able to overcome the stalemate conditions in these areas.

	High Flyer - Group 1	Average - Group 2	Stagnant - Group 3
Provinces	**Gaziantep**	**Adıyaman, Diyarbakır, Mardin, Ş. Urfa**	**Batman, Kilis, Siirt, Şırnak**
Infrastructure	Level 2 Medium infrastructure development, problems might be encountered related to infrastructure.	Level 3,4 Insufficient infrastructure and it is one of the major obstacles for development.	Level 4 Insufficient and bad infrastructure; significant infrastructure investments might be required.
Education	Level 2 An education rank compiling with economic development level; but skilled labour force is required for higher development standings.	Level 4 (Adıyaman 3) Low education level; high difference between woman-man; defective skilled labour force; absence of educated actors to initiate development.	Level 4 Low education level; high difference between woman-man; defective skilled labour force; absence of educated actors to initiate development.
Demography	Level 3 Economic development has not turned into social and human development; high fertility; young labor force	Level 4 (Adıyaman 3) Middle stages of demographic transition; high fertility; high child population; short life expectation.	Level 4 Middle stages of demographic transition; high fertility; high child population; short life expectation.
Health Services	Level 3 Health Services level not compiling with economic development rank.	Level 4 (Ş. Urfa and Diyarbakır - 3) Bad Health Services with poor quality	Level 4 Bad Health Services with poor quality
Financial Index	Level 3 Financial development level not compiling with economic development	Level 4 Inadequate, undeveloped financial institutions	Level 4 Inadequate, undeveloped financial institutions
Institutional Thickness	Level 4 Institutional thickness is not compatible with economic development; local actors have very low capability of coming together and developing joint behaviour.	Level 4 Institutional structure is insufficient to initiate development; local actors have very low capability of coming together and developing joint behaviour.	Level 4 Institutional structure is insufficient to initiate development; local actors have very low capability of coming together and developing joint behaviour.
Social Security	Level 3 Insufficiently developed social security establishments indicating that development is eventuated by the "informal" sector.	Level 4 Deficient and inadequate social security establishments	Level 4 Deficient and inadequate social security establishments
Entrepreneurship	Level 2 High entrepreneurship capacity	Level 4 (Adıyaman 3) Very low entrepreneurship capacity except for Adıyaman	Level 4 Very limited entrepreneurship capacity
General	Social and human development level has not reached economic development level; development of institutional and financial structure in educational level is obligatory for continuation of the development process.	Social and human development indicators point out typical "underdevelopment" except for Adıyaman; very limited actors and institutional structure to speed up the economic development.	All indicators accord with the "underachiever" zone definition; there are no actors to break the locked conditions.

Table 2.26 Three Constellations in the GAP Region and their Main Characteristics

When GIDEM provinces are considered, it can be observed that all four provinces fall under the second category, which is labelled as average and which can be characterized with poor human development level, low entrepreneurship capacity, insufficient city amenities and infrastructure, reluctant local actors for collaborations and so forth. The social and human development indicators point out typical "underdevelopment" except for Adıyaman and poverty is a significant problem in all provinces.

All the things that have been mentioned here signify that there are many things to be done and many steps to be taken for social and human development in the GAP region accompanying economic development. Having such a low degree of social and human development is one of the utmost obstacles for the initiation and acceleration of the development process. GIDEMs, on their part, have been trying to operate and respond to the needs of local businessman in an environment where externalities play such a significant role. At the end of five-year period, the main challenge that these centres is likely to confront is whether each local centre will be able to stand solely with its own financial, institutional capacity and customer profile, or not. This goal is directly related with the level of success of GIDEM services and their positive impact both on the region's social and economic condition and customers' development in business.

3. METHODOLOGY

Economic impacts are the effects on the level of economic activity in a given area induced by a project, program or policy. When we speak of the effects on the level of economic activity, we basically refer to the effects related to economic growth and economic development. In this context, our assignment is the assessment of various effects on economic growth and development induced by GIDEM project in four provinces; Diyarbakır, Urfa, Mardin; Adıyaman and their vicinities.

We believe that economic growth and development are two interrelated issues. When economic growth is concerned, usually a straightforward indicator; gross domestic product (GDP) is referred for measurement. Economic development on the other hand encompasses several other indicators in addition to the GDP such as institutionalisation of companies, or empowerment of women entrepreneurs. Within this scope, our research team have developed an impact model that allows measurement of GIDEMs impact on both economic growth and development. This was realized through incorporation of relevant potential impact areas and indicators that best represents both dimensions in the assessment methodology. Related to the indicators, one technical, but foreseen limitation was due the fact that the impacts of most business development services were not immediately visible and easily quantifiable. This issue was overcome to a certain extent by development of a methodology that is not solely based on visible and quantifiable outputs. By this way some crucial data could have been gathered, which would have been overlooked otherwise. After all, the purpose was not to demonstrate impact with irrefutable numerical evidence, but to establish clear causalities and/ or correlations between the outcomes and the interventions.

The impact assessment of GIDEM services has been accomplished in four major steps:

1. Secondary Research
2. Development of potential impact areas and related indicators
3. Primary Research
4. Impact Assessment

Any impact assessment project should account for some essential components and provide sufficient information to the reader to assess the quality of the study. These components are:

- Statement of the overall question /objective
- Statement of specific research question/objective
- Formulation of hypothesis
- Identification of population to which the results will apply
- Selection of a representative sample of population for survey
- Design of measuring instruments
- Survey plan
- Collection of data, taking into account extraneous variables
- Analyses of data and drawing conclusions. (Black,T.R, 1993)

As stated in Terms of Reference, the objective of the assignment is to estimate the impact of the GIDEM Project on economic growth and development in basically four GIDEM provinces. We specifically ask whether GIDEM service lines have (potential) contribution on the export, institutionalisation, investment and productivity of firms. Embedded in such a research question, there is a hypothesis that a correlation exists, and survey questions are prepared to reveal the nature of the correlation. The rest of the components deemed essential are covered in the following section, unfolding our four impact assessment steps.

3.1 Secondary Research (Desk Research)

Secondary research is the collection of data that, according to its common definition, have already been collected for some other purposes and include both raw and compiled data. In this assignment, the set of secondary data were comprised of GIDEM annual and progress reports, project documents, project web page, raw data on SMEs in Turkey, and outputs of similar projects. Secondary data have been exploited basically for two main purposes:

1. Getting an insight of GIDEM project and laying out GIDEMs' logic model,
2. Understanding the context and external environment in which GIDEMs operate.

To serve the first purpose, the research team has analysed available secondary data pertaining to GIDEM offices and services. Throughout this desk research, the service-lines of GIDEMs have been unfolded, different types of activities have been listed, their relations with the overall project objectives have been revealed, and finally the GIDEM logic model has been clarified. As to second purpose, through exploiting the raw data of Turkish Statistical Institute (TURKSTAT), the research team have depicted the characteristics and peculiarities of GIDEM provinces both in the national and the regional context. Thanks to such a comprehensive approach that incorporates external factors, GIDEM offices have been apprehended thoroughly, more robust potential impact areas & indicators have been developed, and a better-fit survey has been prepared. Consequently, a fine-tuned impact assessment methodology has been developed peculiar to GIDEM provinces.

3.2 Development of Potential impact Areas and Setting of Indicators

As an output of the secondary research, GIDEMs service-lines were detailed and grouped according to GIDEM project objectives. In this sense, it would not be wrong to expect strong relations between impact areas and objectives. In such a sequence of thinking a list of potential impact areas have been developed based on the desk research as well as on contacts with GIDEM central office (PMCU). The potential impact areas, derived from objectives and materialized through service-lines are presented in the following table.

GIDEM Project Objectives	Service - Lines	Potential Impact Areas
Overall Objective: To contribute to economic and social development in Adıyaman, Diyarbakır, Urfa and Mardin and to improve the competitiveness of Region on national and international markets. • to improve managerial, entrepreneurial and operational capacities of the entrepreneurs, and SMEs • to improve export capacities, employment, added value creation, sales and integration of women in the economy.	**Training** • Trade and investment • Business management • Quality and standards • Sector trends • Investment plan • Capacity development in the sector • Project cycle management • Women entrepreneurship **Consultancy** • Pre-feasibility preparation • Business plan preparation • Marketing survey • Machinery and equipment selection • Productivity consultancy • Investment plan preparation • Capacity development in the sector • Specialist support **Information** • Legislation • Financial resources • Investment opportunities • International partner search • Sector trends • Publications • Fair, exhibition, excursion	**1. Domestic Sales** **2. Export** **3. Productivity** **4. Investments** **5. Institutionalisation** **6. Future Expectations**

Table 3.1 Objectives, Service Lines and Potential Impact Areas

For the listed six impact areas, several measurable indicators were adopted. For each indicator, it was checked whether it is

1. quantifiable,
2. relevant to the impact to be measured,
3. specific to the nature of activity,

whose impact ito be measured. Initially, the availability of the related data had been a critical concern; however GIDEMs' close relations with local firms made the firms more open in sharing their information. Yet there had still been a justifiable concern about the quality of data, for which several precautions were taken in the design of primary research.

Impact Areas	Indicators
General Information on Firms	• The age of the firms • Sectoral focus • Number of employees (acc. To gender) • Change in number of employees • Capital structure • Number of shareholders • Services received from GIDEM
Domestic Sales	• Sales (value) • Change in volume (revenue) • New markets
Export	• Sales (value) • Sales volume (change per year %) • New markets • Change in number of international tenders par ticipated • Change in number of contracts awarded
Productivity	• Change in Employment • Change in domestic sales • Change in export
Investments	• Change in Employment • Change in domestic sales • Change in export
Institutionalisation	• Ownership of Trademark, Patent, Useful Model • Change in number of owned Trademarks, Patents, Useful Models • Financial management instruments • Periodic market surveys • Participation to fairs • Capital structure • Specialised departments in the firm • Internet access, company web-page, e-trade (yes/no)
Future Expectations	• Satisfaction level • Impact expectation level • Services that are wished to be received

Table 3.2 Indicators for Measurement of Impact Areas

3.3 Primary Research (Field research)

Primary research basically refers to development of a questionnaire and execution of the survey. In this scope, it is critically important to have an unbiased sampling and an elaborated design of research tools in order to ensure the quality of collected data.

3.3.1 Selection of Sampling Method

As it is not always possible to use whole population in many studies, two general sampling methods are used, namely probability and non-probability sampling. With probability sampling, all elements (e.g. clients, persons, households) in the population have some opportunity of being included in the sample, and the mathematical probability that any one of them will be selected can be calculated. With non-probability sampling, in contrast, population elements are selected on the basis of their availability (e.g. because they volunteered). Non-probability sampling is used when the cost of taking a random sample is too great, or when it is very difficult to obtain a complete list of the members of the whole population. Within this sampling method, a researcher either hand-picks subjects which are judged to be representative, or non-randomly selects subjects from identified strata until desired numbers are reached, or takes a group or individuals that are available.

While non-probability sampling (i.e. purposive sampling, quota sampling, convenient sampling, etc.) provides less justifiably representative samples, probability sampling is the best way to achieve representativeness. Some of the most attended probability sampling types in scientific researches can be listed as simple random sampling, stratified random sampling, cluster sampling, stage sampling.

Among probability sampling methods, **simple random sampling** involves taking a random where members of the population are chosen in such a way that all have an equal chance to be measured. In **stratified sampling**, the population is divided into two or more strata and each subpopulation is sampled (usually randomly); each stratum must share the same characteristic. Random sampling may well be used to select a certain number of data points from each stratum. As a third type, **cluster sampling** refers to a sampling where a population is divided into clusters and a few of these (often randomly selected) clusters are exhaustively sampled- exhaustively hereby means considering all elements. Cluster sampling is used when "natural" groupings (e.g. provinces, sectors) are evident in the population. Finally, **stage sampling** involves successive random selections. Randomly selecting 10 provinces, and then randomly 50 schools in these 10 provinces, and then 100 teachers in these 50 schools is an example to stage sampling. Stage sampling can be used as an extension of cluster sampling.

Within the scope of this assignment non-random sampling techniques are not adopted as they provide less justifiably representative samples. Besides, simple random sampling was not used for it would not ensure that sufficient number of clients be drawn from each province, each sector and service line. Moreover, a fully randomized sampling could have been resulted in a sample that is not representative, for instance, for all provinces at the same time.

Stratified sampling requires grouping members of the population into relatively homogeneous subgroups before sampling. Although stratified sampling has several advantages for improving accuracy of estimations, first of all, it can be difficult to select relevant stratification variables; secondly, it is not useful when there are no homogeneous subgroups; and thirdly it requires accurate information about the population. As far as the context in which the assignment has been carried out, it has been observed that the disadvantages of stratified sampling outweighed its advantages.

Cluster sampling has eventually been considered as the best type of sampling technique that can be applied within the scope of the assignment. The cluster sampling is used when "natural" groupings (e.g. provinces, sectors) are evident in the population. The total population is divided into clusters which are supposed to be as homogeneous as possible internally; and heterogeneous among each other. In other words; each cluster should be a small-scale version of the total population in a way that they are mutually exclusive and collectively exhaustive. A random sampling technique is then used to choose which clusters to include in the study.

The main difference between cluster sampling and stratified sampling is that in cluster sampling the cluster is treated as the sampling unit, so analysis is done on a population of clusters (at least in the first stage). In stratified sampling, the analysis is done on elements within strata. In stratified sampling, a random sample is drawn from each of the strata, whereas in cluster sampling only the selected clusters are studied. For such reasons, cluster sampling is the best type of sampling technique that can be applied within the scope of the assignment.

3.3.2 Sampling

Theory would suggest that "an experimental design" produces more accurate and reliable results. However, in social science studies, experimental designs tend to be difficult to arrange and are often considered artificial and divorced from reality, in that the subjects in sample are usually embedded in their background, social statue, age group, gender, and cannot be detached from them. In these terms, a quasi-experimental design is employed in the overall research.

The target group of GIDEM services is constituted by micro, small and medium-sized enterprises located in Diyarbakır, Urfa, Mardin; Adıyaman and their vicinities, which can also be referred as *population* of the research and out of which the sample is selected. Within the population, by using the capacity utilization reports of TOBB, the research team developed clusters based on the locations, sizes and sectors of the enterprises. In developing the clusters the research team ensured that the sectors that were included in the sampling represent the sectoral distribution of the whole industry in a given province (see table 3.3).

At the same time, local GIDEMs were asked to provide their client databases, which included information on the size (turnover, number of employees), sector and address of GIDEM clients. The firm list complied from TOBB capacity reports that only enumerate firms in manufacturing sector, practically match the GIDEMs' client list, however GIDEMs' list also include firms in service sector as well as some associations. The client lists of GIDEMs have been cross-referenced with the information extracted from the TOBB capacity utilization reports, and the clients have been grouped in accordance to their size and sub-sectors. At the end of the sampling, a sample of 111 clients (main list) along with 20 substitute clients was composed. The lists then were sent back to GIDEMs. The outspoken concern of some local GIDEM directors was the fact that "some of clients are fairly new clients and the impact of

GIDEM services has yet to be observable". However, the questionnaire, which was by then in the process of development, had some precautions to deal with this risk (e.g. all the respondent were asked to comment on the level of impact they would expect to observe in the future).

Sector Codes	No. in Adıyaman	%	Adıyaman Sample	%	No. in Urfa	%	Urfa Sample	%	No. in Diyarbakır	%	Diyarbakır Sample	%	No. in Mardin	%	Mardin Sample	%
11	0	0,00	0	0,00	7	1,83	3	10,00	1	0,30	0	0,00	7	4,55	0	0,00
22	1	0.62	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00
29	2	1,23	0	0,00	13	3,39	0	0,00	30	8,69	2	7,14	0	0,00	0	0,00
31	48	29,63	7	25,93	120	31,33	8	26,67	107	31,94	5	17,86	51	33,12	8	30,77
32	71	43,83	15	55,56	159	41,51	7	23,33	71	21,19	4	14,29	30	19,48	5	19,23
33	5	3,09	0	0,00	0	0,00	0	0,00	7	2,09	0	0,00	0	0,00	0	0,00
34	6	3,70	1	3,70	0	0,00	0	0,00	3	0,90	1	3,57	1	0,65	0	0,00
35	7	4,32	0	0,00	37	9,66	2	6,67	37	11,04	4	14,29	38	24,68	5	19,23
36	3	1,85	0	0,00	18	4,70	0	0,00	46	13,73	6	21,43	8	5,19	2	7,69
37	0	0,00	0	0,00	5	1,31	0	0,00	2	0,60	0	0,00	1	0,65	0	0,00
38	12	7,41	2	7,41	20	5,22	4	13,33	22	6,57	2	7,14	10	6,49	3	11,54
39	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00	1	0,65	0	0,00
41	0	0,00	1	3,70	1	0,26	0	0,00	0	0,00	0	0,00	0	0,00	0	0,00
71	6	3,70	1	3,70	3	0,78	1	3,33	9	2,69	1	3,57	7	4,55	0	0,00
other	1	0,62	0	0,00	0	0,00	5	16,67	0	0,00	3	10,71	0	0,00	3	11,54
	162	100	27	100	383	100	30	100	335	100	28	100	154	100	26	100

Table 3.3 Sample Representativeness with Referance to Research Population

Sector Codes	Sector Labels
11	Agriculture and Hunting
22	Crude Petroleum and Natural Gas Production
31	Manufacture of Food, Beverages and Tobacco
32	Textile, Wearing Apparel and Leather Industries
33	Manufacture of Wood and Wood Products, Including Furniture
34	Manufacture of Paper and Paper Products, Printing and Publishing
35	Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber and Plastic Products
36	Manufacture of Non-Metallic Mineral Products, Except Products of Petroleum and Coal
37	Basic Metal Industries
38	Manufacture of Fabricated Metal Products, Machinery and Equipment
39	Other Manufacturing Industries
41	Electricity, Gas and Steam
71	Transport and Storage
Other	Other includes Service Sector (TOBB Reports only Manufacture Sector)

Table 3.4 Sector Labels and Sector Codes

As supplementary to quantitative part of the research composed of questionnaires, a qualitative research has also been executed. In doing so, eight in-depth interviews and cognitive mapping study have been conducted among questionnaire respondents. Meanwhile, the qualitative study has been expanded to cover interviews with non-clients who have been selected randomly among firms in the dominant sectors of each province. The main purpose of those interviews, tracing "outsider views", has been to understand how non-client firms conceive GIDEMs and their services. In addition, considering the two-tier provision of GIDEM services in terms of pooling of resources with other local institutions, the research team have also decided to carry out in-depth interviews with them paying attention to their opinions about and relations with GIDEM offices.

Concerning the overall primary research, 100 clients have been subject to the questionnaires, of which eight firms have also been subject to in-depth interviews and cognitive mapping study. On top of that, four non-client firms have been added to the qualitative analysis as well. Furthermore, the research team have had in-depth interviews with several institutions as mentioned above. In the end, the research team have been able to access 100 clients for questionnaires, which constitute approximately 9,7% of whole population. Concerning qualitative analysis, 41 interviews have been carried out in total, 12 of which is with firms and 29 of which with local institutions. The overall list of respondents is provided in the following part.

The cooperation with local GIDEMs was beneficial for basically two reasons: First of all, it helped the research team to have a better understanding of the business environment and the profile of GIDEM clients, and secondly it improved the level of understanding and participation among interviewees.

3.3.3 Respondent Profile and Response Rate

Initially, the aim of the research team was to reach approximately 10% of the whole population, which signifies a high representativeness rate, amounting to 25 to 30 respondents from each GIDEM province. As a matter of fact, in practice, researchers have never obtained responses from 100% of the sample. Some sample members apparently were travelling, hospitalised, incarcerated or under the military service. Some could not be contacted because of their work schedule, community involvement, or social life. Some others simply refused to participate in the study, even after the best efforts of the researcher to persuade them otherwise. Having faced similar excuses; thanks to substitute list, the research team have been able to access 100 clients which constitutes 9,7% of whole population (which is 1034 firms). In statistical terms, 9.7% sample size is legitimate in that precautionary measures had already been taken during the sampling.

Adıyaman	Şanlıurfa	Mardin	Diyarbakır
Akan Perde	Akbeş Tekstil	Ademhan Petrol	Arı Madencilik
Barteknik Yedek Parça	Ateş Net Danışmanlık	Aynur Çeyizcilik	Bakraç Yoğurt
Besi Bebek	Badıllı Zirai Aletler	Babaoğlu İletişim	Beden Mermer
Bilce Tekstil	Batı Endüstri İnşşat	Cercis Murat Kona ı	Besan Yapı Kimyasalları
Çerkezoğlu Makina San	Çed Mühendislik	Dalgıçlar Petrol	Botan Fuarcılık
Çiftçi Tekstil	**Ertekin Pompa**	Fer Gıda	Dicle Plastik
Doğu Çelik	Gap Fidancılık	Gülbiş Madeni Eşya Sanayi	Dimer
Estetik Dokuma	Gaplin Tekstil	İpek Bulgur	DTS Transformatör
Gapeks Baskı	Gök Grup Balon	Karaboğa Şirketler Gr	Ekol Çorapları
Güçlü Yağ	Gün Tekstil	Mar Plas	Erdem Plastik
Hanımeli Restoran	Haliloğulları Sentetik Çuval	Marcan Un	**Goreseven Tekstil Sanayi**
Kahta Sercan Tekstil	İmteks Pamuk	Martu A.Ş.	Gün Plastik
Ketencioğlu Gıda	Işıklar Gıda	Mehtar-Dicle Gıda	Hatipoğlu Tekstil
Mem Tekstil	Kaliru Turizm	Mer Gıda	Karaaslan Mermer
Memer Triko	Karalök Aşurelik ve Bulgur	**Mes Süt**	Kardaşlar Çırçır
Merit Tekstil	Koyuncu Bulgur ve Yem Sanayi	Özhan Kimya	Mega Seramik
Milenyum İnşaat Gıda	Külahlı Pamuk	Özmuratoğlu Makina Sanayi	Nett Makine
Miraç Tekstil	Meksan Transformator	**Pikasso Boya**	Odabaşı Bal
Modapen Tekstil	Parlak Bulgur Mercimek	Selsan San. Tic.	**Özdicle Yapıkimyasalları**
Perre Tekstil	**Roza Ekolojik Tarım**	Sevgi Tıp Merkezi	Özyıldızlar Un
Sena Tekstil	Safır Plastik	Sürücü Otomotiv	Sevgi Plastik
Sifa Un Sanayi	Sağırlar Gıda	Şahan Gıda	Sürgücü Gıda
Star Giyim Üretim	Selim Uludağ Organik	Umur Teknik Makina	Vitray Gıda
Turkuaz Yemek	Sizem Un		
Utsa Çuval	STC Antepfıstığı İşleme		
	Toru Toys		
	Vema-BCT		
	Yersun İplik		
	Zümrüt Tekstil Sanayi		

Table 3.5. List of Questionnaire Respondents
** Bold names refer to those firms subject to in-depth interviews*

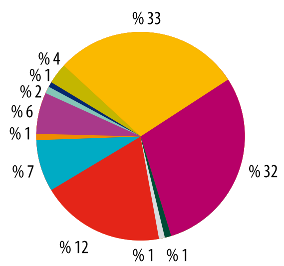


Figure 3.1 Sectoral Distribution of Enterprises in Population

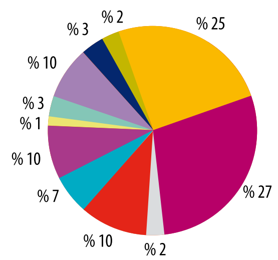


Figure 3.2 Sectoral Distribution of Enterprises in Sample

- Manufacture of Food, Beverages & Tobacco
- Textile, Wearing, Apparel & Leather Industries
- Other Mining
- Agriculture
- Transport and Storage
- Man. of Fabricated Metal Prod., Mach. & Eqp.
- Basic Metal Industry
- Man. of Non-Metallic Mineral Prod.
- Man. of Chemicals and Petroleum, Coal, Rubber & Plastic Prod.
- Man. of Paper and Paper Prod., Printing & Publishing
- Man. of Wood and Wood Products, including Furniture
- Other includes Service Sector (TOBB reports only Man. Sector)
- Electricity, Gas and Steam
- Crude Petroleum and Natural Gas Production
- Other Manufacture Industries

In addition to questionnaires and interviews with clients, some in-depth interviews were executed with the non-clients and some leading institutions, whose lists are presented below.

Adıyaman	Şanlıurfa	Mardin	Diyarbakır
Fotomoda (sector code 32)	Polteks iplik (sector code 11)	Artup (sector code 35)	Bisteks (sector code 32)

Table 3.6 In-depth Interview List with Non-Clients

	Institutions
Adıyaman	• AKAD- Anatolian Women Association • ATEKS (Adiyaman) Adıyaman Syndicate of Textile • ATEM Adıyaman Textile and Training Centre • Adıyaman Organized Industrial Site directorate • Governorship • Chamber of Trade and Industry • GIDEM office
Şanlıurfa	• Gap-RDA Urfa, • Association of Young Entrepreneurs • Urfa, OTTUSAT Organic Agriculture and Textile producers Association Urfa, • Urfa AGROGAP • MUSIAD Association of Independent Businessmen • GAP EKODER-development in ecologic agriculture & social mutual benefit association • GAP Association of Greenhouse • Suruc Women Development Association • Municipality of Urfa • GIDEM office
Mardin	• Mercantile exchange of Diyarbakır • Chamber of Trade and Industry • DOGINSIFED • Association of Businesswomen • DOGU MERMERCILER DERNEGI Association of Marble Cutters • GIDEM office
Diyarbakır	• Chamber of Trade and Industry • Association of Disabled people • Governorship • Association of Culture and Tourism • Mokid-women association of Mardin • GIDEM office

Table 3.7 In-depth Interviews with Leading Institutions

3.3.4 Design of Primary Research Tools

The limits in primary data collection and classification, and the difficulty of assessing the social changes by quantified methods prevent the application of a single method in impact assessments. In this respect, the more preferred and sensible way is to use the combination of different techniques in a complementary manner considering both measurable and non-measurable components.

Despite several ways of categorising the survey methodologies, the approach that categorises a survey according to the structure of the questions and answers is both the most common and the one that makes most intuitive sense. According to this approach there are three types of surveys: (a) structured (b) semi-structured and (c) unstructured. However such a categorisation does not imply that a survey should only be designed by using one of the three types. A survey may be designed as a combination of the three types; and this is also same manner our survey is a combination of the structured and semi-structured techniques.

Structured data collection approaches require that all data be collected in exactly the same way with different respondents. This is particularly important for multi cluster evaluations, where one needs to be able to compare success at different clusters. Our questionnaire was prepared accordingly and practically became useful in understanding the various attitudes and opinions in different provinces and sectors. The quality of the data, which deals with reliability and validity of the research data, has been maximized by careful planning and implementation.. The previous experience of the research team in impact assessments of ABIGEM services has also contributed to enhancement of data quality. Such an approach in general has resulted in the attainment of higher response rates.

Nevertheless, a number of reasons that led us envisage that structured interviews would not suffice for the tasks to be fulfilled within the scope of the assignment. The first reason is that GIDEMs do not have a long history for an existence of a sound database. Secondly, most of SMEs in Turkey do not possess a decent financial and operational data recording mechanism, and thirdly businessmen are not always willing to share information. Under such circumstances, we have incorporated several open-ended questions in the questionnaire. More significantly, to compensate the data, we have conducted semi-structured in-depth interviews that cannot be reached either because it is deemed confidential by the respondents or simply because there is no data at all. The in-depth interviews carried out by the team had a fairly open framework that allowed for focused, conversational, two-way communication, yet systematic and following general procedures.

As a third research tool, cognitive mapping method was applied followed right after in-depth interviews. Accordingly, one specific question was asked to get an insight of the "local development conception of businessmen, and their perspective with respect to the role of institutions in local development". Once the question was asked, the answer of the interviewee was listened without any interruption, but meanwhile some basic concepts were extracted out of interviewees sentences by the researcher and drawn schematically on a piece of paper. After the interviewees finished answering, they were asked to grade the relations between each concept according to their being negative or positive. This cognitive mapping study was effective in laying out a broad picture on the visions of businessmen of the region.

3.3.5 Limitations

Before the field study, the basic concern of the research team had been related to persuasion of GIDEM clients to participate in the survey. However, on the field, it was recognized that this concern was invalid. Thanks to the initial contacts of GIDEM offices with relevant clients, the businessmen of region were usually quite hospitable and willing to participate in survey. Consequently, the response rate was significantly high. Yet the research team faced some other challenges during execution of the survey.

The main challenge was related to collection of accurate numeric data. The immaturity of most SMEs in the region resulted in some limitations. For instance, many of the individual enterprises were not able to provide accurate data, as they did not have decent financial and operational reporting systems. In such cases, the interviewees preferred to mention the approximate interval values, which provided us a general picture instead of realized figures.

In another manner, although some SMEs had the updated data, they hesitated to express them. Especially the data related to sales and investments were deemed confidential, and not always provided to the surveyors. At this point, some indirect questions of semi-structured interviews offset these problems to an important extent.

An unexpected challenge was observed when the clients were asked to list the types of services that they had received. Although GIDEMs have a well-categorized structure of services, a similar level of clarity could not be observed at the client level. Except training services, most GIDEM clients had a hard time in articulating the service type. Especially, when information services are concerned, we have observed that many clients perceived these services as informal meetings or conversations; so they could not categorize them as "service received". This deficiency could be overcome, to a large extent, thanks to the preparation and knowledge of research team and their capability to match the original services with the declared answers. Moreover, after the fieldwork GIDEMs were asked to provide a list indicating the clients with the services they received. Such lists also helped to cross check and categorize the asserted services meaningfully.

To sum up, the limitations were basically related to business culture of region, that is not open to information sharing and that has not internalised the multi dimensional side of economic development. In this scope, while some clients did not want to provide us with some answers, for some clients our questions did not make much sense as they had difficulty to see broader relations between the smaller components of GIDEM services and its broader objectives. For instance, asking a firm that has received quality management training, about the expected impacts on future international markets, did not always bring a straightforward answer. This can be best explained with the dominant point of view of local businessmen that is focused on realising their accustomed profit rate from a given input, and ignoring the potential gains (and escaping potential risks) that is likely to accrue via application of new approaches and techniques.

3.4 Impact Assessment

The impact assessment methodology of this assignment is based on two main bodies: (a) analyses and (b) modelling. These methods have been used either together or separately according to the subject of the analysis. The main objective of the statistical analysis was to find out the existent changes in the defined impact areas, and try to assess whether these changes arise from the services delivered by GIDEMs or not. In other words, the research team have tried to find out if the indicators related with GIDEM services explain the change realized in four GIDEM provinces in a statistically significant manner. Additionally, a part of the analyses focused on future impact in order to expose the possible effects that are going to be realised in a near future.

The methods used in the statistical analyses section can be classified as follows:

- Multiple Regression models have been built in order to assess the economic impact of GIDEM services on domestic sales and exports,
- Before/After analysis has been used in order to assess the change in domestic sales and exports; and separately the economic impact of GIDEM services on productivity;
- Repeated measures (ANOVA) tests have been applied in order to assess whether the mean differences between each year (in domestic sales and exports) are statistically significant in each year,
- Multinomial logistic regression models have been developed: (a) to define the causalities between expected level of impact of GIDEM and areas that an impact is expected; (b) to define the causalities between the level of institutionalisation and areas that involve a potential impact;
- Non-parametric tests have been used to evaluate and identify the best client profile,
- A general model has been built in order to estimate the value-added generated through GIDEM services.

4. STATISTICAL FINDINGS

4.1 Domestic Findings

A two-parameter multiple linear regression model has been utilized.

$Y = \beta_0 + \beta_1 X_1 + \beta_2 X_2$

Where;

Y, is the average change in domestic sales (post- & pre-GIDEM assistance)

X_1 contribution of GIDEM to domestic sales

X_2 contribution of GIDEM to new investments

Based on the data, the multiple-linear-regression model is:

$Y = 108.42 + 90.06X_1 + 59.81X_2$ $R^2 = 0.27$

	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
Constant	108,407	45,42366		2,386877	0,023988
Contribution of GIDEM to Domestic Sales	90,06521	41,56816	0,352673	2,166688	0,038921
Contribution of GIDEM to New Investments	59,81802	28,42118	0,342583	2,104699	0,04442

Table 4.1 Domestic Sales Coefficients

	Sum of Squares	df	Mean Square	F	Sig.
Regression	256539,5	2	128269,7	5.04986	0,013406 (a)
Residual	711218,2	28	25400,65		
Total	967757,7	30			

Table 4.2 Domestic Sales Anova

	R	R Square	Adjusted R Square	Std. Error of the Estimate
Regression	0,515(a)	0,265	0,213	159,3758

Table 4.3 Domestic Sales Model Summary

The resulting equation suggests that GIDEMs' contributions to "domestic sales" and "new investments" explain the improvement in the domestic sales between pre and post GIDEM periods. The general model and each variable within the model are statistically significant in 95% confidence interval.[1]

The equation explains 27% of the variability in the change in sales, and such a value indicates that the role of GIDEMs' assistance is lower than other factors effecting the change in the domestic sales. That is, there are a number of factors other than GIDEMs' performance covering a stronger effect on the mentioned change, such as changes in the overall macroeconomic atmosphere or sectoral shocks. Additionally, other parameters representing GIDEMs contribution (apart from two independent variables in the model) cannot be proved to be effective in the changes between pre and post GIDEM period in terms of domestic sales since they are not statically significant.

4.1.1 Sales per Employee

Similar to regression model above, a representative sample is constituted in order to detect respondents' pre-GIDEM and post-GIDEM domestic sales performance by looking at the distribution of clients in terms of size and sector, and 30 clients improving their domestic sales have been observed from the sample. Having constituted the relevant sample, the firms' performance is evaluated by analyzing the domestic sales per employee values both for pre-GIDEM and post-GIDEM periods. Methodologically, the years of 2002 and 2003 is defined as pre-GIDEM period, in which the effect of GIDEMs' assistance is not visible yet. Following three years, namely from 2004 to 2006, is defined as post-GIDEM period with a similar rationale. The domestic sales per employee values are estimated by dividing the value of domestic sales in respective year to the number of employment.

As can be observed from the proceding table the average change in domestic sales per employee is TRY 61.423. But, as explained above, the regression equation explaining the changes in the domestic sales indicates that GIDEMs' contribution alone is not adequate to explain ongoing changes. As a result, the role of non-GIDEM factors should not be ignored in such a change in value of domestic sales per employee.

SN[2]	City	SC	Domestic Sales Pre GIDEM	Domestic Sales Post GIDEM	Domestic Sales/ Employee (Pre GIDEM)	Dom. Sales / Employee (Post - GIDEM)	Difference
62	2	31	532957	1072840	7614	35761	28148
5	2	35	5337288	12376320	152494	281280	128786
51	2	32	9715	23040	4858	11520	6662
58	2	32	850000	3000000	5313	18750	13438
63	2	38	700000	1500000	17500	38462	20962
6	21	35	345600	1810000	69120	795036200	-32920
8	21	35	1440000	7500000	65455	340909	275455
9	21	35	595595	1865500	42543	133250	90708
11	21	38	566720	1988000	16192	56800	40608
12	21	29	1836000	9800000	45900	90741	44841
13	21	32	1000350	1935000	71454	71667	213
15	21	31	4745013	9230000	158167	307667	149500
17	21	37	10479483	20230000	190536	367818	177282
18	21	39	1260623	4655300	126062	155177	29114
65	21	36	490000	3500000	6125	43750	37625
68	21	31	10944000	56400000	156343	805714	649371
22	47	31	1003129	1711500	66875	57050	-9825
24	47	31	3840000	5800000	548571	85294	-463277
25	47	35	485100	710000	5707	47333	41626
28	47	35	102600	480000	7892	36923	29031
29	47	31	20043408	40320000	200434	403200	202766
75	47	38	239499	448500	39917	89700	49784
83	47	31	385920	830000	64320	59286	-5034
84	47	31	2880000	7750000	240000	407895	167895
85	63	31	691200	2580000	57600	161250	103650
34	63	31	436762	914000	43676	91400	47724
35	63	32	146880	1272000	918	7950	7032
36	63	32	22778280	40800000	355911	337190	-18721
40	63	38	1900800	5820000	47520	75584	28064
42	63	39	3930240	7325000	78605	146500	67895
94	63	50	160000	130000	22857	18571	-4286
Average			**3230876**	**8186355**	**94080**	**155503**	**61.423**

Table 4.4 Sales per Employee

[1] Please refer to ANOVA and coefficients tables respectively for the detailed evaluation of mentioned significance.

[2] In order to keep the client names confidential, a unique id number is assigned for each client

4.1.2 Statistical Results (Impact on Domestic Sales)

In order to determine whether there is a statistically significant difference between volumes of domestic sales between pre- and post-GIDEM assistance the following data set is constituted. The following table displays the volumes of domestic sales of clients in each year and at the last column, the percentage of change between before and after assistance period is calculated.

The average domestic sales of the companies in the sample, which is believed to be representative of the businesses in GIDEM provinces, were in the neighbourhood of TRY 3,2 million before GIDEM assistance, and increased to TRY 8,18 million after. But still, it should be beard in mind that, GIDEMs performance has a partial effect in this change.

SN	SC	City	Year	2002	2003	2004	2005	2006	Before/ After
62	2	31	2004	250969	281988	316840	356000	400000	101.30
5	2	35	2005			5337288	5930320	6446000	131.88
51	2	32	2005			9715	11040	12000	137.15
58	2	32	2005			850000	1000000	2000000	252.94
63	2	38	2006				700000	1500000	114.29
6	21	35	2004	129600	216000	360000	600000	850000	423.73
8	21	35	2004	540000	900000	1500000	2500000	3500000	420.83
9	21	35	2004	245245	350350	500500	715000	650000	213.22
11	21	38	2004		566720	644000	644000	700000	250.79
12	21	29	2004	756000	1080000	1800000	3000000	5000000	433.77
13	21	32	2004	473850	526500	585000	650000	700000	93.43
15	21	31	2004	2260713	2484300	2730000	3000000	3500000	94.52
17	21	37	2004	4934783	5544700	6230000	7000000	7000000	93.04
18	21	39	2004	290913	969710	1385300	1979000	1291000	269.29
65	21	36	2004		490000	700000	1000000	1800000	614.29
68	21	31	2004	4104000	6840000	11400000	19000000	26000000	415.35
22	47	31	2004	488704	514425	541500	570000	600000	70.62
24	47	31	2004	1840000	2000000	2000000	2000000	1800000	51.04
25	47	35	2004	254100	231000	210000	200000	300000	46.36
28	47	35	2004	48600	54000	60000	120000	300000	367.84
29	47	31	2004	9325008	10718400	12320000	14000000	14000000	101.16
75	47	38	2004	116679	122820	133500	150000	165000	87.27
83	47	31	2004	171520	214400	268000	335000	227000	115.07
84	47	31	2004	1280000	1600000	2000000	2500000	3250000	169.10
85	63	31	2004	307200	384000	480000	600000	1500000	273.26
34	63	31	2004	204442	232320	264000	300000	350000	109.27
35	63	32	2004	65280	81600	102000	170000	1000000	766.01
36	63	32	2004	10726280	12052000	13100000	13100000	14600000	79.12
40	63	38	2004	844800	1056000	1320000	1500000	3000000	206.19
42	63	39	2004	1883240	2047000	22250000	2500000	2600000	86.38
94	63	50	2004		160000	200000	500000	600000	-18.75

Table 4.5 Change in Domestic Sales

	Mean	N	Std.	Std. Error
Before	3230876	31	5575021	1001303
After	8224097	31	13455931	2416757

Table 4.6 Paired Sample Statistics (difference on domestic sales)

Having analyzed the difference between pre-and post-GIDEM services in real terms, whether this increase is significant or not in statistical terms evaluated. A two tailed paired sample t-test is applied to determine whether the difference in the mean change of two groups is meaningful for domestic sales. The means of the two groups (e.g. post and pre assistance) is statistically different as well. The results of the analyses in 95% confidence interval are as follows:

	Paired Difference					t	df	Sig (2 - tailed)
	Mean	Std. Deviation	Std. Error Mean	% 95 Confidence Interval of the Difference				
				Lower	Upper			
Before - After	-4993221	8923160	1602647	-8266262	-1720179	-3,116	30	0,004

Table 4.7 Interpretation of Results (change in domestic sales)

4.1.3 Repeated Measures (ANOVA) Test

Repeated measures analysis of variance generalizes t-test for paired samples. It is used when at least one of the factors consists of repeated measurements on the same subjects or experimental units, under different conditions

The last step indicating the analysis of domestic sales is a comparison of statistically meaningfulness of changes year by year, and giving the significance for each year set from 2002 to 2006. In order to achieve that, repeated measures test (ANOVA) is applied. The variables and the comparison in the analyses include the domestic sales in 2002,2003,2004,2005 and 2006 respectively. The results and the evaluation of the test are as follows:

Domestic Sales	Mean	Standard Deviation	N
2002	1730914	2855161,806	24
2003	2104230	3319686,441	24
2004	2576318	3978125,376	24
2005	3201875	5025550,987	24
2006	3857625	6127361,797	24

Table 4.8: Domestic sales variables

Factor 1	Mean	Std. Error	% 95 Confidence Interval	
			Lower Bound	Upper Bound
2002	1730914	582807,5	525284,489	2936542,677
2003	2104230	677628,2	702449,064	3506010,353
2004	2576318	812031,4	896503,311	4256133,356
2005	3201875	1025836	1079770,93	5323979,068
2006	3857625	1250742	1270267,03	6444982,969

Table 4.9: Domestic sales estimates

The preceding table indicates that in year 2002, the domestic sales of the firms lie between TRY 525.284 and TRY 2.936.542 at 95% confidence interval. For the years 2003 and 2004 this values ranges between the pairs of TRY 702.449 –TRY 3.506.010 respectively. These values increase to TRY 1.079.770 and TRY 5.323.979 in 2005, and to TRY 1.270.267 and TRY 6.444.982. As can be seen from the following Parameter Estimates table, the values obtained from the estimates above are statistically significant for all years at 95% confidence interval.

Dependent Variable	Parameter	B	Std. Error	t	Sig.	%95 Confidence Interval		Partial Eta Squared	Noncent. Parameter	Observed Power (a)
						Lower Bound	Upper Bound			
Domestic Sales 2002	Intercept	1739014	582807,5	2,970	0,007	525284,489	2936542,677	0,277	2,970	0,812
Domestic Sales 2003	Intercept	2104230	6777628,2	3,105	0,005	702449,064	3506010,353	0,295	3,105	0,845
Domestic Sales 2004	Intercept	2576318	812031,4	3,173	0,004	896503,311	4256133,356	0,304	3,173	0,859
Domestic Sales 2005	Intercept	3201875	1025836,3	3,121	0,005	1079770,93	5323979,068	0,298	3,121	0,848
Domestic Sales 2006	Intercept	3857625	1250742,5	3,084	0,005	1270267,03	6444982,969	0,293	3,084	0,840

Table 4.10 Domestic sales parameter estimates
(a)Computed using alpha = .05

Having analyzed the overall structure of domestic sales year by year, a comparison of mean difference between each year set is observed. The results obtained are as follows:

The mean difference in domestic sales between 2002 and all years (2003 to 2006) are statistically significant. Similarly, differences between year 2003 and other years (2002 to 2006) can be considered as significant, where as such a significant difference cannot be observed between 2004 and 2005. In 2006, the differences in domestic sales are statistically significant in other years as well. Such an interpretation specifies that apart from the difference in 2004 and 2005, the mean change in the domestic sales in GIDEMs' service hinterland is meaningful.

(I) Factor 1	(J) Factor 1	Mean Difference (I -J)	Std. Error	Sig.	% 95 Confidence Interval for Difference	
					Lower Bound	Upper Bound
2002	2003	-373316,13	129022,6	0,008	-640219,772	-106412,478
	2004	-845404,75	320950,0	0,015	-1509340,396	-181469,104
	2005	-1470961,4	626911,4	0,028	-2767826,444	-174096,390
	2006	-2126711,4	906417,1	0,028	-4001778,044	-251644,789
2003	2002	373316,125	129022,6	0,008	106412,478	640219,772
	2004	-472088,63	195109,8	0,024	-875704,079	-68473,171
	2005	-1097645,3	507305,6	0,041	-2147086,871	-48203,712
	2006	-1753395,3	791166,1	0,037	-3390047,156	-116743,427
2004	2002	845404,75	320950,0	0,015	181469,104	1509340,396
	2003	472088,625	195109,8	0,024	68473,171	875704,079
	2005	-625556,67	316072,9	0,060	-1279403,350	28290,017
	2006	-1281306,7	603491,2	0,045	-2529723,276	-32890,058
2005	2002	2470961,4	626911,4	0,028	174096,390	2767826,444
	2003	1097645,3	507305,6	0,041	48203,712	2147086,871
	2004	625556,7	316072,9	0,060	-28290,017	1279403,350
	2006	-655750	304386,4	0,042	-1285421,268	-26078,732
2006	2002	2126711,4	906417,1	0,028	251644,789	4001778,044
	2003	1753395,3	791166,1	0,037	116743,427	3390047,156
	2004	1281306,7	603491,2	0,045	32890,058	2529723,276
	2005	655750	304386,4	0,042	26078,732	1285421,268

Table 4.11 Domestic Sales Pairwise Comparison

4.2. Exports

A two-parameter multiple linear regression model has been utilized.

$Y = \beta_0 + \beta_1 X_1 + \beta_2 X_2$

Where;

Y, is the average change in exports (post- & pre-GIDEM assistance)

X_1 contribution of GIDEM to the increase number of products exported

X_2 contribution of GIDEM to exports

Based on the data, the multiple-linear-regression model is:

$Y = 169.65 + 49.78X_1 + 50.78X_2$ $R^2 = 0.72$

	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
Constant	169,656	13,9921		12,187	0,000
Contribution of GIDEM to the Increase of Number of Products Exported	49,783	20,199	0,453	2,465	0,025
Positive Contribution of GIDEM to Exports	50,788	19,817	0,471	2,563	0,021

Table 4.12 Exports Coefficients

	Sum of Squares	df	Mean Square	F	Sig.
Regression	71084,627	2	35542,314	21,118	0,000 (a)
Residual	26928,660	16	1683,041		
Total	98013,287	18			

Table 4.13 Exports Anova

Model 1	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	0,852(a)	0,725	0,691	41,02489

Table 4.14 Exports Model Summary

The resulting equation signifies that GIDEMs' contributions to "exports" and to "the increase number of products exported" explain the average change in exports realized between pre- and post-GIDEM assistance periods. The variables and the model in general are statistically meaningful. The equation explain %72 of the variability in the change in exports, and from this point, it can be emphasized that the contribution of GIDEM assistance on the change is more significant than any factor(s) that could stimulate the export revenues through these years.

However, nearly 40 clients stated that they were exporter firms, and only half of them preferred to share their level of income from exportation between the years 2002-2006. Therefore, it should be regarded that the impact on exports is limited only with these group of firms.

4.2.1. Exports per Employee

In order to display the change realized in exports between pre- and post-GIDEM assistance period, first, a statistically representative group constituted in terms of size and sector among the firms. After that each client's revenue from exportation is calculated both in pre- and post-GIDEM period. Methodically, the years 2002 and 2003 are named to be pre-GIDEM period, assuming that the impact of GIDEM services were not supposed to be realized in these initial years of the project, and the following three years (2004, 2005 and 2006) are named to be the post-GIDEM period, assuming that the impact of services could be observed at least on some areas. The level of exports per employee is calculated by dividing the revenue from exportation of each period (pre-&post-GIDEM) to the number employees in these periods.

SN	SC	Year	Exports (pre - GIDEM)	Exports (post - GIDEM)	Exports / Employee (pre - GIDEM)	Exports / Employee (post - GIDEM)	Difference
5	35	2005	1020000	3045000	29143	69205	40061,69
6	35	2004	135000	370000	27000	7400	-19600,00
9	35	2004	105000	260000	7500	18571	11071,43
11	38	2004	2500000	10000000	71429	285714	214285,71
12	29	2004	950000	3810000	23750	35278	11527,78
13	32	2004	125000	355000	8929	13148	4219,58
15	31	2004	1300000	2220000	43333	74000	30666,67
21	37	2004	40000	120000	4444	15000	10555,56
22	31	2004	60000	220000	4000	7333	3333,33
23	31	2004	2700000	12750000	3857	63750	59892,86
24	31	2004	70000	325000	10000	4779	-5220,59
29	31	2004	1600000	5420000	16000	54200	38200,00
30	32	2004	2500000	8500000	19231	65385	46153,85
34	31	2004	195000	590000	19500	59000	39500,00
35	32	2004	155000	510000	969	3188	2218,75
36	32	2004	500000	1650000	7813	13636	5823,86
38	31	2004	155000	530000	15500	53000	37500,00
40	38	2004	4300000	18000000	107500	233766	126266,23
44	31	2005	500000	1500000	26316	78947	52631,58
Average			**995263**	**3693421**	**23485**	**60805**	**37320,44**

Table 4.15 Export per Employee

As can be observed from the preceding table the **average change in exports per employee is TRY 37.320.**

4.2.2. Statistical Results

The following table displays the volumes of exports of clients in each year and at the last column, the percentage of change between before and after assistance period is calculated. The data in the table is tested in order to find out whether there is a *statistically significant* change between two periods.

SN	SC	City	Year	2002	2003	2004	2005	2006	Before/ After
5	35	02	2005			1020000	1200000	1845000	198.53
6	35	21	2004	65000	70000	100000	120000	150000	174.07
9	35	21	2004	55000	50000	75000	85000	100000	147.62
11	38	21	2004		2500000	3500000	4000000	2500000	300.00
12	29	21	2004	450000	500000	800000	910000	2100000	301.05
13	32	21	2004	55000	70000	100000	120000	135000	184.00
15	31	21	2004	600000	700000	900000	1000000	320000	70.77
21	37	47	2004	20000	20000	30000	50000	40000	200.00
22	31	47	2004	25000	35000	50000	80000	90000	266.67
23	31	47	2004	1200000	1500000	2750000	5200000	4800000	372.22
24	31	47	2004	30000	40000	65000	120000	140000	364.29
29	31	47	2004	800000	800000	1500000	2800000	1120000	238.75
30	32	63	2004	1000000	1500000	2000000	3000000	3500000	240.00
34	31	63	2004	85000	110000	140000	200000	250000	202.56
35	32	63	2004	65000	90000	120000	170000	220000	229.03
36	32	63	2004	200000	300000	370000	530000	1900000	230.00
38	31	63	2004	65000	90000	120000	170000	240000	241.94
40	38	63	2004	1800000	2500000	3500000	5000000	9500000	318.60
44	31	63	2005			500000	700000	800000	200.00

Table 4.16 Change in Exports Year on Year

	Mean	N	Std. Deviation	Std. Error Mean
Before	995263,2	19	1208615	277275,4
After	3693421	19	5077621	1164886

Table 4.17 Exports Paired Sample Statistics (difference on domestic sales)

As in the analyses of domestic sales, a two tailed paired sample t-test is applied to determine whether the difference in the mean change of two groups is meaningful for exports as well. The results and the interpretation of results are as follows:

	Paired Differences					t	df	Sig (2 - tailed)
	Mean	Std. Deviation	Std. Error Mean	% 95 Confidence Interval of the Difference				
				Lower	Upper			
Before - After	-2698158	3896685,276	893960,9	-4576300	-820016	-3,018	18	0,007

Table 4.18 Exorts Paired Sample t-Test

With a t-ratio of -3.018, and according to the significance level the analysis above suggests the means of the two groups (e.g. exports before and after GIDEM assistance) are statistically different. Hence it can be strongly argued that GIDEM services increase the exports performance of the clients.

4.2.3. Repeated Measures (ANOVA) Test

Here, as in domestic sales part, it is utilized whether the difference between the volume of exports are statistically significant for each year that GIDEMs were active by using repeated measures.

	Mean	Standard Deviation	N
2002 Export	407187,5	535259,964	16
2003 Export	523437,5	724800,475	16
2004 Export	788750	1088639,059	16
2005 Export	1222188	1774753,475	16
2006 Export	1537813	2547252,748	16

Table 4.19 Exports Descriptive Statistics

Factor 1	Mean	Std. Error	% 95 Confidence Interval	
			Lower Bound	Upper Bound
2002	407187,5	133815,0	121967,598	692407,402
2003	523437,5	181200,1	137218,589	909656,411
2004	788750	272159,8	208655,193	1368844,807
2005	1222188	443688,4	276488,128	2167886,872
2006	1537813	636813,2	180477,322	2895147,678

Table 4.20 Exports Estimates

The preceding table indicates that in year 2002, the exports of the firms lie between TRY 121967 and TRY 692407 at 95% confidence interval. For the years 2003 and 2004 this values ranges between the pairs of TRY 137.218 –TRY 909.656 and TRY 208.655- TRY 1.368.844 respectively. These values increase to TRY 276.488 and TRY 2.167.886 in 2005, and to TRY 180.477 and TRY 2.895.147. As can be seen from the following Parameter Estimates table, the values obtained from the estimates above are statistically significant for all years at 95% confidence interval.

Dependent Variable	Parameter	B	Std. Error	t	Sig.	%95 Confidence Interval		Partial Eta Squared	Noncent. Parameter	Observed Power (a)
						Lower Bound	Upper Bound			
2002 Export	Intercept	407187,5	133815,0	3,043	0,008	121967,598	692407,402	0,382	3,043	0,812
2003 Export	Intercept	523437,5	181200,1	2,889	0,011	137218,589	909656,411	0,357	2,889	0,770
2004 Export	Intercept	788750	272159,8	2,898	0,011	208655,193	1368844,807	0,359	2,898	0,773
2005 Export	Intercept	1222187,5	443688,4	2,755	0,015	276488,128	2167886,872	0,336	2,755	0,731
2006 Export	Intercept	1537812,5	636813,2	2,415	0,029	180477,322	2895147,678	0,280	2,415	0,617

Table 4.21 Exports Parameter Estimates
(a)Computed using alpha = .05

(I) Factor 1	(J) Factor 1	Mean Difference (I -J)	Std. Error	Sig. (a)	% 95 Confidence Interval for Difference (a)	
					Lower Bound	Upper Bound
2002	2003	-116250,00	51584,276	0,040	-226199,281	-6300,719
	2004	-381562,50	140076,407	0,016	-680128,294	-82996,706
	2005	-815000,00	317203,602	0,021	-1491103,473	-138896,527
	2006	-1130625,00	516214,360	0,045	-2230909,863	-30340,137
2003	2002	116250,00	51584,276	0,040	6300,719	226199,281
	2004	-265312,50	98260,356	0,016	-474749,492	-55875,508
	2005	-698750,00	279325,266	0,024	-1294117,711	-103382,289
	2006	-1014375,00	469392,532	0,047	-2014861,499	-13888,501
2004	2002	381562,50	140076,407	0,016	82996,706	680128,294
	2003	265312,50	98260,356	0,016	55875,508	474749,492
	2005	-433437,50	182552,914	0,031	-822539,826	-44335,174
	2006	-749062,50	398093,692	0,079	-1597579,118	99454,118
2005	2002	815000,00	317203,602	0,021	138896,527	1491103,473
	2003	698750,00	279325,266	0,024	103382,289	1294117,711
	2004	433437,50	182552,914	0,031	44335,174	822539,826
	2006	-315625,00	326954,022	0,350	-1012511,001	381261,001
2006	2002	1130625,00	516214,360	0,045	30340,137	2230909,863
	2003	1014375,00	469392,532	0,047	13888,501	2014861,499
	2004	749062,50	398093,692	0,079	-99454,118	1597579,118
	2005	315625,00	326954,022	0,350	-381261,001	1012511,001

Table 4.22 Exports Pairwise Comparison

According to the analysis, the export revenues for the years 2002, 2003, 2004, 2005 and 2006 were compared and it is observed that the differences (in volumes of export) were *statistically significantly* in general. But this result do not directly signifies that the difference between each year is meaningful. The pairwise comparisons table above displays for which years the differences are *statistically significant*, and for which are not.

The mean difference in exports between 2002 and all years (2003 to 2006) are statistically significant. Similarly, differences between year 2003 and other years (2002 to 2006) can be considered as significant, where as such a significant difference can not be observed between 2004 and 2006. In 2005, the differences in domestic sales are statistically significant in other years as well apart from the difference with 2006.

The graphical representation of changes both in domestic sales and exports can be observed from graphs below. As pointed out above analyses, since the role of GIDEMs' performance in domestic sales seems to be much lower than the other factors and such an insignificant change cannot also be assigned to GIDEMs' performance. Hence, there should be signs of other factors regarding the relative stableness of the domestic sales between 2004 and 2006. On the other side, the role of GIDEMs' performance in exports seems to be more significant which is revealed above by the regression analysis. However much the range of export revenues is narrower than the domestic sales, it can be easily seen that the slope of the increase in exports is significantly larger than domestic sales.

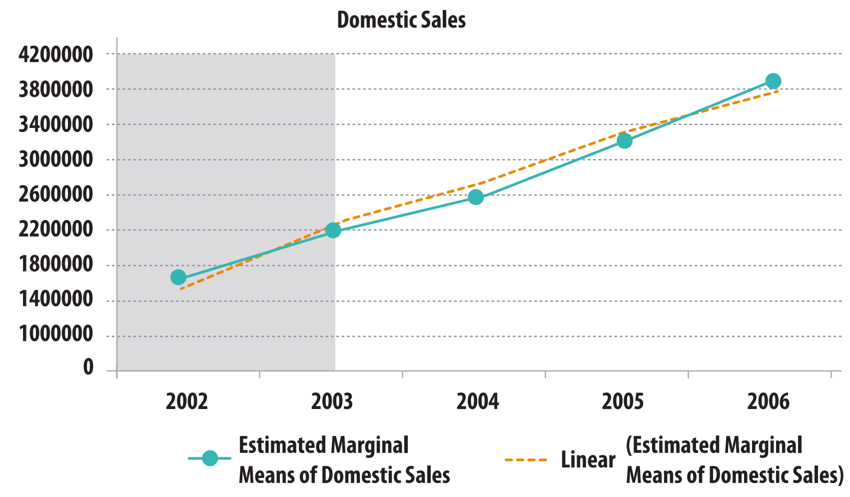


Figure 4.1 Graphical Representation of Domestic Sales

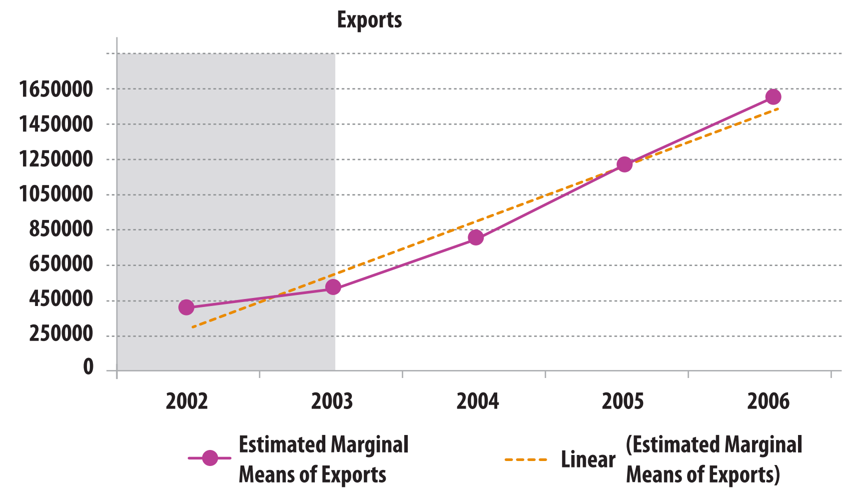


Figure 4.2 Graphical Representation of Exports

4.3 Productivity, Productivity of Labour Force And Employment

The *productivity criterion* developed for the analysis of productivity (e.g. impact of GIDEM services on the productivity of clients) is based on the changes in domestic sales and exports compared to the changes in number employees. The table below displays the data that is going to be tested in order to find out whether the increase in the level of productivity is statistically significant or not.

SN	City	change in exports %	change in employees %	increase in productivity %	SN	City	change in dom. sales %	change in employees %	increase in productivity %
5	02	198.53	25.71	137.47	62	2	101.30	-57.14	369.70
6	21	174.07	900.00	-72.59	5	2	131.88	25.71	84.45
9	21	147.62	0.00	147.62	51	2	137.15	0.00	137.15
11	21	300.00	0.00	300.00	58	2	252.94	0.00	252.94
12	21	301.05	170.00	48.54	63	2	114.29	-2.50	119.78
13	21	184.00	92.86	47.26	6	21	423.73	900.00	-47.63
15	21	70.77	0.00	70.77	8	21	420.83	0.00	420.83
21	47	200.00	-11.11	237.50	9	21	213.22	0.00	213.22
22	47	276.67	100.00	83.33	11	21	250.79	0.00	250.79
23	47	372.22	-71.43	1552.78	12	21	433.77	170.00	97.69
24	47	364.29	871.43	-52.21	13	21	93.43	92.86	0.30
29	47	238.75	0.00	238.75	15	21	94.52	0.00	94.52
30	63	240.00	0.00	240.00	17	21	93.04	0.00	93.04
34	63	202.56	0.00	202.56	18	21	269.29	200.00	
35	63	229.03	0.00	229.03	65	21	614.29	0.00	614.29
36	63	230.00	89.06	74.55	68	21	415.35	0.00	415.35
38	63	241.94	0.00	241.94	22	47	70.62	100.00	-14.69
40	63	318.60	92.50	117.46	24	47	51.04	871.43	-84.45
44	63	200.00	0.00	200.00	25	47	46.36	-82.35	729.38
					28	47	367.84	0.00	367.84
					29	47	101.16	0.00	101.16
					75	47	87.25	-16.67	124.72
					83	47	115.07	133.33	-7.83
					84	47	169.10	58.33	69.96
					85	47	273.26	33.33	179.95
					34	63	109.27	0.00	109.27
					35	63	766.01	0.00	766.01
					36	63	79.12	86.06	-5.26
					40	63	206.19	92.50	59.06
					42	63	86.38	0.00	86.38
					94	63	-18.75	0.00	-18.75

Table 4. 23 Productivity

	N	Mean	Std. Deviation	Std. Error Mean
Productivity	50	192,9406	268,83926	38,01961

Table 4.24 Productivity One Sample Statistics

	Test Value = 1					
	t	df	Sig. (2 - tailed)	Mean Difference	% 95 Confidence Interval of the Difference	
					Lower	Upper
Productivity	5,048	49	0,000	191,9406	115,5373	268,3439

Table 4.25 Productivity One Sample t-Test

With a t-ratio 5.048, the increase in productivity is statistically significant as shown in the table above. And according to the table above *we can be 95% confident that mean of the random variable (productivity) lies between the lower (115.53%) and upper (268.34%) bounds of the confidence interval.*

Although; the year, in which a client has received GIDEM service, is taken as the beginning point of the analyses, the results above do not indicate that there is a "direct causality" between GIDEM and the high increase in productivity. However, when the outcome of the analysis on productivity is cross-referenced with the answers to the question (e.g.**Question 77:** *Do you think that the training programmes provided by GIDEM have/will have an impact on the productivity of your firm?*) of the survey, *it is clear that clients' perception of impact of GIDEMs on productivity is quite positive.* The results of the 77th question of the survey are summarized below:

	Frequency	Percent	Valid Percent	Cumulative Percent
a. No	18	18.0	18.0	18.0
b. Yes	44	44.0	44.0	62.0
c. Partially	21	21.0	21.0	83.0
d. Expected	17	17.0	17.0	100.0
Total	100	100.0	100.0	

Table 4.26 Question 77: Training Services versus Impact on Productivity

When the clients, which believe that the impact of GIDEM services will be seen in the future (option d), are left out, the distribution will be: 21.7% for no impact, 25.3% for partial impact and 53.0% for impact.

Then going back to the average productivity increase (192.4%), we can argue that 41.7% is not attributable to GIDEM, 48.6% is partially attributable and 101.9% is also partially attributable however the implied attribution rate is higher. Below is scenario analysis on impact of GIDEM training services on productivity.

		Attribution rates for option (c), yes				
		70.00%	60.00%	50.00%	40.00%	30.00%
Attribution rates for option (b), partial impact	50.00%	47.7	42.7	32.6	32.5	27.4
	40.00%	45.3	40.2	35.1	30	24.9
	30.00%	42.9	37.8	32.7	27.6	22.5
	20.00%	40.5	35.4	30.3	25.2	20.1
	10.00%	38	32.9	27.8	22.7	17.6

Table 4.27 Scenarios for Average Productivity

If we assume that the impact of "yes" is 50% and that of "partial" is 30%, the impact of GIDEM services on average productivity will be **32.7%** (base case scenario). Even in the worst case scenario (yes: 30% and partial 10%) the impact is highly satisfactory: **17.6%.**

It is hardly arguable that there is a relationship or causality between training programmes (services) and productivity. The high increase in productivity rates (like Turkish economy witnessed just after the deep economic crisis in 2001) could be the consequences of various factors (e.g. possible increase in informal labour force). Although the questionnaire did not include a question that asks the relevance of the training programmes (services) offered by GIDEM with the real needs of the respondents, the number of the respondents that indicated that GIDEM training programmes (services) have had or are expected to have a positive impact on productivity (83.0%) could be seen as an evidence that there is a relevance.

4. 4 Investments

In investment analyses, firstly how much of the clients have made an investment over the last 5 years is analyzed and the majority of respondents (82%) indicated in a positive way. Unfortunately however, again majority of respondents (%72) who had made an investment indicated that GIDEM had no impact on the investment decision, whereas %15 of them indicate that GİDEM made a partial contribution to the investment decision. Thus no further analyses have been made to see whether or not GIDEM services impact the investment decisions. The majority of the investments were made in the existing sector of the firm (63 %) and the types of the investments are mainly in equipment supply (%50) and new plant (%41) forms.

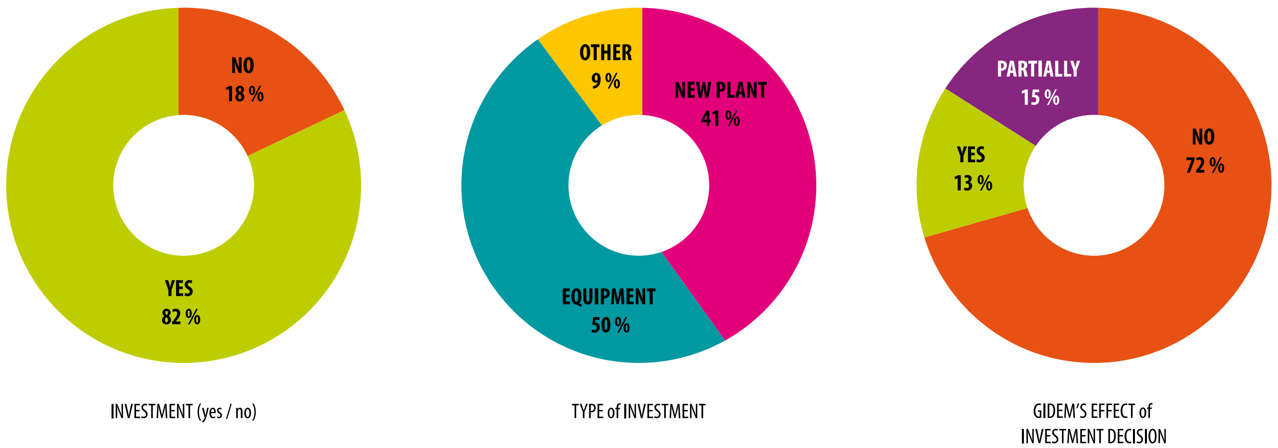


Figure 4.3. Graphical Representation of Investments

Statistics			Other	[11]	[29]	[31]	[32]	[35]	[36]	[37]	[38]	[39]	[50]	[63]	[72]	[93]	[94]	Total
NEW INVESTMENTS	NO	Count	1	2	0	3	6	3	0	0	1	0	1	0	0	1	0	18
		% within new investments	5,6	11,1	0,0	16,7	33,3	16,7	0,0	0,0	5,6	0,0	5,6	0,0	0,0	5,6	0,0	100
		% within sector	33,3	50,0	0,0	12,0	22,2	16,7	0,0	0,0	20,0	0,0	50,0	0,0	0,0	50,0	0,0	18,0
	YES	Count	2	2	2	22	21	15	2	4	4	3	1	1	1	1	1	82,0
		% within new investments	2,4	2,4	2,4	26,8	25,6	18,3	2,4	4,9	4,9	3,7	1,2	1,2	1,2	1,2	1,2	100
		% within sector	66,7	50,0	100	88,0	77,8	83,3	100	100	80,0	100	50,0	100	100	50,0	100	82,0
	Total	Count	3	4	2	25	27	18	2	4	5	3	2	1	1	2	1	100
		% within new investments	3,0	4,0	2,0	25,0	27,0	18,0	2,0	4,0	5,0	3,0	2,0	1,0	1,0	2,0	1,0	100
		% within sector	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Table 4.28 Sectors-New Investments Cross Tabulation

When we consider the investment proportions of each sector separately, in "Manufacture of Food and Beverage (31)", 88 percent of the firms made a new investment, and in "Textile, Wearing Apparel and Leather Industries (32)" 77% of firms made a new investment Additionally, there are some other sectors with 100% new investment capacities during the last five years, but since the total number of firms in each one is too small to make such a comparison, they can be regarded as negligible.

4.5. Quality Certifications

Questions 25 to 27 were related to the quality certifications. Question 25 asked which quality certifications (if any) do the respondents posses, and when they got the certification (before or after GIDEM). The following table demonstrates the quality certifications possessed by the respondent.

Certification	Percent of respondent
ISO 9001	21
TSE	18
ISO	10
CE	7
ISO 14001	6
HACCP	5
OHSAS	4
ISO 13485	3
TSE 1649	1
Other	11

Table 4.29 Rate of Possession of Quality Certifications

As can be seen from the table, ISO 9001 is the most common certification followed by TSE. Other certificates, including sector specific ones, and ISO took the third and fourth places with 11 and 10 respondents. There is not a meaningful difference in the ownership of remaining ones like CE, ISO 14001 and HACCP in GIDEM's client profile.

Question 26 asked whether GIDEM had any impact on getting the quality certification. Since only 15 respondents indicated that they obtained a quality certification after they had received a GIDEM service the sample size was also 15. Among these post-GIDEM certificate obtaining ones, 47 % of the all respondents owning certificate indicated that GIDEM has a partial or full impact on obtaining the quality certification.

4.6. Institutionalization

The institutionalisation index developed for the impact assessment is based on the questions: 16, 17, 25, 21, 28, 29, 30, 31, and 73. The index has four categories:

1. Fully institutionalized
2. Partially institutionalized
3. Slightly institutionalized
4. Not institutionalized

If the ratio of positive responses to all the responses to mentioned questions is less than 20%, the company is considered to be "not institutionalized"; if ratio of positive responses is between 20% and 50% the company is considered to be "slightly institutionalized" , if the ratio of positive responses is between % 50 and %80 the company is considered to be "partially institutionalized" and if the positive responses is more than 80%, the company is considered to be "fully institutionalized".

Accordingly, institutionalisation index is based on the following 10 parameters: change in

1. Quality and production certificates
2. Availability of design activities
3. Research and development activities
4. Registered trade mark and patents
5. Financial management methods
6. Specialized units
7. Periodic market research
8. Information infrastructures
9. Share of foreign capital
10. New financial resources

Similar to the modelling attempt for measuring the "expectations of client", an ordinal scale logistic regression model has been adopted (all parameters are on an ordinal scale). According to the data; 13 of the respondents are "fully institutionalized", 46 are "partially institutionalized", 31 are "slightly institutionalized" and 8 are "not institutionalized" (n=100, with 3 missing data).

	Frequency	Percent	Valid Percent	Cumulative Percent
Not Institutionalized	8	8	8	8
Scarcely Institutionalized	31	31	31	39
Partially Institutionalized	48	48	48	87
Fully Institutionalized	13	13	13	100
Total	100	100	100	100

Table 4.30 Institutionalization of Clients

4.6.1. Logistic Regression Model on Institutionalisation

A model has been developed by cross-referencing the four institutionalisation levels with the answers to Q20(research & development activities), Q34(periodic researches), Q24(ownership of certificates), Q60(foreign capital) and Q64(investment agreements with foreign companies). The answers to Q20, Q34, Q24, Q60 and Q64 were also on ordinal scale:

1. Yes,
2. Partially
3. No

Since all the parameters are on an ordinal scale, an ordinal scale logistic regression model has been adopted, instead of a multiple regression modelling. The resulting model is:

	Model Fitting Criteria	Likelihood Ratio Tests		
Model	-2 Log Likelihood	Chi-Square	df	Sig.
Final	217,8367			
Intercept Only	144,162	73,675	15	0,000

Table 4.31 Institutionalization Model Fitting Information

	Model Fitting Criteria	Likelihood Ratio Tests		
Effect	-2 Log Likelihood	Chi-Square	df	Sig.
Intercept	157,238	13,076	3	0,004
R&D	158,401	14,239	3	0,003
Periodic Researches	153,733	9,571	3	0,023
Certificates	154,971	10,809	3	0,013
Foreign Capital	174,332	30,170	3	0,000
Investment Agreements	158,281	14,119	3	0,003

Table 4.32 Institutionalization Likelihood Ratio Tests

As can be seen from the above *likelihood ratio tests*, all indicators in the measurement of institutionalisation and future expectations on R&D, Periodic research activities, Certificates, Foreign capital and investment agreements with foreign companies indicate a statistically significant result. Additionally, the model in general is significant as can be observed from *model fitting information* above.

Predictor	Coefficient	SE Coefficient	Wald	Z	P	Odds Ratio	95% Confidence Interval	
							Lower	Upper
Const(1)	-4.247	2.236	3.609	-1.9	0.057			
Const(2)	-1.892	1.007	3.532	-1.879	0.06			
Const(3)	-3.563	1.337	7.103	-2.665	0.008			
Q20								
2	-1.031	0.827	1.557	-1.248	0.212	0.357	0.071	1.802
3	1.559	0.58	7.214	2.686	0.007	4.755	1.524	14.833
4	1.607	0.719	4.991	2.234	0.025	4.987	1.218	20.419
Q34								
2	2.747	1.154	5.663	2.38	0.017	15.589	1.623	149.696
3	0.089	0.581	0.023	0.153	0.878	1.093	0.35	3.413
4	0.078	0.712	0.012	0.11	0.912	1.082	0.268	4.363
Q24								
2	-0.069	0.697	0.01	-0.098	0.922	0.934	0.238	3.663
3	1.324	0.473	7.845	2.801	0.005	3.759	1.488	9.496
4	1.304	0.554	5.537	2.353	0.019	3.684	1.243	10.915
Q60								
2	-0.275	0.628	0.192	-0.438	0.662	0.76	0.222	2.602
3	-2.236	0.516	18.746	-4.33	0	0.107	0.039	0.294
4	-1.29	0.565	5.211	-2.283	0.022	0.275	0.091	0.833
Q64								
2	-0.7	0.822	0.726	-0.852	0.394	0.496	0.099	2.486
3	1.42	0.475	8.945	2.991	0.003	4.137	1.631	10.489
4	1.14	0.534	4.559	2.135	0.033	3.128	1.098	8.908

Table 4.33 Results of Logistic Regression Model on Institutionalisation

The results of the logistic analysis summarized in the table above indicate that R&D activities, ownership of certificates, foreign capital and investment agreements with foreign companies have a considerable impact on institutionalisation. The level of this impact can be emphasized as follows:

- Involving in R&D activities, increases institutionalisation approximately 5 times more than no involvement in R&D;
- Ownership of certificates, increases institutionalisation approximately 3.5 times more than no ownership of certificates;
- Increase in investment agreements with foreign companies, increases institutionalisation approximately 3.5 times more than no increase in investment agreements with foreign companies;
- Additionally, increase in the share of foreign capital seems to be effective on institutionalisation; however the level of effect is not sufficient.

4.7. Future Expectations

When we analyze the performance of clients and the role they have attribute to GIDEM and GIDEM services, an obvious difference exists between the typology of the clients and their future expectation of GIDEMs. According to institutionalisation index discussed above the clients were ranked between 1 and 4. With the help of such a client performance indicator, the differences among their future expectations are discussed by using a means box plot below.

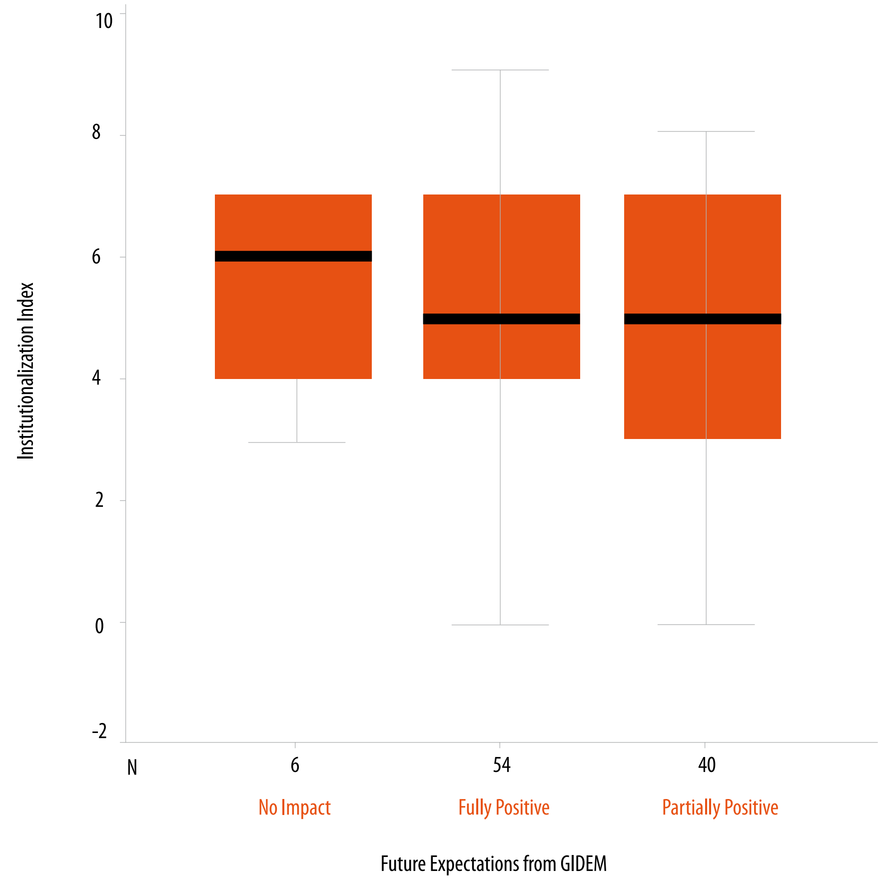


Figure 4. 4 Graphical Representation of Institutionalisation and Expectations from GIDEM

In the mean box plot, we can see that a significant difference among the degrees of the clients in the institutionalisation index and their future expectations from GIDEM. As can be observed from the plot, the ones with relatively higher level of institutionalisation, (with a mean value of 6) are the ones expecting no impact from GIDEM in the future. The ones with a partially and fully positive impact of GIDEM in future have an average 5 value in the institutionalisation index. As a result, it can be interpreted that, the no impact expecting ones from GIDEM have a higher initial level of institutionalisation then the ones expecting fully or partially positive expectations.

4.7.1. Logistic Regression Model on Expectations of Clients

The 87th question[3] of the survey asked the future expectations of the clients regarding the level of impact of GIDEM services. The respondents were expected to indicate one of the following: (1) very positive, (2) positive, (3) none, and (4) negative. A model has been developed by cross-referencing this 4-level parameter with the answers to Q51 (new international market), Q44 (new domestic markets), Q68 (international tenders) and Q72 (domestic & international fairs). The answers to Q51, Q44, Q68 and Q72 were also on ordinal scale: (1) yes, (2) partially and (3) no.
Since all the parameters are on an ordinal scale, an ordinal scale logistic regression model has been adopted, instead of a multiple regression modelling. The resulting model is:

	Model Fitting Criteria	Likelihood Ratio Tests		
Model	-2 Log Likelihood	Chi-Square	df	Sig.
Final	99,932			
Intercept Only	51,459	48,473	8	0,000

Table 4.34 Future Expectations Model Fitting Information

	Model Fitting Criteria	Likelihood Ratio Tests		
Effect	-2 Log Likelihood	Chi-Square	df	Sig.
Intercept	84,868	33,409	2	0,000
Int. Markets	68,282	16,824	2	0,000
Domestic Markets	59,292	7,833	2	0,020
Int. Tenders	61,184	9,725	2	0,008
Fairs	65,436	13,977	2	0,001

Table 4.35 Future Expectations Likelihood Ratio Tests

As can be seen from the above *likelihood ratio tests*, all indicators in the measurement of overall future expectations of clients and future expectations from GIDEM in international markets, domestic markets, international tenders and fairs indicate a statistically significant result. Additionally, the model in general is significant as can be observed from *model fitting information* above.

[3] What are your expectations regarding the impact of GIDEM services in the future?

Predictor	Coefficient	SE Coefficient	Wald	Z	P	Odds Ratio	95% Confidence Interval	
							Lower	Upper
Const(1)	12.351	3.53	12.244	3.499	0			
Const(2)	5.888	1.474	15.958	3.995	0			
Q51								
3	-6.246	2.158	8.378	-2.895	0.004	0.002	2.82E-05	0.133
1	-1.456	0.659	4.885	-2.21	0.027	0.233	0.064	0.848
Q44								
3	-2.613	1.311	3.97	-1.992	0.046	0.073	0.006	0.958
1	-1.26	0.549	5.264	-2.294	0.022	0.284	0.097	0.832
Q68								
3	-3.883	1.544	6.326	-2.515	0.012	0.021	0.001	0.424
1	-0.64	0.467	1.874	-1.369	0.171	0.528	0.211	1.318
Q72								
3	-1.75	1.242	1.987	-1.409	0.159	0.174	0.015	1.981
1	-1.878	0.594	9.976	-3.159	0.002	0.153	0.048	0.49

Table 4.36 Results of Logistic Regression Model on Expectations 0f Clients

As can be observed from the preceding table, the clients who are expecting a very positive impact on "participation to new international markets" are only 23% of the ones who are expecting a positive impact; and the clients who are expecting no impact on "participation to new international markets" is only 0.002 of the respondents who are expecting a positive impact.

When "participation to the new domestic markets" is considered, the clients who are expecting a very positive impact on "participation to new domestic markets" are only 28.4% of the ones who are expecting a positive impact; and the clients who are expecting no impact on "participation to new national markets" is only 0.073% of the respondents who are expecting a positive impact.

When we consider the ones expecting positive impact in "new international tenders" from GIDEM, the value obtained is not statically significant, and a conclusion cannot be drawn. Whereas, the ones with a fully positive impact expectation on international tenders in the future, are the 2% of the clients who are expecting a positive impact in general. Additionally, clients expecting a positive impact on "participation to international & domestic fair" are 15% of the ones expecting a positive impact in general.

4.8. Additional Statistical Information

In order to provide some extra evidence on the GIDEMs' performance, the direct impact analyses stated above have been mixed with some additional stats. This part of additional information is based on the sufficiency and expectations of the clients, which is both valuable for overall impact assessment and future sustainability issues.

4.8.1. Degree of Sufficiency of GIDEM services

When asked (question 76) 69% of the respondents indicated that GIDEM services partially meet their needs. The answers obtained from the respondents for the question are below.

"How well do the training, consultancy, information and other business development services provided by GIDEM satisfy your reel needs?"				
City	Does not satisfy	Partially satisfy	Satisfy	Total
Adıyaman	3	14	8	25
Diyarbakır	0	18	5	23
Mardin	2	18	3	23
Urfa	2	19	8	29
Total:	7	69	24	100

Table 4.37 Degree of Sufficiency of Services

When we make a comparison of sufficiency in terms of provinces, there are three issues that need further comments:

1. The percentage of clients that are unsatisfied with GIDEM services is highest in Adıyaman with 12% and followed by Mardin and Urfa with 8,6% and %6,8 respectively. In Diyarbakır, there are no clients indicating GIDEM' provision of services does not satisfy their needs.
2. When we make an evaluation of partial and total satisfaction together, we observe that in general 93% of the clients have been either partially or fully satisfied with GIDEM services in general.
3. When we consider the proportion of satisfied clients in general, the highest level of satisfaction is obtained in Diyarbakır with %32 and followed by Urfa with %27,5. This proportion decreases to %21 in Adıyaman, and reaches the lowest value with %13 in Mardin.

As can be observed from the preceding results, it can be derived that the overall satisfaction of the clients is not at a desired value. Hence, it is meaningful to make some further analyses and detect the expectation of clients as well. In order to do so, a cross-referenced analyses is carried on . The analyses is built from **Question 85:** *"What should be done to improve service performance?"* and the level of sufficiency of clients.

"How well do the training, consultancy, information and other business development services provided by GIDEM satisfy your reel needs?"			
What should be done to improve service performance?	None	Partially	Fully
More services	**3**	**29**	**6**
Diversification in services	2	37	9
More skilled experts	2	32	9
More export orientation	2	29	11

Table 4.38 Question 85 and 76 Cross-Referenced

Clients that are not satisfied with the sufficiency of GIDEM services are in favour of all four categories listed in the performance improvement choices. Most of the partially satisfied respondents are in favour of diversification of services and more skilled experts as well.

4.8.2. Satisfaction

The following table presents the results of **Question 81:** "*In general terms, what is your level of satisfaction with GIDEM services?*". According to data obtained from clients, a staggering 50 % of respondents have indicated that they are satisfied with GIDEM services.

Highly unsatisfied	Unsatisfied	No opinion	Satisfied	Completely Satisfied	Total
2	1	13	53	31	100

Table 4.39 Satisfaction from GIDEM Services

We have also cross-referenced question 81 *(In general terms, what is your level of satisfaction with GIDEM services?)* question 87, which asks the expectations of clients regarding the future impact of GIDEM services. According to the data 12 of 13 respondents who indicated that they cannot make a decision on their level of satisfaction with GIDEM services are expecting a partially or fully positive impact in the near future.

		Future expectations on impact of GIDEM services			
		Negative	None	Partially positive	Fully Positive
Level of satisfaction with the services	Highly unsatisfied	0	1	1	0
	Unsatisfied	0	0	0	1
	Cannot make a decision	0	3	3	7
	Satisfied	0	2	24	27
	Highly satisfied	0	0	26	5
Column share in total		0%	6%	54%	40%

Table 4.40 Question 87 and 81 Cross-Referenced

Most of the unsatisfied clients are also expecting a partially or fully positive impact in the near future. Hence, it is believed that the future satisfaction of the clients from GIDEM services will be higher than the initial level, since there is a tendency to move from dissatisfaction and no opinion choices to partial of fully positive impact in the future observations of the clients. If the expectations of clients hold true **the level of satisfaction with GIDEM services will significantly increase.** According to our estimations 94% of the clients will either be satisfied or highly satisfied and 6 % will remain highly or partly unsatisfied.

4.9 Summarized Basic Findings

The analyses regarding the post and pre-GIDEM assistance indicate that there is a significant positive change in domestic sales and exports; however, in **domestic sales** the role of GIDEM in this change is much lower than the outside factors. When the average changes in the domestic sales analyzed year by year, it can be summarized that, apart from the difference in 2004 and 2005, the mean change in the domestic sales in GIDEMs' service hinterland is meaningful. The average change in domestic sales per employee is TRY 61.423.

The data in the **export** side of analyses show that, the difference in the average value of exports between pre and post GIDEM assistance is statically meaningful as well. The model represents that the contribution of GIDEMs performance is much more effective than the other factors effecting increase in exports. The average change in exports per employee is TRY 37.320.

The increase in the **productivity** before and after GIDEM is measured by considering the changes in domestic sales and exports relative to employment. The average productivity increase in GIDEMs' hinterland is 192.4%, which is a significantly high figure.

In **investment** analysis, no particular impact was observed. The majority of the respondents (82%) indicated that they have made new investments in the last five years. Unfortunately, 72% of them stated that GIDEM had no impact on the investment decisions, whereas only 15% of them indicated that GIDEM made a partial contribution to the investment decision.

According to the **institutionalisation** index developed for the assignment, 48% of the clients is partially and 31% of the clients is scarcely institutionalized. According to the logistic regression model, R&D activities, ownership of certificates, investment agreements with foreign companies have a particular effect on the level of institutionalisation.

Expectations of clients were assessed according to their position in the institutionalisation index. As a result, it is revealed that, the non impact expecting clients from GIDEM have a higher initial level of institutionalisation then the ones expecting fully or partially positive impact. Additionally according to the logistic regression model, the clients who are expecting a very positive impact on "participation to new international markets" are 23% of the ones who are expecting a positive impact from GIDEM; and the clients who are expecting a very positive impact on "participation to new domestic markets" are 28.4% of the ones who are expecting a positive impact from GIDEM.

5. BEST CLIENT

The main rationale for developing client typologies is to identify the types of SMEs that the GIDEM services create the most impact, and hence define a best client typology. To this end, expected impacts, satisfaction level of firms, and change in sales are cross-referenced with size, sector and institutionalisation levels of clients. Such a categorization is an important knowledge for GIDEMs in their quest for self-sustainability.

5.1 Size

Out of 100 respondents 98 provided information on the number of people they employ. SME definition of KOSGEB has been utilized for the classification of clients.

	Frequency	Percent	Valid Percent	Cumulative Percent
micro	17	17	17,347	17,347
small	47	47	47,959	65,306
medium	33	33	33,673	98,980
large	1	1	1,020408	100
total	98	98	100	
missing	2	2		
total	100	100		

Table 5.1 Number of Employees

Respondent firms are categorized as SMEs except one large-sized firm, so we have not included the large-sized firm in the following analyses.

	Frequency	Percent	Valid Percent	Cumulative Percent
negative	0	0	0	0
no impact	6	6,0	6,0	6,0
positive	54	54,0	54,0	60,0
partially positive	40	40,0	40,0	100,0
total	100	100,0	100,0	

Table 5.2 Expected level of impact distribution

The expected level of impact is in four categories. However, none of the respondents has given negative answer for the expected level of impact. The size of the companies is cross-referenced with the level of expected impact from GIDEM services.

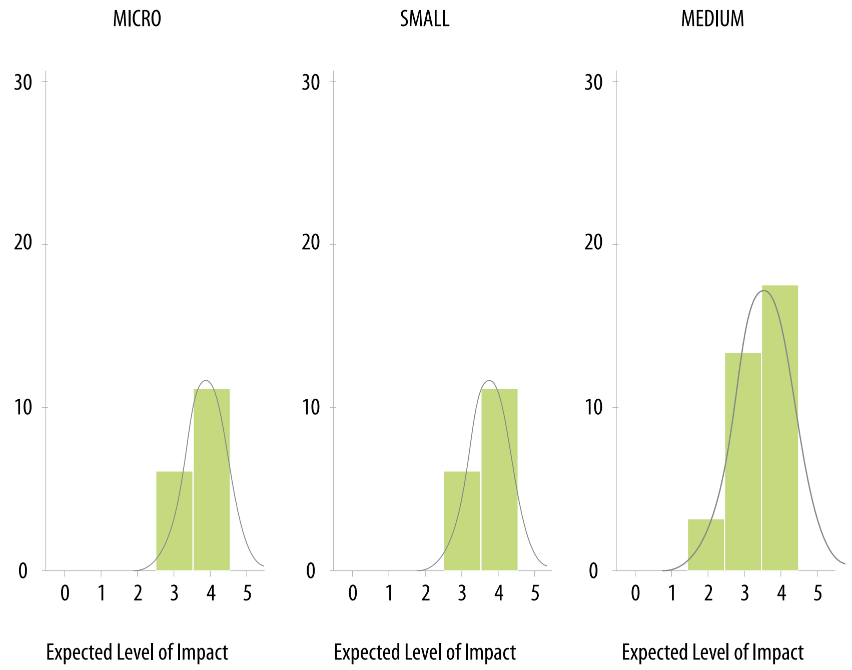


Figure 5.1 Size versus Expected Level of Impact

In all cases sizes the expected level of impact is normally distributed with a fairly strong bias towards high expected impact in the case of small-sized, and a noticeable bias again towards high expected impact in the case of medium-sized companies.

Although the expected level of impact from GİDEM services is rather high in general terms, the level of expected impact is noticeably higher in the case of small- and medium-size companies when compared to micro-sized ones.
A non-parametric chi-square test reveals more on the relationship between the size of the clients and the level of expected impact.

***P_1*:** *proportion of medium scale companies in all the companies that are expecting a positive impact.*
***P_2*:** *proportion of small scale companies in all the companies that are expecting a positive impact.*
***P_3*:** *proportion of micro scale companies in all the companies that are expecting a positive impact.*
***H_0*:** *$P_1=P_2=P_3=1/3$(no difference in positive expectation with regard to scale of the company)*
***H_1*:** *At least one of the groups is different from other in terms of expecting a high level of impact*

	Firm Size
Chi- Square	12,022
df	2
Asymp. Sig.	0,002

Table 5. 3 Level of Expectation Test Statistics

Degrees of freedom = k-1 = 2; at $\alpha_{0.05}$ critical value of chi-square is 5,99.

Since the computed x^2 (12,022) exceeds the critical value of 5,99, we can safely conclude that there exists a difference with regard to size in terms of expectation of a positive impact (in other words the null hypothesis (H_0) can be rejected). Now that we have evidence to indicate that the proportions P_1, P_2, P_3 and P_4 are unequal further analyses can be made on individual values. The logical inference that could be built on the above calculations is that the likelihood of making partially positive or positive impact is higher for small- and medium-size companies.

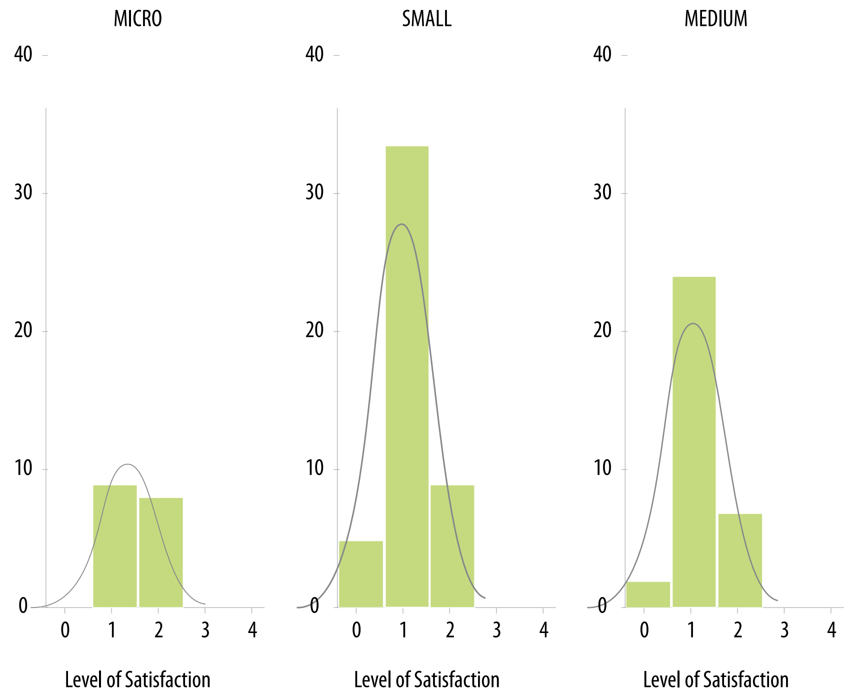


Figure 5.2 Size versus Satisfaction

According to the descriptive stats and analyses small-sized companies (employment between 10 and 49) seem to the best clients whereas medium-sized companies are second bests.

A non-parametric chi-square test reveals more on the relationship between the size of the clients and the level of expected impact.
***P_1*:** *proportion of medium-scale companies in all the companies that are satisfied with GİDEM services;*
***P_2*:** *proportion of small-scale companies in all the companies that are satisfied with GIDEM services*
***P_3*:** *proportion of micro-scale companies in all the companies that are satisfied with GIDEM services*
***H_0*:** *$P_1=P_2=P_3=1/3$ (no difference in positive expectation with regard to scale of the company)*
H_1*:At least one of the groups is different from other in terms of expecting a high level of impact*

	Firm Size
Chi- Square	10,467
df	2
Asymp. Sig.	0,005

Table 5.4 Level of Satisfaction Test Statistics

Degrees of freedom = k-1 = 2; at $\alpha_{0.05}$ critical value of chi-square is 5,99.

Since the computed x^2 (10,467) exceeds the critical value of 5,99, we can safely conclude that there exists a difference with regard to size in terms of satisfaction with GİDEM services (in other words the null hypothesis (H_0) can be rejected). Small- and Medium-sized companies are more likely to be satisfied with GIDEM services.

5.2 Sectors

The sectoral distributions are presented in the following table. Clients in sectors 32 (Textile, Wearing Apparel and Leather Industries), 31 (Manufacture of Food, Beverages and Tobacco), 35 (Manufacture of Chemicals and Chemical, Petroleum, Coal, Rubber and Plastic Products) constituted 69 percent of the sample.

	Frequency	Percent	Valid Percent	Cumulative Percent
32- Textile,Wearing Apparel&Leather Industries	27	27	27	27
31-Manufacture of Food,Beverages&Tobacco	25	25	25	52
35-Manufacture of Chemicals&Chemical, Petroleum,Coal,Rubber&Plas	18	18	18	70
38-Man.of Fabricated Metal Prod.,Mach.&Equip.	5	5	5	75
11-Agriculture&Hunting	4	4	4	79
37- Basic Metal Indst.	4	4	4	83
0- Other	3	3	3	86
39- Other Man.Indst.	3	3	3	89
29- Other Mining	2	2	2	91
36- Manufacture of Non-Metallic Mineral Products,except Products	2	2	2	93
50- Construction	2	2	2	95
93- Social and Related Community Services	2	2		97
22- Crude Petroleum&Natural Gas Production	1	1	1	98
63- Restaurants and Hotels	1	1	1	99
72- Communications	1	1	1	100
Total	100	100	100	

Table 5.5 Sectoral Distribution

The following figures indicates that GİDEM services mostly on the leading sectors of the province, which is Textile, Wearing Apparel and Leather Industries in Adıyaman, Manufacture of Chemicals and Chemical, Petroleum, Coal, Rubber and Plastic Products in Diyarbakır, Manufacture of Food, Beverages and Tobacco in Mardin and Textile, Wearing Apparel and Leather Industries and Manufacture of Food, Beverages and Tobacco in Urfa. The sizes of the firms also support this evaluation as the leading sectors are mostly small and medium sized entrepreneurs.

Figure 5.3 Sectoral Distribution of Clients with Reference to Their No. of Employees

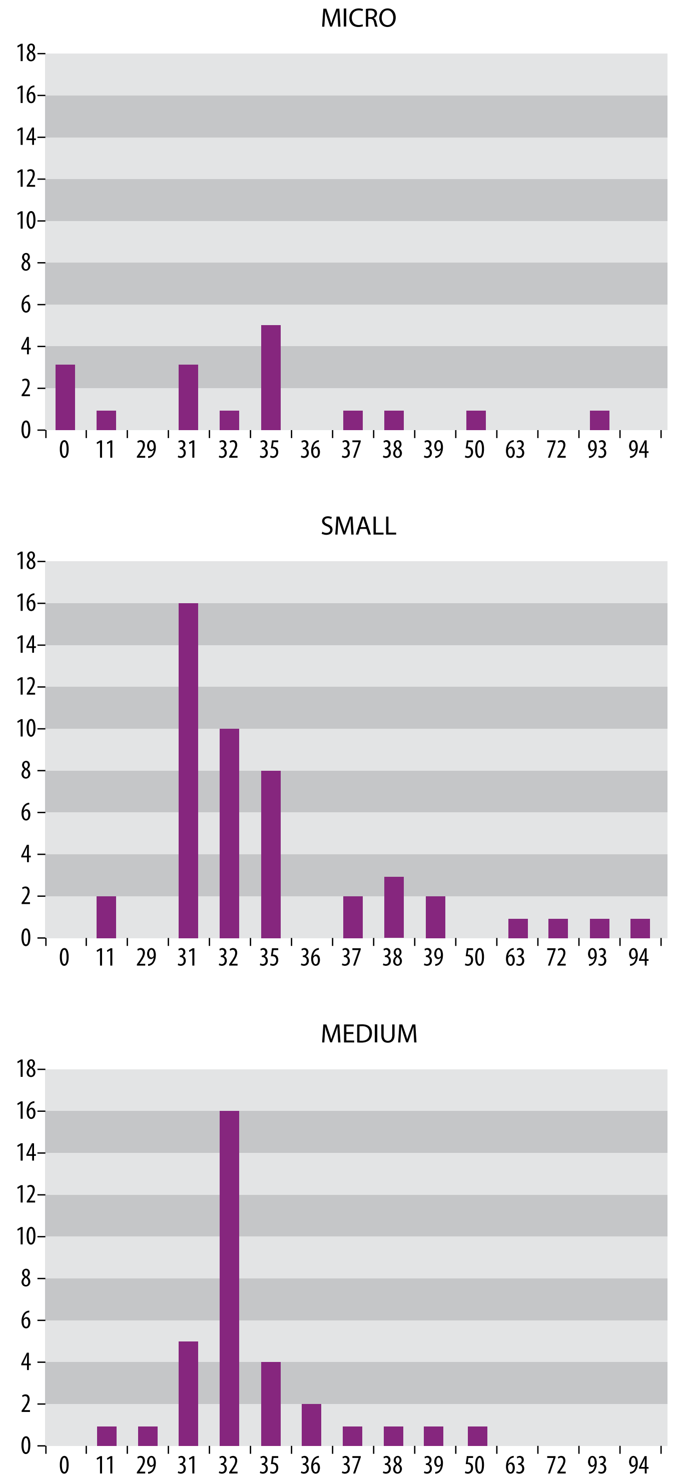
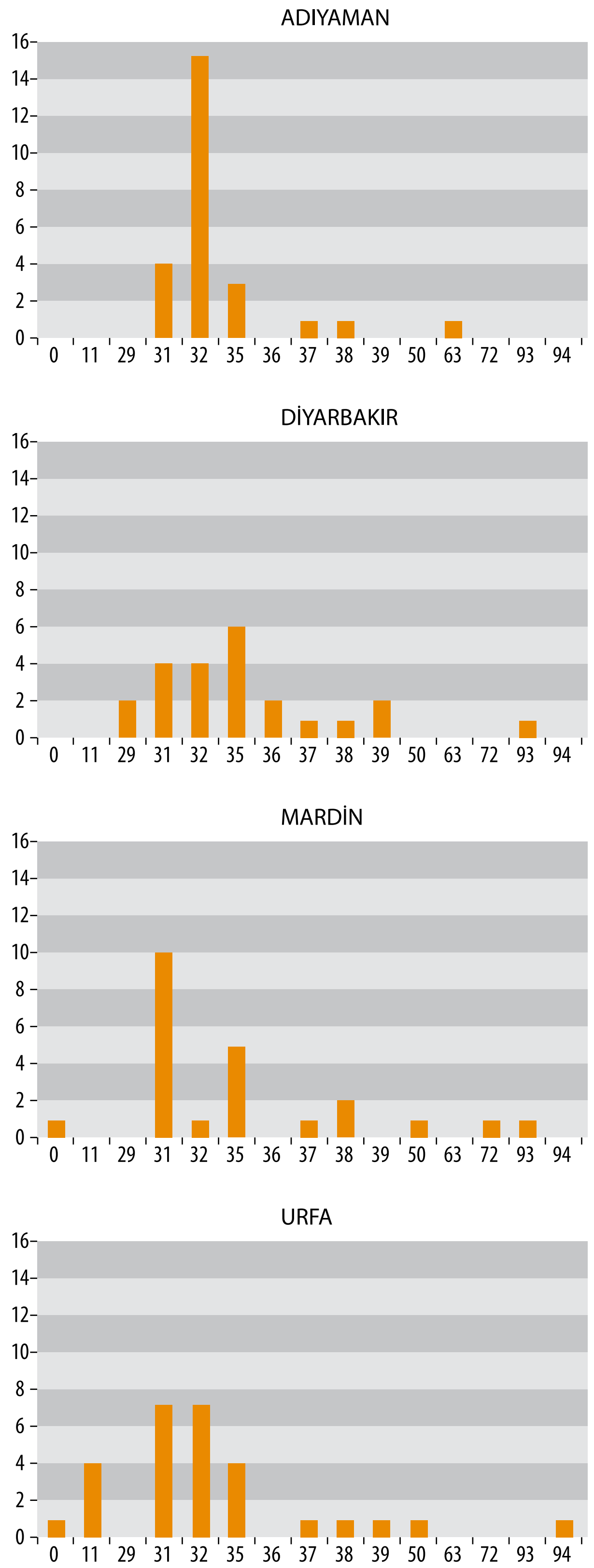


Figure 5.4 Sectoral Distribution of Clients with Reference to Provinces



sector	change in domestic sales (between pre & post gidem)	change in exports (between pre & post gidem)	average change
29	433,77	301,05	367,41
31	150,07	244,65	197,36
32	265,73	220,76	243,24
35	267,31	173,41	220,36
37	93,04	200,00	146,52
38	164,63	309,30	236,97
39	177,83	-	88,92

Table 5.6 Sector Distribution of Average Change in Sales

First of all, average changes in domestic sales and exports between pre and post GIDEM period is calculated for each sector regardless of the provincial differences. According to this general results, the highest value obtained in 29 (Other Mining) and followed by 35 (Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber & Plastics) and 32 (Textile, Wearing Apparel & Leather Industries)

One step beyond the above analyses, provincial distributions are considered. In order to do so, first relative weights of each sector are evaluated. (Refer table 1) Then, changes in sales (domestic sales and exports) with respect to each province for each sector are calculated separately. (Refer Table 2) Lastly, each sector weight is multiplied by corresponding sales value for each province. (Refer Table 3)

Sector / Province	29	31	32	35	36	37	38	39
21	0,13	0,19	0,13	0,31	0,06	0,06	0,06	0,06
47	0,00	0,71	0,00	0,14	0,00	0,07	0,07	0,00
63	0,00	0,33	0,42	0,00	0,00	0,00	0,17	0,08
02	0,00	0,17	0,33	0,33	0,00	0,00	0,17	0,00

Table 5.7 Province-Based Weighted Sector Matrix

Sector / Province	29	31	32	35	36	37	38	39
21	734,82	580,64	277,43	1379,47	614,29	93,04	321,00	269,29
47	0,00	2022,18	0,00	414,20	0,00	200,00	87,27	0,00
63	0,00	753,77	1544,16	0,00	0,00	0,00	524,79	86,38
02	0,00	101,30	390,10	330,41	0,00	0,00	114,29	0,00

*Table 5.8 Province * Sector-Cross Referenced: Change in Sales*

Province \ Sector	29	31	32	35	36	37	38	39
21	91,85	108,87	34,68	431,08	38,39	5,82	20,06	16,83
47	0,00	1444,41	0,00	59,17	0,00	14,29	6,23	0,00
63	0,00	251,26	643,40	0,00	0,00	0,00	87,47	7,20
02	0,00	16,88	130,03	110,14	0,00	0,00	19,05	0,00

*Table 5.9 Province * sector-cross referenced: average sales per sector*

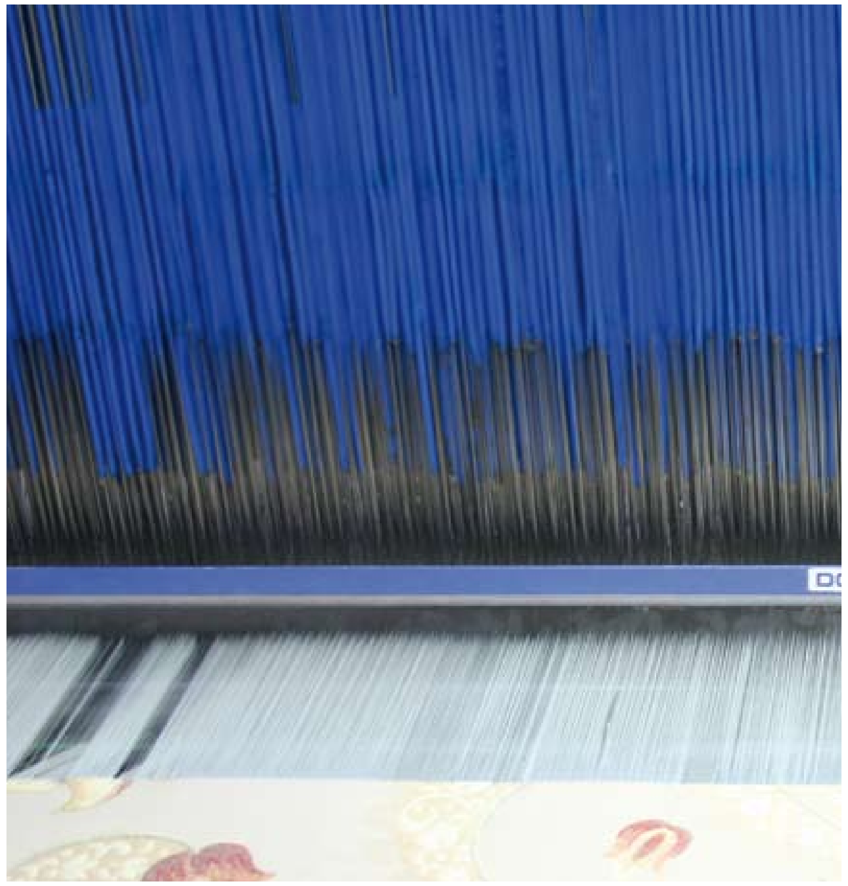
Results of the above analyses can be summarized as follows:

In Diyarbakır, best client profile is from sector 35 (Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber & Plastics)

In Mardin, best client profile is from sector 31 (Manufacture of Food, Beverages & Tobacco)

In Urfa, best client profile is from, 32 (Textile, Wearing Apparel & Leather Industries) and 31 (Manufacture of Food, Beverages & Tobacco)

In Adıyaman, the best client profile is from sector 32 (Textile, Wearing Apparel & Leather Industries)



5.3 Institutionalisation

In the previous analyses we have indicated that 40% of the clients are expecting a partially positive and 54% of the clients are expecting positive impact from GIDEM services.

			Level of Institutionalisation(LoI)				
			not institu-tiona-lised	scarcely institu-tionalised	partially institu-tionalised	fully institu-tiona-lised	total
Expected Level of Impact (ELI)	no impact	Count		4	2		6
		% within ELI		66,66667	33,33333		100
		% within LOI		12,90323	4,166667		6
		% of Total		4	2		6
	partially positive	Count	7	13	14	6	40
		% within ELI	17,5	32,5	35	15	100
		% within LOI	87,5	41,93548	29,16667	46,15385	40
		% of Total	7	13	14	6	40
	positive	Count	1	14	32	7	54
		% within ELI	1,851852	25,92593	59,25926	12,96296	100
		% within LOI	12,5	45,16129	66,66667	53,84615	54
		% of Total	1	14	32	7	54
Total		Count	8	31	48	13	100
		% within ELI	8	31	48	13	100
		% within LOI	100	100	100	100	100
		% of Total	8	31	48	13	100

Table 5.10 Expected Level of Impact-Level of Institutionalisation Cross Tabulation

The relations between level of institutionalisation and expected level of impact can be interpreted as follows. % 17,5 of the firms that are expecting partially positive impact are non-institutionalized, %32,5 of the firms that are expecting partially positive impact are scarcely institutionalized, %35 of the firms that are expecting partially positive impact are partially-institutionalized and % 15 of the firms that are expecting partially positive impact are fully-institutionalized. % 1,9 of the firms that are expecting positive impact are non-institutionalized, %25,9 of the firms that are expecting positive impact are scarcely institutionalized, %59,3 of the firms that are expecting positive impact are partially-institutionalized and %13 of the firms that are expecting positive impact are fully-institutionalized. Finally, more institutionalized the firm, more positive impact its expecting from GİDEM services in the future.

	institutionalisation
Chi-Square	36,979
df	3
Asymp. Sig.	,000

Table 5.11 Level of institutionalisation test statistics

A non-parametric chi-square test reveals more on the relationship between the size of the clients and the level of expected impact.

***P_1*: *proportion of non-institutionalized companies in all the companies that are expecting a positive impact.*

***P_2*: *proportion of partly-institutionalized companies in all the companies that are expecting a positive impact.*

***P_3*: *proportion of scarcely-institutionalized companies in all the companies that are expecting a positive impact.*

***P_4*: *proportion of fully-institutionalized companies in all the companies that are expecting a positive impact.*

***H_0*: *P_1=P_2=P_3= P_4 1/4(no difference in positive expectation with regard to scale of the company)*

***H_1*: *At least one of the groups is different from other in terms of expecting a high level of impact*

Degrees of freedom = k-1 = 3; at $\alpha_{0.05}$ critical value of *chi-square* is **7.81.**

Since the computed x^2 (36,979) exceeds the critical value of 7,81, we can safely conclude that there exists a difference with regard to level of institutionalisation in terms of expectation of a positive impact (in other words the null hypothesis (H0) can be rejected). Small- and Medium-sized companies are more likely to be satisfied with GİDEM services. Partially institutionalized clients seem to expect more impact from GIDEM services.

		Level of Institutionalisation(LoI)				
		not institu-tiona-lised	scarcely institu-tionalised	partially institu-tionalised	fully institu-tiona-lised	total
Expected Level of Impact	no impact		4	2		6
	partially positive	7	13	14	6	40
	positive	1	14	32	7	54
Total		8	31	48	13	100

Table 5. 12 Expected Level of Impact-Level of Institutionalisation Distribution

According to findings of on the analyses above, it can be stated that the best client for GIDEM would be a partly institutionalized small- and/or medium-size company that operate in one of the leading sectors of its province which is sector 35 (Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber & Plastics) in Diyarbakır, sector 31 (Manufacture of Food, Beverages & Tobacco) in Mardin, sector 32 (Textile, Wearing Apparel & Leather Industries) and 31 (Manufacture of Food, Beverages & Tobacco in Urfa and sector 32 (Textile, Wearing Apparel & Leather Industries) in Adıyaman.

6.
GENERAL MODEL

A general model developed for the estimation of the economic impact of GIDEMs should be evaluated together with macro-economic trends in the industry sector. In other words, although our general model is going to reflect the impact generated through GIDEM services, the macro economic trends in the national economy should be taken into consideration in the evaluation of results.

According to the official data, the industrial sector grew on average by 9.3%, and the industrial manufacturing sector grew on average by 10.2% in the period 2002-2005. In the same years the national rate of growth of the overall national economy was 7.8% on average. Assuming that the growth rate of industrial manufacturing sector is perfectly correlated with sales figures, we can display the position of GIDEM clients that have provided us such figures. In the previous section, we have listed the domestic sales figures provided by respondents. In the following chart the "normal trend line" has been produced by increasing the given sales data by using a growth rate of 10% per annum beginning from 2002.

From this point, we intend to display the difference between the expected growth in general and the growth realised among GIDEM clients. The difference is observable both in domestic sales and exports, yet there is no enough evidence to claim that the difference is statistically significant and it is generated through GIDEM services.

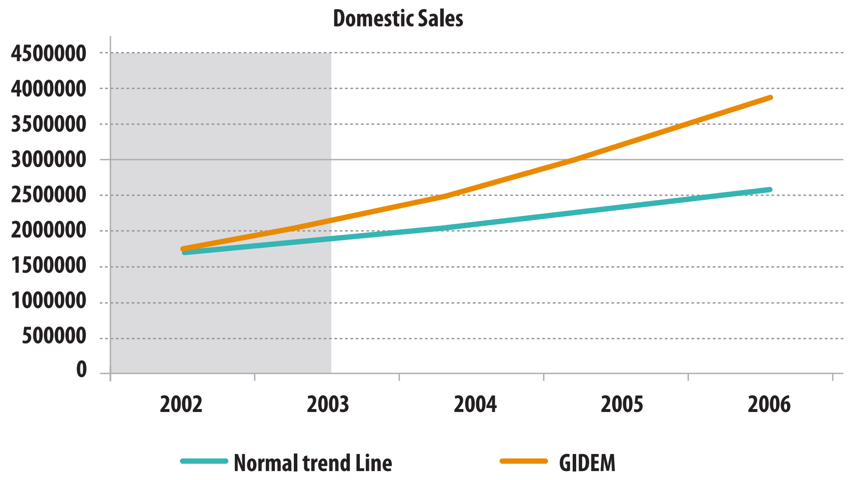


Figure 6. 1 Graphical Representation of Domestic Sales

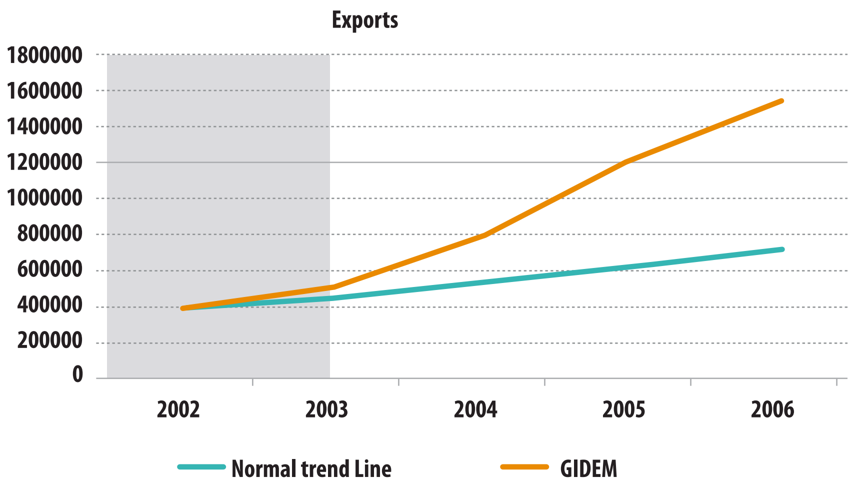


Figure 6. 2 Graphical Representation of Exports

Below we tried to design a model in order to display the average value-added generated through GIDEM services.

6.1 Average Value-Added

Considering the analyses made in the previous part and the limitations with the quantitative data, the only rational method to calculate the average value-added of GIDEM can be generated through the services that have a potential impact on domestic sales, export and investments. From this point of view, the model may be modelled as follows:

Value-added= $[n_1 \times p_1 \times d_1 \times V_1] + [n_2 \times p_2 \times d_2 \times V_2] + [n_3 \times p_3 \times d_3 \times V_3] + [n_4 \times p_4 \times d_4 \times V_4]$

$$\textbf{Value-added=} \sum_{i=1}^{4} n_i \times p_i \times d_i \times V_i$$

Where;

n_1: number of employees in GIDEM clients that make domestic sales
n_2: number of employees in GIDEM clients that make export
n_3: number of employees in GIDEM clients that make sales (both domestic & export)
n_4: number of employees in GIDEM clients that make investments
p_1 : Ratio of GIDEM clients which indicated that GIDEM has a positive impact on domestic sales
p_2 : Ratio of GIDEM clients which indicated that GIDEM has a positive impact on exports
p_3: Ratio of GIDEM clients which believes that GIDEM makes a positive contribution to sales
p_4 : Ratio of GIDEM clients which indicated that GIDEM has a positive impact on new investments
V_1 : Average sales per employee
V_2 : Average exports per employee
V_3 : Weighted average of contribution (average domestic sales per employee and average exports per employee)
V_4 : Average amount of investment per employee
d_1 : is 0.2; assuming that 20% of domestic sales is profit
d_2 : is 0.3; assuming that 30% of exports is profit
d_3 : is 1; as a constant coefficient
d_4 : is 1; as a constant coefficient

In order to minimize the negative effects of the small size of the sample; the insufficiency of data due to the unshared information by the respondents and the time-lag that the impact of GIDEM on these areas is going to be realized, the generated model is going to be calculated under some assumptions:

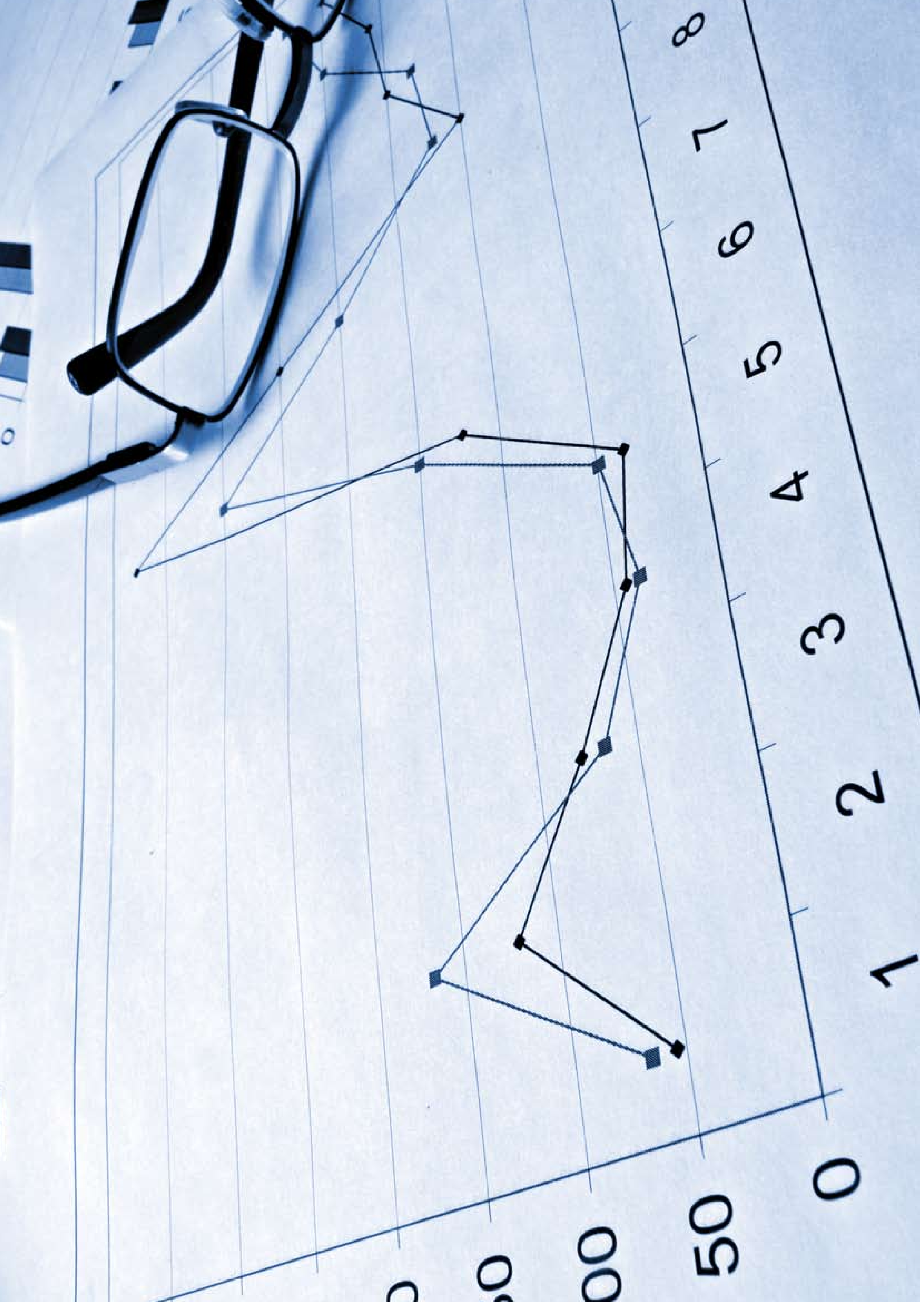
1. Total number of GIDEM clients that make domestic sales is 100; average number of employees is 50 (n_1 is 5000)
2. Total number of GIDEM clients that make export is 100; average number of employees is 50 (n_2 is 5000)
3. Total number of GIDEM clients that make sales is 100; average number of employees is 50 (n_3 is 5000)
4. Total number of GIDEM clients that investment is 25 (quarter of total number of firms); average number of employees is 50 (n_4 is 1250)

Accordingly the model generated in order to estimate the average value-added (VA) by GIDEM services is:

VA= $[5000 \times 0.47 \times 0.2 \times 61423.07] + [5000 \times 0.27 \times 0.3 \times 37320.44] + [5000 \times 0.15 \times 1 \times 25891] + [1250 \times 0.28 \times 1 \times 30348.41]$

The value added of GIDEM to the economy would be **TRY 74.023.812**

Designing a model in order to estimate the average amount of value-added is as difficult as measuring the real impact of an activity in economic terms. Additionally considering that the economic sphere either at national or local level is determined by various factors and the elimination of all these externalities is a fruitless attempt, the difficulty of the task may be understood more clearly. In the model generated above, we tried to exclude the economic developments occurred in the GIDEM provinces that can easily be effective on sales and investments. In this respect, we deeply focused on the services delivered by GIDEM which may have a potential impact on these areas, instead of macroeconomic variables. However, having fewer limitations and more useful data would facilitate our task. Still we believe that, the model reflect the aim on a considerable level by taking into account the main impact areas that generate the added value, and also weighting these values according to the clients' opinions.



7.
EVALUATION OF QUALITATIVE RESEARCH

Although quantitative analyses are useful in revealing some correlations between different factors, in social studies they are not sufficient alone to account for cause-effect relations and intentions of agents. In the same manner, for instance, when there is negative or no measurable impact in statistical terms between a service and impact areas, it would not always be true to draw a conclusion that the GIDEM services are ineffective, or vice versa. At this point, in-depth interviews, and open-ended questions are operational in providing further explanations in a socio-spatial context. Accordingly, this section lays out the analysis of opinions and expressions of local agents that should be attended as supplementary in the evaluation of statistical findings.

7.1 Analysis of in-Depth Interviews with Enterprises

In total eight GIDEM clients had participated in in-depth interviews and the main lines of interviews can be categorized under four subject headings:

1. Successful GIDEM services
2. Shortcomings of GIDEM offices and services
3. Types of services that the clients would like to receive
4. Client's opinions on payable services.

Successful Aspects Related to Gidem Services

The firms in general think that the more frequent the relations with GIDEM occur, the more beneficial the GIDEM services will be. Moreover, they believe that although GIDEM offices are not able to access to every firm with the same high performance, sometimes presentation of a single best practise is very important in terms of opening up new frontiers to other firms. Above all, GIDEM offices encourage small firms and support them in their ventures.

It is often mentioned that when the firms know what they want, GIDEMs would most probably respond their needs. For instance, there are some firms that benefited a wide range of services including preparation of business and investment plan, getting EU grant scheme, several quality certificates, and so on. In this sense, they state, when a firm is able to somehow realize its shortfalls, GIDEMs would orient them in a way that the firm would bear the most reasonable costs. Other way around, GIDEM itself may unveil the shortfalls of the firms. However, clients believe that if the clients are not aware of these shortfalls themselves, GIDEMs efforts would be in vain.

Most probably, success brings attention and convinces clients to commit themselves to the process. it was obvious in some conversations that, the clients do not assign the same importance to all services. For instance, while "search of new markets" was a very important service for some clients with high commitments, some service components of institutionalisation were a kind of loss of time without any interest of some clients.

The clients most significantly emphasized that GIDEMs have brought a new perspective to their provinces. It was surely indicated that "GIDEMs bring an approach and expertise in the provinces, which did not exist formerly. This support, they believe, yield profitable results as long as the firms apply to GIDEMs with right questions.

Opinions on Shortcomings of Gidem Offices and Services

Interviews highlight that the clients expect GIDEM offices to be more active in terms of helping to create stronger and coordinated relations between firms and other institutions, generating relevant and specific projects for individual firm development, providing collective efficiency among firms, bridging the gap between firms and financial resources.

Interestingly, some interviewees have overvalued top-down interventions, praising the good old days of state support systems on the one hand. With a similar motivation, some others have envisaged a more interventionist GIDEM, and preferred to be at the receiving side to the full extent without any liability. On the other, insufficient number of GIDEM staff occurs as one of the mostly indicated shortfalls of GIDEMs according to the clients. Although almost all clients think GIDEM staff are quite professional and helpful, they are not sufficient in number. Some clients have suggested a service design where each sector is represented by one personnel, who is also responsible of all firms within the assigned sector. A grievance claiming that "every sector has not been promoted in equal degrees, in other words GİDEMs have ruled out some sectors from their service provision," appears to be another problem in the eyes of the clients.

Types of Services that the Clients Would Like to Receive (Based On Open-Ended Question, #84)

When all 100 clients have been asked about the services they would like to receive most, several types of services have ostensibly gained significance. All answers can be categorized under four groups in a descending order of demand.

First group includes the most demanded services and relates to "sales and new markets". In this scope, the desired services are about "access to international and national markets", "enhancement of export capacities" and "marketing strategies".

Second group of services relates to "capacity enhancement of individual firms". In this sense, the significant answers are about "quality management services", "remedies for skilled labour shortage", "introduction to financial management techniques" and "guidance on legislations".

Third group of significant answers are related to "financial support". While a few clients required financial support services directly from GIDEMs, most of others wished that GIDEMs clearly laid out all the channels for access to credits, moreover built a strong bridge between firms and KOSGEB. Some clients on the contrary required more information services on state incentives.

Fourth group is about some scarcely provided services. Two clients remarked the need for research and development activities, and technological progress. In the same manner, a few firms wanted support for new investments. While two clients wished engagements in international/national collaborations and tenders, only one firm mentioned the need for software and e-trade.

Opinions on Payable Services

There are two opposite opinions about payable services. While the clients who have worked more closely with GIDEMs have positive attitude, the rest who have engaged in only one or two services with GIDEMs think otherwise.

The first group of clients emphasize strongly the need for expertise in the region. Instead of getting consultancy from western parts of Turkey, they state, they prefer to receive it from professionals who are nearby them and who are much more accessible. Moreover, they envisage that GIDEM services would be at more reasonable costs compared to external consultancy. In addition, they see a direct relation with payable services and taking responsibility. In this sense, they believe that services should be charged in order to achieve better results.

The second group on the other hand tends to perceive GIDEMs as a state institution. Embedded in a business culture that is accustomed to top-down interventions of state, some firms can not even make sense why GIDEMs should charge its services. These types of firms are usually those that have received a few services thanks to GIDEMs own insistent attempts. Although they admit making use of these services, they are still reluctant to pay fees for them.

7.2 Analysis of in-Depth Interviews with Non-clients

The non clients group is comprised of four firms who have not received somehow any GIDEM services. The main purpose of those interviews, tracing "outsider views", has been to understand how non-client firms conceive GIDEMs and their services.

The most obvious justification for not receiving any services among non clients was the reluctance and not knowing what exactly GIDEMs could do for them. These firms all admit that GIDEM staff had indeed visited them initially; however, in the course of the time, the communication broke down for some reasons and both parties kept at a distance with each other. They actually reprove that if GIDEMs really intended to help them, they could find ways to access them with an aim for tackling their obvious problems.

7.3 Analysis of in-Depth Interviews with GIDEM Offices

Interviews with four GIDEM offices included a wide range of issues, namely business culture, women entrepreneurship, and sustainability aspects in the region.

Business Culture and Perception of GIDEM services

As stated by all GIDEM offices, the most dominant characteristic of the enterprises in the region is a non-institutionalized, family based structuring, based on the fact that the actual businessmen of today were the cultivators of yesterday. When watering facilities increased thanks to GAP, they were able to process their surplus agricultural outputs and step into industry.

Despite all, the GIDEM staff state that the overall picture is ameliorating for the last 10 years. Formerly, they explain; the GIDEM offices were visited only when an incentive law was enacted. Nowadays, however, firms are applying to offices whenever they have questions related to their business affairs. The local firms have started to adopt a wider perspective and accordingly understand the importance of institutionalisation for success in the long run. The coming generation of entrepreneurs, GIDEMs assert, are more open to change and less conservative.

As a GIDEM personnel states, the local entrepreneurs are now coming together in the conferences and at least lobbying, even if they are not always fully benefiting the conferences .

Women Entrepreneurship

Referring to women profile in the region, where approximately 40% of women population is illiterate; the women entrepreneurship does not appear as a promising issue in GIDEM provinces. While all GIDEM provinces suffer similar obstacles in terms of women entrepreneurship, Diyarbakır is distinguished among other GIDEM provinces in terms of women associations, rich in number. In the same manner, women in Diyarbakır are more integrated to social life, in contrast to Urfa that represents the worst picture among GIDEM provinces in terms of women's status in the social life. In a similar vein, among other GIDEM offices, Diyarbakır GIDEM office is distinguished with respect to its efforts on women entrepreneurship whose impact seems to reach all GAP Region.

In addition, a considerable number of women associations, highly active at awareness raising about the better representation of women in the society, exist and being supported by all four GIDEM offices. As indicated in the in-depth interviews with GIDEM offices and women associations, the basic obstacle against women entrepreneurs is the lack of credit mechanisms, exacerbated by the cultural background that does not usually let women possess property in a way they can use as collateral.

Sustainability of GIDEM Offices- New Organizational Structures

By December 2007, the GIDEMs are completing the 5th and the last year of their project cycle. In this respect, several GIDEM offices have already entered a new organizational structuring process. There are two actual future models at stake for GIDEMs, namely firm and association models.

Diyarbakır and Mardin has adopted in principle a similar organizational structure. In Diyarbakır, a firm has been established including the Diyarbakır Chamber of Industry & Trade with the highest share, TOBB, and the Mercantile Exchange of Diyarbakır, with smaller shares. In Mardin, likewise, a firm named *"Mardin GIDEM Consultancy and Training Ltd."* have been established with the shareholders of Mardin Chamber of Industry and Trade (%99) and Mardin Industrialists' and Businessmen's Association (1%).

Adıyaman GIDEM office has entered the new phase under the organizational structure of ATEKS, A*dıyaman Textile and Ready-Wear Clustering Association,* basically because an accord could not be reached with relevant chambers and associations so as to become a firm. Although GIDEM staff are aware of the fact that it is a though task to keep the mission in its secular trend, they believe that the Association can endure the original GIDEM service-lines provided that necessary human resources are in place. In the new service design a more sectoral concentration is envisaged.

In the same manner Şanlıurfa GIDEM is preparing to enter the new phase under the organizational structure of GAP-EKODER, *Development in Ecological Agriculture and Social Mutual Benefit Association,* with similar reasons to Adıyaman. In this scope, the office and the activities of GIDEM office will be taken over by GAP-EKODER, and the service lines will be enhanced in a way that addresses more sectors.

Within both models, GIDEMs envisage a more professionalized service delivery with more serious clients, and expect to be more profitable than they could have been in the former structure. Yet, they still share the opinion that a considerable amount of local businessmen are still not ready to pay for consultancy services. When GIDEM staff are asked to give a crude estimation about the revenue share of services, they declare that it would not exceed 15% of all expenditures and anticipate the necessity of further external support.

7.4 Analysis of in-Depth Interviews with Institutions

"We have started to work on a rural development project granted by UN. GIDEM has supported us during the preparation of the proposal and the project. They are more experienced than us about project management. We always keep our connection close with GIDEM offices. In addition, Adıyaman GIDEM office have consulted us in our textile project. It is so easy to access and contact them."

Urfa Municipality

"GIDEM has contributed significantly in the development of textile industry in Adıyaman. The establishment of ATEKS is one of the important accomplishments of GIDEM. By this way, textile clustering has become an association. When we consulted experts about efficiency, GIDEM has prepared a road map for the association and made the connections between ATEKS and the Mediterranean Union of Exporters. In addition, the airport in Adıyaman swings into action again with the support of GIDEM so that international firms could come and make contracts with the firms in Adıyaman. The support of GIDEM cannot be ignored in these terms."

ATEKS President

Considering the two-tier provision of GIDEM services in terms of pooling of resources with other local institutions, the research team have also decided to carry out in-depth interviews with them paying attention to their opinions about and relations with GIDEM offices.

In total 25 in-depth interviews have been executed with several local institutions including various associations, governorships, municipalities and chambers of trade & industry, six of which are located in Adıyaman, seven of which in Urfa, five of which in Diyarbakır and five of which in Mardin. The interviews can be analyzed under four main tittles,

1. The relation of GIDEM offices with institutions
2. Accomplishments of GIDEM offices and their comparison with other local institutions
3. Shortcomings of GIDEM offices and services (4) Opinions on payable services and sustainability of GIDEM offices.

The Relation of GIDEM Offices with Institutions

GIDEMs have supported the establishment of several associations which are actively working in the leading sectors of their provinces. The associations in four provinces work continuously with GIDEMs. GIDEMs inform them about appropriate incentives or international grant schemes that the associations can benefit. Three of the associations still carry on international grant schemes with the support of GIDEM about procedures and necessary documents. In addition, GIDEMs organize several events and education programs together with the leading institutions of the four provinces.

Besides, one of the missions of GIDEMs is to increase the number of women entrepreneurs in four provinces. GIDEM perpetuates this mission in collaboration with the local women associations. GIDEM orients the associations for right and beneficial actions in order to sustain local development.

Finally, it has been stated that, GIDEM disburdens the institutions such as governorship, municipality and the Chamber of Trade and Industry. Before the inauguration of GIDEMs, these institutions had to consult to the local entrepreneurs in all fields but neither their technical facilities nor their experience were sufficient for effective results.

Accomplishments of GIDEM Offices and Their Comparison with Other Local Institutions

During the in-depth interviews, almost all institutions state that GIDEM has significant impact on the development of local economy and they think that GIDEM project should continue in the future. They agree, in common, that GIDEM has started to change the conservative business culture of their provinces. Most of the institutions work collaboratively with GIDEM offices and they mention that especially "clustering projects", "institutionalisation consultancies" and "educations" of GIDEM are very beneficial for the local economic development in all four provinces. They believe that GIDEMs have contributed a lot to entrepreneurs in enhancing their business visions.

The interviewed associations indicate that GIDEM is more experienced in the fields of international agencies" grant schemes and project management when compared to other local institutions. Entrepreneurs can easily access GIDEM offices and get information in a shorter period. In addition, GIDEM has less bureaucracy compared to other institutions that have complicated procedures especially in finance provision.

Shortcomings of GIDEM Offices and Services

Most of the institutions agree that GIDEM has no shortcomings except a few points. One of them is about the publicity of GIDEM services. Due to lack of effective publicity mechanisms, many entrepreneurs have not heard enough about GIDEM services. Local institutions insist that GIDEM offices should introduce themselves more effectively to local people. As another deficiency, some of the institutions point that the efforts of GIDEMs on exports are not sufficient, hence GIDEMs should work more actively on export projects with other local institutions. Moreover, it has been claimed that GIDEM service delivery has been limited to the city centres and unfortunately not efficient in the periphery. Another argument was that the GIDEMs services were limited to only certain sectors, and ruled out some others. Finally, it has been mentioned that there are some deficiencies about the institutional management of GIDEM offices as the centre is located in Ankara, and accordingly some projects of have just stayed on paper.

Opinions on Payable Services and Sustainability of GIDEM Services

The in-depth interviews with the institutions reflect that none of the firms are in such a consciousness of allocating a part of their budget just for getting knowledge or simple consultancy. For this reason, they argue, if GIDEM starts to deliver payable services, most of the entrepreneurs would be seriously reluctant to get some specific services such as "education programs". On the contrary, there is no substitute institution that can take over the mission of GIDEM in case the offices close down. They all foresee that the demand would decrease when the services are charged. However, some of the institutions suggest GIDEM charge some services to certain sectors that have already been flourished, and continue supporting new rising sectors with unpaid services.

"GIDEM office in Urfa is just "an order-taker office" from Ankara. "The office in Ankara" (the headquarters) leads all the services to be given here. People in the Ankara office should pay more attention to local dynamics. GAP should be administered in GAP."

An Association in Urfa

"The fees of the services should not be so high. However, in some cases the services free of charge can decrease the quality of the accomplishments. Because people sometimes do not give enough importance when a service is unpaid."

OSB Directorate

7.5 Analysis of Cognitive Mapping

"Local institutions should guide people who do not have any vision and knowledge about the worldwide business, and then regional development can't be suppressed."

An entrepreneur from Mardin

Cognitive mapping technique was conducted with 12 in-depth interviewees, four of which are non-client. One specific question was asked to get an insight of the local development conception of businessmen, and their perspective with respect to the role of institutions in local development.

Cognitive mapping, as a survey technique, helps structuring the knowledge about a specified concept within a socio-spatial context. In technical terms, the structuring of knowledge includes creation of a list of basic concepts that the respondents stress during the interviews, and the establishment of a qualitative cause and effect relationships between these concepts. With a schematic representation of aggregated answers, structured knowledge can be mapped as a weighted oriented graph.

Our cognitive mapping study has been developed on the question of; "Can you evaluate the role institutions in local economic development in your province?" "The local economic development" has been specified as the concept on which we long for structuring knowledge. Twelve businessmen from several sectors in Adıyaman, Diyarbakır, Mardin and Urfa, accordingly, have evaluated the role of institutions in local economic development through several concepts.

All interviewees mentioned some active institutions in their city such as KOSGEB, the Chamber of Commerce and Industry, the Governorate and GIDEM. Beside these institutions, they have highlighted several concepts such as; economic development, local dynamics, investment, export, trade, business culture, internationalization and entrepreneurship. The following scheme is an overall representation of 12 cognitive mapping results. Such a compilation portrays the terms in which the local businessmen conceive local development.

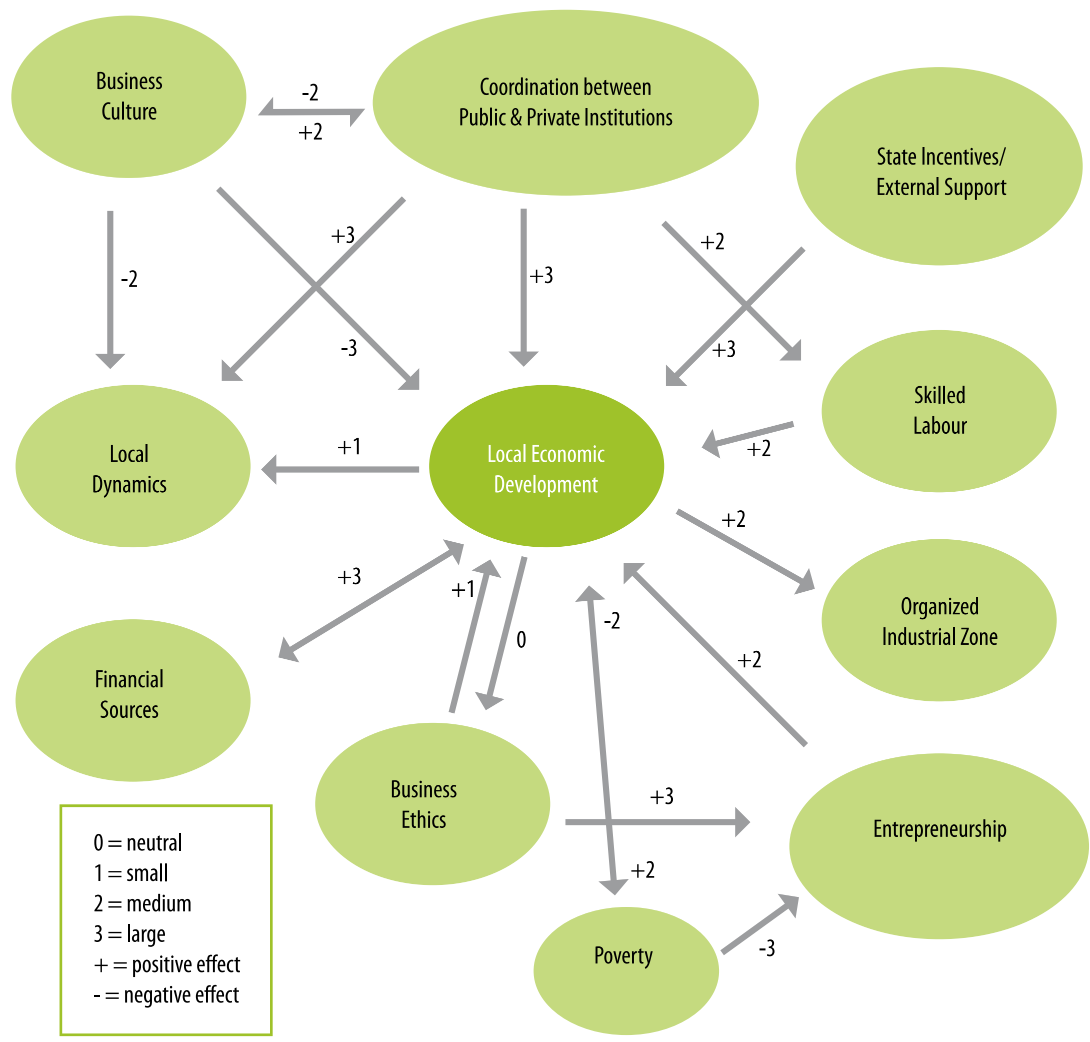


Figure 7.1 Cognitive Map

Cognitive mapping method:
Once the question is asked the answer of the interviewee is listened without any interruption, but meanwhile some basic concepts are extracted out of interviewees sentences by the researcher and drawn in a schematic manner on a piece of paper. After the interviewee finishes his/her words, they are asked to grade the relations between each concept according to their being negative or positive. The direction of the arrows show which concept affects the other and (-), (+) signs indicate whether the effect is in a positive or a negative way.

Analysis of the above-presented cognitive map provides us an overall perspective of the local businessmen in four GIDEM provinces about local development and on the role of institutions in local development. It can be observed from the map that, in local economic development, businessmen give highest importance to (a) the coordination of public and private institutions, (b) the state incentives/external support and (c) access to financial resources. The motivation behind these answers is firstly based on the dominant view that there is an authority conflict between institutions. As long as the institutions do not coordinate and pool their resources, the path cannot be cleared off obstacles, and local dynamics cannot be exploited. Secondly, the respondents still conceive state incentives as vital for their growth. This is basically because of the fact that they face difficulties in accessing various financial resources.

In the second priority comes (d) the need for entrepreneurship, (e) the existence of Organized Industrial Zones (OIZ), (f) the need for skilled labour and (g) combating poverty. The respondents state that these four phenomena are fairly important for local development. Most significantly, the map infers that as long as poverty prevails, the entrepreneurship cannot flourish.

Finally mentioned is the role that the (h) business ethics play for local development. The businessmen denote a need for a business ethic that promotes a fair competition among firms. They envisage a growth in unison.

As a negative relation, (i) the existing business culture is indicated as an obstacle against the local development, as well as against (a) the coordination between institutions and (j) and the exploitation of local dynamics. What is considered as the real obstacle is the conservative attitude that excludes collaborations and plans production in the short run letting it go at mediocre.

For several concepts, the respondents see a two-way relation. For instance they believe that while (c) financial resources contribute to local economic development; other way around local development contributes to flourishing of new financial resources. The more the firms enhance their capital, the more they have access to credits. On the other hand, the more (i) the business culture is opened, the more (a) the coordination is fostered, and vice versa.

In this frame, based on the answers, any institution designed for local economic development should consider (or should not ignore) strengthening the coordination among institutions, the development of finance mechanisms and should respond to need for skilled labour, in a context where business culture plays an important role.

The most indicative result that can be extracted from the map is the importance attributed to state incentives. However, the businessmen have a broader picture in their mind, where coordination and collaborations are flourishing and conservative business culture is giving way to an open culture, in a way that exploits local dynamics. Nevertheless, such a transition, in their opinion cannot be triggered without an external support, which again denotes the vitality of state incentives.

7.6 Province-based Results

Analyses concerning provincial results include a composition of both quantitative aspects coming from the statistical side, and know-how obtained from the open-ended questions and in-depth interviews. Firstly, the tables below have been constituted according to the province-based results of the statistical analyses. Each province table summarizes the main findings, and more importantly the opinions of the clients, concerning GIDEM's position and activities in their province for the last five years. Then, professional judgements obtained by field work and GIDEM interviews have been added to statistical results in order make the differences clearer and account for these differences.

It is important to emphasize that these findings do not intend to make a comparison between the performances of GIDEM offices in each province. Beyond, making such a comparison would be a pretentious interpretation regarding the sample size of the research, unique characteristics of clients in each province and distinctions in the economic orientations of each province which are formed contextually and not easily explained by statistical terms. Therefore, each table should be assessed within its limits however some findings would give indications about potential economic growth.

7.6.1 Diyarbakır

Before the field study, the basic concern of the research team had been related to persuasion of GIDEM clients to participate in the survey. However, on the field, it was recognized that this concern was invalid. Thanks to the initial contacts of GIDEM offices with relevant clients, the businessmen of region were usually quite hospitable and willing to participate in survey. Consequently, the response rate was significantly high. Yet the research team faced some other challenges during execution of the survey.

Province Based Results, Diyarbakır				
Average exports per employee				TRY 42028,00
Impact of GIDEM on Productivity	Yes: 27.3%	Partial: 36.4%	Expected: 18.2%	No: 18.2%
Investments over the last 5 years		Yes:90.9%	No: 9.1%	
Type of investments		New Sector: 27.3%	Existing Sector: 63.6%	
GIDEM's impact on investment decision	Yes: 10 %	Partial: 25%	No: 55%	
Satisfaction from GIDEM services in general	Fully satisfied : 18.2%	Satisfied: 59.1%	Not Satisfied: 4.5%	No opinion: 18.2%
Impact of GIDEM on institutinalization	Fully: 45.5%	Partially:31.8%	No impact:22.7%	
Impact of GIDEM on exports	Positive: 40.9%	Partially: 36.4%	No impact: 13.6%	
Impact of GIDEM on new domestic markets	Positive: 38.1%	Partially:33.3%	No impact: 28.6%	
Impact of GIDEM on entrepreuneurship	Positive: 50.0%	Partially: 31.8%	No impact: 18.2%	
Impact of GIDEM on internationalisation	Positive: 36.4%	Partially: 45.5%	No impact: 18.2%	
Expectations of clients on the impact of GIDEM services	Expecting a high impact on accession to new fairs			
	Expecting a moderate impact on new investments			
	Expecting no impact on foreign capital			

Table 7.1 Province Based Results, Diyarbakır

Beginning with a comparison regarding the clients' opinion on GIDEM's impact, the previous table demonstrates that the highest value in GIDEMs impact is obtained in "entrepreneurship", while the lowest value attained in GIDEM's impact is for "internationalization". The reason for such a low value of proposed impact on the internationalization can be an outcome of the general business culture within the province, rather than a reflection of GIDEM's performance. Additionally, the proportion of fully satisfied firms from all GIDEM services in Diyarbakır is 18.2 %, and the value of satisfied firms is 59.1% while the value of those with a negative attitude is only 4.5 %.

As expected, trade relations within the city are domestic market oriented. As a result, the experience and the scale of the firms are generally inadequate for international markets. Therefore, the province's connections with international markets are quite limited and the firms' priority is rather on domestic markets than global ones. This attitude could be directly associated with the lack of experience in external markets, combined with the emerging relatively favourable domestic market conditions. The official data of foreign trade also confirms this scene by displaying that there were only 82 exporter firms in the last year.

By combining the information obtained from both the questionnaires and the in-depth interviews, we can say that although the needs of the firms are not fully matching with the services of GIDEM, the prospective potentials cannot be ignored. The data denote that the firms are benefiting the information provided by GIDEM in terms of how to become competitive in the global markets. But the lagging side is the application of such information in the management of the firms. The respondents generally indicate that the services provided by the GIDEM have drawn attention to the importance of key variables of competitiveness such as institutionalisation and export orientation; however the firms are not aspiring enough to adopt the necessary adjustments provided by GIDEM.

When the proportion of investment rates of the firms with 90% is considered, the development of the economic activities within region can be seen clearly. Such an investment oriented character infers that, the impacts of GIDEM which is mentioned to be not applicable now, will be visible in the following years.

7.6.2 Urfa

The proceding table demonstrates that the highest expected level of contribution of GIDEM in Urfa is mentioned as the "entrepreneurship" while the lowest value is for "internationalization". When we consider the level of satisfaction for Urfa GIDEM services, 79.3 %, the majority of the clients indicate that they are satisfied or fully satisfied from GIDEMs services. The proportion of clients who are not satisfied with GIDEM services is only 3.4 %, which is a moderately low value.

Province Based Results, Urfa				
Average exports per employee				TRY 44299,00
Impact of GIDEM on Productivity	Yes: 58.6%	Partial: 24.1%	Expected: 6.9%	No: 10.3%
Investments over the last 5 years		Yes:82.8%	No: 17.2%	
Type of investments		New Sector: 17.2%	Existing Sector: 65.5%	
GIDEM's impact on investment decision	Yes: 7.4 %	Partial: 11.1%	No: 66.7%	
Satisfaction from GIDEM services in general	Fully satisfied : 27.6%	Satisfied: 51.7%	Not Satisfied: 3.4%	No opinion: 17.2%
Impact of GIDEM on institutinalization	Fully: 39.3%	Partially:42.9%	No impact:17.9%	
Impact of GIDEM on exports	Positive: 33.3%	Partially: 25.9%	No impact: 40.7%	
Impact of GIDEM on new domestic markets	Positive: 37%	Partially:25.9%	No impact: 37%	
Impact of GIDEM on entrepreuneurship	Positive: 53.6%	Partially: 21.4%	No impact: 25%	
Impact of GIDEM on internationalisation	Positive: 22.2%	Partially: 44.4%	No impact: 33.3%	
Expectations of clients on the impact of GIDEM services	Expecting a high impact on new foreign tenders			
	Expecting a moderate impact on new foreign investment decisions			

Table 7.2 Province Based Results, Urfa

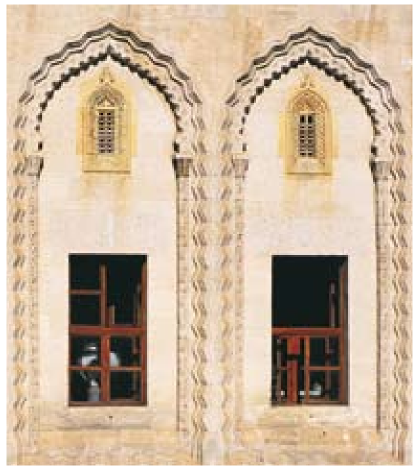
The high level of impact on entrepreneurship is an expected result when the active role of the Urfa GIDEM at the start-up level is considered. As indicated in the interviews, the GIDEM has provided important support to the firms in the start-up level most of which were the firms from service sector. Accordingly when the effect of the GIDEM is considered in Urfa, it should be kept in mind that such a service sector related support would make the statistical results much more bounded and undermine some other services such as export and internationalization. Additionally, the concentrated activities of GIDEM in agriculture and agriculture-related products should be considered as a potential future impact, which is not visible yet.

7.6.3 Mardin

The following table demonstrates that in Mardin the level of impact from GIDEM services is the highest in "entrepreneurship", while the lowest value is on "investment decisions". When we consider the overall satisfaction of the clients from GIDEM services, it is observed that 65.2% of the firms are satisfied and 26.1 % of the firms are fully satisfied from GIDEM services, while we cannot observe any unsatisfied client. Besides, the "domestic sales" appears as the area where the lowest impact is expected.

Province Based Results, Mardin				
Average exports per employee				TRY 21352,00
Impact of GIDEM on Productivity	Yes: 30%	Partial: 21%	Expected: 26.1%	No: 17.4%
Investments over the last 5 years		Yes:73.9%	No:26.1%	
Type of investments		New Sector: 39.1%	Existing Sector: 34.8%	
GIDEM's impact on investment decision	Yes: 13%	Partial: 8%	No: 43%	
Satisfaction from GIDEM services in general	Fully satisfied : 26.1%	Satisfied: 65.2%	Not Satisfied: 0	No opinion: 8.7%
Impact of GIDEM on institutinalization	Fully: 33.3%	Partially:38.1%	No impact:28.6%	
Impact of GIDEM on exports	Positive: 23.8%	Partially: 42.9%	No impact: 23.8%	
Impact of GIDEM on new domestic markets	Positive: 22.7%	Partially:40.9%	No impact: 36.4%	
Impact of GIDEM on entrepreuneurship	Positive: 45.5%	Partially: 40.9%	No impact: 13.6%	
Impact of GIDEM on internationalisation	Positive: 28.6%	Partially: 47.6%	No impact: 23.8%	
Expectations of clients on the impact of GIDEM services	Expecting a high impact on increase in exports			
	Expecting a moderate impact on new international tenders			
	Expecting no impact on FDI			

Table 7.3 Province Based Results, Mardin



The low value regarding the contribution of the GIDEM in domestic sales can be best explained with province's unique business culture, which is constituted on the border trade with Syria and Iraq as well as its location on the Silk Road. Its borderline with Syria and Iraq (which used to be longer before Batman and Şırnak is detached) contributed a lot to flourishing of trade culture in the province. As a result, since the role attributed to domestic markets is much lower than the foreign markets by the clients, the role of GIDEM in domestic markets can be underestimated as well, as have already been reflected in statistical findings.

The relatively high value in terms of entrepreneurship can be explained as a general trend in whole GIDEM provinces. Such a tendency to use support from GIDEM in terms of entrepreneurship, may be mostly due to the fact that, it is a comprehensive field, whose components can be regarded as the ones matching with actual needs of the clients most.

7.6.4 Adıyaman

As can be observed from the proceding table the highest level of impact value belongs to "entrepreneurship" while the lowest value is reflected in "exports". The reason for relatively higher value of entrepreneurship is due to the general tendencies that apply to all provinces, and the relatively lower value of impact on exports is can be attributable to province's characteristics.

Province Based Results, Adıyaman				
Average exports per employee				TRY 40061,00
Impact of GIDEM on Productivity	Yes: 52%	Partial: 4%	Expected: 20%	No: 24%
Investments over the last 5 years		Yes: 80%	No:20%	
Type of investments		New Sector: 28%	Existing Sector: 52%	
GIDEM's impact on investment decision	Fully: 8%	Partial: 8%	No: 68%	
Satisfaction from GIDEM services in general	Fully satisfied : 48%	Satisfied: 40%	Not Satisfied: 4%	No opinion: 8%
Impact of GIDEM on institutinalization	Fully: 40%	Partially: 35%	No impact: 25%	
Impact of GIDEM on exports	Positive: 23.5%	Partially: 29.1%	No impact: 47.1%	
Impact of GIDEM on new domestic markets	Positive: 26.3%	Partially:21.19%	No impact: 52.6%	
Impact of GIDEM on entrepreuneurship	Positive: 55%	Partially: 25%	No impact: 20%	
Impact of GIDEM on internationalisation	Positive: 25%	Partially: 30%	No impact: 45%	
Expectations of clients on the impact of GIDEM services	Expecting a high impact on accessing new domestic markets			
	Expecting a moderate impact on information infrastructure			
	Expecting no impact on increase in the exports			

Table 7.4 Province Based Results, Adıyaman

The mentioned characteristics of Adiyaman which makes the impact of exports lower than expected can be summarized as the relatively new developing character of industry within the city. In Adıyaman, the main tendency is in the textile sector, which is also believed to have a high future potential as well. Most of the firms indicate that they have found new channels to increase their competitiveness. As a result, although the firms admit that the impact of the GIDEM is limited in the exports, they emphasize that the know-how they have obtained so far from GIDEM on competitiveness issue, is a hidden potential which will be applied in the future.

8. CONCLUSION

This assignment has attempted so far to reveal possible quantifiable impacts without undermining the broader unquantifiable contributions. We believe that it is more valuable in social sciences to account for all quantifiable and unquantifiable aspects inclusively as the impacts are contingently formulated in a specific socio-spatial context. In such a perspective, our impact assessment methodology is not limited to measurable numeric data. But, taking one step further, it includes several factors such as "expectations", "mostly demanded services", satisfaction etc.- all of which are difficult to express in numeric terms. Consequently, the impact could be assessed in the most comprehensive manner. In some cases where no quantifiable expression exists, the aim has turned to portray the situation in a narrative form. After all, our aim has not been to demonstrate the impact with irrefutable numerical evidence, but to trace clear causalities, if possible, and correlations between the outcomes and the interventions.

A clear conclusion that can be made after all research and analyses that have been fulfilled within the scope of the assessment is that all the GIDEMs are presently working effectively and their services make positive contributions to region both in measurable and immeasurable terms. In a broader sense, it is possible to indicate that "GIDEM project" has opened up new frontiers for the future policy interventions, and contributed to Turkish regional development experience as a new local development model.

At the end of the analyses, we estimated a total value-added TRY 74 million, which indicates that for every TRY spent for the services, GIDEMs managed to provide an economic impact of approximately TRY 10-considering the service budget of the GIDEM offices in the region. Within this impact, the highest role is attributed to increase in the volume of exports among all other service areas. Such a contribution, although bounded with a small proportion of all clients, has crucial importance given the lack of other local institutional structures in this field. Productivity, in addition, as a related subject with sales (domestic and export), indicates considerably high increase between pre- and post-GIDEM assistance.

In our assessment study, the lowest contribution of GIDEMs is observed in the institutionalisation level of firms. This can be best explained with the dominant business culture that pushes entrepreneurs to perceive institutionalisation as a long-term and hardly achievable target. Additionally, short-term profit maximizing orientation of the firms causes them to ignore potential marginal gains that are likely to be generated through a solid institutionalized structure.

A major challenge of the impact assessment initiative was the relatively short history of GIDEMs. For assessment of those service impacts that are yet to occur, the expectations of clients have been taken in to account. Considering all services received, it is remarked that those clients who are at the upper levels of institutionalisation has weaker expectations, while positive impact expecting clients are relatively less institutionalised. Among all impact areas, the area where highest impact is anticipated has been attained as "participation to new international and domestic markets".

Sustainability of GIDEM services is one of most critical issues for the future restructuring of GIDEM offices. In this respect, the best client analyses have strong implications for the sustainability of GIDEM services, in that they lay out the types of SMEs that the GIDEM services create the most impact. The analyses suggest that the best client for GIDEM would be a partly institutionalized small- and/or medium-sized company that operate in one of the leading sectors of its province, which is sector 35 (Manufacture of Chemicals & Chemical, Petroleum, Coal, Rubber & Plastics) for Diyarbakır, sector 31 (Manufacture of Food, Beverages & Tobacco) for Mardin, sector 32 (Textile, Wearing Apparel & Leather Industries) and 31 (Manufacture of Food, Beverages & Tobacco for Urfa and sector 32 (Textile, Wearing Apparel & Leather Industries) for Adıyaman. When sustainability is at stake, along with such statistical results we should also mention two opposite opinions on payable services as obtained through in-depth interviews. The first group of clients emphasize strongly the need for expertise in the region and prefer to receive and pay for consultancy from professionals who are more accessible. The second group, on the contrary, perceives GIDEMs as state institutions, and referring to state incentives they express that they wouldn't receive any GIDEM services in case they are charged.

As another GIDEMs' policy issue, women entrepreneurship does not provide sufficient data to assess the actual impact of GIDEM services in statistical terms. Nevertheless, the in-depth interviews suggest that there are distinguished efforts of Diyarbakır GIDEM office on women entrepreneurship, whose impact seems to reach all GAP region. In addition, a considerable number of women associations, highly active at awareness raising about the better representation of women in the society, exist and being supported by GIDEM offices. As indicated in the in-depth interviews with GIDEM offices and women associations, the basic obstacle against women entrepreneurs is the lack of credit mechanisms, exacerbated by the cultural background that does not usually let women possess property in a way they can use as collateral. What the team observed during the survey is that especially in Diyarbakır and Mardin there is an increasing number of women entrepreneurs to venture in business, yet with undiversified business ideas limited to handcraft, restaurant and baby nursery.

As touched upon above, development should not be narrowed down only to economic factors but should be taken as a comprehensive activity that considers economic, social, cultural and environmental aspects inclusively. Two main policy issues can be emphasized to stimulate self-producing development;

1. Development of individual capacities of firms
2. Adoption of a development approach that builds formal and informal networks of social interactions adaptable to dynamic nature of development.

Implementation, on the other hand, should include collective action of various actors, fine tuning of projects according to local dynamics, and the commitments of local actors in the project.

In order to accomplish such development perspective, two main issues might be tackled here. First is related to "the institutional thickness" whose concept has been widely used recently by the students of regional development in an attempt to explore the part local institutions can play in achieving sustainable development objectives. It has been suggested that institutional thickness resulting from intense socio-cultural relations based on mutual identity and trust, contributes to the success (or failure) of regional economic development strategies. In addition, institutional thickness is based on a tradition of collective rather than sectional or individual representation, thus playing an instrumental role in how socio-economic and political systems evolve over time. The thicker the institutionalisation, the higher the institutional learning capacity of institutions to cope with larger projects by pooling resources under the unifying banner of shared individual and territorial interests. Growing cooperation and coordination of activities thus helps to create an institutionally thick environment – i.e. a high level of interaction and the consciousness of being engaged in a "common project" among the various institutions – which the actors in turn utilize in order to construct their specialized knowledge as well as to expand their regional scope and exertion of influence. On the other hand, the thinner the institutionalisation, the lower the institutional learning capacity that makes people to act in sleepy provinces with little or even no capacity to upgrade themselves and their places.

What we have observed during our study is that there is very low institutional thickness in the region; and the joint orchestrated actions of various local institutions are relatively limited in order to facilitate networks as a tool for stimulating economic development exploiting synergies. Under these circumstances, GIDEMs, in their future role, might make a larger room with plausible policies for such collective and coordinated actions that would generate such institutional thickness in the region, upgrading itself to a better organisational position.

Another related concept taken into an account is about "commitment". For a reasonable local development intervention, any approach without a solid formulation of proactive subjects seems to be stillborn. This is, of course, more than a stakeholder participation representation as applied in many current projects and planning processes, which has proven elusive in practice and apparently little more than token consultation with no decision-making power in the hands of agents concerned. When talking about the simultaneous determination action and agents, one should start thinking about the level of commitments of agents instead of their conventional kind participation. In order to initiate development, pro-active agents should be in a position in which they should determine the action and roles to which they commit themselves. Commitment, in this sense, refers to roles and responsibilities taken by local agents for development with their trust to their localities and to their activities to unlock to stalemate dynamics that cause underdevelopment.

Under the peculiar conditions of the region, the commitment level of local agents in the development process appears to be very low. For instance, young bright people having much to offer to their provinces in terms of development mostly think to migrate if they can find any alternative since they hardly see prospects in their hometowns in the foreseeable future. In another instance, wealthy regional "Diaspora" members living outside the region are apparently reluctant to make investments since they, to some extent, reckon that their efforts might vanish into thin air. Again, GIDEMs in their future role may focus this issue through solid commitment models capable enough to guide efforts and to frame the hopes and aspirations in making a trigger effect in the region.

Fighting poverty, without a doubt, is an important component of the regional development process. The recent deepening poverty levels and engendering new forms and dynamics of poverty in the country and the region accentuate the importance of the phenomenon in any kind of economic development intervention, considering the fact that the fruits of economic growth do not automatically trickle down to the poor. The regional economy may grow in the foreseeable future and GIDEMs will surely make its contribution basically in term of their regional development interventions in general, of their activities aiming at increasing employment in particular. But, left to itself, to repeat the basic concern here, economic growth may not automatically lead to poverty eradication. What is needed is some policy adjustments to make this growth pro-poor. Although taming the surging level of poverty through pro-poor policies is surely outside of the scope of the GIDEMs activities, in the future they may make important contributions in two broad categories in this manner: High skilled employment opportunities should be widened by way of increasing productive investments with particular attention to a high road to development where upgrading of the market, know how and skilled labour are at the center of the strategy instead of a low road to development with low cost unskilled labour without any capability improvement for the poor to combat against their poverty conditions.

Furthermore, as mentioned above, the region has still had persistent gender-related disparities that pave the way for a depressing picture of absolute poverty conditions for women. In the men-dominated culture in the Southeast, the more likely it is for men to shut women out of the economic picture and the more likely it is to be proud for this practice where obedience and motherhood are the real virtues. In fact female participation to work ratio is very low since women are discouraged from being economically active. Thus, for women-based poverty eradication, GIDEMs should tackle the issue with more solid policy formulations.

The last but not the least, despite their experience and the positive change that they had been through, GIDEM offices still have problems for self financing due to the social product character of the services with wide externalities. Keeping in mind the need for finance raising, GIDEMs should also focus on the designing of individual services to that may yield financial returns. Yet we suggest that both technical and financial external supports are still crucial for the success of such institutions whose ultimate target is local development.

In conclusion, it is possible to say that Turkey has still been a country with large and entrenched inequalities and the distance between different social groups and regions have remained wide and persistent. The GAP region has of course experienced this grim reality despite a slightly significant improvement in aggregated social indicators in terms of economic development in the recent years. Under these circumstances, GIDEM offices in the GAP region, since their inception, have tried to constitute themselves a good brand of regional interventions for economic development. Of course, success cannot be forced at a single stroke and thus GIDEMs role may be highly limited to reduce the disparities. However, according to the impact analysis, GIDEM offices have apparently taken important steps for bottom up planning, widening up horizons of entrepreneurship, improving the business culture despites its limited project budget. In the end, it is the institution which can give hopes to many people for the bottom up planning, and which may prove itself as a catalyser of development.

QUESTIONNAIRE

ANNEX 1

GAP - GİDEM EKONOMİK ETKI DEĞERLENDİRMESİ ANALİZİ

GİDEM hizmetlerinin iktisadi değerlendirmesini yapmak ve bundan sonraki hizmetlerinde gerekli ve anlamlı düzenlemeleri oluşturabilmek için Adıyaman, Şanlıurfa, Mardin, Diyarbakır illerinde bir değerlendirme çalışması yapılmaktadır. Verdiğiniz cevaplar tamamen gizlilik ilkelerine uygun olarak değerlendirilecek ve değerlendirme bitiminde soru kağıtları imha edilecektir.

Araştırmacı:

Firma:

Cevaplayanın Adı ve Soyadı*:

Cevaplayanın Ünvanı:

Tarih:

Lütfen cevaplayıcının iş kartını bu forma iliştirin.

1. Firmanızın iktisadi faaliyet kolunu belirtiniz ____
2. Firmanız hangi yılda kurulmuştur? ____
3. Firmanızın merkezi hangi ildedir? ____
4. Firmanızın GİDEM'e hizmet almak için başvurduğu tarihte çalışan profili ve niteliksel dağılımı nasıldı?

Toplam çalışan sayısı					Lisansüstü	
Çalışan sayısı		kadın		erkek	Üniversite	
Yönetici sayısı		kadın		erkek	Lise	
Teknik eleman*		kadın		erkek	Diğer	
İşçi		kadın		erkek		

**Teknik Lise mezunu tekniker ve mühendis*

5. Firmanızın şu an itibarıyla çalışan profili ve niteliksel dağılımı nasıldır?

Toplam çalışan sayısı					Lisansüstü	
Çalışan sayısı		kadın		erkek	Üniversite	
Yönetici sayısı		kadın		erkek	Lise	
Teknik eleman*		kadın		erkek	Diğer	
İşçi		kadın		erkek		

**Teknik Lise mezunu tekniker ve mühendis*

6. GİDEM'den şu ana kadar aşağıdaki hizmetlerden hangilerini aldınız ya da almayı düşündüğünüz hizmet var mı?

HİZMET	KAÇ KEZ	NE ZAMAN (yıl / yıllar)	KATILIM (kişi sayısı)	ALACAĞIM	NE ZAMAN (yıl / yıllar)
EĞİTİM					
☐ Ticaret ve Yatırım					
☐ İş İdaresi					
☐ Kalite ve Standartlar					
☐ Sektörel Eğilimler					
☐ Yatırım Planlama					
☐ Sektör ve Kapasite Geliştirme					
DANIŞMANLIK					
☐ Ön Fizibilite					
☐ İş Planı Hazırlama					
☐ Pazar Araştırması					
☐ Makina Teçhizat Seçimi					
☐ Verimlilik Danışmanlığı					
BİLGİLENDİRME					
☐ Mevzuat					
☐ Mali Kaynaklar					
☐ Yatırım Fırsatları					
☐ Uluslararası İşbirliği / Ortaklığı Duyurusu					
☐ Sektörel Araştırmalar / Yayınlar					
☐ Fuar, Sergi, Gezi, Toplantı					
DİĞER					

7. GİDEM'den aldığınız hizmetlerden nasıl haberiniz oldu?

- ☐ GİDEM'e biz başvurduk
- ☐ Sanayi ve/veya Ticaret Odası'na başvurduk
- ☐ Onlar bize ulaştı
- ☐ Diğer ____________________

8. Aşağıda listelenen "Yerel Ekonomik Kalkınmaya Yönelik Faaliyetlerden" herhangi birine dahil oldunuz mu?

	EVET	HABERİM YOK	İLGİLENMİYORUM	NE YARAR SAĞLADI?	BEKLENTİLER
Tekstil / konfeksyon sektöründe kümelenme (tüm illere)					
Kadın Girişimciliğinin Geliştirilmesi (tüm illere)					
Uluslarasılaştırma (Dış Ticaret Plani Hazırlanması, e-ticaret Portalına Kayıt, vb.) (tüm illere)					
Adıyaman Tekstil Eğitim Merkezi (ATEM)					
Adıyaman Sarımsak Sektörünün Geliştirilmesi					
Şanlıurfa Ekolojik Tarımın Geliştirilmesi					
Şanlıurfa Tıbbi ve Aromatik Bitkiler Sektörünün Geliştirilmesi					
Şanlıurfa Solar Enerji ile Kurutulmuş Gıda Üretimi Projesi					
Şanlıurfa Ekolojik Endüstriyel Ürünlerin Geliştirilmesi (kümelenme programı)					
Diyarbakır Dicle Üniversitesi Girişimcilik Merkezi (DÜGİMER)					
Diyarbakır Mermere Dayalı Endüstriyel Ürünlerin Geliştirilmesi					
Mardin Atıl Yatırımların Değerlendirilmesi (2005)					
Mardin Üzüm ve Bağcılık Sektörünün Geliştirilmesi					
Mardin Gümüş El İşçiliğinin Geliştirilmesi					

9. Tabloda kendi iş alanınıza yönelik faaliyetlerden herhangi birine "ilgilenmiyorum" işaretlendiyse, sebepleri nelerdir?

____

____

____

____

10. GİDEM'in birlikte faaliyet gösterdiği herhangi bir kurumdan işiniz ile ilgili destek aldınız mı? Hangi konuda, belirtiniz. (Örneğin, valilik, belediye, dernek, ticaret ve sanayi odası, vb.)

Kurum	Destek Konusu	Tarih	İzlenimler

11. GİDEM'den aldığınız hizmet(ler)i işinizde nasıl kullandınız?
   - İşimde kullanmadım (bu işaretlendi ise 12. soruya geçiniz)
   - Yeni yatırım alanları tanımladım.
   - Ürünlerim için yeni pazarlar buldum.
   - Makina ve teçhizat aldım.
   - Yeni iş ortaklarıyla tanıştım / potansiyel iş ortakları belirledim.
   - Uygun yatırım teşviklerine başvurdum / başvurmaya karar verdim.
   - Finansman için başvurdum ______________ neye?
   - İşimle ilgili hukuki ve yasal düzenlemeler yaptım.
   - Diğer ______________

12. Eğer alınan GİDEM hizmetleri iş için kullanılmadıysa, nedenleri nelerdir?
   - Elde ettiğim sonuç kalite ve miktar olarak işimde kullanılacak nitelikte değildi.
   - Hizmet takibi maliyetlerini karşılamaya gücüm yetmedi.
   - Diğer ______________

13. Aldğınız hizmetle için bir ücret ödediniz mi?
   - Evet
   - Hayır *(ise 15. soruya geçiniz.)*

Evetse:

Hizmet Adı	**Ödenen Miktar**	
______	______	YTL
______	______	YTL
______	______	YTL
______	______	YTL
______	______	YTL

Ödendiyse:

14. Aynı servisi piyasada ücret karşılığı almış olsaydınız, size olan maliyeti GİDEM'inkine kıyasla nasıl olurdu?
   - % ______ artardı
   - değişmezdi
   - % ______ azalırdı

Ödeme, ödememe veya ücretle ilgili cevaplayanın açıklamalarını buraya not alınız.

____
____
____

15. Firmanızın üretici firma mı, satıcı firma mı olduğunu belirtiniz. Ürün yelpazesini belirtiniz.
   - Üretici
   - Satıcı (Tüccar) *(ise 25. soruya geçiniz.)*

Ürünler:

______ ______
______ ______
______ ______

Üretici seçeneği işaretlendiyse 16 - 24 arasındaki soruları cevaplayınız.

16. Ürünleriniz ile ilgili tasarım çalışmalarınız var mı?
   - Evet
   - Hayır

Varsa açıklayınız ______________
____
____

17. Ar-Ge faaliyetiniz var mı?
   - Evet
   - Hayır *(ise 20. soruya geçiniz.)*

18. GİDEM hizmetlerinden faydalanmaya başladıktan sonra herhangi bir Ar-Ge faaliyetine başladınız mı?
   - Evet
   - Hayır *(ise 20. soruya geçiniz.)*

19. GİDEM'in firmanızın Ar-Ge faaliyetlerine başlamasına etkisi oldu mu?
   - Evet
   - Kısmen
   - Hayır

20. GİDEM'in hizmetlerinin gelecekte Ar-Ge faaliyetlerine başlamada ya da mevcut Ar-Ge faaliyetlerini arttırmada etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır

21. Tasarım tescili belgeniz, tescilli bir markanız, patent ve/veya faydalı modeliniz var mı?
   - Evet
   - Hayır *(ise 24. soruya geçiniz.)*

Evetse,

Sayı ______________
Tescilli Marka ______________
Faydalı Model ______________
Tasarım Tescili Belgesi ______________

22. GİDEM'den hizmet aldıktan sonra tasarım tescili belgesi, tescilli marka, patentlerinizde ve faydalı modellerinizde nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
   - Artma
   - Azalma
   - Değişim Yok

   Sayı ______

Artma Varsa,

23. GİDEM'den aldığınız hizmetin tasarım tescili belgesi, tescilli marka, patentlerinizde ve faydalı modellerinizdeki artışa etkisi oldu mu?
    Evet Kısmen Hayır
24. GİDEM hizmetlerinin gelecekte yeni tasarım tescili belgesi, tescilli marka, patentlerinizde ve faydalı modellerinizin geliştirilmesine etkisi olabilir mi?
    Evet Kısmen Hayır
25. GİDEM'den önce ve sonra aşağıdaki hangi idari ve üretim kalite sertifikalarına sahip oldunuz veya olacaksınız?

	GİDEM'den önce olduk	GİDEM'den sonra olduk	Yakın gelecekte olacağız
ISO			
ISO 9001			
ISO 14001			
ISO 13485			
TSE			
OHSAS 18000 (iş sağlığı ve güv. yön. sis.)			
HACCP (Gıda güv. yön. sis.)			
CE (Asgari güv. koş. belg.)			
TS 16949			
Diğer			

Yok *(bu seçeneği işaretlediyseniz 27. soruya geçiniz.)*

**" GİDEM'den sonra olduk" seçeneklerinden hiç birini işaretlemediyseniz 27. soruya geçiniz.*

26. GİDEM'in idari ve üretim kalite sertifikaları almasına etkisi oldu mu?
    Evet Kısmen Hayır
27. GİDEM hizmetlerinin gelecekte yeni idari ve üretim kalite sertifikaları alınmasına etkisi olabilir mi?
    Evet Kısmen Hayır
28. Son 5 yıl içinde kullanmaya başladığınız yeni finansal kaynaklar var mı? Varsa, miktar ve süresni belirtiniz.

Kredi Türü	Ne Kadar (YTL)	Süre (Yıllık)
Banka Kredisi		
Devlet Desteği		
AB Hibe Fonları		
Halkbank KOBİ Kredisi		
Diğer		

29. Aşağıdaki mali yönetim araçlarından hangilerini düzenli olarak uygulamaktasınız?
    Bütçeleme Aylık Bütçe Kontrolü
    Maliyet Muhasebesi Hiçbiri*

**" Hiçbiri" seçeneğini işaretlediyseniz 31. soruya geçiniz.*

30. Bu mali yönetim araçlarının uygulanmasında GİDEM'den aldığınız hizmetin ne ölçüde etkisi vardır?

	Bütçeleme	Aylık Bütçe Kontrolü	Maliyet Muhasebesi
Tamamen			
Kısmen			
Hiç			
Etkisi Bekleniyor			

31. Firmanızda aşağıdaki yapıların oluşmasında GİDEM'in bir etkisi oldu mu?

	Firmamda Yok	Firmamda Var	
		GİDEM'in Etkisi Yok	GİDEM'in Etkisi ile Oldu
Aile Dışından Yönetici			
Ayrı Pazarlama Birimi			
Ayrı Satın Alma Birimi			
Ayrı Finans Birimi			
Ayrı İnsan Kaynakları Birimi			
Yıllık veya Çok Yıllık İş Planı			

32. GİDEM'den önce ve sonra periyodik olarak aşağıdaki araştırmaları yapmaya başladınız mı?

	GİDEM'den Önce Başladık	GİDEM'den Sonra Başladık	Yakın Gelecekte Başlayacağız
Pazar Araştırması			
Müşteri Talep Tahmin Araştırması			
Müşteri Memnuniyeti Araştırması			

33. GİDEM'den aldığınız hizmetin periyodik olarak yapılan araştırmaların artmasında etkisi oldu mu?
    Evet Kısmen Hayır
34. GİDEM hizmetleriningelecekte periyodik olarak araştırma yapılmasına veya mevcut araştırmaların artışına etkisi olabilir mi?
    Evet Kısmen Hayır
35. Firmanızın sermaye yapısı nasıldır?
    Anonim şirket
    Limited şirket
    Hakiki şahıs İşletmesi
    Diğer (Belirtiniz)

36. Firmanızın kuruluşu nasıl gerçekleşti? *(Konuşulan kişi şirketin sahibi değilse, yanıtlar şirketin sahibi adına alınmalıdır.)*
- Kendim kurdum.
- Eşim / Akrabalarım ile kurdum.
- Arkadaşlarımla / meslektaşımla / sınıf arkadaşımla / vb. kurduk.
- Bir devlet firmasını satın / devraldım.
- Aile bireylerinden satın aldım.
- Aile dışından birinden satın aldım.
- Şirket aileden bana geçti ____________ kaçıncı kuşak?
- Diğer

37. Şirketin ortakları varsa, kimlerdir? *(Toplam 100% olacak.)*
- Baba, kız kardeş, erkek kardeş (GAP Bölgesinde Yaşayan) % ________
- Baba, kız kardeş, erkek kardeş (Başka Bölgede Yaşayan) % ________
- Diğer akrabalar % ________
- GAP bölgesinde yerli ortak % ________
- İstanbul'da yaşayan hemşehri % ________
- Diğer bölgelerdeki hemşehriler % ________
- Yabancı yatırımcılar % ________
- İşçiler % ________
- Diğer %

%100

38. Son 5 yılda yeni yatırım yaptınız mı ve yaptıysanız bu yatırım türleri nelerdir?
- Evet
- Hayır *(ise 40. soruya geçiniz.)*

Evetse, yatırım türleri nelerdir?

a. Yeni bir sektöre / iş koluna yatırım ____________ ne?
- aynı firma ile
- yeni firma kurarak

b. Mevcut şirkete yatırım:
- çalışan sayısında artış ________ kişi
- yeni fabrika a_1. yaklaşık değeri ________ a_2. yeri ________
- makine ekipman b_1. yaklaşık değeri ________ b_2. yeri ________
- arsa/dükkan/depo c_1. yaklaşık değeri ________ c_2. yeri ________
- diğer d_1. yaklaşık değeri ________ d_2. yeri ________

39. Bu yatırımın gerçekleşmesinde GİDEM'in katkıları oldu mu?
- Evet
- Kısmen
- Hayır

40. Yıllara göre yurt içi satışlarınız nasıl değişti?

	Yıllar	2002	2003	2004	2005	2006
Yurt içi	Gelir (YTL)					
	Önceki yıla göre yüzde değişim*					

*Rakamları net alamıyorsak bir yılın rakamını yazıp diğerlerini yüzde olarak yazabiliriz.

41. Yurt içi satışlarınıza GİDEM'in olumlu katkıları olduğunu düşünüyor musunuz?
- Evet
- Kısmen
- Hayır
- Etkisi bekleniyor

42. GİDEM hizmetlerinden faydalanmaya başladıktan sonra Türkiye içerisinde daha önce satış yapmadığınız yeni pazarlara girdiniz mi?
- Evet
- Hayır *(ise 44. soruya geçiniz.)*

43. GİDEM hizmetlerinin Türkiye içerisinde yeni pazarlara girişte etkisi oldu mu?
- Evet
- Kısmen
- Hayır

44. GİDEM hizmetlerinin gelecekte Türkiye içerisinde yeni pazarlara girişte etkisi olabilir mi?
- Evet
- Kısmen
- Hayır

45. Son 5 yılda ihracat yaptınız mı?
- Evet
- Hayır *(ise 54. soruya geçiniz.)*

46. GİDEM'le çalışmadan önce ihracat yapıyor muydunuz?
- Evet
- Hayır

47. Yıllara göre ihracat geliriniz nedir?

	Yıllar	2002	2003	2004	2005	2006
İhracat	Gelir (para birimini belirtiniz)					
	Önceki yıla göre yüzde değişim*					

*Rakamları net alamıyorsak bir yılın rakamını yazıp diğerlerini yüzde olarak yazabiliriz.

48. İhracatınıza GİDEM'in olumlu katkıları olduğunu düşünüyor musunuz?
- Evet
- Kısmen
- Hayır
- Etkisi bekleniyor

49. GİDEM hizmetlerinden faydalanmaya başladıktan sonra daha önce satış yapmadığınız yeni ülke / uluslararası pazarlara girdiniz mi?
- Evet
- Hayır *(ise 51. soruya geçiniz.)*

50. GİDEM hizmetlerinin yeni ülke / uluslararası pazarlara girişte etkisi oldu mu?
- Evet
- Kısmen
- Hayır

51. GİDEM hizmetlerinin gelecekte yeni ülke / uluslararası pazarlara girişte etkisi olabilir mi?
- Evet
- Kısmen
- Hayır

52. GİDEM'den hizmet aldıktan sonraki süre içerisinde ihraç ettiğiniz ürün sayısında artış oldu mu?
- Evet
- Hayır *(ise 54. soruya geçiniz.)*

Evetse,

53. GİDEM'den aldığınız hizmetin ihraç ettiğiniz ürün sayısında artışa etkisi oldu mu?
- Evet
- Kısmen
- Hayır

54. GİDEM hizmetlerinin gelecekte ihraç ettiğiniz ürün sayısındaki artışa etkisi olabilir mi?
Evet Kısmen Hayır

55. GİDEM hizmet(ler)iyle doğrudan ilgili **uluslararası lisanslı üretim anlaşmanız** var mı?
Evet
Hayır *(ise 57. soruya geçiniz.)*

Evetse,
56. GİDEM'den hizmet aldıktan sonra uluslararası lisanslı üretim anlaşmalarınızda nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
Artma Azalma Değişim Yok **Sayı** ______

57. Yabancı sermayeniz var mı?
Evet Hayır *(ise 60. soruya geçiniz.)*

Evetse,
58. GİDEM'den hizmet aldıktan sonra yabancı sermayenizde nasıl bir değişim oldu? Artış ya da azalış yüzdesini belirtiniz.
Artma Azalma Değişim Yok **Yüzde** ______

59. GİDEM'den aldığınız hizmetin yabancı sermayenizdeki artışa etkisi oldu mu?
Evet Kısmen Hayır

60. GİDEM hizmetlerinin gelecekte yabancı sermayenin oluşmasına veya mevcut yabancı sermaye oranının artışına etkisi olabilir mi?
Evet Kısmen Hayır

61. Yabancı şirketlerle yatırım anlaşmanız var mı?
Evet Hayır *(ise 64. soruya geçiniz.)*

Evetse,
62. GİDEM'den hizmet aldıktan sonra yabancı şirketlerle yaptığınız yatırım anlaşmalarında nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
Artma Azalma Değişim Yok **Sayı** ______

Artış varsa,
63. GİDEM'den aldığınız hizmetin yabancı şirketlerle yaptığınız yatırım anlaşmalarındaki artışa etkisi oldu mu?
Evet Kısmen Hayır

64. GİDEM hizmetlerinin gelecekte şirketlerle yaptığınız yatırım anlaşmalarının yapılmasına veya mevcut anlaşmaların artışına etkisi olabilir mi?
Evet Kısmen Hayır

65. Uluslararası ihalelere katılıyor musunuz?
Evet Hayır *(ise 68. soruya geçiniz.)*

Evetse,
66. GİDEM'den hizmet aldıktan sonra katıldığınız uluslararası ihale sayısında nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
Artma Azalma Değişim Yok **Sayı** ______

Artış varsa,
67. GİDEM'den aldığınız hizmetin katıldığınız uluslararası ihale sayısındaki artışa etkisi oldu mu?
Evet Kısmen Hayır

68. GİDEM hizmetlerinin gelecekte uluslararası ihalelere katılımda veya mevcut ihale sayısının artışına etkisi olabilir mi?
Evet Kısmen Hayır

69. Son 5 yılda yurtiçi veya yurtdışı fuarlara katıldınız mı?
Evet Hayır *(ise 72. soruya geçiniz.)*

Evetse,
70. GİDEM'den hizmet almaya başladıktan sonra yurtiçi ve yurtdışı fuarlara katılımınız nasıl değişti? Artış ya da azalış sayısını belirtiniz.

	Arttı	Azaldı	Değişim Yok	Sayı
Yurtiçi Fuarlar				
Yurtdışı Fuarlar				

Artış varsa,
71. GİDEM'den aldığınız hizmetin yurtiçi ve yurtdışı fuarlara katılımınızdaki artışa etkisi oldu mu?
Evet Kısmen Hayır

72. GİDEM hizmetlerinin gelecekte yurtiçi ve yurtdışı fuarlara katılıma veya mevcut katılımların artışına etkisi olabilir mi?
Evet Kısmen Hayır

73. GİDEM'den önce ve sonra aşağıdaki hangi bilişim yapılarını kullandınız?

	GİDEM'den önce	GİDEM'den sonra	Yakın Gelecekte
Network Bağlantısı			
Etkin İnternet Kullanımı			
Düzenli Olarak Güncellenen Web Sayfası			
e-ticaret			
Bilgisayarlı Muhasebe Uygulaması			
Bilgisayar Destekli Üretim Uygulamaları			
Bilgisayar Destekli Ar-Ge Uygulamaları			

"GİDEM'den sonra kullandık" seçeneklerinden en az birini işaretlemediyseniz 75. soruya geçiniz.

74. GİDEM'in bilişim yapılarının kullanılmasında etkisi oldu mu?
Evet Kısmen Hayır

75. GİDEM"in hizmetlerinin gelecekte bilişim yapılarının kullanılmasında etkisi olabilir mi?
Evet Kısmen Hayır

76. GİDEM kapsamındaki danışmanlık, eğitim, bilgilendirme ve diğer hizmetler firmanızın gereksinim duyduğu hizmetleri ne ölçüde karşılamaktadır?
- Tamamen
- Kısmen
- Hiç

77. GİDEM'den şu ana kadar aldığınız eğitimlerin firma verimliliğine veya satışlara katkısı **oldu mu / olacak mı?**
- Evet
- Kısmen
- Hayır
- Etkisi bekleniyor

78. GİDEM'in tüm hizmetlerinden haberiniz oluyor mu? Nasıl?
- Evet
- Hayır

Evetse, nasıl?
- İnternet
- Yayınlar
- Diğer ____

79. Aşağıdaki GİDEM hizmet kategorilerinin performanslarını nasıl değerlendiriyorsunuz?

	Etkili	Kısmen Etkili	Etkisiz
Kurumsallaşma			
Uluslarası (yabancı ortak, ortak yatırım anlaşması, lisanslı üretim)			
İhracat			
Yeni Ulusal Pazarlar			
Girişimcilik, Yeni Yatırımlar			

80. GİDEM hizmetleri ile ilgili beklentilerinizi, taleplerinizi GİDEM ofisine iletiyor musunuz?
- Evet
- Hayır

Evetse, hangi kanallarla?
- e-posta/internet yoluyla
- Telefon
- Toplantı yoluyla
- Dernekler/kurumlar aracılığıyla
- Diğer ____

Hayırsa, neden?

____

81. Genel olarak GİDEM'in hizmetlerinden ne kadar memnunsunuz?
- Çok memnunum
- Memnunum
- Kararsızım
- Memnun değilim
- Hiç memnun değilim

82. 2008 yılından itibaren GİDEM hizmetlerinin ücretlendirilmesi durumunda firmanızın GİDEM'den hizmet talebinde nasıl bir değişim olabileceğini düşünüyorsunuz?
- Artarak devam eder
- Değişim olmaz
- Azalarak devam eder
- Hizmet talebinde bulunulmaz

83. GİDEM'in faaliyet gösterdiği ortamdaki aktörleri/etkenleri GİDEM'in performansına etkileri/katkıları açısından değerlendiriniz.

	Olumlu	Etkisi Yok	Olumsuz
Coğrafi Yapı			
Sektörel Yapı			
AB Projeleri			
Teşvik Yasaları			
İLDEKI KURUMSAL YAPILAR			
Valilik			
Belediye			
Ticaret Odası			
Sanayi Odası			
Diğer (isim belirtiniz)			
____			
____			
____			
____			

84. GİDEM'in başarısını olumsuz etkileyen en önemli faktör sizce nedir?

____

85. GİDEM'in daha iyi hizmet verebilmesi için sizce neler yapılmalıdır?
- Daha iyi hizmet verilsin
- Daha fazla çeşitte hizmet verilsin
- Daha nitelikli uzman kullanılsın
- İhracata daha çok yoğunlaşılsın
- Diğer ____

86. Ne gibi hizmetler almay istersiniz?

____

87. GİDEM'den aldığınız hizmetlerin gelecekte size ne ölçüde bir etki yapacağını düşünüyorsunuz?
- Tamamen olumlu
- Kısmen olumlu
- Hiç
- Olumsuz

ANNEX 2: IN-DEPTH INTERVIEWS WITH CLIENTS

Araştırmacı:

Konuşulan Firma Adı / Sektörü:

Cevaplayanın Adı:

HİZMET ALAN FİRMALARLA DERİNLEMESİNE GÖRÜŞME

1. GİDEM ofisiyle ilk bağlantıya nasıl geçtiniz?
2. Böyle bir kurumun kuruluyor olması sizde/ildeki iş çevresinde heyecan ve motivasyon yarattı mı?
3. İlk kurulduğu dönemdeki yaklaşımınızla şimdiki yaklaşımınız arasında bir değişiklik oldu mu?
4. GİDEM'den ne tür hizmetler aldınız? Aldığınız hizmet yoğunluğunda yıllar içerisinde bir değişim oldu mu? Oldu ise, ne tür? Neden?
5. GİDEM'in (sizin şirketiniz açısından) belli başlı başarıları neler olmuştur? Bunun yanı sıra başarısızlıkları sizce nedir?
6. GİDEM'i başarısız ya da yetersiz gördüğünüz hususlarda bu başarısızlığın kaynağı nedir? Bu eksikliklerin giderilmesi için neler yapılmalıdır?
7. Bu konulardaki fikir ve önerilerinizi GİDEM'e iletme imkanı buldunuz mu? Bulduysanız, dikkate alındığı / alınacağını düşünüyor musunuz?
8. İlinizdeki GİDEM ofisi kurulduğundan bu yana, piyasada belirli sektörel gelişimler, değişimler oldu mu? GİDEM'in bu gelişmelerdeki payı sizce nedir?
9. İlinizde önceden faaliyet göstermiş ve/veya göstermekte olan farklı 'yerel kalkınma' odaklı kurum ve kuruluşlar nelerdi? GİDEM'in bunlardan farklı, yenilikçi, bir yaklaşımı oldu mu?
10. Sizce GİDEM hizmetleri devam etmeli mi? Yeni hizmet alanları olabilir mi? Mevcut hizmet alanlarının yeniden kurgulanması ve/veya geliştirilmesine dair görüşleriniz nelerdir?
11. Hiç ücretli hizmet aldınız mı?
12. GİDEM, hizmetlerini ücretlendirme şeklinde bir yeniden yapılandırmaya gitse; bu hizmetlerden yararlanmayı düşünür müsünüz? Önerileriniz nelerdir?

ANNEX 3: IN-DEPTH INTERVIEWS WITH NON-CLIENTS

HİZMET ALMAYAN FİRMALARLA DERİNLEMESİNE GÖRÜŞME

1. Şehrinizde bir GİDEM ofisi olduğundan haberiniz var mı? Varsa nasıl haberiniz oldu, onlar mı ulaştı, yoksa dolaylı kaynaklardan mı duydunuz?
2. Şehrinizdeki GİDEM ofisinin ve genel olarak GİDE'in faaliyetleri konusunda bilginiz var mı?
3. Verdikleri herhangi bir hizmet konusunda size ulaştılar, bilgi verdiler mi? Hiç doğrudan iletişime geçmeyi denediniz mi?
4. Sizin bu kurumun faaliyetlerinden/etkinliklerinden uzak durmanızın nedeni nedir? Nasıl olsaydı ilişkide olmayı isterdiniz?
5. GİDEM'den hizmet alan ve memnun kalan bir firmayla ilişkiniz oldu mu?
6. GİDEM'den hizmet alan ve memnun kalmayan bir firmayla ilişkiniz oldu mu?
7. Sizce GİDEM şehrinizin kalkınmasında bir rol oynayamaz mı? Evetse nasıl, hayırsa neden?
8. GİDEM'in yapısı hakkında biraz bilginiz varsa, sizce eksik olan taraflar neler? Olumlu tarafları neler?
9. Kendi iş kolunuzda üretim, pazarlama, ihracat (satış) konularında ya da şirketin yönetimi konusunda güncel bilgilere ihtiyaç duyuyor musunuz? Bunları nere-den sağlıyorsunuz?
10. Sizce GİDEM kurulduğundan bu yana şehrin ekonomisine pozitif bir etki oluşturabildi mi? Ne gibi?

Bulanık Algı Haritalama Sorusu

**Soruyu sormadan önce yöntemi kısaca tarif ediniz.*

Genel soru: İlinizde, faaliyet ve sektör alanınızı destekleyen (ulusal ya da uluslarası) kurumların rolünü nasıl algılıyorsunuz?

Uygulama Yöntemi:

1. Soruyu cevaplarken kişinin verdiği cevaplardan kavramları alt alta not alınız
2. Cevap bitince kişi kavram eklemek isterse listeye ekleyiniz
3. Her kavram bir balonun içinde olacak şekilde grafiği çiziniz.
4. Kavramların arasındaki ilişkiyi ok yönü de belirterek (+ çok, +orta, +az) ve (-çok, -orta, -az) biçiminde not alınız. Kişinin birbiri ile ilişkili olmadığını söylediği kısımları boş bırakınız.

ANNEX 4: IN-DEPTH INTERVIEWS WITH GIDEM OFFICES

GİDEM ile DERİNLEMESİNE GÖRÜŞME

1. GİDEM'in yerel kalkınmaya sizce nasıl bir etkisi oldu? GİDEM öncesi ilinizin yerel kalkınmadaki konumu nasıldı?
2. Yerel kalkınmada bir model kurum olarak GİDEM'in yerini nasıl görüyorsunuz? örneğin; GİDEM'in faaliyet gösterdiği 4 il açısından farklılaşan yaklaşımlar nedir yahut ne olmalıdır?
3. GİDEM sunduğu "bilgilendirme, danışmanlık, eğitim, vb. (fırsat pencereleri)" hizmetlerini nasıl bir istişare & seçme & örgütleme sürecine göre kurguluyor? GİDEM ofisinin faaliyet gösterdiği ilin özellikleri ile ne ölçüde ağırlık taşıyor?
4. GİDEM projesinin süreç planını & iş aşamalarını nasıl hazırladınız? (Hizmetlerin nitel - nicel dağılımlarıtablo üzerinden tartışabiliriz.) İş planlama sırasında faydalandığınız işletim - yönetim araçlarınız ve yöntemleriniz ('işletme tanı sistemi', faaliyet kayıtlarının derlenmesi, vb.) ve planlanan - uygulanan projelerinize içsel ve entegre kolaylaştırıcı teknik ve teknolojileriniz (management inf. sys. software kit'leri) nedir?
5. Proje ilk başladığından bu yana firmalara GİDEM'e yaklaşımlarında ne tür değişimler oldu? İldeki kurum ve kuruluşların olaya yaklaşımları ve GİDEM ile operasyonel anlamda ortaklaşma düzey ve biçimleri bu süreçte nasıl rol oynadı? İlin sosyo-ekonomik yapısı ve iş üretme kültürü - alışkanlıkları GİDEM'in çalışma yapısını ne oranda etkilemiştir? Faaliyet gösterilen ildeki ortama (idari, kültürel, sektörel) uyum sağlamak yönünde GİDEM ne tür yöntemsel farklılıklar üretmiştir?
6. Kadın girişimciliği konusunda GİDEM ofisi faaliyete geçtikten sonra nasıl bir değişim yaşandı? Kadınların iş hayatına katılım düzeyinde ve yeni iş kurma konusunda neler yaşandı?
7. GİDEM'in "Start-up" firmaların kurulması sürecinde nasl bir etkisi & etkinliği oldu? İlde yeni sektör ve iş kollarında şirketler kuruldu mu? Yaklaşık ne kadar iş fikir ve projesi şirkete dönüştü?
8. Hizmetlerin kurgulanmasında firmaların katılımı ve katkısı ne düzeyde ve hangi kanallr üzerinden oluyor? GİDEM'in diğer KOBİ destekleyici kuruluşlarla ilişkisi ve ulusal - uluslararası işbirliklerini nasıl tariflersiniz?

GİDEM Ofisi Hizmet Kapasite Bilgileri - Tartışma Alanı

9. Planlanan ancak gerçekleşmeyen aktiviteler olmuş? Gerçekleşmeme sebepleri ne olabilir?
10. Planlamadan gerçekleştirilen aktiviteler olmuş mu? Bu durumu ortaya çıkaran etkenler nedir?

ANNEX 5: IN-DEPTH INTERVIEWS WITH LOCAL INSTITUTIONS

YEREL KURUMLARLA DERİNLEMESİNE GÖRÜŞME

1. Şehrinizin (Sanayi ve Ticaret Odası) olarak şehrin ekonomisindeki yerinizi nasıl tanımlıyor ve değerlendiriyorsunuz?
2. Farklı sektörler ilişkileriniz, işbirliğiniz nasıl? Neler yapılıyor? (idari birimler, dernekler, odalar)
3. Bu aktörler içerisinde GİDEM'in diğerlerinden ayrı bir konumu / yeri olduğu söylenebilir mi? (evetse nasıl, hayırsa neden?)
4. Şimdiye kadar GİDEM'le ne tür ilişkilerniz oldu, sonuçları ne oldu?
5. GİDEM'in kurum yapısındaki olumlu / olumsuz yönler nelerdir?
6. Sizce GİDEM kurulduğundan beri şehrinizin ekonomisinde bir gelişme oldu, firmaların kapasitesi arttı mı?