



EUROPEAN CLUSTER
COLLABORATION PLATFORM

Country factsheet

Türkiye

An initiative of the European Union



Content

1. Introduction and economic policy context	4
2. National cluster policy, programmes and initiatives	6
3. State of cluster policy	13
References	16
Annex	17



01

Introduction and economic policy context



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COLLABORATION PLATFORM

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1. Introduction and economic policy context



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 European Commission's [Türkiye Report 2023](#) 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 the national cluster policy.

02

National cluster policy, programmes and initiatives



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2. 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 column details each aspect for Türkiye's cluster policy.

Within the table the text presented in bold (black) depicts standardised categories across country factsheets (56 in total for 2023), 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:	National Cluster Policy
Policy name:	Cluster Support Programme
POLICY OBJECTIVES 	<p>Strengthening cooperation between companies or industry and RTDI actors</p> <p>Increasing competitiveness and boosting scale up of SMEs</p> <p>Supporting internationalisation activities</p> <p>Enhancing the visibility of clusters</p> <p>Fostering R&D activities, technology development and implementation</p> <p>Fostering innovation and strengthening innovation ecosystems</p> <p>Supporting cluster excellence and professionalisation of cluster management</p> <p>Supporting the consolidation of existing cluster organisations</p> <p>Supporting the creation of new cluster organisations</p> <p>Promoting employment and upgrading skills and competences</p> <p>Strengthening the network of cluster organisations/cross-clustering</p> <p>Cluster analysis and support for policymaking</p> <p>Increase supply chain resilience</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&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>



Policy type:	National Cluster Policy
Policy name:	Cluster Support Programme
POLICY FOCUS 	Sectoral <p>The Cluster Support Programme is focusing predominantly at the manufacturing industry.</p>
RESPONSIBLE  AUTHORITIES	Both drafting and implementation Provides funding Oversees the implementation <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>
BENEFICIARIES 	Cluster organisations Research organisations Academic institutions Business associations Technology centres Policy makers <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>




Policy type:		National Cluster Policy
Policy name:		Cluster Support Programme
INSTRUMENTS 	Financial	Funding collaboration initiatives Support to R&D projects, SMEs becoming cluster members, etc. Application to labelling schemes and similar initiatives Subsidies to hire personnel Subsidies for cluster infrastructure (e.g. offices, equipment) Financing networking events Innovation: voucher, support to hire PhDs, cooperation with R&I actors
	Technical assistance	Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence Support for networking and partnership building (at national and/or international level) Marketing activities: advertising, communication, events, fairs, and so on Support for the broader factor endowment of a cluster including a skilled labour pool, access to raw materials, and good infrastructure
	Explanation	<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&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>
	Period	Limited period
	Ending year (for	-



Policy type:		National Cluster Policy
Policy name:		Cluster Support Programme
HISTORY 	<i>policies with limited period)</i>	
	Starting year	2012
	Explanation	<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 70% and even to 85% for domestically sourced machinery and equipment purchases (with a domestic goods certificate).</p> <p>The programme is scheduled on 5-year periods and renewed regularly. The 4th call of the programme started on September 4, 2023, and ended on November 4, 2023.</p>
BUDGET 	Overall	EUR 2.08 million (since 2017)
	Annual	Varies
	Source of funding	Government funding.
POLICY EVALUATION	Availability	in-itinere
	Results	<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>



Policy type:	National Cluster Policy	
Policy name:	Cluster Support Programme	
		Although not publicly available, according to the responsible national authorities monitoring and evaluation reports are conducted on a regular basis for internal use.
POLICY ALIGNMENT WITH THE EU PRIORITIES 	Green economy Digitalisation Resilience	



03

State of cluster policy



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3. State of cluster policy

This section presents an overview on the state of play of Turkish cluster policy in the form of a qualitative assessment across four categories of analysis – policy scope, continuity of cluster policies, evidence of performance, and the range of cluster support instruments. Please refer to the **Annex** for the detailed overview of the categories. The table below presents an overview of the **state of Turkish cluster policy** for 2023.

Table 1: State of Play

Türkiye	State of Play
POLICY SCOPE	Absence of cluster policy Broad policy Sectoral policy
	National and/or regional cluster policy
CONTINUITY	No cluster-specific policy available Cluster policy established recently Cluster policy established between over 2 and 10 years
	Cluster policy established over 10 years ago
EVIDENCE OF PERFORMANCE	No evaluation and / or monitoring available Existence of evaluations of past policies
	Existence of monitoring or an ongoing / interim evaluation
CLUSTER SUPPORT INSTRUMENTS	Existence of monitoring and ex-ante or ongoing / interim evaluation No instruments for cluster development Financial support for cluster development in the broader and / or sectoral policy Financial or technical support for cluster development in dedicated cluster policy
	Financial and technical support for cluster development in dedicated cluster policy

Source: ECCP (2023)

The text below provides a **qualitative description** of the state of play of the cluster policy in Türkiye.

Policy scope

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.

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

Evidence of performance

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

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EUROPEAN CLUSTER
COLLABORATION PLATFORM

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Annex

Table 2: Analytical framework for the state of cluster policy

Criteria	Description	Categories
Policy scope	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	absence of cluster policy existence of broader policies existence of specific sectoral policies existence of targeted cluster policies
Continuity of cluster policies	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	absence of dedicated policies supporting cluster development cluster policy established recently (within the last 2 years) cluster policy established between over 2 and 10 years cluster policy established over 10 years ago
Evidence of performance	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	no evaluation and / or monitoring available existence of evaluations of past policies, e.g. ex-ante existence of monitoring or an ongoing / interim evaluation existence of monitoring and ex-ante or ongoing / interim evaluation
Cluster Support Instruments	assessment whether the policies provide any instruments to support the policy implementation, being these financial and/or technical support	no instruments for cluster development financial support for cluster development in the broader and / or sectoral policy financial or technical support for cluster development in dedicated cluster policy financial and technical support for cluster development in dedicated cluster policy

Source: ECCP (2023)