ECONOMIC IMPACT ASSESSMENT OF GIDEM PROJECT

GAP Entrepreneur Support Centers Project
July, 2007
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LIST OF ACRONYMS & ABBREVIATIONS

GIDEM Girşimci 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 Geliştirme Merkezi (Turkish Business Centres)
TRY New Turkish Lira
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 intended 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 assessing 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 conservatism 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 Pinarçığlu who coordinated the assessment study. We are also thankful to the research team, composed of H. Özlem Edizel, Hidaye Nur Hasirci, 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 Şekerçioğlu 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
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YÖNETİCİ ÖZETİ

Ekonominin etkisi analizi çalışmalarının genel amacı, GİDEM hizmetlerinin ekonomik büyüme ve kalkınma üzerindeki etkilerini değerlendirmektir. Özel amaçları ise,

1. Belirtilen ilkeler doğrultusunda GİDEM'in ekonomik büyüme ve kalkınmadaği etkisini değerlendirmek üzere bir metodoloji tanımlamak
2. GİDEM tarafından sunulan hizmetlerin ekonomik etkisini tahmin etmek” olarak belirlenmiştir.


GIDEM’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.

Raporun ikinci bölümünde GİDEM’in hizmet verme doğrultusuna genel seviyesi içerisinde GİDEM ileri, (Adıyaman, Mardin, Diyarbakır ve Şanlıurfa) görece olarak ülkenin en zengin geliştirmeyen biri olan GAP Bölgesinde yer almaktadır. Güneydoğu Anadolu Bölgesi, demografi, işgücü, sanayi, finans, sağlık, eğitim ve tımar yönelik göstergelerin tanımlanılıp belirlenerek sonucu, Türkiye’nin yedi coğrafi bölgesi içerisinde alınan strada yer almaktadır.

KOBİ’ler, ulusal ekonomide olduğu gibi, GAP Bölgesi ekonomisinde de büyük önem sahiptir. KOBİ’lerin Türkiye genelindeki önemini göz önünde bulundurursak, GİDEM hizmetlerine de aynı ölçüde yanыsınmak ve Türkiye ölçümünde yer alan tür firmalarının %5,18’i bu bölgede yer almaktadır. Ancak, bu ilerinin genel ekonomik kalkınmaya etkisi ve bu bölgedeki KOBİ’lerin ekonomideki rolü, Türkiye’nin batısında kalın değer ileride ile karşılaştırıldığında, özellikle sermaye birikimi ve girişimcilik kapasitesi gibi eksternaliteleri da bu geri planda olmalıdır.

Girişimcilik endeksi, bir ildeki iş potansiyeline yönelik 15 farklı göstergenin bir arada değerlendirilmesi sonucunda oluşturulmuş kapsamlı bir arıştır. Buna göre, endeks
sonuçlar: Türkiye’deki iilleri beş farklı grupta toplayarak değerlendirirken ve elde edilen sonuçlar, iler ide ciddi farklılıkların varlığına veya yorta coğrafiyada, Sondan ikinci grupta yer alan Güneydoğu Anadolu Bölgesi’ni ele alındığında ise, kendi içerisinde farklılıkların olmasına rağmen son yıllarda kalkınma adı tayi edilmekte olduğunu görmekteydik. Ancak, ekonomik anlama kalkınma adına alınan bu yoğun, çeşitli kalkınma alanında elde edilmişdir aktörü.

vii. GİDEM ofislerini etkilemekle olan dışsal faktörlere bir değerlendirme yapıldığında sonra, raporun üçüncü bölümünde etki deformörüne analiz met-

odologjisini belirterek, GİDEM hizmetleri etki değerlendirmesi dönüştürülür. 3. Saha Araştırma
er

vi. Kaynak araştırmaının bir sonucu olarak, GİDEM hizmet alan detaylandırılmış ve potansiyel etki alanları belirleme yöntemleri ile birlikte sira, öngörülemeyen bir engel, etki değerlendirme analizi met-

v. Kaynak araştırmaının bir sonucu olarak, GİDEM hizmet alanları belirli bir etkinin göstergesi olarak sıralanabilir. Altı farklı etki alanını ölçüleye yönelik belirlenen etki alanları;

• satışlar
• ihracat
• verimlilik
• yeni yatırımlar
• kurumsallaşma
• gelecekte beklenilen

olarak saranabilir. Altı farklı etki alanını ölçmeye yönelik belirlenen göstergelerin

dikkat edilmiş; tüm bunların sonucunda, alternatif veri toplama yöntemleri göz

onzde bulundurularak olası en uygun bilgiler derlenmiştir.

vi. Saha araştırmaının bir sonucu olarak, 100 adet hizmet alan firmaya anket uygulanırken,

x. Saha araştırmasının bir sonucu olarak, anket sonuçları toplama, analizler ve raporlama sistemine sahip illere yapılan araştırmaların yanı sıra, 100 adet hizmet alan firmaya anket uygulanırken, bu çalışma sonucunda, alternatif veri toplama yöntemleri göz önünde bulundurularak olası en uygun bilgiler derlenmiştir.

xi. Veri toplama aşaması anket sonuçlarının hazırlanması ve uygulanmasında kullanılan veri toplama aşamasında kullanılan veri toplama yöntemi ile birlikte, veri toplama yöntemleri göz

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xiii. Saha araştırmasının bir sonucu olarak, anket sonuçları toplama, analizler ve raporlama sistemine sahip illere yapılan araştırmaların yanı sıra, 100 adet hizmet alan firmaya anket uygulanırken, bu çalışma sonucunda, alternatif veri toplama yöntemleri göz

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Yatırımlarla dair analizlerde ise GİDEM'den yararlananlarunun sayısı genelde muhtep firmaların büyük bir çoğunluğu (82%) son beş yıl içerisinde yeni yatırımlar yapacaklarındaki bir önceliği bulunuyor. 647 firmalardan %89'unda, %78'si bu yatırımlarla GİDEM'den herhangi bir katkı bulunup bulunmadığını belirtmiş ve ancak %10'unda her iki GİDEM'den birine de herhangi bir katkı bulunan firmaların sayısı onlyu oldukça azdır.

On farklı parametrelerin bir arada değerlendirildiği sürecinde dil olarak "kurumsaldan" gelen tutum alan firmalar dördüncü kurumsalasım seviyesini seviye atteşte gruplandırılmıştır:
1. Tamamen kurumsalası,
2. Kışım kurumsalası,
3. Az kurumsalası,
4. Hiç kurumsalası.

Bu durumda, "müşteri biriktirme" ve "ulusal pazarlara katılım" gibi anlamları etrafında yapılan analizlerde, "bölgeyi etkileyecek çapta hizmetleri olduğu görülmektedir. Bunun yanında, "bölgeyi etkileyecek çapta hizmetleri" ne kadar iş fikirleri elde, restoran işletmeciliği ve bebek bakıcılığı ile sınırlı da ols;

Altınıcısızlık, "bölgeyi etkileyecek çapta hizmetleri" ne kadar iş fikirleri elde, restoran işletmeciliği ve bebek bakıcılığı ile sınırlı da ols;

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YÖNETİCİ ÖZETİ

Kasımn 2007 itibariyle, GİDEM ofisleri yeniden organizasyon yapılamasına suresi girmiş ve iki model ön plana çıkmıştır:

- şirketleşme
- dernekleşme

Her iki modelde dahilinde de, GİDEM'ler daha ciddi bir müşteri kitlesine daha profesyonel hizmet verme veがらma ve geçmişteki yapılarla daha fazla şar k getiren bir kurum olarak amaçlamaktadır. Fakat tüm GİDEM ofisleri, ücretsiz hizmetlerinin tek başına GİDEM hizmetlerinin ayaktan yeterli olmayaçağı kanısını paylaşmaktadır.

Raporun sekizinci ve sonuç bölümünde, GİDEM'in hizmetleri devam ettirecek sürdürülebilir bir kurum için bazı politika önerileri geliştirilmiştir. Temelde, bölgedeki düşük kurumsal yoğunlukla, yerel aktörlerin düşük üstlenme ve artan yoksulluk seviyelerine dair dikkat çekilmiş ve GİDEM'in bu konularda dikkate alınarak kararlı politikalılar üretmesi gerektiği belirtilmiştir.

Hiç şüphesiz, yoksullukla mücadele bölgesel gelişiminin en önemli bileşenlerinden birisidir. Son dönemde artan yüksek seviyeleri ve yoksulluğun burunduğu yeni tanımlar, bununla birlikte ekonomik büyümenin yoksulluğun her zaman ortadan kalkmadığı geçerliğini anlamanın, yoksulluğun herhangi bir kalkınma döneminde ele alınmasına gereken en önemli ölçümlerden biri haline gelmiştir. Aynı şekilde, her ne kadar bölgesel ekonomiUTE vericilerin biri olan GİDEM ve GİDEM'ler bölgesel gelişmeye dair en temel katılımlarını arzettü surat vermek için böylece GİDEM'lerin bu konularda dikkate alınarak kararlı politikalılar üretmesi gerektiği belirtilmiştir.

Yukarıda bahsedildiği üzere, bölgede kadınların mutlak yoksulluğa hapseden cinsiyet kaynaklı eşitsizlikler vardır. Annelik ve itaatin esas erdem sayıldığı Güneydoğunun erkek egemen kültüründe, kadınların ekonomiye dahil olması gündeme gelmiştir. Bu nedenle kadınların iş hayatına katılmaları ve kadınların bir iş yapma ve kar gideri açmak, GİDEM'lerin bu konularda düşkünlüklerini sona erdirmeleri ve kadınların ekonomiye dahil olması gerektiği belirtilmiştir.

Türkiye yerleşmiş eşitsizliklerin, sosyal gruplar ve bölgeler arasında artan farklılaşmaların olduğu bir ülkedir. GİDEM projelerinin sideded ve Mardin'de yatırım yapmak isteyen girişici kadın sayısı artışını gözlemlemiştir.

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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”

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.

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.

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.

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;

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 compiled 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.
**EXECUTIVE SUMMARY**

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 37.330 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 bespoke 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 Diyarbakı; 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. Secending 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 Diyarbakı 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.

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.

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.

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.

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.
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 of 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 possess, 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 assess 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 catalyst 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.
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.

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.

**1.1 Objectives of the GIDEM Project**

**1.2 Service Organization and Delivery**

"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 GIDEM 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. GIDEM 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
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 of 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 assigned 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 Adıyaman financed various costs of the Centre. 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

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.

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.
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, etc. and can be depicted as most volatile ones due to their undocumented nature. All service lines of GIDEM are presented in Table 1.1.

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.

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 Entrepreneurs 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.

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Service Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>Trade and Investment, Business Management, Quality and Standards, Sector Trends, Investment Plan, Capacity Dev. in the Sector, Project Cycle Management, Women Entrepreneurship, Pre-feasibility Preparation, Business Plan Preparation, Marketing Survey, Machinery &amp; Eqp. Selection, Productivity Consultancy, Investment Plan Prep., Capacity Dev. in the Sector, Specialist Support</td>
</tr>
<tr>
<td>Consultancy</td>
<td>Legislative, Financial Resources, Investment Opportunities, International Partner Search, Sector Trends, Publications, Fair, Exhibition, Excursion</td>
</tr>
<tr>
<td>Information</td>
<td>Pikasso Paint Company</td>
</tr>
</tbody>
</table>
## 1. Overview of GIDEM Project

<table>
<thead>
<tr>
<th>Province</th>
<th>Type of Activity</th>
<th>Local Economic Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adıyaman</strong></td>
<td>Clustering</td>
<td>Textile and Clothing Cluster</td>
</tr>
<tr>
<td>Opportunity Window</td>
<td>Supporting Women Entrepreneurship in the GAP Region</td>
<td></td>
</tr>
<tr>
<td>Internalisation Programme</td>
<td>Preparation of Strategic Business Plans</td>
<td></td>
</tr>
<tr>
<td><strong>Sanliurfa</strong></td>
<td>Clustering</td>
<td>Organic Agriculture Cluster</td>
</tr>
<tr>
<td>Opportunity Window</td>
<td>Supporting Women Entrepreneurship in the GAP Region</td>
<td></td>
</tr>
<tr>
<td>Development of Agro-Based Industries, Aromatic Plants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internalisation Programme</td>
<td>Preparation of Strategic Business Plans</td>
<td></td>
</tr>
<tr>
<td><strong>Diyarbakir</strong></td>
<td>Clustering</td>
<td>Diyarbakır Marble Cluster</td>
</tr>
<tr>
<td>Development of Silver “Telkari” Sector</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internalisation Programme</td>
<td>Preparation of Strategic Business Plans</td>
<td></td>
</tr>
<tr>
<td><strong>Mardin</strong></td>
<td>Opportunity Window</td>
<td>Mardin House Wine</td>
</tr>
<tr>
<td>Revitalization of Old Investments</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internalisation Programme</td>
<td>Preparation of Strategic Business Plans</td>
<td></td>
</tr>
</tbody>
</table>

Table 1.2. Local Economic Development Initiatives
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.

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.
2. GIDEM PROVINCES IN A TURKISH CONTEXT

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.

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

<table>
<thead>
<tr>
<th>Province</th>
<th>1990 (%)</th>
<th>2000 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>15</td>
<td>34</td>
</tr>
<tr>
<td>GAP Region</td>
<td>36</td>
<td>37</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Province</th>
<th>1990 (%)</th>
<th>2000 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>GAP Region</td>
<td>36</td>
<td>37</td>
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</thead>
<tbody>
<tr>
<td>Turkey</td>
<td>87</td>
<td>89</td>
</tr>
<tr>
<td>GAP Region</td>
<td>70</td>
<td>70</td>
</tr>
</tbody>
</table>

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.
2. GIDEM PROVINCES IN A TURKISH CONTEXT

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.

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.

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.

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. GIDEM PROVINCES IN A TURKISH CONTEXT

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.

<table>
<thead>
<tr>
<th>Provinces</th>
<th>Number of Firms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adıyaman</td>
<td>17</td>
</tr>
<tr>
<td>Urfa</td>
<td>17</td>
</tr>
<tr>
<td>Diyarbakır</td>
<td>17</td>
</tr>
<tr>
<td>Mardin</td>
<td>17</td>
</tr>
</tbody>
</table>

Table 2.17 Number of Exporter Firms

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).

<table>
<thead>
<tr>
<th>Value (TRY)</th>
<th>Sector Share %</th>
<th>Growth Rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adıyaman</td>
<td>104.887</td>
<td>22.2</td>
</tr>
<tr>
<td>Diyarbakır</td>
<td>226.613</td>
<td>18.7</td>
</tr>
<tr>
<td>Gaziantep</td>
<td>496.261</td>
<td>24.1</td>
</tr>
<tr>
<td>Mardin</td>
<td>34.420</td>
<td>6.1</td>
</tr>
<tr>
<td>Şırnak</td>
<td>113.839</td>
<td>9.1</td>
</tr>
<tr>
<td>Batman</td>
<td>122.539</td>
<td>10.4</td>
</tr>
<tr>
<td>Şanlıurfa</td>
<td>3.423</td>
<td>2.6</td>
</tr>
<tr>
<td>Kilis</td>
<td>20.376</td>
<td>10.8</td>
</tr>
</tbody>
</table>

Table 2.18 Manufacturing Sector Share and Development Rate, 2001

Table 2.19 Number of Exporter Firms

Figure 2.3 Sectoral Share in GIDEM Provinces
Among newly established firms, the ratio of joint stock companies can be referred as an important indicator which has implications for institutionalisation level in a region, on the basis that a joint 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 joint 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).

### Table 2.20 Number of Establishing Firms

<table>
<thead>
<tr>
<th>Year</th>
<th>Adıyaman</th>
<th>Diyarbakır</th>
<th>Mardin</th>
<th>Şanlıurfa</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>44</td>
<td>11</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>2001</td>
<td>29</td>
<td>7</td>
<td>23</td>
<td>7</td>
</tr>
<tr>
<td>2002</td>
<td>21</td>
<td>24</td>
<td>18</td>
<td>34</td>
</tr>
<tr>
<td>2003</td>
<td>14</td>
<td>17</td>
<td>32</td>
<td>10</td>
</tr>
<tr>
<td>2004</td>
<td>30</td>
<td>9</td>
<td>86</td>
<td>20</td>
</tr>
<tr>
<td>2005</td>
<td>48</td>
<td>17</td>
<td>132</td>
<td>39</td>
</tr>
<tr>
<td>2006</td>
<td>66</td>
<td>25</td>
<td>140</td>
<td>93</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>252</strong></td>
<td><strong>110</strong></td>
<td><strong>315</strong></td>
<td><strong>200</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Joint Stock Companies</th>
<th>Total No. of Companies</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TURKEY</strong></td>
<td>2918</td>
<td>52,999</td>
</tr>
<tr>
<td>GAP Region</td>
<td>71</td>
<td>2211</td>
</tr>
<tr>
<td>Gaziantep</td>
<td>29</td>
<td>730</td>
</tr>
<tr>
<td>Adıyaman</td>
<td>7</td>
<td>148</td>
</tr>
<tr>
<td>Kilis</td>
<td>1</td>
<td>31</td>
</tr>
<tr>
<td>Şanlıurfa</td>
<td>8</td>
<td>391</td>
</tr>
<tr>
<td>Diyarbakır</td>
<td>9</td>
<td>457</td>
</tr>
<tr>
<td>Mardin</td>
<td>7</td>
<td>197</td>
</tr>
<tr>
<td>Batman</td>
<td>1</td>
<td>122</td>
</tr>
<tr>
<td>Şırnak</td>
<td>4</td>
<td>112</td>
</tr>
<tr>
<td>Siirt</td>
<td>5</td>
<td>43</td>
</tr>
</tbody>
</table>

Table 2.21 Number of Newly Establishing Joint Stock Companies and Their Share in Total Number of Establishing Companies, 2006
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 inventors, 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 Istanbul’s supremacy 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.

<table>
<thead>
<tr>
<th>Year</th>
<th>Adıyaman</th>
<th>Diyarbakır</th>
<th>Mardin</th>
<th>Şanlıurfa</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2001</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2002</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2003</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2004</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>2005</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>2006</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>2</td>
<td>2</td>
<td>6</td>
<td>5</td>
</tr>
</tbody>
</table>

Table 2.25 Industrial Design Applications and Registry

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.
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, Kaysi and Gaziantep that have gained ascendency in the past years also belong to this second group. Additionally, cities in a certain improving economic state like Konya and Eskisehir; aside from Tekirdag, obtaining its share from the spreading manufacturing trade of Istanbul 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, Kahramanmaras, Adiyaman and Çankırı; which have clearly demonstrated significant amendment recently and which are rather in an upturned.

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 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 up 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, Adiyaman, Diyarbakir, 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 Adiyaman 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 Adiyaman in the second group and Diyarbakir, 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 Three Constellations in the GAP Region and their Main Characteristics

<table>
<thead>
<tr>
<th>Provinces</th>
<th>High Flyer - Group 1</th>
<th>Average - Group 2</th>
<th>Stagnant - Group 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gaziantep</td>
<td>Level 2 Medium infrastructure development, problems might be encountered related to infrastructure.</td>
<td>Level 3 Low education level; high difference between woman-man, defective skilled labour force; absence of educated actors to initiate development.</td>
<td>Level 4 Insufficient and bad infrastructure, significant infrastructure investments might be required.</td>
</tr>
<tr>
<td>Adıyaman</td>
<td>Level 2 Low education level; high difference between woman-man, defective skilled labour force; absence of educated actors to initiate development.</td>
<td>Level 4 Insufficient and bad infrastructure, significant infrastructure investments might be required.</td>
<td></td>
</tr>
<tr>
<td>Diyarbakır, Mardin, Ş. Urfa Batman, Kilis, Siirt, Şırnak</td>
<td>Level 4 Middle stages of demographic transition; high fertility, high child population; short life expectation.</td>
<td>Level 4 Middle stages of demographic transition; high fertility, high child population; short life expectation.</td>
<td></td>
</tr>
<tr>
<td>Provinces</td>
<td>Health Services</td>
<td>Financial Index</td>
<td>Institutional Thickness</td>
</tr>
<tr>
<td>-----------</td>
<td>-----------------</td>
<td>-----------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Gaziantep</td>
<td>Level 3 Health Services level not compiling with economic development rank.</td>
<td>Level 4 Inadequate, undeveloped financial institutions</td>
<td>Level 4 Institutional structure is insufficient to initiate development; local actors have very low capability of coming together and developing joint behaviour.</td>
</tr>
<tr>
<td>Adıyaman</td>
<td>Level 3 Financial development level not complying with economic development</td>
<td>Level 4 Inadequate, undeveloped financial institutions</td>
<td>Level 4 Institutional structure is insufficient to initiate development; local actors have very low capability of coming together and developing joint behaviour.</td>
</tr>
</tbody>
</table>

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.

Table 2.26 Three Constellations in the GAP Region and their Main Characteristics
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 unforeseen 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
3. METHODOLOGY

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 (TURK-STAT), 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. Methodology

#### 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 (IPMACU). The potential impact areas, derived from objectives and materialized through service-lines are presented in the following table.

<table>
<thead>
<tr>
<th>GIDEM Project Objectives</th>
<th>Service Lines</th>
<th>Potential Impact Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Objectives: To contribute to economic and social development in Adıyaman, Diyarbakır, Urfa and Mardin and to improve the competitiveness of Regions on national and international markets.</td>
<td>Training • Trade and investment • Business management • Quality and standards • Sector trends • Investment plan • Capacity development in the sector • Project cycle management • Women entrepreneurship</td>
<td>1. Domestic Sales</td>
</tr>
<tr>
<td></td>
<td>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</td>
<td>2. Export</td>
</tr>
<tr>
<td></td>
<td>Information • Legislation • Financial resources • Investment opportunities • International partner search • Sector trends • Publications • Fair, exhibition, excursion</td>
<td>3. Productivity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Investments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Institutionalisation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Future Expectations</td>
</tr>
</tbody>
</table>

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 to be measured. Initially, the availability of the related data had been a critical concern; however GIDEM’s 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.

<table>
<thead>
<tr>
<th>Impact Areas</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information on Firms</td>
<td>• 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</td>
</tr>
<tr>
<td>Domestic Sales</td>
<td>• Sales (value) • Change in volume (revenue) • New markets</td>
</tr>
<tr>
<td>Export</td>
<td>• Sales (value) • Sales volume (change per year %) • New markets • Change in number of international tenders paricipated • Change in number of contracts awarded</td>
</tr>
<tr>
<td>Productivity</td>
<td>• Change in Employment • Change in domestic sales • Change in export</td>
</tr>
<tr>
<td>Investments</td>
<td>• Change in Employment • Change in domestic sales • Change in export</td>
</tr>
<tr>
<td>Institutionalisation</td>
<td>• 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 • Specialist departments in the firm • Internet access, company web-page, e-trade (yes/no)</td>
</tr>
<tr>
<td>Future Expectations</td>
<td>• Satisfaction level • Impact expectation level • Services that are wished to be received</td>
</tr>
</tbody>
</table>

Table 3.2 Indicators for Measurement of Impact Areas
3.3 Primary Research (Field research)

3.3.1 Selection of Sampling Method

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.

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.

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 status, 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).

### Table 3.4 Sector Labels and Sector Codes

<table>
<thead>
<tr>
<th>Sector Codes</th>
<th>Sector Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Agriculture and Hunting</td>
</tr>
<tr>
<td>22</td>
<td>Crude Petroleum and Natural Gas Production</td>
</tr>
<tr>
<td>31</td>
<td>Manufacture of Food, Beverages and Tobacco</td>
</tr>
<tr>
<td>32</td>
<td>Textile, Wearing Apparel and Leather Industries</td>
</tr>
<tr>
<td>33</td>
<td>Manufacture of Wood and Wood Products, Including Furniture</td>
</tr>
<tr>
<td>34</td>
<td>Manufacture of Paper and Paper Products, Printing and Publishing</td>
</tr>
<tr>
<td>35</td>
<td>Manufacture of Chemicals &amp; Chemical, Petroleum, Coal, Rubber and Plastic Products</td>
</tr>
<tr>
<td>36</td>
<td>Manufacture of Non-Metallic Mineral Products, Except Products of Petroleum and Coal</td>
</tr>
<tr>
<td>37</td>
<td>Basic Metal Industries</td>
</tr>
<tr>
<td>38</td>
<td>Manufacture of Fabricated Metal Products, Machinery and Equipment</td>
</tr>
<tr>
<td>41</td>
<td>Other Manufacturing Industries</td>
</tr>
<tr>
<td>47</td>
<td>Electricity, Gas and Steam</td>
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<tr>
<td>71</td>
<td>Transport and Storage</td>
</tr>
<tr>
<td>Other</td>
<td>Other includes Service Sector (TOBB Reports only Manufacture Sector)</td>
</tr>
</tbody>
</table>

### 3.3 Respondent Profile and Response Rate

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 questionnaire, 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. Considering 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.

Concerning the qualitative study, eight in-depth interviews have been carried out with key informants from 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.

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.
3. METHODOLOGY

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
- Akan Perde
- Bartın Tekstil
- Belkıs Batak
- Büyük İpek
- Çankırı Tekstil
- Cerrahpaşa Tekstil
- Deniz Fakültesi
- Estetik Dekuma
- Gabaş Gıda
- Hamzaş-Restoran
- Kartal Sera Tekstil
- Kütahya Gıda
- Mem Tekstil
- Mem Tekstil
- Mem Tekstil
- Milliyyet İmzalı Gıda
- Mısır Tekstil
- Mızıkaş Tekstil
- Pişman Tekstil
- Pınar Tekstil
- Sultan Tekstil
- Star Sersan Tekstil
- Türkiye Yem
- Usta Çevat

### Şanlıurfa
- Akan Perde
- Bartın Tekstil
- Belkıs Batak
- Büyük İpek
- Çankırı Tekstil
- Deniz Fakültesi
- Estetik Dekuma
- Gabaş Gıda
- Hamzaş-Restoran
- Kartal Sera Tekstil
- Kütahya Gıda
- Mem Tekstil
- Mem Tekstil
- Mem Tekstil
- Milliyyet İmzalı Gıda
- Mısır Tekstil
- Mızıkaş Tekstil
- Pişman Tekstil
- Pınar Tekstil
- Sultan Tekstil
- Star Sersan Tekstil
- Türkiye Yem
- Usta Çevat

### Mardin
- Akan Perde
- Bartın Tekstil
- Belkıs Batak
- Büyük İpek
- Çankırı Tekstil
- Deniz Fakültesi
- Estetik Dekuma
- Gabaş Gıda
- Hamzaş-Restoran
- Kartal Sera Tekstil
- Kütahya Gıda
- Mem Tekstil
- Mem Tekstil
- Mem Tekstil
- Milliyyet İmzalı Gıda
- Mısır Tekstil
- Mızıkaş Tekstil
- Pişman Tekstil
- Pınar Tekstil
- Sultan Tekstil
- Star Sersan Tekstil
- Türkiye Yem
- Usta Çevat

### Diyarbakır
- Akan Perde
- Bartın Tekstil
- Belkıs Batak
- Büyük İpek
- Çankırı Tekstil
- Deniz Fakültesi
- Estetik Dekuma
- Gabaş Gıda
- Hamzaş-Restoran
- Kartal Sera Tekstil
- Kütahya Gıda
- Mem Tekstil
- Mem Tekstil
- Mem Tekstil
- Milliyyet İmzalı Gıda
- Mısır Tekstil
- Mızıkaş Tekstil
- Pişman Tekstil
- Pınar Tekstil
- Sultan Tekstil
- Star Sersan Tekstil
- Türkiye Yem
- Usta Çevat

Table 3.6 In-depth Interview List with Non-Clients

Table 3.7 In-depth Interviews with Leading Institutions

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Table 3.5 List of Questionnaire Respondents

*Bold names refer to those firms subject to in-depth interviews*
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 the 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 cluster evaluations, where one needs to be able to compare success at different clusters. 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.
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.
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:

\[ Y = 108.42 + 90.06X_1 + 59.81X_2 \quad R^2 = 0.27 \]

### Table 4.1 Domestic Sales Coefficients

<table>
<thead>
<tr>
<th>Unstandardized Coefficients</th>
<th>Standardized Coefficients</th>
</tr>
</thead>
<tbody>
<tr>
<td>( B )</td>
<td>( \text{Std. Error} )</td>
</tr>
<tr>
<td>Constant</td>
<td>108.407</td>
</tr>
<tr>
<td>Contribution of GIDEM to Domestic Sales</td>
<td>90.06521</td>
</tr>
<tr>
<td>Contribution of GIDEM to New Investments</td>
<td>59.81802</td>
</tr>
</tbody>
</table>

### Table 4.2 Domestic Sales Anova

<table>
<thead>
<tr>
<th>Sum of Squares</th>
<th>df</th>
<th>Mean Square</th>
<th>( F )</th>
<th>( \text{Sig.} )</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regression</td>
<td>256539.5</td>
<td>2</td>
<td>128265.7</td>
<td>5.04986</td>
</tr>
<tr>
<td>Residual</td>
<td>711218.2</td>
<td>28</td>
<td>25400.65</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>967757.7</td>
<td>30</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 4.3 Domestic Sales Model Summary

<table>
<thead>
<tr>
<th>( R )</th>
<th>( R^2 )</th>
<th>Adjusted ( R^2 )</th>
<th>Std. Error of the Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.515(a)</td>
<td>0.265</td>
<td>0.213</td>
<td>159.3758</td>
</tr>
</tbody>
</table>

The resulting equation suggests that GIDEM’s 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 statistically significant.

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.

<table>
<thead>
<tr>
<th>SN²</th>
<th>City</th>
<th>SC</th>
<th>Domestic Sales Pre GIDEM</th>
<th>Domestic Sales Post GIDEM</th>
<th>Domestic Sales/ Employee (Pre GIDEM)</th>
<th>Domestic Sales/ Employee (Post GIDEM)</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>62</td>
<td>2</td>
<td>31</td>
<td>512957</td>
<td>107284</td>
<td>31763</td>
<td>28184</td>
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<td>5</td>
<td>2</td>
<td>35</td>
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<td>2</td>
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<td>78605</td>
<td>146300</td>
<td>67695</td>
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<td>130000</td>
<td>22857</td>
<td>18571</td>
<td>-4286</td>
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<td>Average</td>
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<td>3230876</td>
<td>8156355</td>
<td>94080</td>
<td>155500</td>
<td>61423</td>
</tr>
</tbody>
</table>

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.
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.

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:

![Image of a table showing statistical results and changes in domestic sales]
Repeated Measures (ANOVA) Test

4.1.3.

The last step indicating the analysis of domestic sales is a comparison of statistically meaningful 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:

Table 4.1: Domestic sales variables

<table>
<thead>
<tr>
<th>Factor</th>
<th>Mean</th>
<th>Standard Error</th>
<th>% 95 Confidence Interval of the Difference</th>
<th>t</th>
<th>df</th>
<th>Sig. (2-tailed)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>1713914</td>
<td>582807.5</td>
<td>525284,489 - 2936542,677</td>
<td>-2.970</td>
<td>3.116</td>
<td>0.004</td>
</tr>
<tr>
<td>2003</td>
<td>2104230</td>
<td>3379686.441</td>
<td>702449,064 - 3506010,353</td>
<td>3.185</td>
<td>0.005</td>
<td>0.045</td>
</tr>
<tr>
<td>2004</td>
<td>2576318</td>
<td>896531,311</td>
<td>4256333,356 - 2147066,871</td>
<td>3.171</td>
<td>0.004</td>
<td>0.041</td>
</tr>
<tr>
<td>2005</td>
<td>3201875</td>
<td>1025836,311</td>
<td>3978125,376 - 2470961,4</td>
<td>3.171</td>
<td>0.004</td>
<td>0.041</td>
</tr>
<tr>
<td>2006</td>
<td>3857625</td>
<td>6127361,797</td>
<td>6449892,969 - 28290,017</td>
<td>3.116</td>
<td>0.005</td>
<td>0.045</td>
</tr>
</tbody>
</table>

Having analyzed the overall structure of domestic sales year by year, a comparison of mean difference between each year is set 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 such a significant difference cannot be observed between 2004 and 2005. In 2006, the differences in years (2002 to 2006) can be considered as significant, whereas such a significant difference is specified that apart from the difference in 2004 and 2005, the mean change in domestic sales in GIDEMs' service hinterland is meaningful.

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.
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

The resulting equation signifies that GIDEM's 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 explains 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.
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.

<table>
<thead>
<tr>
<th>SN</th>
<th>SC</th>
<th>City</th>
<th>Year</th>
<th>2002</th>
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<th>2004</th>
<th>2005</th>
<th>Before/ After</th>
</tr>
</thead>
<tbody>
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<td>31</td>
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<td>31</td>
<td>31</td>
</tr>
</tbody>
</table>

Table 4.16 Change in Exports Year on Year

As in the analyses of domestic sales, a 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:

<table>
<thead>
<tr>
<th>Mean</th>
<th>N</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before</td>
<td>995 263.2</td>
<td>19</td>
<td>12 086 15</td>
</tr>
<tr>
<td>After</td>
<td>369 762.1</td>
<td>19</td>
<td>56 752 72</td>
</tr>
</tbody>
</table>

Table 4.17 Exports Paired Sample Statistics

<table>
<thead>
<tr>
<th>Paired Differences</th>
<th>Mean</th>
<th>Std. Deviation</th>
<th>Std. Error Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>% 95 Confidence Interval of the Difference</td>
<td>Lower Boundary</td>
<td>Upper Boundary</td>
<td></td>
</tr>
<tr>
<td>t</td>
<td>df</td>
<td>Sig (2 - tailed)</td>
<td></td>
</tr>
<tr>
<td>Before - After</td>
<td>24 99 518.5</td>
<td>38 66 685.27</td>
<td>89 59 60 9</td>
</tr>
</tbody>
</table>

Table 4.18 Exports 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.

4.2.2. Statistical Results

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.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Mean</th>
<th>Std. Error</th>
<th>% 95 Confidence Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>407 187.5</td>
<td>13 181.0</td>
<td>12 916 7.598</td>
</tr>
<tr>
<td>2003</td>
<td>523 437.5</td>
<td>18 120.0</td>
<td>17 321 5.89</td>
</tr>
<tr>
<td>2004</td>
<td>788 750</td>
<td>27 205.9</td>
<td>26 065 3.793</td>
</tr>
<tr>
<td>2005</td>
<td>12 211 88</td>
<td>44 368 4.4</td>
<td>27 486 128</td>
</tr>
<tr>
<td>2006</td>
<td>15 378 13</td>
<td>46 316 13.2</td>
<td>18 043 7.32</td>
</tr>
</tbody>
</table>

Table 4.19 Exports Descriptive Statistics

The preceding table indicates that in year 2002, the exports of the firms lie between TRY 121 967 and TRY 692 407 at 95% confidence interval. For the years 2003 and 2004 this values ranges between the pairs of TRY 13 721 – TRY 21 678 866 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 in 2006. 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.

<table>
<thead>
<tr>
<th>Dependent Variable</th>
<th>Parameter</th>
<th>B</th>
<th>Std. Error</th>
<th>t</th>
<th>Sig</th>
<th>% 95 Confidence Interval</th>
<th>Upper Bound</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002 Export</td>
<td>Intercept</td>
<td>407 187.5</td>
<td>13 181.0</td>
<td>3.043</td>
<td>0.004</td>
<td>12 916 7.598</td>
<td>65 297 402</td>
</tr>
<tr>
<td>2003 Export</td>
<td>Intercept</td>
<td>523 437.5</td>
<td>18 120.0</td>
<td>3.043</td>
<td>0.004</td>
<td>12 916 7.598</td>
<td>65 297 402</td>
</tr>
<tr>
<td>2004 Export</td>
<td>Intercept</td>
<td>788 750</td>
<td>27 205.9</td>
<td>3.043</td>
<td>0.004</td>
<td>12 916 7.598</td>
<td>65 297 402</td>
</tr>
<tr>
<td>2005 Export</td>
<td>Intercept</td>
<td>12 211 88</td>
<td>44 368 4.4</td>
<td>3.043</td>
<td>0.004</td>
<td>12 916 7.598</td>
<td>65 297 402</td>
</tr>
<tr>
<td>2006 Export</td>
<td>Intercept</td>
<td>15 378 13</td>
<td>46 316 13.2</td>
<td>3.043</td>
<td>0.004</td>
<td>12 916 7.598</td>
<td>65 297 402</td>
</tr>
</tbody>
</table>

Table 4.21 Exports Parameter Estimates

Table 4.21 Exports Parameter Estimates

(a) Computed using alpha = 0.05
4. STATISTICAL FINDINGS

Table 4.22: Exports Pairwise Comparison

<table>
<thead>
<tr>
<th></th>
<th>Factor 1</th>
<th>Mean Difference (1-2)</th>
<th>Std. Error</th>
<th>Sig. (a)</th>
<th>% 95 Confidence Interval for Difference (a)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Lower Bound</td>
</tr>
<tr>
<td>2002</td>
<td>2003</td>
<td>-116250.00</td>
<td>51584.276</td>
<td>0.040</td>
<td>-226199.281</td>
</tr>
<tr>
<td>2004</td>
<td>2002</td>
<td>116250.00</td>
<td>51584.276</td>
<td>0.040</td>
<td>226199.281</td>
</tr>
<tr>
<td>2005</td>
<td>2002</td>
<td>381562.50</td>
<td>98260.356</td>
<td>0.016</td>
<td>68296.706</td>
</tr>
<tr>
<td>2006</td>
<td>2002</td>
<td>815000.00</td>
<td>138896.527</td>
<td>0.024</td>
<td>99454.118</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>SN</th>
<th>City</th>
<th>change in exports %</th>
<th>change in employees %</th>
<th>increase in productivity %</th>
<th>SN</th>
<th>City</th>
<th>change in dom. sales %</th>
<th>change in employees %</th>
<th>increase in productivity %</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>02</td>
<td>198.53</td>
<td>25.71</td>
<td>137.47</td>
<td>62</td>
<td>2</td>
<td>103.30</td>
<td>-57.14</td>
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<td>6</td>
<td>21</td>
<td>174.07</td>
<td>900.00</td>
<td>-72.59</td>
<td>5</td>
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<td>170.00</td>
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<td>63</td>
<td>230.00</td>
<td>0.00</td>
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<td>17</td>
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<td>95.04</td>
<td>0.00</td>
<td>95.04</td>
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<td>34</td>
<td>63</td>
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<td>202.56</td>
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<td>289.29</td>
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<td>0.00</td>
<td>230.00</td>
<td>66</td>
<td>2</td>
<td>415.35</td>
<td>0.00</td>
<td>415.35</td>
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<td>38</td>
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<td>0.00</td>
<td>241.94</td>
<td>44</td>
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<td>100.00</td>
<td>-16.67</td>
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<td>102.50</td>
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<td>24</td>
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<td>51.04</td>
<td>871.43</td>
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<td>86</td>
<td>63</td>
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<td>0.00</td>
<td>766.01</td>
<td>36</td>
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<td>79.12</td>
<td>86.06</td>
<td>5.26</td>
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<tr>
<td>40</td>
<td>63</td>
<td>206.19</td>
<td>92.10</td>
<td>109.09</td>
<td>42</td>
<td>63</td>
<td>86.38</td>
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<td>86.38</td>
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<tr>
<td>94</td>
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<td>-18.75</td>
<td>0.00</td>
<td>-18.75</td>
<td>29</td>
<td>47</td>
<td>367.94</td>
<td>0.00</td>
<td>367.94</td>
</tr>
</tbody>
</table>

Table 4.23 Productivity
4. STATISTICAL FINDINGS

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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. No</td>
<td>18</td>
<td>18.0</td>
<td>18.0</td>
<td>18.0</td>
</tr>
<tr>
<td>b. Yes</td>
<td>44</td>
<td>44.0</td>
<td>44.0</td>
<td>62.0</td>
</tr>
<tr>
<td>c. Partially</td>
<td>21</td>
<td>21.0</td>
<td>21.0</td>
<td>83.0</td>
</tr>
<tr>
<td>d. Expected</td>
<td>17</td>
<td>17.0</td>
<td>17.0</td>
<td>100.0</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Attribution rates for option (c), yes</th>
<th>70.00%</th>
<th>60.00%</th>
<th>50.00%</th>
<th>40.00%</th>
<th>30.00%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute rates for option (b), partial impact</td>
<td>50.00%</td>
<td>40.00%</td>
<td>30.00%</td>
<td>20.00%</td>
<td>10.00%</td>
</tr>
<tr>
<td>70.00%</td>
<td>47.7</td>
<td>42.7</td>
<td>32.6</td>
<td>32.5</td>
<td>27.4</td>
</tr>
<tr>
<td>60.00%</td>
<td>45.3</td>
<td>40.2</td>
<td>31.5</td>
<td>30</td>
<td>24.9</td>
</tr>
<tr>
<td>50.00%</td>
<td>42.9</td>
<td>37.8</td>
<td>32.7</td>
<td>27.6</td>
<td>22.5</td>
</tr>
<tr>
<td>40.00%</td>
<td>40.5</td>
<td>35.4</td>
<td>30.3</td>
<td>25.2</td>
<td>20.1</td>
</tr>
<tr>
<td>30.00%</td>
<td>38</td>
<td>32.9</td>
<td>27.8</td>
<td>22.7</td>
<td>17.6</td>
</tr>
</tbody>
</table>

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 GIDEM 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.

4.5. Quality Certifications

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.
4.6. Institutionalization

The institutionalization index developed for the impact assessment is based on the questions: 16, 17, 25, 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).

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.
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.

### Table 4.33 Results of Logistic Regression Model on Institutionalisation

<table>
<thead>
<tr>
<th>Predictor</th>
<th>Coefficient</th>
<th>SE Coefficient</th>
<th>Wald</th>
<th>Z</th>
<th>P</th>
<th>Odds Ratio</th>
<th>95% Confidence Interval Lower</th>
<th>95% Confidence Interval Upper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Const(1)</td>
<td>-4.247</td>
<td>2.236</td>
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<td>-1.9</td>
<td>0.057</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Const(2)</td>
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<td>1.007</td>
<td>3.332</td>
<td>-1.879</td>
<td>0.06</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Const(3)</td>
<td>-3.563</td>
<td>1.337</td>
<td>7.100</td>
<td>2.665</td>
<td>0.008</td>
<td></td>
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</tr>
<tr>
<td>Q20</td>
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<td>0.357</td>
<td>0.071</td>
<td>1.802</td>
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<td>1.154</td>
<td>5.666</td>
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<td>0.017</td>
<td>15.589</td>
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<td>0.628</td>
<td>0.192</td>
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<td>0.662</td>
<td>0.76</td>
<td>0.222</td>
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</tr>
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</table>

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.
The 87th question³ 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 markets), 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:

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.

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.

³What are your expectations regarding the impact of GIDEM services in the future?
4.8. Additional Statistical Information

4.8.1. Degree of Sufficiency of GIDEM services

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.

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. When making 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?”

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.

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.

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.

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 or 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.
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.

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.

<table>
<thead>
<tr>
<th>Size</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>micro</td>
<td>17</td>
<td>17</td>
<td>17.347</td>
<td>17.347</td>
</tr>
<tr>
<td>small</td>
<td>47</td>
<td>47</td>
<td>47.959</td>
<td>65.306</td>
</tr>
<tr>
<td>medium</td>
<td>33</td>
<td>33</td>
<td>33.673</td>
<td>98.980</td>
</tr>
<tr>
<td>large</td>
<td>1</td>
<td>1</td>
<td>1.020408</td>
<td>100</td>
</tr>
<tr>
<td>total</td>
<td>98</td>
<td>98</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>missing</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>total</td>
<td>100</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Expected level of impact</th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>negative</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>no impact</td>
<td>6</td>
<td>6.0</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>positive</td>
<td>54</td>
<td>54.0</td>
<td>54.0</td>
<td>60.0</td>
</tr>
<tr>
<td>partially positive</td>
<td>40</td>
<td>40.0</td>
<td>40.0</td>
<td>100.0</td>
</tr>
<tr>
<td>total</td>
<td>100</td>
<td>100.0</td>
<td>100.0</td>
<td></td>
</tr>
</tbody>
</table>

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.
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 GIDEM 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.

\[
P_1: \text{proportion of medium scale companies in all the companies that are expecting a positive impact.}
\]

\[
P_2: \text{proportion of small scale companies in all the companies that are expecting a positive impact.}
\]

\[
P_3: \text{proportion of micro scale companies in all the companies that are expecting a positive impact.}
\]

\[H_0: P_1 = P_2 = P_3 = \frac{1}{3}\] (no difference in positive expectation with regard to scale of the company)

\[H_1: \text{At least one of the groups is different from other in terms of expecting a high level of impact}
\]

Degrees of freedom = \(k-1 = 2\); at \(\alpha = 0.05\) critical value of chi-square is 5.99.

Since the computed \(\chi^2 (12,022)\) 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 \(P_1, P_2, P_3\) 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.

According to the descriptive stats and analyses small-sized companies (employment between 10 and 49) seem to be 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.

\[
P_1: \text{proportion of medium-scale companies in all the companies that are satisfied with GIDEM services.}
\]

\[
P_2: \text{proportion of small-scale companies in all the companies that are satisfied with GIDEM services.}
\]

\[
P_3: \text{proportion of micro-scale companies in all the companies that are satisfied with GIDEM services.}
\]

\[H_0: P_1 = P_2 = P_3 = \frac{1}{3}\] (no difference in expectation with regard to scale of the company)

\[H_1: \text{At least one of the groups is different from other in terms of expecting a high level of impact}
\]

Degrees of freedom = \(k-1 = 2\); at \(\alpha = 0.05\) critical value of chi-square is 5.99.

Since the computed \(\chi^2 (10,467)\) 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 GIDEM 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.

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

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.
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)
5. BEST CLIENT

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

Results of the above analyses can be summarized as follows:

In Diyarbakir, 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 GİDEM services.

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, %63.9 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.
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.

H0: \( P_1 = P_2 = P_3 = P_4 \) (no difference in positive expectation with regard to scale of the company)

H1: 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 \( \chi^2 \) (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 GİDEM services.

According to findings of the analyses above, it can be stated that the best client for GİDEM 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 Diyarbakir, 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.
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
6. GENERAL MODEL

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:

\[
\text{Value-added} = \sum n_i p_i d_i V_i
\]

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
- \(d_1\): 0.2; assuming that 20% of domestic sales is profit
- \(d_2\): 0.3; assuming that 30% of exports is profit
- \(d_3\): 1; as a constant coefficient
- \(d_4\): 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 invest 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.
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. Because of this, GIDEMs that are trying to provide services to local firms face obstacles when it comes to their quality and effectiveness. There are different perceptions of how GIDEM services should be provided, and these perceptions are based on the local culture and social norms.

Despite all, the GIDEM staff state that the overall picture is ameliorating for the local firms. They are more open to change and less conservative. The coming generation of entrepreneurs, GIDEMs assert, are more open to change and less conservative.

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 entrepreneurship.

As a GIDEM personnel states, the local entrepreneurs are now coming together in the conferences and at least 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.

Diyarbakir and Mardin has adopted in principle a similar organizational structure. In Diyarbakir, 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. has 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, Adıyaman 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 tough 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

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 titles,

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 orientates 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 significantly 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 “cluster- ing 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 have of 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.

OSB Directorate

“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.”

An Association in Urfa

“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”
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. Besides 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.

“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 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 interviewee 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.

Figure 7.1 Cognitive Map
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 conserva-
tive 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 quantita-
tive 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 in-
terviews 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 compari-
sion between the performances of GIDEM offices in each province. Beyond, making such a comparison would be a pertinent 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.

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.

### Table 7.1: Province Based Results, Diyarbakır

<table>
<thead>
<tr>
<th>Type of investments</th>
<th>Impact of GIDEM on investment decision</th>
<th>Yes: 10%</th>
<th>Partial: 25%</th>
<th>No: 55%</th>
</tr>
</thead>
<tbody>
<tr>
<td>GIDEM’s impact on investment decision</td>
<td>Yes: 90.9%</td>
<td>No: 9.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction from GIDEM services in general</td>
<td>Fully satisfied: 18.2%</td>
<td>Satisfied: 39.1%</td>
<td>Not Satisfied: 45.5%</td>
<td>No opinion: 18.2%</td>
</tr>
<tr>
<td>Impact of GIDEM on institutionalization</td>
<td>Fully: 45.5%</td>
<td>Partially: 37.8%</td>
<td>No impact: 17.1%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on exports</td>
<td>Positive: 40.9%</td>
<td>Partially: 36.4%</td>
<td>No impact: 13.6%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on new domestic markets</td>
<td>Positive: 38.1%</td>
<td>Partially: 33.3%</td>
<td>No impact: 28.6%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on entrepreneurship</td>
<td>Positive: 50.0%</td>
<td>Partially: 35.5%</td>
<td>No impact: 14.2%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on internationalization</td>
<td>Positive: 36.4%</td>
<td>Partially: 35.5%</td>
<td>No impact: 28.1%</td>
<td></td>
</tr>
<tr>
<td>Expectation of clients on the impact of GIDEM services</td>
<td>Expecting a high impact on access to new foreign markets</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Province Based Results, Diyarbakır</th>
<th>TRY 420,123.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average exports per employee</td>
<td>Yes: 27.3%</td>
</tr>
<tr>
<td>Partially: 36.4%</td>
<td>Expected: 18.2%</td>
</tr>
<tr>
<td>No: 18.2%</td>
<td></td>
</tr>
<tr>
<td>Investments over the last 5 years</td>
<td>Yes: 90.9%</td>
</tr>
<tr>
<td>Partial: 9.1%</td>
<td></td>
</tr>
<tr>
<td>Type of investments</td>
<td>New Sector: 27.3%</td>
</tr>
<tr>
<td>Existing Sector: 63.6%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on productivity</td>
<td>Fully satisfied: 36.4%</td>
</tr>
<tr>
<td>Satisfied: 39.1%</td>
<td>Not Satisfied: 24.5%</td>
</tr>
<tr>
<td>Impact of GIDEM on institutionalization</td>
<td>Fully: 45.5%</td>
</tr>
<tr>
<td>Impact of GIDEM on exports</td>
<td>Positive: 40.9%</td>
</tr>
<tr>
<td>Impact of GIDEM on new domestic markets</td>
<td>Positive: 38.1%</td>
</tr>
<tr>
<td>Impact of GIDEM on entrepreneurship</td>
<td>Positive: 50.0%</td>
</tr>
<tr>
<td>Impact of GIDEM on internationalization</td>
<td>Positive: 36.4%</td>
</tr>
<tr>
<td>Expectation of clients on the impact of GIDEM services</td>
<td>Expecting a high impact on access to new foreign markets</td>
</tr>
</tbody>
</table>
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 Diyarbakir is 79.3 %, the majority of the clients indicate that they are satisfied or fully satisfied from GIDEM services. The proportion of clients who are not satisfied with GIDEM services is only 3.4 %, which is a moderately low value.

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 institutionalization 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 dearly. 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.
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.

As can be observed from the preceding 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.

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.

7.6.3 Mardin

<table>
<thead>
<tr>
<th>Province Based Results, Mardin</th>
<th>Average exports per employee</th>
<th>TRY 21352,00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of GIDEM on Productivity</td>
<td>Yes: 30% Partial: 21% Expected: 26.1% No: 17.4%</td>
<td></td>
</tr>
<tr>
<td>Investments over the last 5 years</td>
<td>Yes: 73.9% No: 26.1%</td>
<td></td>
</tr>
<tr>
<td>Type of investments</td>
<td>New Sector: 39.1% Existing Sector: 34.8%</td>
<td></td>
</tr>
<tr>
<td>GIDEM’s impact on investment decision</td>
<td>Yes: 13% Partial: 8% No: 43%</td>
<td></td>
</tr>
<tr>
<td>Satisfaction from GIDEM services in general</td>
<td>Fully satisfied: 26.1% Satisfied: 65.2% Not Satisfied: 0 No opinion: 8.7%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on institutionalization</td>
<td>Fully: 33.3% Partially: 30.1% No impact: 36.6%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on exports</td>
<td>Positive: 23.8% Partially: 42.9% No impact: 33.3%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on new domestic markets</td>
<td>Positive: 45.5% Partially: 40.9% No impact: 13.6%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on internationalisation</td>
<td>Positive: 28.6% Partially: 47.0% No impact: 24.4%</td>
<td></td>
</tr>
<tr>
<td>Expectations of clients on the impact of GIDEM services</td>
<td>Expecting a moderate impact on new international tenders Expecting no impact on FDI</td>
<td></td>
</tr>
</tbody>
</table>

Table 7.3 Province Based Results, Mardin

7.6.4 Adıyaman

<table>
<thead>
<tr>
<th>Province Based Results, Adıyaman</th>
<th>Average exports per employee</th>
<th>TRY 40061,00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact of GIDEM on Productivity</td>
<td>Yes: 52% Partial: 4% Expected: 20% No: 24%</td>
<td></td>
</tr>
<tr>
<td>Investments over the last 5 years</td>
<td>Yes: 100% No: 0%</td>
<td></td>
</tr>
<tr>
<td>Type of investments</td>
<td>New Sector: 28% Existing Sector: 52%</td>
<td></td>
</tr>
<tr>
<td>GIDEM’s impact on investment decision</td>
<td>Fully: 8% Partial: 8% No: 68%</td>
<td></td>
</tr>
<tr>
<td>Satisfaction from GIDEM services in general</td>
<td>Fully satisfied: 48% Satisfied: 40% Not Satisfied: 4% No opinion: 8%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on institutionalization</td>
<td>Fully: 40% Partially: 35% No impact: 25%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on exports</td>
<td>Positive: 23.5% Partially: 29.1% No impact: 47.1%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on new domestic markets</td>
<td>Positive: 26.3% Partially: 27.19% No impact: 46.1%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on entrepreneurship</td>
<td>Positive: 55% Partially: 25% No impact: 20%</td>
<td></td>
</tr>
<tr>
<td>Impact of GIDEM on internationalisation</td>
<td>Positive: 35% Partially: 30% No impact: 45%</td>
<td></td>
</tr>
<tr>
<td>Expectations of clients on the impact of GIDEM services</td>
<td>Expecting a high impact on accessing new international markets Expecting a moderate impact on information infrastructure Expecting no impact on increase in the exports</td>
<td></td>
</tr>
</tbody>
</table>

Table 7.4 Province Based Results, Adıyaman

The mentioned characteristics of Adıyaman 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.
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 into 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 defined as “participation to new international and domestic markets”.

Sustainability of GIDEM services is one of the 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 Diyarbakir, 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 Adiyaman. 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 GIDEM’s 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 Diyarbakir 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 Diyarbakir and Mardin there is an increasing number of women entrepreneurs to venture in business, yet with undiversified business ideas limited to handicraft, 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 and effective 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 despite 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 catalyst of development.
AnnEX 1

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

*Lütfen cevaplayıcının iştiraki bu forma uygun olarak verin.*

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

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*Teknik Lise mezunu tekniker ve mühendis

5. Firmanızın an itibariyle çalışan profilisi ve niteliksel dağılımı nasıldır?

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*Teknik Lise mezunu tekniker ve mühendis.*
6. GİDEM'den şu ana kadar aşağıda belirtilen hizmetlerden hangilerini aldınız ya da almayı düşünüdünüz hizmet var mı?

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7. GİDEM'den aldığınız hizmetlerden nasıl haberniz oldu?

| Você | GİDEM'den aldığınız hizmetlerin verimliliği 
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<td>Onlar bize ulaştı</td>
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8. Aşağıda listelenen “yerel Ekonomik Kalkınmaya Yönelik Faaliyetlerden” herhangi birine dahil olduğunu mu?

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<th>HABERIM YOK</th>
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</table>
10. GİDEM'in birlikte faaliyet gösterdiği herhangi bir kurumdan iş ile ilgili destek aldınız mı? Hangi konuda, beliritleiniz. (Örneğin, valilik, belediye, dernek, ticaret ve sanayi odası, vb.)

Kurum Deste Konsent Tarih İzneler

11. GİDEM'den aldığınız hizmetleri işinize nasıl kullanmadınız?
- İşimde kullanmadım (bu işaretlendi ise 12. sora geçiniz)
- Yeni yatırım alanları tanımladım.
- Ürünlerin için yeni pazarlar buldum.
- Makina ve teçhizat aldımdım.
- Yeni iş ortaklarıyla tanıştım / potansiyel iş ortakları belirledim.
- Uygur yatırım teşviklerine başvurdum / başvurmaya karar verdim.
- Finansman için başvurдум / başvurdu neye?
- İşime ilgili hukuki ve yasal düzenlemeler yaptım.
- Diğer

12. Eğer alınan GİDEM hizmetleri iş için kullanılmadıysa, nedenleri nelerdir?
- Elde ettiği sonuç kalite ve miktar olarak işimde kullanılamaz nitelikteydi.
- Hizmet takibi maliyetlerini karşılamayamaya gücüm yetmedi.
- Diğer

13. Aldığınız hizmetle için bir ücret ödediniz mi?
- Evet (i.e. 13. sora geçiniz)
- Hayır

14. Aynı servisi piyasada ücret karşılığı olmayıp olsaydı, size olan maliyeti GİDEM'inkine karsıla nası olurdu?
- % __________ artardı
- % __________ azaldı
- % __________ değişmedi
- Ödeme, ödeme veya ücretle ilgili cevaplayıcı açıklamalarını buraya not alınız.

15. Firmanızın üretici firma mı, satıcı firma mı olduğunu belirtiniz. Ürün yelpazesini belirtiniz.
- Üretici
- Satıcı (İçer 25. sora geçiniz)

16. Ürünleriniz ile ilgili tasarım çalışmalarınızı var mı?
- Evet
- Hayır (i.e. 17. sora geçiniz)

17. Ar-Ge faaliyetinizi var mı?
- Evet (i.e 20. sora geçiniz)
- Hayır

18. GİDEM hizmetlerinden faydalanırsanız hangi bir Ar-Ge faaliyetine başladınız mı?
- Evet
- Hayır (i.e 22. sora geçiniz)

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

20. GİDEM'in hizmetlerinin gelecekte Ar-Ge faaliyetlerine başlamasına ekolü olabilir mi?
- Evet
- Kismen
- Hayır

21. Tasarım tescili belgeniz, tescilli bir markanız, patent ve/veya faydalı modeliniz var mı?
- Evet
- Hayır (i.e 23. sora geçiniz)

22. GİDEM'den hizmet alıktan sonra tasarım tescili belgesi, tescilli marka, patentlerinize ve faydalı modellerezinde nası bir değişim oldu? Artış ya da azaş sayısını belirtiniz.
- Artma
- Azalma
- Değişim Yok
- Sayı
23. GİDEM'den aldığınız hizmetin tasarım tescili belgesi, tescilli marka, patentlerin-izde ve faydali modellere ilişkin bir etkisi olduğu mu?
- Evet
- Kismen
- Hayır

24. GİDEM hizmetlerinin geleceği için tasarımı tescilli, tescilli marka, patentlerin-izde ve faydali modellere ilişkin bir etkisi olduğu mu?
- Evet
- Kismen
- Hayır

25. GİDEM'den önce ve sonra kullandığınız hizmetin kalite sertifikaları sahip olduğunu veya alacağını?
- ISO
- ISO 9001
- ISO 14001
- ISO 13485
- TSE
- OHSAS 18000
- HACCP
- Ce
- TS 16949
- Diğer

26. GİDEM hizmetlerinin kalite sertifikalarının alınması etkisi olduğu mu?
- Evet
- Kismen
- Hayır

27. GİDEM hizmetlerinin kalite sertifikalarını alınması etkisi olduğu mu?
- Evet
- Kismen
- Hayır


29. Aşağıdaki mali yönetim araçlarından hangilerini düzenli olarak uygulamaktanız?
- Bütçeleme
- Aylık Bütçe Kontrolü
- Maliyet Muhasebesi

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

31. Firmamızda aşağıdaki yapıların oluşumunda GİDEM'in bir etkisi olduğu mu?

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

33. GİDEM'den aldığınız hizmetin peneydik olarak yapılan araştırmaların artmasında etkisi olduğu mu?

34. GİDEM hizmetlerinin geleceği için peneydik olarak araştırma yapmasına veya mevcut araştırmaların artırmasına etkisi olduğu mu?

35. Firmamızın sermaye yapısı nasıl?
- Anonim şirket
- Limited şirket
- Hakiki kişi İletmesi
- Diğer (Belirtiniz)
36. Firmanızın kurulduğu nasil gerçekleşti? (Konuulan kişi şirketin sahibi değişse, yanıtlar şirketin sahibi adına alınmalıdır.)
- Kendim kurdum.
- Eşim / Akrobaların ile kurdum.
- Arkadaşlarıyla / meslektama / sınıf arkadaşlarıyla / vb. kurduk.
- Bir devlet firmasını satın / devraldım.
- Aile bireylerinden satın aldım.
- Aile dişinden birinden satın aldım.
- Şirket alımda bana geçti __________________________ kaçınık kupak?
- Diğer

37. Şirketin ortaalan vasa, kilmelidi? (Toplam 100% olarak)
- Baba, kız kardeşim erkek kardeş (GAP Bölgesinde Yaşayan) %
- Baba, kız kardeş erkek kardeş (Başka Bölgede Yaşayan) %
- Diğer akrabalardır %
- GAP bölgesindeki hemşehri %
- İstanbul'da yaşayan hemşehri %
- Diğer bölgedeki hemşehri %
- yabancı yatırımcılar %
- İşçilerr %
- Diğer %
- %100

38. Son 5 yılda yeni yatırım yaptınız mı ve yapışsaz bu yatırımlar türü nereder?  
- Evet  Hayır (ise 40. soruya geçiniz.)
  Evette, yatırımlar türü asırdır?
  a. Yeni bir sektöre / iş koluna yatırım __________________________ne?
    - aynı firma ile
    - yeni firma kurarak
  b. Mevcut şirkete yatırım:
    - çalışan sayısında artış __________________________kişi
    - yeni fabrika __________________________a1. yeri
    - makine ekipman __________________________b1. yeri
    - arsa/dükkan/depo __________________________c1. yeri
    - diğer __________________________d1. yeri

39. Bu yatırımın gerçekleşmesinde GİDEM'in katkıları oldu mu?
- Evet  Hayır (ise 40. soruya geçiniz.)

40. Yıllara göre yurt içi satışınızın nasıl değişti?

<table>
<thead>
<tr>
<th>Yıllar</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
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<td>Gelir (TL)</td>
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<td>Önceki yılı göre yüzde değişim</td>
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*Not: Lütfen net alcımlar ve bir yıla nakaranظاهرة değiştirliğiyle yüzde olarak yazınız.*

41. Yıllara göre yurt içi satışınızın nasıl değişti?

- Evet  Hayır  Kismen  Etkisi bekleniyor

42. GİDEM hizmetlerinden faydalanmaşı bağlandıktan sonra Türkiye içerisinde daha önce satış yapmadığınız yeni pazarlara gidin mi?  
- Evet  Hayır (ise 44. soruya geçiniz.)

43. GİDEM hizmetlerinin Türkiye içerisinde yeni pazarlara giriste etkisi olduğu mu?  
- Evet  Kismen  Hayır

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

45. Son 5 yılda ihracat yaptınız mı?  
- Evet  Hayır (ise 51. soruya geçiniz.)

46. GİDEM ile çalışmından önce ihracat yapıyor muydunuz?  
- Evet  Hayır

47. Yıllara göre ihracat geliriniz nedir?

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<tr>
<th>Yıllar</th>
<th>2002</th>
<th>2003</th>
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<th>2005</th>
<th>2006</th>
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<td>Gelir (para birimini belirtiniz)</td>
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*Not: Lütfen net alcımlar ve bir yıla nakaranظاهرة değiştirliğiyle yüzde olarak yazınız.*

48. Ihracatınızda GİDEM'in oluşturduğu katkılardır mu?  
- Evet  Kismen  Hayır  Etkisi bekleniyor

49. GİDEM hizmetlerinden faydalanmaşı bağlandıktan sonra daha önce satış yapmadığınız yeni ülke / uluslararası pazarlara gidin mi?  
- Evet  Hayır (ise 57. soruya geçiniz.)

50. GİDEM hizmetlerinin yeni ülke / uluslararası pazarlara giriste etkisi olduğu mu?  
- Evet  Kismen  Hayır

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

52. GİDEM'den aldığınız hismetin ihraç forgiveness ürün sonrasında artış olduğu mu?  
- Evet  Hayır (ise 54. soruya geçiniz.)

53. GİDEM'den aldığınız hismetin ihraç forgiveness ürün sonrasında artış etkisi olduğu mu?  
- Evet  Kismen  Hayır
54. GİDEM hizmetlerinin geleceği için hakkı ettiği ürün endüstrisinde artış etkisi oluşabilir mi?
   - Evet
   - Kısmen
   - Hayır

55. GİDEM hizmetleriyle doğrudan ilgili uluslararası lisanslı üretim anlaşlarının var mı?
   - Evet
   - Hayır (i.e 57. soruya geçiniz.)

56. GİDEM'den hizmet alındıktan sonra uluslararası lisanslı üretim anlaşımlarında nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
   - Artma
   - Azalma
   - Değişim Yok
   - Sayı

57. Yabancı sermayeniz var mı?
   - Evet
   - Hayır (i.e 60. soruya geçiniz.)

58. GİDEM'den hizmet alındıktan 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 artış etkisi olduğu mu?
   - Evet
   - Kısmen
   - Hayır

60. GİDEM hizmetlerinin geleceği için yabancı sermayenin oluşmasına veya mevcut yabancı sermaye oranın artışına etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır

61. Yabancı şirketlerle yatırım anlaşmanız var mı?
   - Evet
   - Hayır (i.e 64. soruya geçiniz.)

62. GİDEM'den hizmet alındıktan sonra yabancı şirketlerle yaptığınız yatırım anlaşmanızınernalında nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
   - Artma
   - Azalma
   - Değişim Yok
   - Sayı

63. GİDEM'den aldığınız hizmetin yabancı şirketlerle yaptığınız yatırım anlaşmanızın etkisi olduğu mu?
   - Evet
   - Kısmen
   - Hayır

64. GİDEM hizmetlerinin geleceği için yabancı şirketlerle yaptığınız yatırım anlaşmanızın yapılmaması veya mevcut anlaşmaların artışına etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır

65. Uluslararası ihalelere katılabiliyor musunuz?
   - Evet
   - Hayır (i.e 68. soruya geçiniz.)

66. GİDEM'den hizmet alındıktan sonra katıldığınız uluslararası ihale sayısında nasıl bir değişim oldu? Artış ya da azalış sayısını belirtiniz.
   - Artma
   - Azalma
   - Değişim Yok
   - Sayı

67. GİDEM'den aldığınız hizmetin katıldığıınız uluslararası ihale sayısındaki artışa etkisi oluştu mu?
   - Evet
   - Kısmen
   - Hayır

68. GİDEM hizmetlerinin geleceği için ihalelere katılmada veya mevcut ihale sonrasına etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır

69. Son 5 yılda yurtiçi veya yurtdışı fuarlara katıldıınız mı?
   - Evet
   - Hayır (i.e 72. soruya geçiniz.)

70. GİDEM'den hizmet almayı başlarken sonra yurtiçi ve yurtdışı fuarlara katılımınız nasıl değişti? Artış ya da azalış sayısını belirtiniz.

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

72. GİDEM hizmetlerinin geleceği için yurtiçi ve yurtdışı fuarlara katılımının etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır

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

74. GİDEM'in bilişim yapılarının kullanılması etkisi oluştu mu?
   - Evet
   - Kısmen
   - Hayır

75. GİDEM'in hizmetlerinin geleceği için bilişim yapınının kullanılması etkisi olabilir mi?
   - Evet
   - Kısmen
   - Hayır
76. GİDEM kapsamlındaki danışmanlık, eğitim, bilgilendirme ve diğer hizmetler firmanızın gereksinim duydugunuz hizmetleri ne ölçüde karşılamaktadır?
- Tamamen
- Kısmen
- Hiç

77. GİDEM'den şu ana kadar aldığınız eğitimlerin firma verimliliğini ve satışlara katkısi olduğunuz/olacağınız ortamlarda etkisi olduğunu/olৎacağını değerlendiriniz.
- Evet
- Hiç

78. GİDEM'in tüm hizmetlerinden haberdarınız oluyor mu? Nasıl?
- Evet, nasıl?
- Internet
- Yayınlar
- Diğer

79. Aşağıdaki GİDEM hizmet kategorilerinin performanslarını nasıl değerlendirirsiniz?

<table>
<thead>
<tr>
<th>Hizmet Kategorisi</th>
<th>Etkili</th>
<th>Kısmen Etkili</th>
<th>Etkisiz</th>
</tr>
</thead>
</table>

80. GİDEM hizmetleri ile ilgili beklenmelere, taleplerinizi GİDEM ofisi ile iletiyor musunuz?
- Evet
- Hayır

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

82. 2008 yılından itibaren GİDEM hizmetlerinin ülkemizdeki durumunun firmanız GİDEM'den hizmet talebinde nasıl bir değişim olabileceğini düşünürsünüz?
- Artarak devam eder
- Değişim olmaz
- Azalarak devam eder
- Hizmet talebinde bulunulmaz

83. GİDEM'in faaliyet gösterdiği ortamındaki aktörleri/etoğleri GİDEM'in performansına etkisi/katkısı açısından değerlendiriniz.

<table>
<thead>
<tr>
<th>Coğrafi Yapısı</th>
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<tbody>
<tr>
<td>Evet</td>
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<tr>
<th>Sektörel Yapı</th>
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<th>AB Projeleri</th>
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<td>Evet</td>
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<table>
<thead>
<tr>
<th>İLDEKİ KURUMSAL YAPILAR</th>
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<tbody>
<tr>
<td>Valilik</td>
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<tr>
<td>Belediye</td>
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<tr>
<td>Ticaret Odası</td>
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<tr>
<td>Sanayi Odası</td>
</tr>
<tr>
<td>Diğer (isim belirtiniz)</td>
</tr>
</tbody>
</table>

84. GİDEM'in başarısını olumsuz etkileyen en önemli faktör size nào?

85. GİDEM'in daha iyi hizmet verebileceği için size ne neler yapılmalıdır?
- Daha iyi hizmet verilsin
- Daha fazla çiştte hizmet verilsin
- İhracata daha çok yoğunlaştırılın
- Diğer

86. Ne gibi hizmetler almayı isteriniz?

87. GİDEM'den aldığınız hizmetlerin gelecekte size ne ölçüde bir etki yapacağını düşünürsünüz?
- Tamamen olumlu
- Kısmen olumlu
- Hiç
- Olumsuz
ANNEX 2: IN-DEPTH INTERVIEWS WITH CLIENTS

HİZMET ALAN FİRMALARLA DERINLEMESİNE GÖRÜŞME

1. GİDEM ofisyle ilk bağlantıyı nasıl geçtiniz? Boyle bir kurumun kuruluyor olması size/de ideki iş çevresinde heyecan ve motivasyon yarattı mı?
2. İlk kurulduğu dönemdeki yaklaşımla şimdiki yaklaşım arasında bir değişiklik oldu mu?
3. GİDEM'den ne tür hizmetler aldınız? Aldığınız hizmet yoğunluğunda yıllardır bir değişim oldu mu? Oldu ise, ne tür? Neden?
4. GİDEM'in (sizin şirketiniz açısından) belirli başlangıç neler olmuştur? Bunun yanı sıra başarılarınızı size nerede?
5. GİDEM'in (sizin şirketiniz açısından) belli başlı başarıları neler olmuştur? Bunun yanında başarılarınızı size nerede?
6. GİDEM'i başarısız ya da yetersiz gördüğünüz hususlarda bu başarılarınızın kaynağı nerede? Bu eksikliklerin gidilmesi için neler yapılmalıdır?
7. Bu konulardaki ilk ve önlemlerini GİDEM'e iletmeye imkanı bulduğunuz mu?
8. İlinizdeki GİDEM ofisi kuruluşu hakkında bu yana, piyasada belirli sektörel gelişmeler, değişimler olduğu mu? GİDEM'in bu gelişmelerdeki payı size nerede?
9. İlinizde önceki faaliyet göstermiş ve/veya göstermemekte olan farklı yere kalkınma'ı/odak kurum ve kuruluşlar nelerdir? GİDEM'in bunlardan farklı, yeni-likçi bir yaklaşım olduğu mu?
10. Size GİDEM hizmetleri devam etmeli mi? Yeni hizmet alanları olabilir mi? Mevcut hizmet alanlarını yeniden kurgulaması ve/veya geliştirmesine dair görüşleriniz nelerdir?
11. Hiç ücretli hizmet aldınız mı?
12. GİDEM, hizmetleri ücretlendirme şeklinde bir yeniden yapılandırırmaya gitse, bu hizmetlerde yararlanmayı düşünür müsünüz? Önerileriniz nelerdir?
ANNEX 3: IN-DEPTH INTERVIEWS WITH NON-CLIENTS

HİZMET ALMAYAN FİRMALARLA DERINLEMESÎNE GÖRÜŞME

1. Şehrinizde bir GİDEM ofisi olduğunu haberiniz var mı? Varsa nasıl haberiniz oldu, onlar mı ulaştı, yoksa dolaylı kaynaklardan mı duyduınız?

2. Şehrinizdekî GİDEM ofisinin ve genel olarak GİDE'nin faaliyetleri konusunda bilginiz var mı?

3. Verdikleri herhangi bir hizmet konusunda size ulaştılar, bilgi verdiler mi? Hiç doğrudan ilâşkeme geçmeyi denerdiniz mi?

4. Sizin bu kurumun faaliyetlerinden/etkinliklerinden uzak durmanızın nedeni nedir? Nasıl olduğu illâskide olmayı isterdiniz?

5. GİDEM'den hizmet alan ve memnun olan bir firmaya ilişkin var mı?

6. GİDEM'den hizmet alan ve memnun kalmayan bir firmaya ilişkin var mı?

7. Sizce GİDEM’den bahsediniz kalkınmasında bir rol oynamaz mı? Evetse nasıl, hayırsa neden?

8. GİDEM’in yapısı hakkında biraz bilginiz varsa, size eksik olan tarlalar neler?

9. Olumlu tarlalar neler?

10. Kendi iş kolunuzda üretim, pazarlama, ihraçat (satış) konularında ya da şirketin yönetimi konusunda güncel bilgilere ihtiyaç duyuyorsunuz? Bunları nereden sağlayanız?

Bulanık Algı Haritalama Sorusu
*Soruyu sormadan önce yöntemle kavram tarif ediniz.

**Genel soru:** Elinizde, faaliyet ve sektör alanınızı destekleyen (ulusal ya da uluslararası) kurumların rolünü nasıl algıyorsunuz?

**Uygulama Yöntemi:**
1. Sorgunun cevaplardır kişisinin verdiği cevaplardan kavramları alt alta not alınız
2. Her kavram bir balonun içinde olarak şekillerde grafiği çiziniz
ANNEX 4: IN-DEPTH INTERVIEWS WITH GİDEM OFFICES

GİDEM ile DERİNLEMESİ GÖRÜŞME

1. GİDEM’in yerel kalkınmaya sızı bir etki olduğu? GİDEM öncesi ilinizin yerel kalkınma konumunuz neydi?
2. Yerel kalkınmada bir model kurulum olarak GİDEM’in yeri ve etkisi neydi? Örneğin, GİDEM’in faaliyet gösterdiği ilin bir alt sektörunda farklılaşmış yaklaşımlar nerede yahut ne oldular?
3. GİDEM’in faaliyetleri “bilgilendirme, danışmanlık, eğitim, vb. (fırsat pencereleri)” hizmetlerini nasıl bir fırsat & seçme & örgütme sürecine göre kuruluyor? GİDEM ofisinin faaliyetlerini ilinizin özellikleri ile ne ölçüde algılayarak çözdü?
4. GİDEM projesinin süreç planını & iş asamlarını nasıl hazırladınız? (Hizmetlerin nitel - nicel dağılmalarınıuzun düşünülebilir) İş planlama sürecinde faaliyetlerinizi ve yönetim süreçlerini nasıl kurguluyoruz?
5. Proje ilk başlangıçtan bu yana firmalar GİDEM’de faaliyet gösteren şirketler ve işlevlerle bu süreçte nasıl rol oynadı? İlin sosyo-ekonomik yapısı ve iş üretme kültürü - alışkanlıkları GİDEM’in faaliyetlerini ve faaliyetleri ile ne ölçüde etkiliyoruz?
6. Kadın girişimcilik konusundaki değişşimler GİDEM ofis faaliyetlerine ne ölçüde etkiliyor? Örneğin, kadınların iş hayatına katılımın, new firm kurma ve faaliyetlerin ne ölçüde etkiliyor?
7. GİDEM’in “Start-up” firmalarının faaliyetleri organize sürecinde nasıl bir etkiye ve etkinliği oldu? İlin sosyo-ekonomik yapısı ve iş üretme kültürü - alışkanlıkları GİDEM’in faaliyetlerini ve faaliyetleri ile ne ölçüde etkiliyoruz?
8. GİDEM ofisinin faaliyetlerini ve faaliyetleri ile ne ölçüde etkiliyoruz? (İş planlama sürecinde faaliyetlerinizi ve yönetim süreçlerini nasıl kurguluyoruz?)
9. Planlanan ancak gerçekleşmemiş aktiviteler olmuyor? Gerçekleşmemiş sebepleri ne olabilir?
10. Planlanan ancak gerçekleşmemiş aktiviteler olmuyor mu? Bu durumu ortaya çıkaran etkenler nedir?
ANNEX 5: IN-DEPTH INTERVIEWS WITH LOCAL INSTITUTIONS

YEREL KURUMLARLA DERINLEMESİNİ GÖRÜŞME

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