



EUROPEAN CLUSTER  
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# Country factsheet

Türkiye

An initiative of the European Union





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## Introduction



This document presents an overview of the cluster policy in Türkiye. Given the importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country can be consulted in the [Türkiye Report 2021](#) which highlights the country's recent developments, economic outlook and the state of play of its relations with the EU.

The COVID-19 pandemic has caused an unprecedented economic shock to Türkiye and the global economy. In response, Türkiye launched a 21 point [stimulus package](#) ('Economic Stability Shield Programme') including fiscal commitments amounting to 2.1% of GDP, most of them tax deferrals, to tackle the economic outfall of the coronavirus pandemic. Clusters were not specifically targeted.

In addition to the COVID-19 pandemic, the ongoing Russian military aggression against Ukraine has also taken its [toll on the Turkish economy](#) and the ensuing energy crisis and market disruptions present further challenges for Turkish companies.

In the following, a succinct overview of the cluster policy in Türkiye will be provided. The structure of this factsheet encompasses:

- 1) an overview of the existing cluster-related policy in Türkiye,
- 2) an assessment of the state of play of the national cluster policy.

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# National cluster policy, programmes and initiatives



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## 1. National cluster policy, programmes and initiatives

In this section we provide an overview of the existing Turkish cluster-related policies.

The breakdown is presented in the form of a table, with the first column showcasing information on the aspects which constitute the policy (beginning with 'Policy Objectives', following with 'Policy Focus', etc.). The second and third column details each aspect for Türkiye's cluster-related policies.

Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2022), which are applied for comparative purposes. This is followed by a complementary descriptive text to provide more insights about the cluster policy in Türkiye.



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
<p><b>POLICY OBJECTIVES</b></p> 	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Supporting internationalisation activities</b></p> <p><b>Enhancing the visibility of clusters</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting the creation of new cluster organisations</b></p> <p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Cluster analysis and support for policymaking</b></p> <p><b>Increase supply chain resilience</b></p>	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Supporting internationalisation activities</b></p> <p><b>Enhancing the visibility of clusters</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Supporting cluster excellence and professionalisation of cluster management</b></p> <p><b>Supporting the consolidation of existing cluster organisations</b></p> <p><b>Supporting the creation of new cluster organisations</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Cluster analysis and support for policymaking</b></p> <p><b>Increase supply chain resilience</b></p>



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
	<p>CISOP is focused on increasing competitiveness through improving the business environment and R&amp;D, innovation, and technological development. The expected results are: (1) Improved functioning of the business sector; (2) Increased access to financing for SMEs; (3) Increased clustering, networking, and internationalisation of SMEs; (4) Greater quality and quantity of public and private R&amp;D and innovation for economic development.</p>	<p>The Cluster Support Programme is set up to support cluster initiatives in order to transform Turkish manufacturing industry towards a higher share in world exports in high-tech products, sustain a qualified workforce, and increase general competitiveness and productivity while being sensitive to the environment and the society.</p> <p>The Programme pursues a broad range of cluster-supporting objectives including strengthening cluster capacity and networking (cross-clustering), cluster branding; developing factor conditions and markets like a skilled labour market, access to raw materials, and infrastructure development; more efficient supply chain governance including sharing best practices; and promoting innovation activities from applied R&amp;D to product, process and market innovation.</p> <p>Since the 2022 amendment of the regulation governing the Cluster Support Programme, it contains a domestic sourcing provision guaranteeing higher support rates for buying machinery and equipment with a domestic goods certificate.</p>
<p><b>POLICY FOCUS</b></p> 	<p><b>No specific focus</b></p>	<p><b>Sectoral</b></p>
	<p>CISOP has a comprehensive outlook and aims to improve the business environment as well as to strengthen research, technologic development and innovation in general.</p>	<p>The Cluster Support Programme is focusing predominantly at the manufacturing industry.</p>



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
<p><b>RESPONSIBLE</b></p>  <p><b>AUTHORITIES</b></p>	<p><b>Both drafting and implementation</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p>	<p><b>Both drafting and implementation</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p>
	<p>The Ministry of Science, Industry and Technology is the lead ministry in charge of developing, implementing, and operationalising clusters. The Ministry has 7 operational directorate generals and is affiliated with the Turkish Patent Institute (TPE), Small and Medium Enterprises Development Organisation (KOSGEB), and The Scientific and Technological Research Council of Türkiye (TUBITAK).</p> <p>There is a representative of the National IPA coordinator, the National Authorising Officer, the National Fund, Audit Authority, and the bodies of the Operational Structure for each IPA policy area/programme. There is also a Sectoral Monitoring Committee consisting of members of the aforementioned authorities plus representatives from civil society as well as socio-economic and regional organizations.</p> <p>As the Operating Structure and Contracting Authority of the CISOP, The Ministry of Industry and Technology, is responsible for selection, preparation, contracting and implementation of the projects supported under CISOP which serve to the above-mentioned policy objectives.</p>	<p>The Cluster Support Programme is carried out by the Ministry of Industry. It is responsible for both drafting and implementation, provides funding and oversees implementation.</p> <p>A Selection Committee consisting of cluster experts from the ministry, academicians and the private sector is elected for five-year terms and evaluates the applications.</p>



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
<b>BENEFICIARIES</b> 	<b>Cluster organisations</b> <b>Research organisations</b> <b>Academic institutions</b> <b>Business associations</b> <b>Technology centres</b>	<b>Cluster organisations</b> <b>Research organisations</b> <b>Academic institutions</b> <b>Business associations</b> <b>Technology centres</b> <b>Policy makers</b>
	<p>Although SMEs are the central final beneficiary of the facilities established by CISOP, CISOP's direct beneficiaries are umbrella organisations, non-profit public or semi-public institutions. SMEs cannot directly be the beneficiaries.</p> <p>Direct beneficiaries include public institutions (including development agencies), universities (accelerators), quasigovernmental and not-for-profit business representative organizations, OIZ managements, and TDZ managements.<sup>1</sup></p> <p>As far as financial instruments are concerned, final beneficiaries include IFIs, universities, not-for-profit business representative organizations, public organizations, as well as incubation centres.</p>	<p>Institutions, organisations and private legal entities that may take part in the cluster organisations include local governments, universities and research institutions, technology development zones (TDZ), chambers of commerce and industry, organised industrial zones (OIZ), and exporters' associations.</p>

<sup>1</sup> OIZ = Organised Industrial Zone; TDZ = Technology Development Zone.



Policy type:	Broad Policy	National Cluster Policy	
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme	
<b>INSTRUMENTS</b> 	Financial	<p><b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b></p> <p><b>Application to labelling schemes and similar initiatives</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p> <p><b>Financing networking events</b></p> <p><b>Supporting market entry (e.g. testing, proof-of concept, prototyping, demonstration projects)</b></p> <p><b>Financing start-ups</b></p> <p><b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b></p>	<p><b>Funding collaboration initiatives</b></p> <p><b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b></p> <p><b>Application to labelling schemes and similar initiatives</b></p> <p><b>Subsidies to hire personnel</b></p> <p><b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b></p> <p><b>Financing networking events</b></p> <p><b>Innovation: voucher, support to hire PhDs, cooperation with R&amp;I actors</b></p>
	Technical assistance	<p><b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</b></p> <p><b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b></p> <p><b>Support for soft skills development: coaching, management training, upskilling/reskilling</b></p> <p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p> <p><b>Others: Building administrative capacity for project assessment and selection, monitoring and evaluation improving project documents</b></p>	<p><b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b></p> <p><b>Support for networking and partnership building (at national and/or international level)</b></p> <p><b>Marketing activities: advertising, communication, events, fairs, and so on</b></p> <p><b>Support for the broader factor endowment of a cluster including a skilled labour pool, access to raw materials, and good infrastructure</b></p>



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
	<p><b>Explanation</b></p> <p>The CISOP focuses primarily on increasing capacity of actors within the business environment including academic and research organisations, increasing access to finance and capital, funding and providing the common use infrastructure for more international partnership building, networking and marketing activities, and providing technical assistance such as needs assessments, capacity building and strategic planning.</p>	<p>The Cluster Support Programme lists a broad range of support activities including financial support for cluster creation and development, hiring personnel, networking events and R&amp;D and innovation collaborations. Technical assistance is given, among others, in the form of market analysis, laboratories, and advertisement.</p> <p>Other forms of support are to develop the broader factor endowment of a cluster including a skilled labour pool, access to raw materials, and good infrastructure.</p>
<p><b>HISTORY</b></p>	<p><b>Period</b></p> <p><b>Limited period</b></p>	<p><b>Unlimited period</b></p>
	<p><b>Ending year</b> (for policies with limited period)</p> <p>2020</p>	-
	<p><b>Starting year</b></p> <p>2014</p>	2012
	<p><b>Explanation</b></p> <p>The CISOP is the second phase (2014-2020) of the Competitive Sectors Programme (CSP) following the Regional Competitiveness Operational Programme First Phase (2007-2013), aligning with the first and second phase of the EU Instrument for Pre-Accession (IPA). The IPA III has not yet been approved. The preparation of the 3rd period, which will cover 2021-2027, are still in progress. Private sector</p>	<p>The Cluster Support Programme has been launched with the Cluster Support Programme Regulation on September 15, 2012. Since then, three support calls have been made by the Ministry. 17 applications were received in the 1st Call, 16 in the 2nd Call, and 12 in the 3rd Call. An amendment of the Regulation entered into force on July 22, 2022, raising the support rate from 50% to</p>



Policy type:		Broad Policy	National Cluster Policy
Policy name:		Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
		supports and clusters, innovation etc. will most probably be included under IPA III but details such as which subjects/axes will be supported and budget etc. are not yet clear. Therefore, all the OPs and other supports are still under preparation. The IPA unit of the Ministry of Industry and Technology (MoIT) is responsible for these programmes.	70% and even to 85% for domestically sourced machinery and equipment purchases (with a domestic goods certificate).
<b>BUDGET</b> 	<b>Overall</b>	EUR 260 million (with national contribution)	-
	<b>Annual</b>	Varies	Varies. In 2017 four clusters were supported with ca. 12.5 million TRY (2.67 million EUR) <sup>2</sup> .
	<b>Source of funding</b>	The European Union contributes 85% to the funds while the Turkish government contributes 15%.	Government funding.
<b>POLICY</b>  <b>EVALUATION</b>	<b>Availability</b>	<b>in-itinere</b>	<b>in-itinere</b>
	<b>Results</b>	Evaluation capacity has been expanded for the 2014-2020 phase of the programme. A scheduled interim evaluation is still being carried out and expected to be completed by the end of 2022. An ex-post evaluation will be released within 3 years of the end of the programming period.	<p>For the supported cluster initiatives, independent audits are envisioned every year, evaluations by the ministry in the second year after the start of implementation of a cluster organisation's business plan.</p> <p>An impact analysis at the programme level shall be conducted at most every five years.</p> <p>Although not publicly available, according to the responsible national authorities monitoring and evaluation reports are conducted on a regular basis for internal use.</p>

<sup>2</sup> Calculated according to the European Commission's InForEuro exchange rate for 12/2017. See [https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro\\_en](https://ec.europa.eu/info/funding-tenders/procedures-guidelines-tenders/information-contractors-and-beneficiaries/exchange-rate-inforeuro_en) (accessed 23.11.2022).



Policy type:	Broad Policy	National Cluster Policy
Policy name:	Competitiveness and Innovation Sector Operational Programme (CISOP)	Cluster Support Programme
<b>POLICY ALIGNMENT WITH THE EU PRIORITIES</b> 	<b>Green economy</b> <b>Digitalisation</b>	<b>Green economy</b> <b>Resilience</b>

02

## State of play of cluster policy



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## 2. State of play of cluster policy

This section presents an overview of the state of play of Turkish cluster policy in the form of a quantitative and qualitative assessment. The data below illustrates how the country ranks in terms of **maturity of cluster policy at the national level**. The maturity assessment is based on a combination of factors presented in Chapter 1, which receive a score based on the existence or absence of a given element in the cluster policy.

Note: the maturity assessment does not reflect the performance of a country, but only the degree of development of their national cluster policy at the moment of data collection (Q3 2022). The assessment illustrates how the country scores for each of the four criteria (policy scope, continuity of cluster policies, evidence of performance, cluster support instruments) compared to the maximum score that they can reach. Please refer to the **Annex** for a detailed overview of the categories and the scoring system.

The table below presents an overview of the **maturity assessment for Türkiye** for 2022. The total score of Türkiye amounts to 7 points out of 8.

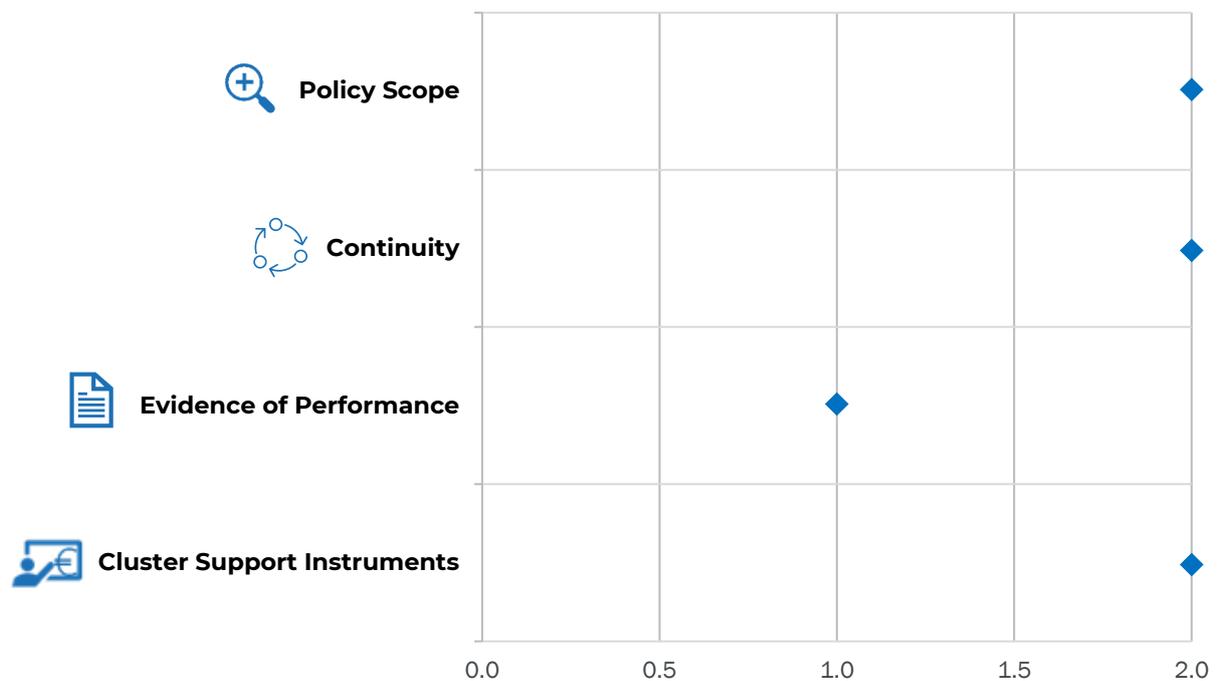
Türkiye	MATURITY ASSESSMENT	Max score	Actual score
POLICY SCOPE	Absence of cluster policy	0	
	Broad policy	0,5	
	Sectoral policy	1	
	National and/or regional cluster policy	2	<b>2</b>
CONTINUITY	No cluster-specific policy available	0	
	Cluster policy established recently	0,5	
	Cluster policy established between over 2 and 10 years	1	
	Cluster policy established over 10 years ago	2	<b>2</b>
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available	0	
	Existence of evaluations of past policies	0,5	
	Existence of monitoring or an ongoing / interim evaluation	1	<b>1</b>
	Existence of monitoring and ex-ante or ongoing / interim evaluation	2	
CLUSTER SUPPORT INSTRUMENTS	No instruments for cluster development	0	
	Financial support for cluster development in the broader and / or sectoral policy	0,5	
	Financial or technical support for cluster development in dedicated cluster policy	1	
	Financial and technical support for cluster development in dedicated cluster policy	2	<b>2</b>
<b>TOTAL (8)</b>			<b>7</b>

Source: ECCP (2022)



Drawing from the table above that showcases the scored points in Türkiye's cluster policy, the Figure below portrays the **degree of maturity** across four categories related to the national level cluster policy.

**Figure 1: Maturity of cluster policy - Türkiye**



Source: ECCP (2022)

The text below provides a **qualitative description** of the state of play of the cluster policy in Türkiye, which is complementary to the maturity assessment presented above.

### **Policy scope**

Türkiye's cluster policy is distributed across several programmes.

First, it is integrated in the broader CISOP to support business competitiveness and innovation in collaboration with research and academic institutions. Regional development agencies (RDA) identify sectoral projects which aim to develop specific local clusters. Though projects are identified by RDAs, project selection, monitoring and evaluation takes place at the programme, i.e. national, level. Cluster policy, therefore, is part of a more general business development and innovation policy framework controlled at the national level.

Second, the Cluster Support Programme provides a very comprehensive range of support options for cluster initiatives, covering the improvement of cluster coordination, awareness, or effectiveness; development of factor conditions or markets; enhancing efficiency (in common facilities, procurement and reuse of materials, energy efficiency, etc.); and strengthening innovation capacity.

Finally, further programmes like UR-GE and HİSER, run by the Ministry of Trade, support cluster initiatives for export development in manufacturing and IT sectors respectively.



## **Continuity**

Türkiye started developing the policy foundations to support cluster growth in the 1960s which included the development of Organized Industrial Zones and Small Industrial Sites, which encouraged firm co-location and employment. This was followed by structural adjustment policies and the creation of the regional production networks in the 1980s. Since then, there have been a series of national cluster initiatives such as the Competitive Advantage of Türkiye project group which supported cluster initiatives and cluster research. However, these were not government policies.

The European Union has done a number of projects with Türkiye, first starting with the textile and fashion cluster in 2005-2006. The National Clustering Policy Project (2007-2011) defined Türkiye's clusters and outlined policy recommendations and roadmaps in a Clustering Policies White Book for Türkiye. In 2011, the SME Networking project with the EU piloted clusters in 5 regions. The Clustering Support Programme has continued these earlier efforts from 2012 onwards until today.

The CISOP is a broad policy running since 2007 with EU support from the Instrument for Pre-Accession (IPA) that includes cluster projects and support. Currently, projects of the second phase, which ended in 2020, will run until 2026. A prolongation into a third phase for the new IPA III (2021-2027) is pending.

The cluster-oriented export support programmes UR-GE and HİSER by the Ministry of Trade were launched in 2010 and 2022 respectively.

## **Evidence of performance**

With regard to CISOP, as a result of the evaluation of the first phase of the policy (2007-2013) evaluation capacities were strengthened. Sectoral committees provide ongoing monitoring and project evaluations. An interim evaluation was scheduled for 2019 but has not been published yet. A final evaluation of phase two is scheduled for three years after the programme ends (i.e. 2023 at the latest).

For the Cluster Support Programme an annual monitoring of activities as well as an impact evaluation at the programme level are scheduled but not publicly available. According to the responsible national authorities monitoring and evaluation reports are conducted on a regular basis for internal use.

## **Cluster support instruments**

The CISOP programme offers both financial and technical support to identify, develop and promote clusters at the regional level and build institutional capacities.

The Cluster Support Programme offers both financial and technical support to develop cluster initiatives and their broader economic ecosystems.

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## Annex

Criterion of maturity assessment	Description	Scoring (points between 0 and 2)
<b>Policy scope</b>	assessment whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies, e.g. foreign trade policies, labour and social policies or specific sectoral policies, e.g. industrial policy tourism policies, agriculture policies	<p><b>absence of cluster policy = 0</b></p> <p><b>existence of broader policies = 0,5</b></p> <p><b>existence of specific sectoral policies = 1</b></p> <p><b>existence of targeted cluster policies = 2</b></p>
<b>Continuity of cluster policies</b>	assessment of the duration and experience of the country in carrying out cluster policies. This criterion assesses only existence of targeted cluster policies and not broader policies or sectoral policies	<p><b>absence of dedicated policies supporting cluster development = 0</b></p> <p><b>cluster policy established recently (within the last 2 years) = 0,5</b></p> <p><b>cluster policy established between over 2 and 10 years = 1</b></p> <p><b>cluster policy established over 10 years ago = 2</b></p>
<b>Evidence of performance</b>	assessment whether there are evaluations of past and ongoing policies and a monitoring system in place. The existence of monitoring and evaluation mechanisms determines the degree of policy development in the country	<p><b>no evaluation and / or monitoring available = 0</b></p> <p><b>existence of evaluations of past policies, e.g. ex-ante = 0,5</b></p> <p><b>existence of monitoring or an ongoing / interim evaluation =1</b></p> <p><b>existence of monitoring and ex-ante or ongoing / interim evaluation =2</b></p>
<b>Cluster Support Instruments</b>	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	<p><b>no instruments for cluster development =0</b></p> <p><b>financial support for cluster development in the broader and / or sectoral policy = 0,5</b></p> <p><b>financial or technical support for cluster development in dedicated cluster policy = 1</b></p> <p><b>financial and technical support for cluster development in dedicated cluster policy = 2</b></p>

Source: ECCP (2022)