



PRESIDENCY OF THE REPUBLIC OF TURKEY
PRESIDENCY OF STRATEGY AND BUDGET

100th YEAR TURKEY PLAN

**ELEVENTH
DEVELOPMENT PLAN
(2019-2023)**



**DECISION
OF
THE GRAND NATIONAL ASSEMBLY OF TURKEY**

**Decision on the approval of
the Eleventh Development Plan (2019-2023)**

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ABBREVIATIONS

5G	Fifth Generation
AFAD	Disaster and Emergency Management Authority
ASDEP	Family Social Support Programme
BIST	Borsa Istanbul Inc.
Brexit	British Exit (Withdrawal of the UK from the EU)
BRSA	Banking Regulation and Supervision Agency
BSEC	Black Sea Economic Cooperation
CBRT	Central Bank of the Republic of Turkey
Cif	Cost Insurance and Freight
CMB	Capital Markets Board
CO ₂	Carbon Dioxide
COMCEC	Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation
CPI	Consumer Price Index
CRA	Central Registry Agency Inc.
ÇAYKUR	Directorate General of Tea Enterprises
ÇEMATEM	Child and Adolescent Substance Addiction Treatment and Education Centre
D-8	Developing Eight Countries
DSİ	Directorate General of State Hydraulic Works
ECB	European Central Bank
ECO	Economic Cooperation Organization
ESK	Directorate General of Meat and Milk Board
EU	European Union
EXIST	Energy Exchange Istanbul Inc.
Fed	Federal Reserve
Fintech	Financial Technology
Fob	Free on Board
FSRU	Floating Storage and Regasification Unit
FTE	Full Time Equivalent
G20	Group of Twenty
GDP	Gross Domestic Product
HBM	Hot Bituminous Mixture
HPP	Hydroelectric Power Plants
ICT	Information and Communication Technologies
IFK	Mortgage Financing Agency
IoT	Internet of Things
IPARD	Instrument for Pre-Accession Assistance
ISO	International Organization for Standardization
ITS	Intelligent Transport Systems
ITU	International Telecommunication Union
IXP	Internet Exchange Point
İLBANK	Directorate General of İller Bankası Inc.
İŞKUR	Turkish Employment Organization

ABBREVIATIONS

KEP	Registered Electronic Mail
KIRDES	Metropolitan Municipality Rural Infrastructure Project
KOSGEB	Small and Medium Enterprises Development Organization of Turkey
KÖYDES	Village Infrastructure Support Project
kWh	Kilowatt Hours
LDC	Least Developed Countries
LIBOR	London Inter Bank Offered Rate
LNG	Liquified Natural Gas
M2M	Machine to Machine Communication
MS	Market Surveillance
MTA	Directorate General of Mineral Research and Exploration
MW	Megawatt
NGO	Non-Profit Organization
NIH	National Institutes of Health
NPP	Nuclear Power Plant
OECD	Organisation for Economic Co-operation and Development
OIC	Organization of Islamic Cooperation
OIZ	Organized Industrial Zone
OPEC	Organization of Petroleum Exporting Countries
P&D	Product Development
PED	Thousand Tonnes of Equivalent Oil
PERBİS	Retail Information System
PPP	Public-Private Partnership
PPP	Purchasing Power Parity
PPS	Private Pension System
R&D	Research and Development
RDISP	Rural Development Investments Support Programme
SDG	Sustainable Development Goals
SIZ	Small Industrial Zone
SME	Small and Medium-Sized Enterprises
SOE	State-Owned Enterprise
SSI	Social Security Institution
SSL	Secure Sockets Layer
SUKAP	Water, Sewage and Infrastructure Project
TDZ	Technology Transfer Office
TEİAŞ	Directorate General of Turkish Electricity Transmission Corporation
TFP	Total Factor Productivity
TL	Turkish Lira
TOE	Tonne of Oil Equivalent
TOKİ	Housing Development Administration
TPS-OIC	Trade Preferential System among the Member States of the Organization of Islamic Cooperation
TRNC	Turkish Republic of Northern Cyprus

ABBREVIATIONS

TSE	Turkish Standards Institution
TTO	Technology Transfer Office
TURKPATENT	Turkish Patent and Trademark Office
TURKSTAT	Turkish Statistical Institute
TÜBİTAK	Scientific and Technological Research Council of Turkey
TWh	Terawatt Hours
UAV	Unmanned Aerial Vehicle
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
USA	United States of America
YEKA	Renewable Energy Resource Areas
YÖK	Council of Higher Education

Chapter One

1. INTRODUCTION

1. Eleventh Development Plan (2019-2023), the first development plan prepared under the Presidential Government System, lays down development vision of our country with a long-term perspective and will serve as a basic roadmap in meeting the fundamental values and expectations of our nation, raising the position of our country in international rankings and improving the welfare level of our people.

2. Designed as the first five-year part of a fifteen-year perspective, the Development Plan envisages an overall change and breakthrough in all fields, and a resolute and uninterrupted implementation in the long-term perspective. The plan aims at transforming the economic structure, to maintain stability and sustainability in the long-term, while boosting human capital through a breakthrough in education as well as technology and innovation capacities through a breakthrough in national technology.

3. The Development Plan has been prepared in an environment where international cooperation has been diversified and become further complicated, uncertainties have increased, the balance of economic and political powers have been changing rapidly among developed and developing

countries, a global process of re-balancing continues, and new centers of power and attraction are being formed in political and economic levels.

4. Coupled with political, economic and financial risks growing at the global level, the rising tensions in the field of trade, growing technological competition and uncertainties fueled by new protectionist trends lead to continued displacements in areas of conflict and alliances, making it difficult for countries to take firm positions in certain areas. On the other hand, global power elites tend to manage their development and economic growth processes with a much more strategic approach, develop key cooperation initiatives, improve their competencies in critical technologies and adopt a more planned approach in their economic preferences. This further increases the need for development process planning which makes it easier to foresee long term priorities. The Eleventh Development Plan will play a guiding role for increasing economic and social resources and channeling them to more productive areas in the medium and long term, by implementing concentration strategies targeting common goals.

5. The Eleventh Development Plan calls for an economic and social development

process that would boost the productivity of our country in all fields and help us create more value to achieve greater competitiveness at the international level, through a breakthrough in technology. The Plan adopts the principles of supremacy of law, fundamental rights and freedoms protected and enhanced by strong democracy as the pillars of development efforts, while its priority objectives include economic stability and sustainability, improved and more fairly shared welfare and a continued orientation towards development in the fields of human, social and spatial development.

6. The Development Plan focuses on facilitating competitiveness and efficiency increase in all fields. The Plan has five fundamental pillars; namely, stable and strong economy, competitive production and productivity, qualified human and strong society, livable cities and sustainable environment, and rule of law, democratization and good governance. All these pillars aim at achieving the ultimate vision of “a stronger and more prosperous Turkey that produces more value and shares more fairly”. Building on this approach, the Plan aims at boosting domestic production and accelerating industrialization particularly in priority sectors identified in the manufacturing industry. In addition to the priority sectors, agriculture, tourism and defense industry have been established as the priority fields of development in the development plan.

7. Under the pillar of “stable and strong economy”; the Plan lays down a basic framework and principles governing the monetary, fiscal, revenue and foreign trade policies as well as macroeconomic targets to reinforce these policies. The pillar of “competitive production and productivity” cov-

ers policies to achieve competitiveness and productivity increase in the economy and to support the structural transformation in production as well as the improvement in welfare. Under the pillar of “qualified human and strong society”, the Plan sets out policies to strengthen human capital, explicitly implement the inclusive growth approach and scale up welfare across all sections of the society. Under the pillar “Livable Cities and Sustainable Environment”, the Plan includes goals and policies aimed at protecting the environment, improving the quality of living in urban and rural areas and reducing regional development disparities in line with the goal of enhanced economic and social benefit. The pillar of “rule of law, democratization and good governance” covers goals and policies aimed at reinforcing the application of the principles of rule of law and democratization across all institutions and organizations making up the state, strengthening inclusiveness, transparency and accountability at all levels in public administration.

8. In the Eleventh Development Plan, which includes significant steps for fundamental structural transformation targeted in economic and social domains in the medium and long terms, the implementation aspect of the Plan has been strongly and concretely designed, with policies and measured envisaged under all pillar, primarily including competitive production and productivity. In this framework, resource allocation has been prioritized according to needs and productivity enhancing functions, and the implementation mechanisms and instruments to be used over the five-year Plan period have been set out.

9. The Eleventh Development Plan has been prepared through an inclusive ap-

proach involving all sections of the society including ministries and public institutions and organizations. In this scope, 75 specialized commissions (SC) and working groups were set up, bringing together and more than 3,500 public employees and representatives from the private sector, NGOs and academia. As part of the consultation process on the development priorities of our country a total of 267 meetings and workshops were organized in 81 provinces, with the participation of approximately 12,000 people at the local level. In addition, comments and suggestions were collected from more than 19,000 people on the priorities of the Plan, through a citizen survey carried out via the internet.

10. The Development Plan offers a set of policies which will guide all institutions in setting priorities for the preparation of other policy documents and strategic plans. In order to efficiently implement the policies and measures envisaged in the Plan, the Presidency Program, medium-term programs (MTP), annual programs of the Presidency, regional development and sectoral strategies, institutional strategic plans will be prepared on the basis of the Development Plan. The Development Plan has particularly considered the budgetary aspects of all policies and measures to be implemented, in order to strengthen the linkages between the Plan and budget. Public institutions will set their policies, investment and current expenditures, institutional and legal arrangements in compliance with the targets and resources envisaged in the Plan.

11. Given the expedited and effective structure of the executive function under the Presidential Government System, the Eleventh Development Plan, which lays down the highest-level policies to be implemented in this framework, will be efficiently implemented by administrations. In this framework, the monitoring and evaluation of progress achieved in the Development Plan will be carried out through an efficient monitoring and evaluation mechanism to be established through the coordination of the Ministry of Treasury and Finance and the Presidency of Strategy and Budget, and monitoring and evaluation results will be reported to the President annually.

12. Public institutions will be responsible for developing the sub-policies and measures applicable to their respective fields of duty, within the framework of the Plan's objectives, goals, principles and policies. The Plan's objectives, goals and policies will provide the overall framework for the budget and expenditure processes.

13. In the time of increased geopolitical and economic uncertainties and global balances of power started to be reshaped, all resources of our country will be channeled to the achievement of goals set by this Plan, through a shared understanding, in order to address risks and threats, take the available opportunities for the benefit of our nation, maintain a government understanding that values welfare and equally shared prosperity above everything and raise our country to the level of contemporary civilizations.

Chapter Two

2. GLOBAL DEVELOPMENTS AND TRENDS

2.1. GLOBAL TRENDS AND INTERACTIONS WITH TURKEY

Increasing Uncertainties and New Quests

14. Despite extensive measures taken during the process following the global financial crisis in 2008 a total recovery has not yet been achieved in global economy. The global financial crisis has undermined the confidence in the efficient functioning of liberal market economies, while it has severely affected income distribution. Coupled with the discontentment caused by the practices introduced to address the acute problems caused by the crisis, the income disparities observed recently among countries and population groups has further exacerbated the distrust towards liberal democracy and institutions.

15. The growing intensity of international migration and geopolitical tensions have fueled xenophobia. Defense expenditures have grown alongside terrorist acts globally. In this context, coupled with the un-

dermined confidence in liberal democracy, more protectionist and inward oriented populist policies have strengthened and interventionist policies have taken root.

16. The searches for power balance continue globally in geopolitical, military and economic domains. This search has significant implications on the formulation of energy, global trade, international investments, logistics and defense policies. The advantages to be offered by accelerated technological transformation to countries which take initial market making steps going forward will lead countries to take steps beyond market mechanisms and shape up trade wars on technology grounds.

17. During this period, when uncertainties have grown and it has become more difficult to communicate policies targeting long-term benefits despite short-term losses, there is a need for a sustainable and efficiently operating international policy coordination that is based on equality and regularity.

Shifts in Economic Center of Gravity and Quest for Global Economic Rebalancing

18. The axis of production is shifting from high-income countries to developing countries, and these economies including Turkey are expected to get stronger and more influential in the fields of global production, trade, technology and value added in the future.

19. High-income countries, on the other hand, seek reinforcing their superiorities in innovative production technologies and qualified human resources through technology wars, trade wars and protectionist approaches with a view to maintaining their leadership in global value chains.

20. The protectionist approach adopted by the United States of America (USA) and Brexit are expected to negatively affect global trade and integration. While the USA, European Union (EU) and Japan focus on bilateral agreements, China attempts to expand its global trade network through Belt and Road Initiative.

21. It is foreseen that the trade corridors between African and Asian countries will grow faster than the corridors among developed countries and new logistics networks and regions with transit passages will gain importance.

22. Brexit, the “crisis of values” which has broken out with the rise of extreme rightist and xenophobic policies, the weakening in transatlantic relations, and accelerated irregular migration reduce the normative power of the EU and make it imperative to re-define its role particularly in security terms.

Changing Technology, Production Structure and Service Delivery Forms

23. The current organization of global economy and the business models that have brought about this organization style are under heavy pressure from new products, services and business models that have emerged in some major technology areas.

24. Innovations to originate from the use of general purpose technologies such as biotechnology, digital technologies, advanced material technologies and stratified production technology are expected to become the primary sources of productivity gains, through transformation in production structure and value chains.

25. The reduced dependency of cost on economy of scale in the manufacturing industry, due to the development of 3D printers, the customization of production and the transformation of logistic networks in support of the emerging production structure could be the potential trends going forward.

26. Digitalization is expected to strengthen in industry as it collects and processes detailed and real-time data from the industrial production value chain and thus helps raise productivity.

27. In line with the developments in digital technologies, the services complementing manufacturing will assume greater importance through the collection and processing of detailed data on production and logistic processes and consumer preferences and their integration into the whole value chain.

28. The sharing economy business models, which have become prevalent in areas like

transportation and accommodation, are expected to be applied in a much broader range of fields during the upcoming period.

29. The information platforms in the fields such as social media and e-trade are expected to be customized and scaled up in sectors like health, finance, manufacturing industry and agriculture with the help of accelerated digitalization.

30. The developments experienced in technologies mentioned above will increase the importance of innovative enterprises which can act more flexibly in the global economy relative to the large firms.

Cyber Security and Privacy

31. Due to the spread of digital technologies and their transboundary nature, cyber security has become one of the primary elements of national defense as cyber threats and crimes diversify and expand. Therefore, countries make intensive efforts to put in place the required technical infrastructure, institutional capacity, and human capital in the field of cyber security.

32. Countries with large technology firms call for the facilitation of cross-border transfer of digital data, while other countries do not permit such transfer or require certain legal and technical measures to be taken. More stringent measures are expected to be taken on the protection of privacy and cross-border data transfers.

Evolution of Educational Approaches

33. The education systems which equip students with analytical, critical, creative

and computational thinking skills for the solution of real-life problems through an approach that focuses on natural sciences, technology, engineering and mathematics disciplines in an integrated manner, are gaining greater importance.

34. Learning environments and techniques involving mutual teaching and learning in groups and imposing skills of capturing knowledge from different sources outside school and comparing them, adopting edutainment approaches, and promoting self-confidence in decision making are getting more popular.

35. Innovative learning designs using mobile technology, enabling students and teachers to rapidly access the information they demand, are gaining value.

36. The creation of learning environments where workplace and experimental settings are simulated so that technology can be integrated into education, organization of virtual site trips instead of constantly reading texts, and learning approaches involving media creation rather than follow-up are emerging trends.

37. We are experiencing a shift towards an entrepreneurial university model whereby universities take active role in the conversion of knowledge produced into value and cooperate closely with the industry and public sector.

38. The lifelong learning approach aimed at acquiring skills required for changing needs in the face of rapid technological developments is diversifying and expanding in all fields.

Changes in Demographic Structure

39. While global population growth rate slows down, life expectancy is increasing and the aging trend continues. The rate of old-age population is expected to rise to 16 percent by 2050, from 8 percent in 2015.

40. Economies are slowing down as the labor force contracts in developed countries which heavily experience an aging process in demographic transformation, and the growing health and social security expenditures increase the need for the development of healthy and active aging policies.

41. In response to the growing old-age population, there is a growing need for improving elderly care services, enhancing lifelong learning facilities and helping the elderly adapt to change.

42. In developing countries at earlier stages of demographic transformation, however, rapid economic development can be achieved by employing additional labor by increasing productivity, during times when the share of employable population grows, and thus the importance of education policies for productivity increases.

43. During the aging process, economic growth and the development of middle class transform markets in terms of qualified job opportunities and product demand, while elevated social expectations increase the need for a change in management styles.

44. International migration is expected to flow from less developed countries with rapid population growth to rapidly growing economies. Selective migrant policies increase the competition for qualified labor

force while uncertainties over the management of non-qualified and poor population movements persist.

Transformation of Economic and Social Structures in the Labor Market

45. With the effect of technological changes in today's and future's works; labor supply with demographic and migration dimensions; employment relations with the effect of changes in the quality of work; and the social reconciliation with the distribution and assurance of income is transforming on a global scale.

46. The technology-driven transformation production methods increase the demand for qualified labor and reduce the demand for moderate and low-skill jobs subject to automation. The shares of moderate-skill jobs and wages in employment are declining, particularly in developed countries.

47. The developments in digital technologies bring about new occupations and ways of doing business, and countries are revising their labor legislation to accommodate different flexible employment modes.

48. Despite the increase in the level of education in women, the high rate of female labor in areas such as low-quality, informal and unpaid family labor continues. Although it varies by country, female labor force participation is declining.

49. The issue of migration is becoming a key element of labor supply, and rising levels of migration are obscuring the distinction among migration receiving, sending and transit countries. The concentration of uncontrolled migrants in low-skill jobs

is leading to the deterioration of working conditions and causing reactions among host communities.

50. The free movement of the workforce, which has increased with globalization, will affect the economies in which young populations are dense such as South Asia and Africa and cause them to become the main source of global workforce in the coming years.

51. The economic gains generated through globalization and increased weight of the financial sector concentrate mostly in a small group of population, and real wages lag behind efficiency gains in most parts of the world due partly to the weakening of labor market institutions.

Deterioration in Income Distribution

52. The high growth levels recorded by the Asia-Pacific economies including China and India have positively affected the income disparities among countries.

53. Domestic income disparities of countries, however, have been exacerbated by the further enrichment of high-income earners and impoverishment of the low-income earners, resulting in deterioration of domestic income distribution.

54. In developing countries where institutional capacity, access to technology, levels of education and efficiency of public policies are relatively lower, income disparities tend to increase when compared with the developed countries.

55. Income inequality affects all segments of societies, complicating social cohesion,

sustainability of economic growth and the efficiency of public policies.

56. Imbalanced growth and rapid technological transformation are the most important reasons behind the rise in income inequality. The fact that the increase in the quality of human capital cannot keep up with the rapid technological transformation affects all segments of the society and causes polarization in wages.

57. Technological transformation restricts the employment opportunities and the share of income for low-income individuals with limited skills development.

58. As the production structures of companies change over time, their labor demand diversifies and capital movements shift to countries with low cost of labor, which lead to a continued fall in wages.

59. Increasing capital efficiency due to progressive technology reduces the attractiveness of cheap labor and causes some of the production to return to technology intensive production countries and put pressure on income distribution in developing countries.

Reorganization of Health Services in the Face of Changing Technologies

60. As health literacy improves and the interest in healthy living styles grows, health services have been evolving towards a focus on user preferences from a focus on physicians and service providers.

61. Biotechnological products and individualized medicines are being developed in line with the development of health sci-

ences, diversified and massive use of sub-cutaneous chips measuring body values and wearable health technologies including smart watches and wrist bands expected to be widespread.

62. Aging population and the increased proportion weight of non-communicable and chronic diseases in the burden of disease are changing the needs for healthcare services, increasing financial burdens and making the rational use of medicine and treatment more important.

63. Health tourism sector is expected to grow in line with increased access to information about more attractive countries in terms of price and quality of healthcare services and facilitation of transportation.

Rapid Urbanization

64. Urban population has been rising globally and the number and population share of metropolises and mega cities are growing significantly particularly in developing countries.

65. By 2050, the share of urban population in world population is expected to reach 70 percent, and approach 90 percent among the Organization of Economic Cooperation and Development (OECD) countries.

66. City regions that integrate production and daily life in metropolises and surrounding settlements are being developed. Governance plans which are developed at city and region level are gaining importance as a result of their ability to compete in the global system and to flexibly and effectively adapt to uncertainties even in countries that have central administration structures.

67. The fact that metropolises and city regions attract population and investments poses a risk of deepening the disparities between regions within the country, particularly in fast growing developing countries.

68. Environment friendly urbanization approach maintains its importance. On the other hand, policies are being developed to ensure that the efficiency gains and value added created by urbanization inclusively integrate different social sectors into the development process.

69. Global economic and political uncertainties and the fight over the sharing of energy and natural resources are triggering violence and terror in cities. This undermines urban life and slow down investments, capital movements and tourist inflows.

70. Failure to adapt the migrant populations to urban life may both result in extensive unemployment and poverty, and cause tensions among social sectors, destruction of the sense of belonging and confidence, rise in crime rates and spatial distinctions between social groups.

71. More democratic and inclusive mechanisms are being developed for the management of urbanization. The establishment of local-level participation and citizen oversight together with other supervision mechanisms is incentivized alongside the preparation of urban development plans which involve arrangements to enable social inclusion, sustainable growth and environmental protection.

72. In smart cities around the world, smart growth plans, smart card systems for public transportation, smart mobility programs

such as integrated pricing systems and information and communication technologies (ICT) controlled energy and infrastructure systems are being improved in order to increase life quality inhabitants and to grow the local economy.

Rapid Socio-Cultural Changes

73. The facilities for inter-cultural interaction have become much more diverse, faster and inclusive through the introduction of new media instruments. The contents disseminated through means of mass communication that serve the export of culture lead to changes in the values and habits of individuals and societies.

74. While new communication tools support multiculturalism by enabling promotion of local cultures, developing communication facilities increase cultural interaction, and the standardizing mass culture accelerated by multinational companies strengthens cultural hegemony in the name of universal culture.

Increasing Need for Good Governance

75. While the role of the public in social and economic life continues to change, its regulatory and intervening functions in the global economy are strengthened.

76. For an efficient public administration that can contribute to the development of human capital, growth of the industry and establishment of economic security, it is important to put in place principles of good governance which make it possible to transparent, accountable, responsive and rapid decision-making as well as to include citizens in this decision-making process.

77. Big data applications play a crucial role in improving the decision making and implementing capacities of the public administration. The data created through mobile applications and social media, in addition to the data produced by the government, allow for the identification and solution of existing and potential problems concerning public services such as health, traffic and public order.

78. While a results-focused understanding of public administration is strengthening, it is getting more common to integrate impact analyses conducted before public activities and policy-focused reporting evaluating the post-activity status into the public administration system, in addition to the monitoring of activities, goals and policies.

Climate Change, Food Safety and Efficient Use of Water

79. As various global impacts of climate change seem to accelerate, the commitment and adaptation levels of developed and developing countries under Paris Agreement, which offers a new framework, fall short in achieving the global targets.

80. The increased demand for food, climate change and urbanization weigh on soil and water resources as well as agricultural products and producers, while it gets more important to develop plant and animal species compatible with changing climate and protect the environment and biodiversity. Furthermore, the need for skilled labor and technology is growing, so that the demand for food can be met with less resource.

81. While advanced countries are expected to sustain their commercial superiorities

through new-generation applications, developing countries are struggling to support technology-based small agricultural enterprises and become competitive in the food supply chain with large scale production.

82. The demand for healthy and organic products produced through good agricultural practices is growing, as the trends for supplying plain and local products directly to consumers through different marketing channels get stronger.

Interaction of Global Developments with Turkey

83. Uncertainties and imbalances in the economic and geopolitical spheres on a global scale feed the direction search and increase the need for effective international policy coordination even more. In order to create a sound basis for Turkey's development dynamics; it is essential to take measures against disruptions observed in the international dimension in the period after the crisis and be an active and engaging member of constructive international policy coordination for ensuring peace and shared prosperity in the region and in the world.

84. Our country which has close economic and commercial relations with the EU and is a transit country between Asia and Europe has the advantage in the Middle Corridor, TEN-T, TRACECA and VIKING corridors. The fact that production axis being oriented to the east through the logistic opportunities springing from the change in global production and trade channels and the Western countries' responses with moves like Industry 4.0 bring about important

risks and opportunities relating to technology and labor force in Turkey. In the coming period, it is important to make the best use of the opportunities and to manage the risks in a way that will be turned in favor of our country.

85. Turkey has limited capabilities in innovative technology development and productive usage of these technologies compared to developed countries. In order to ensure the adaptation of our country to technological transformation and to increase competitiveness of our country in the Eleventh Development Plan period, enriching qualified human resources in priority sectors, increasing the spread of technology to enterprises, improving the organization and innovation capabilities of companies, and ensuring effective mechanisms for financing innovation and research and development (R&D) are the priority areas.

86. In order to proactively prevent the potential risks to the national security of our country, which may arise as a result of technological advancements, Turkey needs to improve her capacity to develop technologies relating to cyber security and data privacy, address the gaps in the availability of qualified human resources, complete her institutional restructuring and keep her legal infrastructure up-to-date and compliant with evolving technologies.

87. While significant progress has been made in the field of education, the achievement of the goals established in the Plan requires improving the quality of education and raising the labor force equipped with the skills needed for competitive production and productivity, through radical reforms in the education system.

- 88.** Similar to the trends observed worldwide, our country which has a relatively young population is facing the issue of aging population; but the window of opportunity is still open in the demographical transformation process. The advantages offered by the demographic window of opportunity are expected to diminish during the upcoming period and hence there is a greater need for taking structural measures in the fields of health and social security so that the growing needs and demands of the old-age population can be met within the existing capacities.
- 89.** Our country needs to complete the vocational education and institutional structuring compliant with the qualifications and ways of doing business required by technological transformation, and the demographic window of opportunity must be used to transform the young labor force such that this need can be addressed.
- 90.** Global economic developments pose a series of risks to the employability of vulnerable groups in particular. Empowering women and disabled individuals such that they can meet labor market demands remains to be an important priority in our country.
- 91.** Facilitating the access of all individuals to high-quality education and ensuring that the required skills are available in the labor market, so that our country can respond to the growing need for skilled labor against the increase in technology-intensive production, will contribute positively to income distribution in the long term.
- 92.** Starting from pre-school education, encouraging secondary and tertiary education and spreading on-the-job trainings will enable the active working low-skilled workforce to rise to upper income groups.
- 93.** The reorganization of tax and social transfer policies in order to develop social security networks outside the labor market and education opportunities continues to be an important policy area on behalf of our country in reducing income inequality.
- 94.** The burden and cost of chronic diseases have been growing as population ages in our country, which makes it even more important to increase efficiency in service provision and untap the potential in technological developments, highlighting the potential of our country in the health tourism market.
- 95.** While urbanization rate has declined in our country, urban population continues rising and the urbanization process continues predominantly with increased population of big cities and metropolitanization.
- 96.** As internal migration concentrates particularly in provinces with developing economy and external migration increases and concentrates in certain provinces due to instabilities in the neighboring countries, effective policies are needed to address the population distribution and the integration of migrant population with urban life.
- 97.** The growth of cities requires environmental measures to be taken in line with economic and social development. The assessment of investments and services required for the development of cities in conjunction with economic policies as well as environmental protection and improvement will make it possible to turn this pro-

cess into an opportunity in terms of production.

98. In Turkey, metropolitan model is developing and expanding to ensure efficiency in service provision. However, this model needs to be further improved to engage citizens and strengthen coordination with central administration in terms of regional and local development, urban planning and service provision. Furthermore, it would be important to develop mechanisms to foster coordination between the civil society and private sector at the local level on the one hand and the public administrations on the other hand.

99. Local authorities are given direction towards the target of becoming a smart city by the National Smart Cities Strategy and Action Plan prepared in Turkey.

100. It would be important to establish strong governance structures and boost the confidence in institutions, to accelerate the development process with a multiplier effect, in achieving the long term goals of our country.

101. In order to boost our competitiveness and protect the interests of our country, it is necessary to support a government structure which is capable of producing effective economic and social policies when necessary, which pursues an understanding of open governance, and which operates effectively, transparently and in a coordinated manner.

102. Due to its geographical location, Turkey is among the countries that will be affected most from climate change and is already faced with an increased incidence

of sudden rains, flood and drought. In line with our country's developing country position, efforts to reduce emissions and to adapt to climate change have been continuing. Clarification of opportunities to access climate financing for Turkey, that has intense industrial growth trend, will enable the use of emission reduction opportunities having the lowest marginal cost.

103. Efforts are growing for sustainable use of soil and water resources, ensuring food safety and keeping agricultural population in rural areas, increasing rural development subsidies in our country, ensuring efficient use of inputs through more common use of technology and knowledge in agriculture, diversification of marketing channels and organizing production in a demand-responsive manner.

2.2. GLOBAL MACROECONOMIC DEVELOPMENTS AND PROSPECTS

104. The world economy is losing pace due to the slowdown in manufacturing industry output and the reduced international trade as a result of global trade wars. The weak outlook for investment, trade, productivity and wage increases, high debt ratios, the increase in income inequality and the slowdown in China weigh on global economic activity.

105. As a result of these developments, world economy is expected to grow by 3.3 percent in 2019, slightly down from 3.6 percent on average during the period 2014-2018.

106. The rapid fall in commodity prices since mid-2014 and the geopolitical turmoil in the Middle East have made it difficult for oil-exporting countries to break the economic slump and adversely affect world growth.

107. Advanced economies, which grew by 2.1 percent annually on average in the 2014-2018 period, and emerging markets and developing economies, which annually grew by 4.6 percent, are expected to grow by 1.8 percent and 4.4 percent, respectively, in 2019 with some loss of momentum.

108. During the period 2019-2023, emerging markets and developing economies are expected to recover and grow by 4.7 percent annually on average, as a result of the supportive policies of the central banks of developed countries. During this period, economic activity in developed economies is expected to continue losing pace, with a forecast growth rate of 1.7 percent.

109. Economic and political uncertainties around the world adversely affect growth expectations in many countries. Brexit led downward revisions in growth forecasts for the UK and many other European countries. The Eurozone, which grew by 2.4 percent and 1.8 percent in 2017 and 2018, is expected to continue to slow down and grow by 1.3 percent in 2019. In the 2019-2023 period, the Eurozone is expected to grow by 1.4 percent annually on average.

110. Some advanced countries, which have supported economic activity in response to the global financial crisis, have entered into a monetary normalization process. The Fed increased the policy rate nine times between December 2015 and June 2019 and raised the policy rate from near zero to 2.5 percent. As the European Central Bank (ECB) has also started the normalization process, the London Interbank Interest Rate (LIBOR) on a global scale has increased since 2017. However, uncertainties regarding the monetary normalization process of the ECB remain. In Japan, where the effect of expansionary policies on the economy is limited, monetary expansion policy is expected to continue for a while.

111. By the second quarter of 2018, acceleration of Fed's monetary policy normalization process has led to fluctuations in global financial markets. Portfolio flows to emerging economies countries weakened as risk perception deteriorated towards these economies, causing exchange rate depreciation and volatility. While this has helped these countries gain competitiveness and improve their current account deficits, it also created pressures on their inflation rates.

112. Recent aggravated concerns over global economy and protectionist trade policies have interrupted the normalization process of monetary policies. Despite positive developments in the labour market, due to the fact that growth and inflation remain far from targets especially in the Eurozone and high level of uncertainty over global trade, a more supportive stance is expected from the central banks of advanced economies.

113. Net capital flows to emerging markets and developing economies which have started to increase since 2016, have recently recorded a modest upward trend as the advanced economy central banks showed a more supportive stance than expected and the prospects over resolution of trade disputes. With the expectation that the supportive stance in monetary policies will continue, capital flows to developing economies are expected to be positive and to occur predominantly in the form of foreign direct investment during the upcoming period, albeit below former levels.

114. Global trade growth which was 5.4 percent in 2017 due to increasing investments in advanced economies, decreased to 3.8 percent in 2018. Given the trade tensions between the US and China, coupled with mutual retaliations, and the weakening investments and output globally, world trade volume is expected to hit lowest levels during the upcoming period since the global financial levels, with an annual average growth rate of 3.8 percent during the period 2019-2023.

115. In China, with the transition process from export-oriented growth model to domestic demand-driven growth model, the concept of rapid and strong growth has

been replaced by a controlled and quality growth approach. The long-term average growth rate of Chinese economy before 2011 was around 10 percent, declining to an annual average of 6.9 percent for 2014-2018 period, and it is expected to further decline to 5.9 percent in 2019-2023 period. While this is a significant cause of the slowdown in the global economy, China is expected to contribute positively to global demand through the One Belt and One Way Initiative, which is an important development in terms of international economic cooperation and integration.

116. Unemployment rates in advanced economies, which were 8.1 percent in 2010-2013, decreased to 6.2 percent in 2014-2018 period with contributions from the growth and employment-oriented policies after the global crisis. The average unemployment rate in these economies is expected to be 5 percent in 2019. It is estimated that the global unemployment rate will continue to be around 5 percent level in 2019-2023 period. Despite the improvement in the overall unemployment levels converging to the pre-crisis levels, youth unemployment, which constitutes 35 percent of the unemployed globally, continues to be a common issue.

117. Although unemployment rates have improved significantly due to the measures in the post-crisis period, labor market productivity has slowed down in many countries over the past decade. Weak productivity gains lead to low real wage increases. It also leads to limited demand and output growth. Going forward, extensive technological advancements particularly including digitalization are expected to contribute positively to productivity.

118. In the post-crisis period, inflation rates in advanced economies was below the targets and world averages, due to the declines in global energy prices, weak wage increases and economic recession. Continuing supportive monetary policy stance in advanced economies will eliminate the pressure of depreciation on emerging market currencies and contribute to the improvement in inflation levels in the upcoming period.

119. The general government gross debt stock has risen dramatically recently, especially in emerging markets and developing economies. High indebtedness levels reduce the effectiveness of fiscal policy in both advanced and developing economies. In emerging markets and developing economies, the borrowing trend is expected to continue in the coming period, and the ratio of the general government gross debt stock to Gross Domestic Product (GDP) is expected to rise to 58.5 percent by 2023.

120. Rising levels of debt and declining saving rates render economies vulnerable to shocks, from the perspective of financial and macroeconomic stability, in the medium term, while the trends for sustained supportive monetary policies of advanced economies turn out to be an opportunity to tolerate these vulnerabilities.

121. Brent type crude oil prices, which tested the lowest levels of past 12 years in early 2016, rose to 86 USD in the global markets because of the supply shortages caused by the developments in Iran and Venezuela in 2018. However, due to the negative expectations for the global economy and the sig-

nificant increase in US oil production and stocks, oil prices decreased to 50 dollars by the end of 2018.

122. Since early 2019, oil prices have entered to an upward trend due to the cut downs of oil supply by OPEC+ countries and the increasing tension between the US and Iran. Oil prices are expected to be shaped by the geopolitical events in the Middle East, the tension between the US and Iran, the supply levels of the US, OPEC's production cuts, global demand and the course of trade tensions.

123. The global economic outlook for the upcoming period has weakened due to the downside risks. Protective trade policy trends, the loss of momentum in the Chinese economy, developments regarding Brexit and the financial fragility created by the private sector's high indebtedness will continue to be risk factors. The decline in capital inflows to emerging markets in the event of worsening global financial conditions is one of the major risks. Trade wars not only affect the short-term but also the medium and long-term expectations regarding the global economic outlook due to the uncertainty and the postponement of investment-trade decisions.

124. In this process, ensuring policy harmonization of countries, balanced implementation of fiscal and monetary policies, giving priority to structural reforms focusing on saving and productivity increase will play an important role in reviving global demand and growth and increasing citizens' income, welfare and living standards.

Table 1: Main Global Macroeconomic Indicators of World Economy

(Percent)

	2014-2018 ¹	2019-2023 ¹
World GDP Growth	3.6	3.6
Developed Economies	2.1	1.7
Euro Zone	1.9	1.4
USA	2.4	1.8
Japan	1.0	0.6
Emerging Markets and Developing Economies	4.6	4.7
China	6.9	5.9
India	7.6	7.6
Brazil	-0.8	2.2
Russia	0.5	1.6
ASEAN-5 ²	5.0	5.2
Middle East and North Africa	2.7	2.6
World Trade Volume	3.6	3.8
World Inflation Rate	3.1	3.5
Developed Economies	1.2	1.9
Emerging Markets and Developing Economies	4.5	4.6
General Government Budget Balance/GDP		
Developed Economies	-2.4	-2.2
Emerging Markets and Developing Economies	-4.0	-4.4
General Government Gross Debt Stock/GDP		
Developed Economies	103.7	102.6
Emerging Markets and Developing Economies	46.0	55.8
World Unemployment Rate³	5.1	5.0
Developed Economies	6.2	4.9
Euro Zone	10.0	7.6

Source: World Economic Outlook, IMF, April 2019.

(1) Period average

(2) ASEAN-5 countries are Malaysia, Indonesia, the Philippines, Thailand and Vietnam.

(3) Global Employment Trends, International Labor Organization (ILO), 2019.

Chapter One

3. PRE-PLAN PERIOD ECONOMIC AND SOCIAL DEVELOPMENTS IN TURKEY

125. Turkish economy was affected relatively mildly from financial crises, oppressing global economy starting from second half of 2008, due to its solid foundations and measures timely taken and hence recovered rapidly as of 2010.

126. Despite the fall in tourism revenues and slowdown in trade revenues, triggered by geopolitical tensions, domestic political developments including the atrocious coup attempt in 2016 and the negative developments such as the intensified global trade wars in 2018, annual growth rate averaged 4.9 percent during the Tenth Development Plan period (2014-2018).

127. During this period, the per capita income level of our country made a significant progress in the process of convergence with developed countries. Turkey's per capita income in terms of purchasing power parity (PPP), which follows a rising trend in general, reached 64.6 percent of EU average in 2018. Per capital national income in terms of PPP, as defined by OECD, rose to USD 28,205 from 22,205 in 2013.

128. While the share of industrial and services sectors in GDP increased year by year during the period 2014-2018, the share of agriculture sector contracted. The shares of agricultural, industrial and services sectors in GDP were 5.8 percent, 22.2 percent and 61.5 percent in 2018 respectively. Due to the leading role of industrial sector in efficiency gains, it is very important to sustain its rising trend in its share within GDP during the upcoming period.

129. Although its share in the economy has decreased over time during the Tenth Development Plan period, private consumption maintained its importance within economic activity, growing by 3.8 percent annually on average during the period. A positive development experienced during this period is that the contribution of net goods and services exports to economic growth has risen significantly, with average for the period reaching 1 percentage point.

130. While fixed capital investments increased by 4.5 percent on average during the subject period, the share of produc-

tive areas within the investment composition has relatively contracted as resources have been channeled to sectors not subject to foreign trade, rather than the industrial sector. In order to boost the economy's potential growth rate in the medium and long term, our country needs investments in productive areas, which would raise our country's position in the hierarchy of global value chain.

131. During the period 2014-2018, all sub-components of expenditure side contributed positively to GDP growth. While consumption contributed by 3 percentage points to the average growth rate of 4.9 percent, fixed capital investments had a contribution of 1.3 percentage point and net goods and services exports by 1 percentage point. Going forward, ensuring a more balanced growth composition and raising the contribution of net goods and services exports would be important in terms of the quality of growth.

132. Productivity gains maintain their importance for a sustainable growth structure. During the Tenth development Plan period, capital stock contributed to growth by 57.2, employment by 39.9 percent, whereas total factor productivity (TFP) contributed by only 3 percent. This low level of TFP contribution to growth was due to the negative domestic and external conditions prevalent during the Plan period.

133. The unemployment rate, which was 9 percent in 2013, rose to 11 percent in 2018 due to the strong increases in labor force participation rates particularly for female population, as well as increases in working age population. With the effect of labor market programs and employment incen-

tives, total employment grew by 3.2 percent annually on average during the period 2014–2018. This period also saw a decline in the rate of informal employment, particularly in non-agricultural sectors, while actual working times decreased and minimum wage increased significantly.

134. During the Plan period, rising TL-denominated import prices due to the depreciation of TL, high course of food prices and deterioration in pricing behavior caused inflation to remain above the target. Throughout the period, Central Bank of the Republic of Turkey (CBRT) tightened monetary policy stance in order to limit the deterioration of inflation expectations. While medium term inflation was expected to stabilize at single-digit levels in the Tenth Development Plan, Consumer Price Index (CPI) growth rate was realized as 10.4 percent annually on average.

135. The political developments in our close region, the fluctuating course of the EU economy and the domestic developments which negatively affected economic activity during the Plan period have resulted in the slowdown of exports relative to previous periods. Despite the negative developments, our country's exports, amounting to 167.9 billion USD in 2018, managed to increase its global share, which demonstrates the competitiveness of real sector as well as its strong and resilient structure. The declining trend of imports and foreign trade deficit over the Plan period, combined with the recovery in tourism sector, which is more pronounced particularly recently, have contributed positively to the current accounts balance, with the rate of current accounts deficit to national income falling to 3.5 percent in 2018.

136. Fiscal policy tightened in 2014-2015 period has been used effectively in 2016 and 2017 to mitigate the effects of economic and political uncertainties, unfavorable geopolitical developments and July 15 military coup attempt on the domestic economic activity. Within the scope of this fiscal framework, beginning from the last quarter of 2016, macro prudential measures such as tax easing, postponement of social security premium collection and facilitating the access of enterprises to financial resources were applied to support domestic demand and to enhance economic recovery. As the economy entered into a rebalancing process since the middle of 2018, fiscal policies which prioritized fiscal discipline in the public sector and support price stability became prominent. In the previous Development Plan period, general government balance excluding privatization revenues and interest expenditures run 0.6 percent surplus on average as of GDP. The share of EU-defined general government debt stock in GDP, which is well below developed and developing country averages and Maastricht criteria, has been 30.4 percent in 2018.

137. Within the framework of the establishment of continued economic stability and sustainability in order to facilitate access to finance, activities were carried out to diversify products and services and develop interest-free finance system over the Tenth Development Plan period. As part of its evaluation dated December 2016, the European Commission acknowledged that the regulatory and supervisory framework for the banking sector was equivalent with the EU legislation. Furthermore, the review completed by Basel Banking Supervision Committee in 2016 found our country ful-

ly compliant with all Basel standards. With the help of macro-prudential measures and Credit Guarantee Fund (KGF) over the period 2014-2018, the financial system supported economic growth. During this period, alternative products could not be developed sufficiently despite the efforts to diversify products and services, and deposits continued to be the largest funding source.

138. Various reform arrangements were implemented to improve the business environment and progress was achieved in this field over the Tenth Development Plan period. In the World Bank's Doing Business index, our country climbed to the 43rd place out of 190 countries in 2018, up from the 51st place out of 189 countries in 2014.

139. Manufacturing industry production grew by 5.3 percent annually on average over the period 2014-2018. Our country ranked 13th in the World and 5th in Europe in terms of total value added production in the manufacturing industry in 2018. Development and dissemination of advanced technology production remains to be a key structural issue. The share of high-technology sectors in manufacturing industry exports rose to 3.2 percent in 2018 from 3.1 percent in 2013, while the share of medium-high technology sectors rose to 34.6 percent from 31.5 percent. Thus, the share of medium-high and high technology sectors rose to 39.6 percent from 34.6 percent between 2013 and 2018. The share of these sectors in world trade is around 60 percent.

140. Progress has been achieved in promoting R&D and innovation activities over the course of Tenth Development Plan period, and the share of R&D expenditures in GDP

reached 0.96 percent in 2017, up from 0.82 percent in 2013. During this period, R&D and innovation subsidy programs were diversified, the amount of private sector R&D expenditures and number of research staff have increased, and Law No. 6550 on Supporting Research Infrastructure was enacted in 2014 with a view to scaling up and streamlining research infrastructures. However, there is still a need to promote information and technology transfer and entrepreneurship and commercialization activities which would transform R&D results into economic and social benefit.

141. Significant developments have been recorded in the services sector which plays a key role in improving the competitiveness of the economy and which has a share of 61.5 percent in GDP as of 2018. Construction sector grew by 4.48 percent on average during the period 2014-2018. The sector's share in total employment reached 6.9 percent, accounting for 1,992,000 people as of end-2018, up from 1,768,000 in 2013. Tourism sector saw fluctuations during the period 2014-2018, and the growth trend since early 2000s reached the peak level in 2014, but a contraction was recorded in 2015 and 2016 due to domestic and external developments. However, the recovery process which started in 2017 gained a significant impetus in 2018, when the number of foreign visitors amounted to 39.5 million and tourism revenues to 29.5 billion USD. During the Plan period, wholesale and retail trade developed significantly, while electronic trade also flourished and raised its share in retail market to 4.5 percent. In the customs services sector, due to the developments in foreign trade and travel demand, total number of declarations processed grew by 19 percent, the physical

infrastructure was improved to respond to the growing demand, projects were implemented to facilitate customs procedures and efficient anti-smuggling actions were taken. Overall, it is important to expand the share and exports of high value added areas in the services sector and to scale up the use of ICT.

142. Turkish economy is still weigh heavily on small and medium-sized enterprises (SME). As of 2017, there are approximately 3.09 million SMEs in Turkey and 99.8 percent of total enterprises, 74.2 percent of employment, 54.1 percent of value added, 56.2 percent of exports, 19.6 percent of R&D expenditures are composed of SMEs. In December 2018, SMEs used 26 percent of bank loans. In terms of increasing competitiveness in the economy, improving innovation and entrepreneurship and creating employment, the need to increase productivity and the need for growth and institutionalization of SMEs continues.

143. During the Tenth Development Plan period, various studies were carried out in order to ensure structural transformation in the agricultural sector, including diversification of agricultural supports, food safety, sustainable use of soil and water resources, development of R&D, modernization of agricultural enterprises, plant and animal health and breeding. In the land consolidation studies, the target of 8 million hectares of plan period has been achieved and the registration process of the aggregated areas is continuing. In order to improve the irrigation infrastructure, investments accelerated and a net irrigation area of 487 thousand hectares was opened during the plan period.

144. Taking advantage of the geostrategic position of our country between production and consumption regions, efforts were made to make our country a key regional actor in the energy sector. On the other hand, our country is among the top countries in terms of energy demand due to her developing economy. While our primary energy consumption grew by 6.4 percent on average during the period 2014-2017, electrical energy demand grew by 3.9 percent on average over the period 2014-2018. As a result of the liberalization process in the electricity market, the share of private sector in electricity generation reached 85 percent. The share of renewable energy resources in total electricity generation rose to 32.5 percent in 2018 from 28.9 percent in 2013, while the share of electricity generated from indigenous coal resources rose to 14.9 percent from 12.6 percent over the same period. In 2017, auctions for Renewable Energy Resource Areas (YEKA) based on wind and solar energy, with a total capacity of 2.000 MW, were completed in order to efficiently and effectively use renewable energy resources and promote domestic production of equipment used in generation facilities. In order to strengthen security of energy supply measures were taken to support renewable energy generation, use of indigenous coal resources for electricity generation and expand natural gas underground storage capacity. The foundations of Akkuyu Nuclear Power Plant were laid in 2018, and studies were conducted for the construction of new nuclear power plants.

145. As a result of significant exploration activities for lignite coal, which has a significant share in mining activities, the proven lignite reserve increased to 18.9 billion tons as of 2018, from 14.1 billion tons in 2013.

Studies have been undertaken for preparing an inventory and certificating our mineral reserves in harmony with international standards, as well as archiving the geological data produced by the public and private sectors during the mineral exploration, research and production activities so that they can be reused later. Oil and natural gas exploration activities were started in the seas, including the licensed fields of Turkish Republic of Northern Cyprus (TRNC). In this scope, in addition to the seismic research vessel purchased by Turkish Petroleum Corporation in 2012, two advanced drilling vessels were procured in 2017 and 2018, and another seismic research vessel, built using domestic resources to a large extent was engaged. In order to promote global scale and highly-competitive mining companies, legal arrangements were put in to force to allow Directorate General of Mineral Research and Exploration (MTA) to commit exploration and research activities abroad and establish companies for this purpose.

146. During the Plan period, the logistic and transportation infrastructure were improved and activities were carried out to interconnect domestic and overseas production and consumption centers and integrate various modes of transportation. 3,591 km long divided highways including motorways, 325 km long high-speed railways, three new airports including Istanbul Airport and 249 km long urban rail system lines for public transport were completed. In addition, activities were carried out for the infrastructure of Filyos Port, one of the three main ports planned. As of end-2018, progress rate has reached 43 percent for electrical railways and 45 percent for lines with signaling system, and significant elec-

trification and signaling work is underway. Although the geometrical and physical standards of highways have been improved, there is still a need for improving highway traffic safety. The dominant position of highways among transport modes persists in passenger and cargo transportation, and it is necessary to focus on cargo transportation and railway mode in transportation investments. The integration, efficiency and predictability of transportation system, particularly the improvement of customs services, could not reach the desired levels and Turkey's position in Logistic Performance Index has worsened. In this scope, there is still a need to reduce logistic costs, improve manufacturing industry and trade, develop combined transportation practices and raise the shares of railway and maritime transportation in order to strengthen the competitiveness of our country, and establish a fast, flexible, safe, reliable, predictable and integrated logistics and transportation system.

147. During the term of Tenth Development Plan, total public fixed capital investments amounted to 4.2 percent of GDP. Furthermore, Public-Private Partnership (PPP) Model has been applied in many sectors, primarily including transportation and health sectors. While 190 PPP contracts with contract value of 120 billion dollars and total investment cost of 51 billion dollars (in 2019 prices) were signed as of end-2013, the number of contracts rose to 2421 as of end-2018, and total investment cost and contract value amounted to 64 billion dollars and 140 billion dollars, respectively. Major projects implemented through the PPP model during the period 2014-2018 included Yavuz Sultan Selim Bridge, Eurasia Tunnel, Osmangazi Bridge,

Istanbul Airport, 8 city hospitals. There is still a need to address PPP projects within an integrated framework, streamline processes such that they will be compliant with macroeconomic policies and improve institutional capacity.

148. During the Plan period, significant progress has been achieved in terms of widespread use of ICT by enterprises, citizens and institutions. In this context, the use of communication services, especially broadband access, has increased; the number of broadband subscribers, which was 42.5 percent in 2013, raised to 90.8 percent in 2018. In the same period, the total fiber cable length in the telecommunication infrastructure of our country increased from 227 thousand km to 355 thousand km. In this period, ICT sector has grown in real terms and information technology exports have increased significantly. Besides, number of innovative enterprises, especially in the field of e-commerce and digital gaming, has risen. On the other hand, although there is intense competition based on infrastructure in mobile services in the electronic communication sector, the same development has not been achieved in fixed infrastructure and the need to develop infrastructure based competition in this field continues. Qualified employees in information technologies and effective policies that enable companies operating in the software sector to expand into foreign markets are still needed.

149. During the term of Tenth Development Plan, significant progress has been achieved in raising the quality of basic public services such as health and education and making them more extensive and more easily accessible. Effective policies have

been developed to strengthen the vulnerable groups of the population, and a more inclusive social security system and more efficient and extensive social assistance and services system have been created. Policies implemented have eradicated absolute poverty and reduced relative poverty.

150. During the term of Tenth Development Plan, human and physical infrastructure have been improved in the field of education, number of teachers has been increased, enrollment rates have been increased in all levels of education, particularly for girls and disadvantaged students, and the number of students per classroom have been reduced significantly. The number of provinces where the number of students per classroom is higher than 30 declined to 6 in 2018, from 15 in 2013. Moreover, educational subsidies were maintained in order to increase the share of private education. Despite the progress achieved in access to education in all levels, it is still important to increase access to preschool education and reduce dropouts in secondary education. Over the course of the Plan period, significant progress has been achieved in meeting the access and infrastructure needs of tertiary education, and Higher Education Quality Board has been established as an organ that is administratively and financially autonomous. As a result of the efforts for internationalization in higher education, the number of international students in Turkey climbed to 148 thousand in 2018, from 73 thousand in 2015. However, there is still a need for setting higher education quotas by taking into consideration supply and demand balance and education-employment linkages, for enhancing the international competitiveness of higher education system and strengthening accountability.

151. The policies pursued in the field of health during the Tenth Development Plan period have expanded the coverage of healthcare services and improved quality. The physical and human resources infrastructure for healthcare services has been improved and the efficiency of preventive and therapeutic health services has been increased. In this direction, the number of patient beds per ten thousand people rose to 27.9 in 2018, from 26.4 in 2013, the number of physicians per one hundred thousand people rose to 186 from 174, infant mortality rate per one thousand live births declined to 9.1 from 10.1 and maternal mortality rate per one hundred thousand live birth declined to 14.6 from 15.9 during the same period. The new Plan aims at improving further the quality of healthcare services and ensuring financial viability.

152. The social policies implemented during the Plan period have been effective in improving the participation of all segments of society in economic and social life and strengthening fragile segments of the population. In consequence of the developments in the labor market, there has been significant increase in employment. On the other hand, labor force participation was higher than this increase, resulting in an increase in the unemployment rate. The need of strengthening the physical and human infrastructure in the labor market and improving the quality of service provision remain important. In other respects, important regulations have been made to strengthen women in society and to ensure equal opportunities for women and men. Turkey, as a country with a high population of children and young people, has prioritized policies aimed at ensuring child wellbeing and supporting young people to

become equipped and productive generations. Based on active aging understanding, care models aimed at the interaction of the elders with the social environment have been developed. Social services offered to disabled people have been diversified and expanded; and policies for the participation of disabled people in education, social life and labor market have continued.

153. Through the humanitarian and emergency assistance offered to the population under international protection and temporary protection, these groups are allowed to benefit from public services such as education and health. In this framework, a total of 180 migrant health centers were established in 29 provinces, and 5 million vaccinations were applied during the period 2014- 2019. Furthermore, 61.7 percent of the school-age children in the population under temporary protection was allowed access to education as of 2018.

154. With the transition to the Presidential Government System, the multi-headings in the decision-making processes of the executive were eliminated. The Presidential decrees aiming at the systematic and holistic design of the structural and functional transformation of public administration have been published in a way to comply with the requirements of the new government system. In this context, while the central organization of the Presidency focused on policy and strategy development, monitoring and evaluation in order to realize citizen-oriented, efficient and effective public service delivery, the ministries were shaped in a more executive and functional structure.

155. Through Law No. 6360 enacted in 2012, the provinces with a population of

more than 750,000 were given the status of metropolitan municipality, covering all territories within provincial boundaries, and thus the areas of authority of metropolitan municipalities have been expanded, which increased the rate of population living in metropolitan municipalities to 93.8 percent. The Law aimed at serving rural settlements with the possibilities of metropolitan municipalities. However, there is still a need for expanding the service provision capacities of metropolitan municipalities and reviewing their overlapping powers and responsibilities with district municipalities.

156. In our country, policies that take environmental problems into consideration have been carried out within the framework of sustainable development principles. In this context, efforts were made to improve the institutional structure, legislation and standards in the field of environment. In order to minimize losses caused by disasters, efforts were made to improve the institutional structure and response capabilities. Urban transformation practices have been continued and decreasing trend in housing deficit has been sustained. During the Plan period, the Housing Development Administration (TOKI) produced 239 thousand houses, 89 percent of which was social housing. The quality of life has been improved through urban infrastructure investments, particularly drinking water, wastewater and solid waste services, and efforts to increase accessibility in urban transportation have continued.

157. Turkey is among the countries that will be affected most from climate change, due to her geographical position, and is therefore contributing to the efforts to combat climate change with an understanding that

observes the realities facing our country. In line with the developing country status of our country, Turkey is pursuing a policy aimed at promoting green growth and limiting the rising trend of emissions, while efforts for adaptation to climate change remain important.

158. During the Tenth Development Plan period, regional development plans were put into practice, attraction centres program was implemented and comprehensive financial and technical supports were provided by development agencies that contribute to the competitiveness of the regions. Furthermore, rural development policies continued to be implemented in line with the determined strategies and action plans. In this context, the Village Infrastructure Support Project (KÖYDES) and the Water, Sewerage and Infrastructure Project (SUKAP) and the Social Support Program for the priority provinces for social development were implemented.

159. The Official Development Assistance (ODA) provided by Turkey to developing countries increased consistently over the period of Tenth Development Plan and reached 8.6 billion USD according to the preliminary data for 2018. Turkey's rate of ODA to GDP rose to 1.1 percent according to the preliminary data for 2018, from 0.4 percent in 2013. This rate makes Turkey one of the seven countries that have achieved the 0.7 percent target set by the United Nations (UN) for the ODA/GDP ratio of countries, as one of the sustainable development goals. Based on the preliminary data, Turkey ranks sixth among the member states of OECD Development Assistance Committee (DAC) in terms of the total ODA amount in 2018, and ranks first

in terms of ODA/GDP ratio. Humanitarian aid accounts for 86 percent of the development assistance provided by our country in 2018. According to the humanitarian aid data for 2018, Turkey provided 7.4 billion USD worth humanitarian aid in 2018. In this scope, Disaster and Emergency Management Authority (AFAD) and Turkish Red Crescent, acting as global actors in this field, provided assistance in response to natural and man-induced disasters in 138 different countries during the past 10 years. In the light of all these developments, the need for new planning, implementation, coordination, monitoring and evaluation instruments has increased as the volume and coverage of development ads expanded.

160. During the term of Tenth Development Plan, the activities of Standing Committee for Economic and Commercial Cooperation (COMCEC) within the Organization of Islamic Cooperation (OIC) gained significant impetus; the types and volume of its operations expanded substantially and significant steps have been taken to make COMCEC a more efficient platform of development, dialogue and policy development among the member states. In this scope, priorities in areas of cooperation have been identified and instruments for the development of cooperation have been defined (Working Groups and COMCEC Project Finance). Our country hosted the Organization of Islamic Cooperation (OIC) Exchanges Forum, COMCEC Capital Market Regulators Forum, OIC/COMCEC private Sector Tourism Forum and OIC/COMCEC central Banks Forum.

161. Within the context of Turkey's policy to make Istanbul a regional center for the

United Nations, many UN organizations were attracted to Istanbul, including UN Development Program's Europe and Commonwealth of Independent States Regional service Center, UN Population Fund's Central Asia and Eastern Europe Regional Office, UN Women Europe and Central Asia Office and UN Development Program's Is-

tanbul International Center for Private Sector in Development, among others. In June 2018, UN Technology Bank for Least Developed Countries (LDC) was established in our country. Our country has played a key role in voicing the problems of developing countries in particular on platforms like the UN, OECD and G20.

Chapter Two

1. VISION, MAIN OBJECTIVES AND PRINCIPLES OF THE ELEVENTH DEVELOPMENT PLAN

162. The Eleventh Development Plan presents a long-term perspective based on the vision of “stronger and more prosperous Turkey that produces more value added and shares more fairly”.

163. Within the framework of this vision, the Plan’s long-term development objective is to raise the international position of our country and welfare levels of our people, building on the fundamental values and expectations of our nation. The Eleventh Development Plan aims at raising Turkey to the level of high-income countries and countries with highest levels of human development. To this effect, the Plan aims at raising GDP to 1,080 billion USD, per capita income to 12,484 USD; exports to 226.6 billion USD, reducing unemployment rate to 9.9 percent and inflation to consistently low and single-digit figures by the year 2023.

164. In this framework, the Plan envisages a stable and sustainable economic growth and raising the competitiveness and welfare levels of our country. With the strong support of the government and leading role of the private sector, the capital accumula-

tion and industrialization process will be speeded up, efficiency levels will be raised in all fields, domestic savings and productive investments will be scaled up; and production investments will be converted into export-oriented, innovative and less import-dependent structure.

165. Our basic objectives include achieving economic welfare, whereby our citizens can maintain a happy, healthy and safe life, their fundamental rights and freedoms are safeguarded a fair and fast-running justice system, as well as providing citizen-centric and easily accessible public services based on equal opportunities, through highly predictable public policies.

166. It is essential to create an environment where individuals can produce and generate income through a human-focused development understanding, can develop skills to adapt to new knowledge and technologies and can participate more actively in socio-economic life; as well as to offer better job opportunities and living environments in urban and rural areas in line with the goal of expanding the coverage of social welfare.

167. By making best use of the demographic window of opportunity, the level of individual and social qualifications and competencies will be raised, and inter-generational fairness and viability will be observed in social security regulations and in the use of natural resources.

168. During the term of the Eleventh Development Plan, the achievements of our country in economic and social fields will be utilized at the maximum level and the position of our country in becoming a prestigious member of international commu-

nity will be strengthened and maintained through active diplomacy, and effective policies will continue to be produced for the solution of global and regional problems.

169. Over the Plan period, through a human centric, participatory, inclusive, accountable, transparent and efficient approach, it will be ensured that the objectives and goals set out in the Plan are bought in by all sections of the society and fundamental steps are taken to achieve the Plan's vision.

Chapter Two

2. OBJECTIVES AND POLICIES OF THE PLAN

2.1. STABLE AND STRONG ECONOMY

170. The objectives of the Eleventh Development Plan have been determined within the framework of an export-oriented stable growth model that focuses on productivity and leading role of the industrial sector.

171. During the Plan period, the harmonization between monetary, fiscal and revenue policies will be strengthened by providing strong policy coordination in economic administration. In addition, the business and investment environment will be further developed, the elimination of market imperfections and the development of rule based perfect competitive market will be supported.

172. In order to ensure technological transformation in industry, especially in the priority sectors underlined in the Plan period and to increase the value added that will enable the establishment of a more productive and competitive economic structure, enhancement of physical and human capital that will motivate private sector invest-

ments will be ensured in the allocation of public investments.

173. Political stability, macroeconomic stability, the rule of law, democratization and strong business and investment environment will constitute the most important driving factors in achieving the Plan objectives thus the confidence and stability environment will increase investment, production, employment and exports.

174. Those groups of the working age population which are outside the labor force will be included in the labor force. The competencies of the labor force and their harmony with the business environment will be improved with better quality education and disseminated vocational and focused training opportunities.

175. In the first two years of the Plan period, arebalancing period for economic activity is expected. Thanks to important steps taken, growth is expected to accelerate in the next three years and reach a high and sustainable level. In this context, it is targeted that the growth rate will be

4.3 percent annually on average in the Plan period and at the end of the Plan period, income per capita is expected to reach USD 12,484 and income per capita in terms of PPP (purchasing power parity) is expected to exceed USD 37,000. It is foreseen that 4.3 million new jobs will be generated during the Plan period and the unemployment rate will decrease to 9.9 percent at the end of the period.

176. Under the defined growth model, it is important that the investment channeled to productive areas are stable and substantial. The Plan aims at increasing the level of domestic savings, which constitute the most reliable funding source of these investments, with a target of raising the rate of domestic savings to national income beyond 30 percent by the end of plan period. Raising the level of domestic savings will contribute to reducing current accounts deficit and making Turkish economy more resilient to potential shocks. In addition to raising the level of public savings, households and companies will be encouraged to gain greater awareness and tendency of saving, with incentives for longer-term savings, and policies will be implemented to channel savings to investments in more productive fields of the economy.

177. On the basis of policies that increase competitiveness and productivity, the solid foundations of export-oriented transformation that will enable more exports with a production structure that is less dependent on imports will be revealed. The current account deficit will be significantly reduced with the contribution of tourism revenues increase as well as exports that will increase by supporting sectors with competitive potential and high foreign trade deficit. Con-

sidering the national rights and interests of our country; bilateral, regional, multiple, multilateral trade and economic relations and cooperation will be improved and share of our country in world trade will be increased in line with growth targets. A significant improvement in the quality of financing of the current account will be achieved with the effect of technology transfer provided foreign direct investments.

178. In the Plan period, with the policies and measures to be implemented, exports are expected to reach 226.6 billion dollars and imports to 293.5 billion dollars and with the targeted increase in tourism revenues, the ratio of current account deficit to GDP is expected to realize 0.9 percent at the end of the period.

179. The policy framework based on price stability and financial stability in monetary policy will continue and inflation will converge gradually to the 5 percent target under the strengthened policy coordination. Accordingly, while the floating exchange rate regime is maintained, all available instruments will continue to be used decisively in order to ensure the price stability for reaching the target.

180. In line with the growth targets envisaged to be achieved in the Plan period, it is aimed that the financial markets will be able to meet the financing needs of the real sector at low cost and to provide different financial instruments. In this period, when structural transformation is aimed in the industry, it is essential that both financial markets be effective in the implementation of the policies put forward and that our country will progress decisively towards becoming a global financial center. In this

context, capital markets will be developed, financial technology ecosystem will be strengthened and the weight of interest-free finance within the sector will be increased.

181. The public fiscal discipline will be maintained in a way that will support the quality growth path that does not generate inflation and the expenditure policy will be implemented in a way that will utmost affect the plan targets. In this context, program budget system will be implemented and expenditure reviews will be made. Revisions will be made to strengthen tax justice and broaden the tax base, and own revenues of local government will be increased. At the end of the Plan period, public sector borrowing requirement, general government deficit and the central government budget deficit ratio to GDP are targeted to be 1.7, 1.8, and 2 percent, respectively.

182. In order to strengthen the financial sustainability of the social security system by taking into account the actuarial balance; the population covered in the system will be expanded by increasing the formal employment, the pressure of the pension and health expenditures on public finance will be kept under control by increasing of premium collections and the social security system will be ensured to operate in an efficient and fair structure.

183. Public enterprises will continue to operate in accordance with the principles of profitability, efficiency and corporate governance. In this framework, public enterprises will determine their prices and tariffs on a commercial basis, increase product optimization and productivity, and develop R&D and innovation activities. Privatization practices will continue in line with the

objectives of increasing productivity in the economy and improving public fiscal balances.

2.1.1. Macroeconomic Policy Framework

184. In the Eleventh Development Plan, an export-oriented stable growth model is envisaged that focuses on productivity, where industrial sector plays a leading role.

185. Strengthening and maintaining of a rule based and functioning free market economy will play an active role in the development of competitive production infrastructure.

186. The regulatory and supervisory role of the government will be strengthened and independent regulatory and supervisory agencies in the markets will continue to operate to ensure the effectiveness of the market within the framework of predictability and transparency.

187. Efforts to facilitate market entry and exit, eliminate market failures and strengthening the fully competitive market will be continued with determination.

188. Physical and social capital which is needed in the allocation of public investments and which motivates private sector investments will be increased.

189. The business and investment environment will be further improved through the establishment of macroeconomic stability, improvement of investment processes and encouraging productive investments.

190. In addition to improving the investment environment, different support mech-

anisms will be implemented to increase private sector investments.

191. Foreign direct investments will be attracted especially to the industrial sector and the share of green-field investments will be increased.

192. While focusing on efforts to attract foreign direct investment, the principle of free of movement of capital will continue to be applied. Accordingly, the share of qualified and long-term resources in the financing of the current account deficit will be increased.

193. The privatization will continue to reduce the share of the state in production that does not involve public benefit, and the activities of existing state-owned enterprises (SOEs) will be maintained in an efficient and productivity-based manner that will not have a distorting effect on the market.

194. Coordination and harmony will be essential in economic administration. While ensuring strong coordination among policies, thanks to effective decision-making mechanisms, the continuity of macroeconomic stability will be ensured by keeping in mind the harmony between monetary, fiscal and incomes policies.

195. Medium and long-term effects will be taken into consideration in the implementation of macro-prudential policy implementations.

196. When taking basic transformation decisions, particular attention will be paid to ensuring social consensus with the participation of public, private sector, non-governmental organizations (NGOs) and all other stakeholders.

197. CBRT will continue to maintain to price stability and oversee financial stability. While the floating exchange rate regime is maintained, all available instrument will continue to be used decisively to ensure the price stability required by the target set.

198. The fiscal policy framework will be sustained on fiscal discipline with an approach supporting qualified growth, and with expenditure policy based on sustainability, efficiency and productivity in the use of resources.

199. The borrowing policy will be carried out on the basis of strategic criteria based on financing at the best possible cost in the medium and long term within a reasonable risk level considering domestic and foreign market conditions and cost factors.

200. Efficiency will be taken as a basis in public expenditures as well as saving, focus will be given to rationalization of investment and current expenditures, and extending the tax base will be one of the basic tools to increase sustainable and healthy income.

201. The fiscal gains achieved from public finance will be used to support stable and strong growth.

202. Governance processes of SOEs and local administrations will be improved and fiscal implementations will be controlled within the framework of sustainability.

203. Expenditure responsibilities will be clarified in line with the general fiscal policies of administrations.

204. A balanced risk sharing with the private sector will be observed in PPP trans-

actions taking into consideration budgetary obligations as well.

205. New instruments will be created to increase the domestic savings in order to finance stable and strong growth and these resources will be directed to competitive areas in a balanced and effective manner. Priority sectors will be highlighted in the public resource allocation and public supports will be re-evaluated in a way to encourage institutionalization, scale-up and technological innovation.

206. Physical, human and technological infrastructure will be strengthened in order to achieve technological transformation in the industry, especially the priority sectors identified for the Plan period, and to increase the added value that will enable the establishment of a more efficient and competitive economic structure.

207. A holistic approach will be adopted in which the services and agricultural sectors supporting the industrial sector are common to the overall productivity gains.

208. With the policies that increase competitiveness and productivity, export-oriented transformation will be realized which ensures more exports with lower import dependency in foreign trade.

209. The diversity and quality of tourism services will be improved so that the contribution of tourism sector to the economy can be increased substantially.

210. Human resources will be one of the main elements of the stable growth process envisaged in the Plan period. Directing of the labor force in the productive sectors and

areas, observing the relationship between education and employment, increasing the qualifications of the labor force, encouraging the participation of women in the labor force, and equipping the youth with the professional skills needed in the labor market are among the main priorities.

211. The steps to be taken to make the labor market flexible through practices that are in favor of wage-earners and employers will both increase participation in labor force and contribute to growth by making the matching mechanisms between jobs and job seekers more efficient.

212. Working conditions will be improved to encourage labor force participation, productivity gains, formal-employment, job quality and vocational education. Employment growth and quality job opportunities will be main tools for fighting poverty and ensuring improvement in income distribution.

213. Arrangements to improve flexibility in the labor market, expanded child-care services and education opportunities and employment oriented policies will support the labor market competencies of women and will support their more intensive participation into working life. Participation of women in the labor market at higher rates and with better jobs will boost household incomes and directly will contribute to savings, thereby enable more financing resources for investments.

214. As a result of the policies focusing on productivity and competitiveness, the real GDP growth is targeted to be 4.3 percent annually on average. Following the rebalancing period envisaged for the first year of

the Plan period, it is expected that the production level will converge to the potential and the growth rates will move upwards with our potential as a result of productivity gains.

215. By the end of the Plan period, the current GDP is expected to reach 1,080 billion dollars per capita income is envisaged to reach 12,484 USD, exceeding the high income threshold. Per capita income in terms of PPP is expected to reach 69.5 percent of the EU average and OECD defined per capita income in terms of PPP will exceed 37,000 dollars.

216. During the Plan period, 4.3 million additional jobs are envisaged to be created, with an annual average rate of increase of 2.8 percent. Building on the economic growth to be achieved, rapid employment growth and increased participation of women in the labor market through policies to be implemented towards the labor market will raise labor force participation rate to an estimated 56.4 percent level. In line with these developments, unemployment rate is envisaged to fall to 9.9 percent by the end of the Plan period.

217. It is aimed that the targeted growth to be realized in a balanced path, in terms of both production and expenditure components. It is expected that contribution of TFP to growth to increase within sources of production, while the contribution of investments and net exports to accelerate relatively within demand components and the share of industrial value added in GDP to rise.

218. Through improvement of competitiveness and productivity by focusing on

manufacturing industry and the steps to be taken for the development of technological capacity, the industrial sector is expected to grow by 5.7 percent annually on average, coupled with a significant change in the sectoral composition of production, raising the share of industry in GDP to 24.2 percent. It is expected that the agriculture sector to grow 3.1 percent annually on average and its share in GDP to decrease to 5.4 and the share of services sector in GDP to be 60.1 percent.

219. In the industrial sector, through the adoption of a production model that adapts to the transformation in global trade, that is technology intensive and has high domestic innovation capacity, together with expected growth in tourism revenues, net goods and services exports are anticipated to contribute more to growth, by an additional 1.1 point on average over the Plan period.

220. At the center of productivity and innovation, fixed capital investments is expected to grow at a rate of 5.3 percent annually on average in the Plan period. Private sector investments are expected to contribute significantly to this growth in investments It is predicted that the share of private fixed capital investments in GDP to reach 26.8 percent at the end of the Plan period with a 1.7 percent increase annually on average.

221. Within the framework of the steps towards increasing technological capacity, strengthening institutional capacity and developing human capital, TFP is expected to increase by 0.3 percent annually on average in the Plan period and its contribution to growth is expected to reach 13.9 percent at the end of the period.

Table 2: Growth and Employment Realizations and Targets

	2018	2023
Main Indicators		
GDP (2009=100 Chain Linked Volume Index, Billion TL)	1,737	2,142
GDP (Current, Billion TL)	3,701	7,453
GDP (Current, Billion Dollars)	784	1,080
Population (Mid-year, Mil. Persons)	81.4	86.5
GDP Per Capita (Current, Dollars)	9,632	12,484
GDP Per Capita (PPP, Dollars)	28,205	37,423
Sectoral Distribution of Value Added (ratio to current GDP, Percent)		
Agriculture	5.8	5.4
Industry	22.2	24.2
Services	61.5	60.1
Labor Market		
Labor Force Participation Rate (%)	53.2	56.4
Labor Force (Million People)	32.3	36.7
Employment (Million People)	28.7	33.0
Employment Rate (%)	47.4	50.8
Unemployment Rate (%)	11.0	9.9

Source: 2023 figures are estimates of the Eleventh Development Plan.

Table 3: Developments and Targets of Resources of Growth

	2014-2018 ¹	2019-2023 ¹
Growth (%)	4.9	4.3
Growth of Production Factors (%)		
Capital Stock ²	7.3	5.9
Employment	3.2	2.8
TFP	0.1	0.3

Source: 2019-2023 figures are estimates of the Eleventh Development Plan.

(1) Refers to period average

(2) Adjusted with capacity utilization rate

Table 4: General Balance of Economy

(Current Prices, as a share of GDP, Percent)

	2018	2023
TOTAL CONSUMPTION	72.0	68.5
Public	10.7	9.6
Private	61.3	58.9
TOTAL INVESTMENT	29.2	31.2
Public	4.5	4.4
Private	24.7	26.8
FIXED CAPITAL INVESTMENT	29.7	31.2
Public	4.6	4.4
Private	25.1	26.8
CHANGE IN STOCK	-0.5	0.1
Public	-0.1	0.0
Private	-0.4	0.0
TOTAL DOMESTIC DEMAND (TOTAL SOURCES)	101.2	99.8
Net Goods and Services Export	-1.2	0.2
Goods and Services Export	29.6	30.8
Goods and Services Import	30.8	30.5
GROSS DOMESTIC PRODUCT (GDP)	100.0	100.0
Net Factor Income + Net Current	-1.6	-1.3
Transfers from Abroad	0.1	0.1
GROSS NATIONAL DISPOSABLE INCOME (GNDI)	98.5	98.8
PUBLIC DISPOSABLE INCOME	12.5	12.0
Public Consumption	10.7	9.6
Public Saving	1.8	2.4
Public Investment	4.5	4.4
Public Saving-Investment Gap	-2.7	-2.1
PRIVATE DISPOSABLE INCOME	86.0	86.8
Private Consumption	61.3	58.9
Private Saving	24.7	27.9
Private Investment	24.7	26.8
Private Saving-Investment Gap	0.1	1.1
Total Domestic Saving	26.5	30.3

Source: 2018 figures reflect calculations of the Presidency of Strategy and Budget, whereas 2023 numbers indicate Eleventh Development Plan estimates.

Note: Figures are rounded to single decimal digit. Total values may differ from the sum of sub-components.

2.1.2. Domestic Savings

a. Objective

222. The main objective is to increase domestic savings during the Plan period and to direct increased savings to the financing of investments in priority sectors in manufacturing industry and productive areas.

b. Policies and Measures

223. In order to strengthen the tendency to make long-term savings and increase the pension income of individuals, participation in systems other than the public pension system will be encouraged; the private pension system (PPS) will be improved to increase number of participants, duration of the stay in the system and amount of funds.

223.1. The current state subsidies in the PPS will be differentiated by age to make long-term savings attractive to the young population.

223.2. In order to prevent the exit of PPS participants due to their short-term cash needs, individuals will be given the opportunity to withdraw some of their savings without leaving the system due to needs such as health, marriage, education and property ownership.

223.3. Automatic enrollment in private pension system will be re-arranged such that the duration of stay in the system and fund amounts will be improved and it will be integrated with the severance pay fund to be established on the basis of individual accounts.

223.4. It will be ensured that complementary pension institutions based on sector, branch of activity or occupation will be developed and expanded in line with best practices.

224. Corporate savings and their efficient use in priority sectors will be increased by additional tax incentives.

224.1. Cash capital increases of the companies in the priority sectors will be encouraged by additional tax regulations.

225. By reducing the attractiveness of unproductive investments through tax and macro prudential arrangements, savings will be directed to investments in productive areas.

225.1. Regulations and practices regarding taxation and credit utilization in second and subsequent housing purchases will be reviewed.

225.2. Legislation and implementation on taxation of value increases arising from re-zoning will be strengthened.

226. Efforts will continue to attract the resources outside the financial system into the system by diversifying instruments.

226.1. Special incentives will be maintained and new incentives will be designed to attract under-the-mattress savings to the financial system.

227. In order to increase household savings, behavior of saving before spending instead of spending by borrowing will be supported.

227.1. For spending items such as durable consumer goods, education and holidays, special savings accounts will be created for each expenditure item group in banks and tax incentives will be applied for the related purchases using these savings.

228. By increasing financial literacy, awareness of households and firms to make savings and the level of knowledge about financial instruments to which savings will be directed will be increased.

228.1. Financial literacy will be increased especially for SMEs in order to increase corporate savings.

228.2. Financial training activities carried out by public institutions, especially the Capital Markets Board (CMB), will be expanded and educational support will be provided to households on basic finance concepts.

228.3. Guidance and regulation will be provided in order to make banking services be more easily understood by consumers.

Table 5: Domestic Saving Targets

	2018	2023
Rate of Domestic Savings (% of GDP)	26.5	30.3
Public Sector Savings Rate (% of GDP)	1.8	2.4
Private Sector Savings Rate (% of GDP)	24.7	27.9
Number of PPS Participants (Million People)¹	11.6	15.2
Amount of PPS Funds (Billion TL)^{1,2}	96.3	296

Source: Data for 2018 belongs to Strategy and Budget Presidency and EGM. Data for 2023 are estimates of the Eleventh Development Plan.

(1) Total of voluntary and automatic participation systems. Year-end values.

(2) At Prices of 2018

2.1.3. Balance of Payments

a. Objective

229. The main objective is to significantly improve the balance of payments with the contribution of foreign direct investments that provide technology transfer ensuring sustainable export growth by supporting priority sectors and development areas with strong employment and international competitive potential, reducing dependence on imports, as well as reducing current account deficit with increasing tourism revenues.

b. Policies and Measures

230. The medium-term export route map of Turkey will be prepared.

230.1. The Export Master Plan will be prepared and put into practice with a target market and target product-oriented approach, which supports the integration of our companies into the value-added stages of the global value chains and aims for sustainable export growth.

231. The value-added and competitiveness of the exported goods and services will be

increased by supporting the design, product development (R&D) and branding activities of our companies.

231.1. Market penetration action plans will be implemented for exporters, market penetration barriers will be monitored and solutions to overcome these barriers will be supported.

231.2. Training and consulting services will be developed through projects to support the companies preparing for export activities.

231.3. Within the scope of export supports for enterprises, institutional capacity for design and branding activities will be improved; fair participation, office and store opening, branding and Turquality support will be continued.

231.4. The legislation covering export supports will be activated at regular intervals as a result of impact analyzes, and new support tools will be developed while the supports that do not meet the conditions of the day are terminated.

232. Efforts will be increased for our country to gain more shares in the global halal product market growing increasingly.

232.1. Necessary support will be provided for the Institute of Standards and Metrology of Islamic Countries hosted by our country to work more effectively.

232.2. The institutional capacity of the Halal Accreditation Agency will be strengthened and the volume and type of activity will be increased.

232.3. Support mechanisms will be developed for companies exporting in the field of halal products.

233. Competitiveness of domestic production to reduce import dependency will be increased.

233.1. Support will be provided to local firms that produce goods and services for exporters.

233.2. The visibility and awareness of domestic goods will be increased by encouraging domestic consumption.

233.3. The protection of domestic production will be ensured within the framework of our international obligations against the damages and threats caused by imports on domestic production.

233.4. Internationalization of national institutions will be ensured in the certification of production standardization of Turkish export products.

233.5. By conducting commercial quality audits effectively, the quality image of agricultural products in export markets will be preserved and it will be ensured that they meet international quality standards.

234. The necessary infrastructure will be strengthened to enable the exporter to operate based on more information and analysis.

234.1. A digital “Easy Export Platform” which covers comprehensive and up-to-date data will be established to enable exporters can follow up global commercial data closely and obtain information about

government supports, potential products and markets and recipient country applications.

235. Sustainability of the promotion and awareness of the companies and brands belonging to our country will be ensured.

235.1. A database containing the information of the companies that have participated in the trade delegations held abroad and the information of the foreign companies contacted will be established and updated periodically.

235.2. In order to maximize the competitiveness of our companies through fast supply advantage, Turkish Trade Centers will be equipped with a structure that is integrated with distribution and storage channels.

235.3. In order to more efficiently use the funds and resources used for the promotion of our country and Turkey brand, the resources spent by different institutions and agencies will be consolidated and a new promotion strategy will be developed.

236. Considering the national rights and interests of our country; bilateral, regional, multiple, multilateral trade and economic relations and cooperation will be developed.

236.1. Dialogue with foreign countries on bilateral, regional, multiple and multilateral platforms will be strengthened in order to improve our companies' access to markets and ensure their work in a fair competition environment.

236.2. Efforts to update the Customs Union with the EU will continue.

236.3. In order to increase competitiveness and productivity in the economy and to develop opportunities for preferential market entry, new free trade agreements supporting macroeconomic targets will be negotiated and efforts will be continued to expand the scope of the free trade agreements in force.

236.4. Efforts to improve bilateral trade and economic relations within the framework of the Belt and Road Initiative will be continued.

236.5. Diplomatic, economic, commercial and cultural relations with African countries will be strengthened; the foreign trade volume between Turkey and the region countries will be increased within the framework of the Turkey's opening policy to Africa.

236.6. Our existing diplomatic, economic, commercial and cultural relations with the Middle East countries will be strengthened; foreign trade volume with the region countries will be increased.

Financing of the Current Account Deficit

237. A strong legal, administrative and physical infrastructure will be established to ensure our country more attractive in terms of international direct investments, the sustainability of these investments and increase its share in financing the current account deficit.

237.1. An investment and business environment that compliant with international standards will be developed.

237.2. Beside the basic regulation to facilitate private sector investment, a com-

prehensive legislative restoration will be carried out to increase predictability and transparency, strengthening investor confidence, guarantee the retrospectivity of adverse judgement and remove the obstacles that preventing the acceleration of investments.

237.3. Arrangements will be made to ensure that all kinds of bureaucratic procedures related to investments are completed by the public administration in a shorter period on a single addressee.

237.4. The infrastructure that aims to expand the use of solution in international standards for dispute resolution related to investments will be strengthened.

237.5. Information system will be established to ensure fast, user-friendly and cost-effective processes of permits, approvals, licensing processes and etc. related to investments.

238. Foreign direct investments will be directed to exporting sectors.

238.1. In order to attract the greenfield investments creating value added in the man-

ufacturing industry to our country, active promotion, negotiation and customized incentive mechanisms will be implemented.

239. The current accounts deficit will be financed from external resources that do not create substantial levels of debts, and financing quality will be improved.

239.1. In long-term investment projects, financing instruments that are aligned with the maturity structure and that are based on long-term international partnership will be developed.

239.2. Long term external borrowing facilities will be eased, international collaboration mechanisms will be strengthened, and investment environment of our country will be promoted in the international arena through a detailed program.

239.3. New financial instruments will be developed to attract large scale funds, especially pension funds, for long term investment to our country.

239.4. Advertising activity related to real estate sales to nonresidents will be increased and the processes will be activated.

Table 6: Targets on Balance of Payments

	2018	2023
Exports Fob (Billion USD)	167.9	226.6
Imports Cif (Billion USD)	223.0	293.5
Current Accounts Balance (Billion USD)	-27.1	-9.9
Current Accounts Balance / GDP (%)	-3.5	-0.9
Travel Revenues (Billion USD)	25.2	55.3
Proportion of Imports Covered by Exports (%)	75.3	77.2
Foreign Direct Investment Inflow (Billion USD)	13.0	23.8

Source: The data (2018) belong to Turkish Statistical Institute (TURKSTAT) and Central Bank of the Republic of Turkey. The data (2023) are estimates of the Eleventh Development Plan.

2.1.4. Inflation and Monetary Policy

a. Objective

240. The basic objective is to continue effectively using monetary policy instruments and ensuring and maintaining price stability through a strong monetary policy stance, while preserving financial stability.

b. Policies and Measures

241. Monetary policy instruments will continue to be used robustly. Monetary, fiscal and income policies will be carried out in coordination.

241.1. In line with the inflation targeting regime, Inflation targets will be continued to be determined and announced by the Government and the Central Bank.

241.2. The prudential monetary policy instruments aimed at reducing inflation gradually to 5 percent will be supported by fiscal and revenue policies as well.

241.3. In order to maintain fiscal discipline, managed and administered prices and tax regulations will be determined to help reduce the indexation behavior of past inflation.

241.4. By closely monitoring the factors affecting the general level of prices, monetary and fiscal policy instruments will be put into practice in a coordinated, rapid and effective manner in order to avoid deviation from the inflation target against the sudden developments that will adversely affect price stability.

242. The CBRT will continue to use all instruments decisively and independently for

the effective functioning of the monetary transmission mechanism in line with its primary objective of achieving price stability.

242.1. Monetary policy decisions will be made by taking into consideration inflation expectations, pricing behavior and other factors affecting inflation.

242.2. Within the scope of the communication of policy decisions, the public will continue to be informed about developments in pricing behavior and factors affecting inflation and how these developments affect decisions.

242.3. Reserve-enhancing practices and instruments for financial stability will be strengthened and diversified.

243. The floating exchange rate regime will continue to be implemented and necessary steps will be taken to ensure stability in markets in case of unhealthy price formations in exchange rates or excessive volatility.

244. Necessary arrangements will be introduced in the fields of logistics and storage in order to reduce the pressure of food prices on inflation, and institutional infrastructure of regional- and product-based planning will be implemented in agriculture.

244.1. The organized structure in agricultural production will be strengthened in order to reduce intermediation and logistics costs in the food distribution chain.

244.2. A more competitive structure that provides food logistics and warehousing services at international standards will be created.

244.3. Cold storage chains that will help minimize periodic price fluctuations will be supported.

244.4. The modernization and transformation of transport vehicles aimed at minimizing casualties during transport will be encouraged.

244.5. Vegetable and animal stock exchanges will be established to create a competitive product market.

244.6. Product Surveillance Mechanism will be implemented in order to monitor price fluctuations in food products closely by using big data and advanced analytical methods by establishing an early warning system that enables supply and yield forecasts in agricultural products to be made in a healthy manner.

244.7. Technological greenhouse cultivation and modern irrigation systems will be supported, as balancing factors against seasonality and price surges in the fresh fruit and vegetable market.

245. Awareness will be raised on the negative effects of inflation on economic and social life, and social consensus on the fight against inflation will be strengthened.

245.1. By using communication channels actively, written, visual and audio content, which is diversified, will be shared with the public to address all sections of the society.

Table 7: Inflation Forecasts

	2018	2023
CPI (End of Year, %)	20.3	5.0

Source: Data for 2018 is announced by TURKSTAT. Data for 2023 is forecast of the Eleventh Development Plan.

2.1.5. Financial Sector

a. Objective

246. The main objective is to form a financial sector with a strong institutional structure that can sufficiently satisfy financing needs of the real sector at a lower cost; offer various financial instruments to investors in a wide spectrum through reliable institutions and support the target of Istanbul for becoming an attractive global financial centre.

b. Policies and Measures

247. The effectiveness of financial sector in the financing of real sector will be increased and real sector's use of fund from capital market and non-bank financial institutions under the supervision of Banking Regulation and Supervision Agency (BRSA) will be encouraged.

247.1. The issuance limit of the Mortgage Finance Institution (MFC) will be made independent of its capital.

247.2. In order to decrease issuance costs of MFC, transaction costs such as CMB board fee and Central Securities Depository of Turkey (CSD) custody fee will be reduced.

247.3. The securities to be issued by MFC may be subject to liquidity transactions such as repo.

274.4. The securitization of assets in bank balance sheets will be encouraged.

247.5. SME asset leasing company will be established, sukuk will be issued by and support for issuance costs will be provided.

247.6. To a certain extent, investments in Borsa İstanbul (BIST) Private Market companies will be deducted from the period profit of the investing companies.

247.7. Legislation will be made for intermediary institutions to establish project finance funds and issue project-based securities.

247.8. It will be ensured that non-performing loans other than finance sector can be transferred to asset management companies.

247.9. Asset management companies will become members of the Association of Financial Institutions.

247.10. Tax incentives will be provided to support the public offerings of companies.

247.11. Partnership-based securities instruments which will be backed on public and private assets and projects will be developed.

247.12. In order to financing the innovative projects, modern and new generation financing models such as mass funding will be introduced to the Turkish capital markets.

247.13. In order to financing of the PPP projects, in addition to credit markets, capital markets will be used.

248. The regulation and supervision framework of financial institutions will be strengthened, an effective competition environment will be provided, transaction costs will be reduced, and access to sound information will be facilitated.

248.1. Financial regulatory and supervisory bodies will be merged under Turkey Financial Services Committee in order to improve the efficiency of regulation and supervision.

248.2. The effectiveness of existing consolidated audit framework covering main shareholders and all subsidiaries of financial institutions will be increased.

248.3. Cross-border supervision framework and practices will be strengthened.

248.4. Direct access to the documents and information requested for loan applications will be provided through a central database.

248.5. Electronic check and bond system will be established.

248.6. A regulation will be made to eliminate the differences between financial institutions in terms of access to information.

248.7. Regulations will be made to reduce the use of physical documents and wet signatures in the transactions of financial institutions with customers.

248.8. Financial regulations will be announced to the public during their preparation phase, sufficient time will be allotted for the related parties to give their opinions and regulatory impact analysis will be done for the regulations.

248.9. Regulations that violate transparency and predictability criteria and that have retrospective impact will be avoided while making financial regulations.

248.10. Reference interest rates will be set for hedging interest rate risk of TL denomi-

nated assets and pricing assets with variable interest rate.

249. In order to develop alternative money and payment systems that will be accepted in the international trade system, country collaborations will be established and for this purpose studies will be continued.

249.1. The structure of European Payment System, which will be used in barter-based trade, will be examined and a similar structure will be introduced in our country, too.

249.2. In order to create a global reserve money alternative, collaborations between countries will be established and it will be ensured that the central banks of these countries will conduct joint projects.

249.3. Trade opportunities in terms of local currencies will be developed through bilateral agreements.

249.4. The opportunities for compatible payment systems with the central banks of the target countries will be searched and measures will be taken to strengthen the reliability of trade and to accelerate trade.

249.5. Blockchain-based digital central bank money will be implemented.

250. The formation of a safe financial technology (fintech) ecosystem which provides equal opportunities for companies will be supported considering international good practices.

250.1. A road map for the development of a fintech ecosystem in our country will be prepared and coordination of the implementation will be provided by a single public agency.

250.2. Regulatory Sand Box and Industry Sand Box will be launched.

250.3. Association of Payment Services and Electronic Money Institutions will be established.

250.4. Istanbul Finance and Technology Base will be established.

250.5. In order to strengthen open banking legal infrastructure, legislative alignment with the EU Payment Services Directive-2 will be provided.

251. Activities will be carried out to facilitate access to financial services and to improve financial awareness and investor base.

251.1. Financial literacy education will be expanded in the primary, secondary and higher education institutions and this education will be provided to adults within the scope of non-formal education.

251.2. Financial Advisory System will be developed in which the needs of financial consumers are determined correctly, their rights are protected against financial institutions and intermediary services are provided between both parties.

251.3. In order to improve supplementary health insurance, advantages will be provided to the employers for group policies.

251.4. Turkey Reinsurance Pool will be launched to operate.

251.5. In case the issuers fail to fulfil their payment obligations, a legal arrangement will be made to ensure that the document to be obtained from CSD of Turkey has the

quality of verdict and create “general assembly of debt instrument holders” in the companies issuing debt securities.

251.6. Employee stock ownership programs will be defined.

251.7. The existing arbitration mechanism will be made more operational in order to build a trustworthy ecosystem in the capital markets.

251.8. The information related to fees and commissions taken from financial customers will be provided more transparently, understandably and comparably.

Interest-Free Finance

252. The position of interest-free finance system in our country’s financial system will be strengthened, diversification of financial instruments and services and human resources in interest-free finance will be developed, tools and mechanisms to support policy development processes will be established.

252.1 Regulations will be made for the implementation of new business model/window system in order to expand participation banking.

252.2. Awareness of the interest-free finance system will be increased by providing more information to the public about the functioning of the interest-free finance system and financial products.

252.3. An integrated data reporting infrastructure in interest-free finance will be established.

252.4. Regulations will be made to increase the diversification of financial instruments and services in interest-free finance system.

252.5. In order to carry out commodity murabaha transactions in Turkey, platforms based on lease certificate, electronic warehouse receipt or stock portfolio will be created.

252.6. The use of lease certificate issuances in the financing of public investments will be increased.

252.7. Legislation will be revised in order to provide ease of application in the use of special purpose institutions in issuing lease certificates.

252.8. Interest-free financial audit standards will be established.

252.9. The standardization of the terminology of instruments and institutions related to interest-free finance will be ensured.

252.10. Interest-free corporate governance system will be established and will be harmonized with international practices.

252.11. Legal and institutional structure encouraging takaful will be developed and expanded to address all types of risk groups.

252.12. Retakaful fund will be established in order to prevent the flow of national resources abroad.

Table 8: Targets for Financial Markets

(Percent)

	2018	2023
Banking Loans / GDP	67.3	82.2
Participation Bank Loans / Total Loans	4.7	7.0
BIST Market Capitalization / GDP	21.5	39.3
Nominal Stock of Private Sector Debt Securities / GDP	1.7	5.8

Source: 2018 data belong to BRSA, CMB and TURKSTAT. 2023 data are the estimations for the Eleventh Development Plan.

2.1.6. Fiscal Policy

a. Objective

235. The basic objective is to protect the strong and sustainable structure of public finance by decisively maintaining fiscal discipline.

b. The Framework of Public Finance

254. The robust and sustainable stance of public finance will be maintained during the Plan period. In this context, the central government budget deficit, which was 2 percent in 2018 in terms of GDP, is expected to remain at the same level in the Plan period. Compared to GDP, the program-defined central government budget balance, which had a deficit of 1.5 percent in 2018, is projected to increase to a surplus at the end of the Plan period. The public sector borrowing requirement, which was 2.4 percent in 2018, is expected to be reduced to 1.7 percent at the end of the Plan period.

255. The ratio of public consumption to GDP, which was 10.7 percent in 2018, is foreseen to be reduced to 9.6 percent by the end of Plan period, while the rate of public savings is foreseen to be raised to 2.4 percent from 1.8 percent in 2018.

256. Public finance policy will be used effectively for achieving the objectives and

structural transformations set out in the Plan with a fresh quality-growth friendly perspective.

257. In order to achieve the targets set for the priority sectors and areas of improvement, it is planned to budget, over the Plan period, the expenditures required for the incentives and subsidies to support private sector investments, R&D, innovation, production and export activities, in addition to public sector investment expenditures primarily for education, logistics infrastructure, industrial zones infrastructure and irrigation. These expenditures will be financed through the fiscal space to be created by rationalizing budgetary revenues and expenditures. The share of expenditure items that will strengthen the long-term productivity and efficiency of the economy in the budget expenditures will be increased over the Plan period.

258. Policies to strengthen the actuarial balance of the social security system will be implemented. Spending principles of extra-budgetary and revolving funds will be determined and unity principle of the budget in application will be strengthened. Value-added created by SOE's as a percentage of GDP will be increased by profitability and efficiency policies. Rising SOE investments will be financed by increasing profitability hence borrowing requirement of

SOE's will remain the same as a percentage of GDP.

c. Policies and Measures

259. Program based budgeting system will be initiated in order to prioritize resource allocation and usage according to the policy and targets of the Development Plan and to perform budget with output and result oriented approach and to follow and assess it, and as a result of these, to strengthen the tie of plan-program-budget and implementation, following and assessment processes.

259.1 Works on program-based classification of public expenditures will be completed.

259.2. A budgetary structure that addresses public services with a program approach will be adopted, by observing compliance with the Development Plan, medium-term program, annual program of the Presidency and strategic plans.

260. Spending reviews will be conducted to assess and prioritize public expenditures, to ensure the efficient use of resources, to evaluate the performance of public institutions and to perform healthy fiscal consolidation practices. Efficiency in processes of public expenditures programs will be developed and level of expenditures will be kept under control.

260.1. Spending reviews which will enable reporting public expenditures' efficiency, effectiveness and economic conditions will be conducted.

260.2. As a result of expenditure reviews, unproductive expenditures will be elim-

inated and the fiscal space created will be channelized to the prioritized expenditure areas.

260.3. Public human resources will be used more efficiently, employee satisfaction will be increased, and public employees' fiscal and social rights are going to be adjusted according to the macroeconomic policies foreseen on the Plan.

260.4. By reconsidering organizational and methodological structures, public service delivery will be made more effective and efficient with fewer administrative units, new service demands will be met by existing units instead of creating new units, e-Government applications will be extended, and thereby the efficiency of public expenditures will be improved.

260.5. Competition will be increased by improving public procurement and contract processes in order to save on public investment expenditures.

260.6. The Vehicles Law will be updated to ensure efficiency and effectiveness in vehicle management.

260.7. The scope of central government budget will be enlarged by decreasing the number of revolving funds and special accounts, to contribute to fiscal discipline.

261. Incentive, subsidy and social aid practices will be reviewed and inefficient practices will be terminated, structural arrangements will be made within the scope of Plan priorities.

261.1. A new incentive system which is flexible, centered on investment period,

consists of cash based incentives and providing a competitive advantage in areas of value added product will be established.

261.2. Tax incentives will be evaluated according to their economic and social effects, ineffective ones will be gradually terminated by inspecting regulations qualified as tax expenditures.

261.3. The existing incentive and support programs will be reevaluated and the duplicated incentives and subsidies will be eliminated in line with the Plan objectives.

261.4. Agricultural subsidies will be allocated in a manner that increase value added, a monitoring and evaluation system will be established to allow for the comparison of the intended social and production-oriented benefit with the financial burden, the effectiveness of the subsidies will be measured regularly and ineffective practices will be terminated.

261.5. Transfer payments will be made via registration payment systems.

261.6. Social assistance programs will be carried out with a holistic approach considering their impact on the labor market and duplications will be prevented.

262. Voluntary compliance, predictability and transparency in taxation will be increased and taxation services will be improved.

262.1 An effective mechanism will be set up to determine and produce the required tax statistics and more detailed and explanatory tax statistics will be regularly shared with the public.

262.2. The institutional capacity of the revenue administration will be increased and fight against the informal economy will be sustained.

262.3. Works on establishing a Tax Data Analysis Center will be completed.

262.4. Through the activation of the Taxpayer Services Center and Interactive Tax Office project, all tax related services will be provided electronically and it will be ensured that small taxpayers keep their tax records electronically.

262.5. E-invoice and e-ledger applications will be improved systematically and counterfeiting will be more effectively tackled.

262.6. Legal infrastructure will be established for tax-payer rights.

263. Revisions will be made in the tax system in order to enhance tax justice, broaden the tax base and increase tax revenue.

263.1. The Income Tax Law will be enacted, which combines income and corporate taxes in a single law, enlarges the tax base, facilitates tax compliance, increases predictability, and supports investment and production.

263.2. Mechanisms for taxation according to ability to pay will be increased at an increasing rate.

263.3. A new Tax Procedure Law which reduces compliance costs, includes comprehensive regulations on taxpayer rights, resolves disputes quickly, adopts deterrent tax penalties to increase voluntary compliance will be introduced.

263.4. By rearranging the scope, base and rates, the share of direct taxes in tax revenues will be increased.

263.5. Lump sum taxes will be adjusted with respect to changes in the general price levels.

263.6. Luxury goods and goods with high import intensity which are not subject to special consumption tax will be reviewed and tax regulation will be made.

263.7. Taxes on property ownership will be reassessed by taking into account the taxation of other savings instruments.

264. Own revenues of local governments will be increased in order to strengthen their financial structures.

264.1. Law on Municipal Revenues will be revised.

264.2. Tax justice will be improved and the efficiency of taxation will be strengthened by introducing a new system for identifying the declaring the purchase and sale values taken as a basis for the taxation of immovable properties. In this context, the relevant ministries will form the necessary infrastructure and the regulations regarding the design and implementation of the system together.

267. Integrated Public Financial Management Information System Project will be completed.

265.1. An accounting-oriented information system infrastructure with new technological facilities such as e-document, e-signature, e-file invoice, and e-invoice will be established for public administrations within the scope of central government.

Table 9: Targets on Public Finance

(as a share of GDP, Percent)

	2018	2023
Public Sector		
Public Expenditures	10.7	9.6
Public Savings	1.8	2.4
Public Fixed Capital Investments	4.6	4.4
Public Sector Borrowing Requirement ¹	2.4	1.7
Public Sector Program Defined Balance ²	-2.3	0.2
General Government		
General Government Revenues	33.4	32.3
General Government Expenditures	35.8	34.1
General Government Balance	-2.4	-1.8
Central Government Budget		
Central Government Budget Revenues	20.5	20.3
Central Government Budget Expenditures	22.4	22.3
Central Government Budget Balance	-2.0	-2.0
Central Government Budget Primary Balance	0.0	0.5
Central Government Budget Program Defined Balance ²	-1.5	0.0

Source: 2018 figures belong to Presidency of Strategy and Budget, 2023 figures are Eleventh Development Plan estimates.

Note: Public sector consists of central government budget, local governments, social security institutions and general health insurance funds, extra budgetary funds, revolving funds, Unemployment Insurance Fund and SEEs. When obtaining the total general government expenditure and revenue, SEEs are excluded

(1) (-) refers to surplus.

(2) Interest expenditures and revenues, privatization revenues, public bank dividends and other one-off revenues are excluded. saplanmaktadır.

2.1.7. Social Security System and Finance

a. Objective

266. The main objective is to ensure the long-term financial sustainability of the social security system by taking into account the actuarial balance of the system.

b. Policies and Measures

267. The social insurance premium base will be expanded, access to the system will be facilitated and the system will be activated through audits.

267.1. In order to increase flexible employment opportunities, easy employer practices will be extended in the registration of employees.

267.2. After performing an impact assessment on employment incentives, the incentives will be designed to have simple and effective structure.

267.3. Audit practices in the social security system will be developed and diversified, and risk-oriented audit practices will be expanded.

- 267.4.** Cooperation between the institutions on auditing will be strengthened and maintained.
- 268.** Informal employment and undeclared wages will be tackled more effectively.
- 268.1.** After determining the sectors where it is difficult to increase registered employment, registration practices which are appropriate to the characteristics of those sectors will be developed.
- 268.2.** Programs to raise awareness on the fight against unregistered work will be implemented.
- 269.** Contribution collections will be increased.
- 269.1.** Contribution collections will be increased by tracking and collecting contribution debts efficiently.
- 269.2.** Specific contribution payment periods will be determined for those earning income during certain months of the year,
- such as farmers and seasonal agricultural workers.
- 270.** The social security system will be ensured to have an effective operating structure.
- 270.1.** The social security legislation will be modified in a simple and understandable manner.
- 270.2.** IT structure of the Social Security Institution (SSI) will be strengthened.
- 270.3.** Social security legislation and practices will be harmonized with changing labor market and working conditions.
- 271.** Participation in other pension schemes other than the public pension system will be encouraged to increase the pension income of individuals.
- 271.1.** Complementary pension systems based on sector, business or profession will be strengthened by extending the scope of these schemes.

Table 10: Targets on the Social Security System

	2018	2023
Ratio of Budget Transfers to SSI to GDP (%)	4.0	3.2
File Based Active-Passive Ratio¹	1.73	1.90
Total Contribution Collection Ratio (%)	82.9	88.1
Social Insurance Coverage (%)	85.6	92.0

Source: 2018 data belongs to SSI. Numbers for 2023 are estimates of the Eleventh Development Plan.

(1) Trainees, course attendees and apprentices are excluded. It is based on the number of files instead of the number of persons.

2.1.8. Public Enterprises and Privatization

a. Objective

272. The main objective is that public enterprises should carry out their activities

on the basis of profitability and productivity principles in a way that does not cause a disrupting effect on the market mechanism and they should not give primary deficit; if these enterprises are assigned for social and public interest activities, the incurred cost should be totally covered in time.

b. Policies and Measures

273. It will be ensured that public enterprises will perform more efficient production at low cost and product optimization.

273.1. Projects aimed to increase productivity in the organizational structures, business processes and labor force of public enterprises will be implemented.

273.2. In order to increase the product diversity and productivity, capacity building regarding R & D and innovation activities will be concentrated on in the investment budgets of public enterprises.

273.3. The number of personnel to be employed in SOEs will not be increased except in specific cases.

273.4. Turkish Grain Board (TMO) will purchase grain through licensed warehouses and electronic warehouse receipts.

273.5. General Directorate of Tea Enterprises (ÇAYKUR) will conduct export-oriented market research and will ensure product optimization.

273.6. General Directorate of Agricultural Enterprises (TİGEM) will increase its sales by improving its marketing activities, the company will continue its R & D studies and certified seed production in cooperation with private sector seed companies.

274. Public enterprises' capacity utilization rates in the production units will be increased, the capacities of existing facilities will be used at their highest levels and new investment decisions will be implemented accordingly.

274.1. Instead of making new meat combine investments for General Directorate of Meat and Milk Institution (ESK), idle capacities of company's existing meat combines or private sector's meat combine capacities will be considered as priority.

274.2. The idle capacity in the General Directorate of Meat and Milk Institution's (ESK) meat combines will be utilized by the public and private sectors and nongovernmental organizations.

275. The prices and tariffs of SOEs will be determined according to commercial principles and their practices that prevent liberalization and competition in the sector will be abolished.

275.1. Sales prices and tariffs of SOEs in energy sector will be determined with respect to their costs.

276. Accountability will be strengthened and transparency will be increased in public enterprises.

276.1. A system will be established for the integrated monitoring of the budget link of SOEs' strategic management documents and planning processes will be made effective through evaluation reports.

276.2. The quality of financial reporting and independent auditing of SOEs will be improved.

277. Privatization practices will continue in line with the objective of establishing an effective market mechanism.

277.1. New and alternative models, including initial public offers, will be used

for privatization applications, within the framework of long-term sectoral priorities and within a defined program, and planing based on economic value added will be adopted.

277.2. During the Plan period, the privatization of the companies and assets in the privatization portfolio will continue and potential companies and assets will be included in the portfolio and privatized.

Table 11: Targets on SOEs

(Ratio to GDP, Percent)

	2018	2023
Total Value Added	0.7	0.8
Gross Sales	3.4	2.9
Total Budget and Fund Transfers	0.5	0.6
Dividends and Treasury Levy	0.1	0.2
Investments	0.5	0.7
Borrowing Requirement¹	0.5	0.5

Source: The data in the table includes the SOEs within the scope of the Decree Law No. 233 and the public enterprises operating within the framework of the Privatization Law No. 4046. Data for 2023 are estimates of the Eleventh Development Plan.

(1) Excluding Transfers from Budget and Fund.

2.2. COMPETITIVE PRODUCTION AND PRODUCTIVITY

278. Competitive pressure has increased at a global level as the acceleration transformative role of technological advancements and communication channels in economic and social life, and countries have entered a fierce race to become more competitive. To have a more competitive economic structure that will enable our country to take place at higher levels of the global value chains in this race, our country needs to strengthen physical, anthropic and technological infrastructure.

279. The elements of competitiveness at the global level are rapidly transforming and the roles between capital and labor in production are reallocated. While the intensity of the competition based on cheap labor is decreasing; high-technology based, faster, flexible and innovative production, design and branding along with the active diplomacy and strong commercial channels that are strengthened with logistic infrastructure and marketing strategies stand out as the main factors that increase the competitive advantages of countries. Productivity gains in these factors have a special place to integrate technological progress with production processes and to integrate competitively into the global value chain.

280. During the Eleventh Development Plan period, it is aimed to achieve stable and strong growth, sustainable current account balance, increase employment and boost competitiveness and productivity at all levels, including individuals, companies, sectors government.

281. In the Eleventh Development Plan, a manufacturing industry oriented approach was developed to increase competitive production and productivity due to tendency of manufacturing sectors to new P&D modes, technological development, and productivity increase; intensity of investment activity as the most common form of technology transfer; abundance of export opportunities and foreign exchange earning functions; strong forward and backward linkages both within itself and with the agricultural and services sectors.

282. During the Plan period; it is aimed to increase competitiveness and productivity at all levels, including individuals, companies, sectors and the government; to reduce dependence on technology import; to transform the production structure; to prioritize large-scale investments and technology-intensive sectors by implementing more active industrial policies based on the manufacturing industry, which is critical for an economic growth based on TFP increases; and to satisfy the need of qualified labor force for all rings of the value chain.

283. In this context, a sectoral prioritization approach has been adopted to accelerate the technological regeneration that dynamizes productivity growth and to ensure a structural transformation in the manufacturing industry which is considered as the driver of stable growth. Using this approach, the following priority sectors have been identified as a result of the comparison of trade, production, value-added, employment, and technology levels of the manufacturing industry sectors and the analysis of forward and backward linkages among sectors.

- Chemistry
- Pharmaceuticals-medical devices
- Machinery-electrical equipment
- Automotive
- Electronics
- Rail system vehicles

284. During the Plan period, it is aimed to increase technology, innovation, product quality and, productivity in the priority manufacturing industry sectors, to transform the industrial capacity to become more competitive and to promote high value-added production. All of the priority sectors are among the medium-high and high technology sectors, thus the development of these sectors will increase demand for R&D. In this framework, a strong R&D and innovation approach will be put into practice in priority sectors with focus on critical technologies; the export of products and product groups, that are appropriate for our needs, industrial infrastructure, and potential, simultaneously that can increase our competitiveness, will be supported primarily with the integrated incentive programs. Also, it is expected to increase the production of products that can be produced in our country but are not sufficient to meet domestic demand.

285. Horizontal policy areas that intersect with the selected priority sectors are selected to strengthen Turkey's competitive production structure by increasing efficiency. These horizontal policy areas are grouped under three headings in the Eleventh Development Plan, namely accelerator, ecosystem reformative and sustainability provider policies.

Horizontal Policy Areas



286. Through the strong financial structure planned to be created under the accelerator policies, companies' access to appropriate and flexible financing instruments will be facilitated and the TFP will be increased by allocating the allocation of savings to the highest-yielding investments. Digital transformation, as another accelerator policy, is expected to increase speed, quality, and flexibility in the manufacturing industry and lead to a significant increase in productivity.

287. Long-term foreign financing and investments will be ensured by improving the business and investment climate under the ecosystem reformative policies; creating a strong business ecosystem that will increase productivity through high institutional capacity enabled by adopting property rights, rule of law and good governance principles; facilitating timely and cost-effective access to the business ecosystem by strengthening the logistics and energy infrastructure.

288. The high-interest rate harms investments, economic growth and inflation. The high-interest rate directly increases the production cost of goods and services and causes inflation; increased inflation increases the interest rate and triggers a vicious circle; high inflation on the one hand and high interest, on the other hand, deferred investments consequently and cause

the economy to lag behind its potential. Therefore, the steps to be taken to reduce interest rates will help to reduce inflation and increase investments and thus allow more production; consequently, increased production will bring inflation down. Over the Plan period, this approach will not only lead to a permanent fall in inflation but also raise the growth to the desired levels. In this context, one of the main priorities is to establish a low interest rate policy that will stabilize the financing costs incurred by investors at low levels over the Plan period.

289. Sustainable production capacity of the country will be improved with the contribution of the labor force to high productivity rates and investment climate by fostering qualified human resources under the sustainability provider policies; the efficiency of companies and entrepreneurs will be increased by improving their research and innovation capacities through the investments in R&D, innovation and critical technologies, as well as the institutional structures, interfaces and supports to be established.

290. In the Eleventh Development Plan, it is aimed to increase the TFP at the national level and in the main production sectors of agriculture, industry and services and making these sectors more competitive, with planned measures in policy areas such as technology adoption, labor skills, corporate management quality, investment climate, incentives to support innovation and entrepreneurship, and ease of access to finance.

291. In addition to the approaches of sectoral prioritization in the manufacturing industry, critical technologies and focus on product and product groups, agriculture,

tourism and defense industry are identified as priority development areas in the Plan. It is expected to both increase the export scale and accelerate the value added through productivity with strong actions in these areas.

292. As is the case in the rest of the world, in our country as well, productivity gains especially in the industrial sector, play a dominant role in terms of sustainable growth. However, the value-added per employee in the industrial sector is about one-third of the EU average. This difference is more apparent on a scale basis among enterprises operating in the manufacturing industry, and labor productivity differences between micro-enterprises (1-9) and large enterprises (250+) are measured as approximately 6 times.

293. As a result of the transformation envisaged in the Plan period, the increased value-added through productivity increases, which form the basis of economic growth and high welfare, will reflect as high profitability for companies, high wages for employees and low prices for consumers.

294. The production and productivity focus of the Eleventh Development Plan offers a critical perspective for increasing the international competitiveness of Turkey and ensures sustainable economic growth and development by creating high value-added.

295. To increase production and productivity, close cooperation and coordination mechanisms with the private sector through strong and concrete public policies are emphasized. Due to the multidimensional and dynamic nature of industrial policies, implementation of these policies requires the highest level ownership, strong institutional structures, inter-institutional coordina-

tion, flexible resource allocation and effective monitoring processes in cooperation with the private sector. In this framework, a high-level decision-making and coordination mechanism will be established in the Plan. The Competitive Production and Productivity section consists of horizontal policies focusing on priority sectors, priority development areas, and policies tailored for these sectors and areas.

Manufacturing Industry

a. Objective

296. The main objective is to boost high value-added production and exports by improving competitiveness and productivity in the manufacturing industry.

Table 12: Targets on the Manufacturing Industry

	2018	2023
Manufacturing Industry / GDP (Current Prices, %)	19.1	21.0
Manufacturing Industry Exports (Billion USD)	158.8	210.0
Share of Priority Sectors in the Manufacturing Industry Exports (%)	37.9	46.3
Share of Mid.-High-Tech. Industries in the Manufacturing Industry Exports (%)	36.4	44.2
Share of High-Tech. Industries in the Manufacturing Industry Exports (%)	3.2	5.8

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

Innovative and Domestic Production

297. A strong institutional structure will be established for the formulation and implementation of industrialization policies that will support domestic production and technological transformation with inter-institutional coordination and high level ownership.

297.1. The “Industrialization Executive Committee” will be established to take high-level decisions in the development of domestic production and technological capabilities, under the chairmanship of the President with the participation of the top executives from related institutions.

297.2. The Industrialization Executive Committee will be responsible and authorized in the following subjects to reach the

targets set for priority sectors within the scope of the Plan:

- Developing common strategies for industrialization policies,
- Ensuring coordination among relevant public institutions,
- Monitoring the implementation of industrial strategies,
- Determination of principles and procedures for increasing domestic production, including developing specific models of public procurement,
- Ensuring that public administrations implement different methods including joint procurement in accordance with the determined models.

It will be ensured that the budget resources necessary for the fulfillment of the assigned

tasks are created and that these resources will be used effectively and efficiently with the decisions of the Industrialization Executive Committee.

297.3. The Ministry of Industry and Technology will make the necessary preparations for the decisions of the Industrialization Executive Committee in cooperation with other public-private institutions and organizations and will ensure follow-up and monitoring of the decisions taken by the Committee. An expert administrative capacity will be created within the Ministry.

297.4. Within the framework of the Development Plan and the Industrialization Executive Committee decisions, action plans will be prepared, implementations will be monitored and the results will be evaluated by the Industrialization Executive Committee.

297.5. The Ministry of Industry and Technology will conduct medium and long-term needs analyses in public procurement, identify critical technologies and products that can be produced in our country, create a specification pool and competency inventory, cooperate with companies to improve product quality and prepare technology roadmaps.

297.6. Industrialization units will be determined in related institutions and organizations. By working in coordination with the Ministry of Industry and Technology, these units will carry out needs analyses, preparations and procurement projections for projects, prepare leading procurement programs including research, certification and trial processes, and carry out studies to ensure compliance with domestic products and legislation.

297.7. The necessary budget funds will be allocated in the central government budget to be used in priority areas determined by the Industrialization Executive Committee to achieve the targets envisaged for the manufacturing industry in the Plan.

2.2.1. Industrial Policies

2.2.1.1. Horizontal Policy Areas

2.2.1.1.1. Strong Financial Structure

a. Objective

298. The main objective is to create a structure that will incentivize manufacturing industry companies to take risks by targeting long-term returns and facilitating access to finance with strong and innovative instruments.

b. Policies and Measures

299. The effectiveness of the existing Credit Guarantee System will be increased and the Credit Guarantee Fund will be used primarily for projects that boost competitiveness and efficiency in priority sectors. Fifty percent of the Credit Guarantee Fund will be allocated for investment and export loans in the manufacturing industry sectors.

300. The support of the Development and Investment Bank to industrial investments will be strengthened, particularly in priority sectors.

300.1. The equity capital of the Development and Investment Bank will be increased by 10 billion Turkish Liras during the Plan period.

300.2. The Development and Investment Bank will secure long-term funds from abroad for use in priority sectors.

300.3. The Development and Investment Bank will provide economic, financial and technical investment consultancy support to companies covering all stages of a project from analysis to monitoring.

300.4. The Development and Investment Bank will establish the Turkey Development Fund to promote investments and the projects for sustainable growth and to ensure the efficient use of capital and funding sources, particularly in priority sectors in line with the development goals of our country.

301. Turkey Wealth Fund will support large-scale investments, particularly in priority sectors, by financing or becoming a shareholder.

302. The venture capital system will be improved to support investments focusing on technology and innovation.

302.1. A venture capital resource (fund of funds) will be established within the Ministry of Industry and Technology.

302.2. Without prejudice to the regulations on venture capital in the capital market legislation, the coordination of the venture capital system will be gathered under the roof of the Ministry of Industry and Technology.

302.3. The venture capital funds for technology-based enterprises will be strengthened.

302.4. Without prejudice to the regulations on venture capital in the capital market leg-

islation, legal arrangements will be introduced to encourage and facilitate the operation of foreign venture capital funds by obtaining licenses in our country.

302.5. Regional venture capital will be initiated by the Development Agencies that will vivify regional potentials, contribute to the development of the regions and boost their competitiveness by providing capital contributions to the companies with growth potential and will be initiated in the pilot regions and will be executed under the priorities determined in regional plans.

302.6. Studies will be conducted to ensure the participation of national and international investors in venture capital funds.

303. The practices of financial support institutions and the banking system towards of the manufacturing industry will be strengthened.

303.1. The share allocated to the manufacturing industry from the subsidies of the Small and Medium Enterprises Development Organization (KOSGEB) will be gradually raised to 75 percent and the share allocated to the priority manufacturing sectors will be raised to 50 percent. Subsidies will be simplified, and interest-free, long-term, reimbursed support models will be gradually replaced by grants.

303.2. Within the scope of the investment incentive system, additional support will be provided for the investment loans extended by banks for the production of products that will be determined in the priority sectors.

303.3. Systems and processes for access to loan through a chattel mortgage will be

enabled and in this way opportunities for extending loan to manufacturing industry sectors will be expanded.

304. Eximbank programs towards the industrial sector will be strengthened and export capacities of priority sectors will be improved.

304.1. Export subsidies will be increased, especially through encouraging and diversifying insurance/guarantee programs, in addition to loans.

304.2. The equity capital of Eximbank will be increased by 10 billion Turkish Liras during the Plan period and the ratio of Eximbank support to Turkey's total exports will be gradually increased.

304.3. Eximbank will develop a support program for the futures market transactions for exporting companies to be used for their export receivables and inputs that are not produced in our country.

305. Alternative financing methods will be developed for the manufacturing industry, especially for the priority sectors.

305.1. Legislative work and studies will be carried out to diversify and expand the use of non-banking direct financing applications such as the issuance of convertible bonds to stocks, crowdfunding, a venture

fund and risk capital by industrial and technology companies.

305.2. For the financing of priority sector investments, tax subsidies will be provided to participation banks if the methods of the labor-capital partnership (mudarakah), profit-loss partnership (musharakah), joint investments (venture capital), ownership partnership and agricultural partnerships are offered.

306. Financing opportunities will be increased to foster the growth of companies.

306.1. The access of SMEs to finance will be eased by increasing the volume and rate of loans provided to SMEs with high growth potential.

306.2. Mergers and acquisitions of companies will be credited.

307. The contribution of financial markets to industrialization will be increased.

307.1. Saving opportunities will be increased in pension funds and directing the resources generated in these funds to the growth of the industry will be encouraged.

307.2. In the banking system, appropriate instruments will be developed to increase the ratio of loans secured to the manufacturing industry to total loans.

Table 13: Financial Targets for Manufacturing Industry

	2018	2023
Share of Medium-High and High Technology Sectors in Total Loans (%)	4.8	13.0
Ratio of Development and Investment Banking Loan Volume to Total Loan Volume (%)	8.1	12.0
Ratio of Turkish Eximbank Supports to Exports (%)	26.0	29.0
Share of Manufacturing Industry within KOSGEB Supports (%)	48.0	75.0

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

2.2.1.1.2. High Institutional Capacity

a. Objective

308. The main objective is to establish institutional structures whereby the industrial policy can be effectively followed and implemented in close cooperation between public and private sectors, to evaluate the development of domestic production as a priority in public practices, and to boost growth and institutionalization among private sector firms.

b. Policies and Measures

Improving Private Sector Institutional Capacity

309. In the manufacturing industry, a production structure suitable for the economies of scale will be created and the obstacles to the growth of SMEs will be removed.

309.1. A pool of qualified experts will be created to develop the institutional capacity of the private sector and professional organizations, and enterprises and professional organizations will be supported that receives qualified expert services from this pool.

309.2. Management consulting sector will be supported for enabling Local companies in this field to operate at the international level and priority will be assigned to prefer such firms for the state-funded management consulting services that received by SMEs.

309.3. To increase the efficiency of SMEs and contribute to their digital transformation, the Model Factory (SME Competency

Center) Consultancy Support Program will be launched.

309.4. International company acquisition grants support mechanisms will be strengthened in strategic areas to ensure technology transfer and easy access to the market.

309.5. Clustering cooperation initiatives of SMEs will be supported among themselves, with large enterprises and other actors of the entrepreneurial ecosystem. In this context, support programs will be implemented by considering sectoral needs.

309.6. All of the additional compulsory obligations imposed by the legislation due to the scale-up of the firms in the manufacturing industry will be revised and re-determined by observing compliance with the scale-up target of the manufacturing industry.

309.7. In the case of scale-up, the additional burden of employment will be reduced.

309.8. A new support program for company mergers will be created that covers twinning, qualified employment, and consultancy supports.

309.9. Development Agency subsidies will be restructured and priority will be given to issues such as institutionalization, innovation management, customer relationship management, corporate resource planning, e-trade, digital transformation, foreign trade, and lean manufacturing, clean production, energy efficiency, and industrial symbiosis.

309.10. The institutional capacities of techno-park management companies, tech-

no-parks, and technology transfer offices will be improved.

310. Professional organizations qualifying as public institutions and NGOs including manufacturing industry companies will be supported to have a structure capable of producing qualified data-based analysis and solutions for sectoral problems.

310.1. A capacity-building program will be implemented for NGOs operating in manufacturing industry sectors and research projects will be supported that can solve common sectoral problems.

310.2. It will be ensured that chambers and commodity exchanges will establish service standards for the offered services to their members and will improve their accountability and transparency mechanisms.

Improving the Public Institutional Capacity in the Field of Industrial Policy

311. Policy-making and implementation processes for the manufacturing industry will be activated and a strategic framework for the sustainability of the sectors will be established.

311.1 A National Industry Data Master Plan will be prepared regarding the scope, method and analysis of data to be collected at sector and firm level, to make data-based analyzes and plans related to the manufacturing industry and to monitor the companies operating in this field regularly.

311.2. The integration of industrial information systems such as the Central Registry Number System, Entrepreneur Information System, Industrial Registry System,

and State Support Information System will be ensured.

311.3. Institutional capacity and system will be established to enable needs-based monitoring of domestic companies with high technological capabilities with specific importance and policies will be developed regarding measures required to be taken in terms of economic security.

311.4. Coordination and cooperation will be ensured between the public administrations and the Ministry of Industry and Technology during the preparation phase of the legal arrangements affecting the manufacturing industry.

311.5. A governance mechanism will be established with the participation of relevant public institutions and organizations and NGOs to determine the raw materials which are deemed necessary and critical in the production structure of the manufacturing industry in the current and upcoming period and to implement the policies that will ensure their supply security.

312. Productivity problems will be analyzed at regional and sectoral levels and solutions will be developed accordingly.

312.1. Productivity Development Maps will be created.

312.2. Composite Productivity Index will be published.

312.3. A distance training platform for productivity will be established.

313. The quality infrastructure for the manufacturing industry will be improved to en-

sure the supply of safe products in the markets while preventing unfair competition.

313.1. Necessary arrangements will be introduced to carried out activities in coordination with the metrology, standardization, conformity assessment, accreditation and technical regulations and to strengthen the perception of high-quality goods made in Turkey, to ensure that our products do not encounter technical barriers in entering global markets, as well as to prevent the entry of low-quality and unsafe products into our country.

313.2. Awareness raising and guidance activities will be carried out on production following technical regulations and standards for manufacturing industry sectors.

313.3. Effective participation of producers in national and international standards-setting processes will be strengthened and stakeholder participation in the establishment of international standards will be supported.

313.4. Technical infrastructure will be established to ensure the effective participation of stakeholders in the studies conducted in the field of standardization.

+313.5. A mechanism will be established for the registration, following, and monitoring of companies, institutions and organizations which are operating in the field of conformity assessment.

313.6. The test, inspection and certification needs of our producers will be determined and an inventory of domestic test and certification infrastructures will be prepared; and a portal will be created to ensure the efficient use of test infrastructures and to

identify the test/inspection infrastructures needed for export.

313.7. The legal infrastructure of the Turkish Standards Institute (TSE) will be strengthened to provide standardization and conformity assessment services in a fast, effective and efficient manner so that our manufacturers can take place in global markets without facing technical barriers through high-quality production.

313.8. It will be ensured that the scope, effectiveness, recognition, acceptability of conformity assessment activities carried out by domestic institutes at the national and international areas will be increased.

313.9. National and especially international halal conformity assessment institutes will be accredited.

313.10. In the field of halal accreditation, bilateral or multilateral agreements including the protocol and memorandum of understanding will be signed on cooperation opportunities with international representative accreditation institutions.

313.11. In the field of Market Surveillance and Inspection (MSI), the duties and responsibilities of the related institutions will be clarified, and the effectiveness and efficiency of the MSI activities will be improved by enhancing the cooperation of the private sector and NGOs with authorized bodies.

313.12. The efficient use of national and international databases will be ensured to increase efficiency in MSI activities for products that do not comply with the technical legislation.

313.13. New control and audit strategies will be developed to ensure that the products within the scope of legal metrology are supplied to the market following the technical regulations and conduct reliable mea-

surements, by observing the principles of effectiveness and efficiency.

313.14. The field of industrial metrology area will be regulated.

Table 14: Productivity Targets of Manufacturing Industry

	2018	2023
Index of Production per Hour Worked in the Manufacturing Industry (2015=100)	113.4	126
Number of Employees per Enterprise in the Manufacturing Industry	11 ¹	12.9

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

(1) Estimate of the Eleventh Development Plan.

2.2.1.1.3. Business and Investment Climate

a. Objective

314. The main objective is to improve the competitive environment in the markets by ensuring transparency, stability, reliability and predictability in business and investment climate reforms and public policies and regulations, to strengthen the production structure by applying effective incentive programs, and to make Turkey a regional manufacturing hub by increasing foreign direct investments that will foster technological transformation in the economy.

b. Policies and Measures

Enhancing Bureaucratic and Legal Predictability

315. Framework legislation on private investments will be introduced.

315.1. An investment ombudsman system will be established to settle potential investment disputes between public administrations and investors.

315.2. In the relevant ministries, Investment Coordination Units will be established to receive applications for transactions such as permits, licenses, and certifications related to investments and to coordinate these processes, evaluate investor requests and develop solutions, and provide contact with the Presidency Investment Office. These units will develop cooperation with Development Agencies at the local level.

315.3. The timelines for the conclusion of the transactions such as permits, licenses, and certifications related to the investments will be determined and announced by the relevant authority in advance. In case of deviation from the prescribed timelines, the new timelines shall be notified to the investor together with the deviation reason without any delay.

315.4. It will be ensured that the legal amendments which have certain criteria and which affect the priority sectors, will be shared with the public via an e-Government integration internet portal and if possible, a transition process will be envisaged for the implementation of the legislation.

316. The bureaucratic processes affecting the business and investment climates will be simplified, the effectiveness and predictability of the legal arrangements will be improved and the costs affecting the investment processes will be reduced.

316.1. The legal arrangements about the Standard Cost Model will be implemented.

316.2. The public regulations affecting the business and investment climate will be reviewed, and the cost of each regulation and its impact on doing business will be calculated and target-oriented design of investment environment reforms will be made.

316.3. The applications of local administrations regarding investment permits will be reviewed and simplified, complicating applications will be removed, and e-municipality applications will be uniformized by generalizing.

316.4. The processes carried out by public institutions for all types of bureaucratic works and transactions such as permits, approvals, and licenses, and the documents and fees demanded these works and transactions will be rationalized by examining in terms of cost and benefit.

316.5. It will be ensured that all processes related to Inward Processing Regime, Outward Processing Regime, Tax Duties Charges Exemption Certificate and Certificate-Free Export Credits and state aid practices will be ensured to be automated.

317. It will be ensured that duties will assign to the Presidency Investment Office and will be authorized in coordination with the related public institutions and organizations for making the processes and proce-

dures about the investment applications of foreign direct investors, conducting procedures to be carried out at the related public agencies and organizations, coordination of processes, consulting services and developing solutions for emerging disputes at the investor level.

318. To improve the legal processes related to the business and investment climate, specialization in justice services will be provided and the implementation area of the simple trial procedure will be expanded.

318.1. Specialized courts will be established in areas such as environment, reconstruction, and energy; works will be carried out to ensure that certain suits like commercial, intellectual and industrial rights suits can be handled at the specialized courts in provincial centers.

318.2. Arrangements will be introduced so that the simple trial procedure can be applied for all suits where the subject of the trial can be measured in monetary terms and which have a value below a monetary limit.

318.3. A mandatory mediation application will be expanded.

318.4. Legal amendments will be made to reduce the number and costs of the transactions requiring notarization, and notaries will be allowed to handle certain non-controversial judicial cases and perform evidence recording processes as limited to the period when the suit has not been initiated yet.

318.5. The new enforcement office model will be expanded, primarily in places with intensive workload, virtual enforcement of-

file application will be started, the margin of error in enforcement-bankruptcy processes will be reduced, procedures will be established to ensure that the confiscated property is sold at its real value, the trustee institution will be improved by implementing the licensed trustee depository and reorganizing the liquidation procedure.

Effective Use of Incentives and Supports

319. The effectiveness of incentive and support programs will be measured, simplification of legislation will be made and incentive and support applications will be designed according to priority sectors and areas of the Plan.

319.1. Evaluation and impact analysis studies will be conducted to analyze the effectiveness of the programs, and impact analyses will be submitted to the Industrialization Executive Committee regularly.

319.2. The legislation on the programs will be reviewed and simplified, duplicated incentives and supports will be abolished and the legislation will be integrated and activated based on the priority sector and areas and the objective of scale-up.

319.3. The implementation period, budget and goals of the programs will be determined and the changes in the programs will be performed within the framework of impact analysis at the end of the period.

320. Within the scope of the Technology-Oriented Industry Action Program, investments in priority sectors will be supported in a product-oriented manner, including all R&D, design, investment, production, marketing and export processes.

320.1. Products which will be supported in priority sectors within the scope of Technology-Oriented Industry Action Program will be determined and announced within the framework of the criteria of strategic priority, technological development level, future potential, impact on technological development, impact on current account deficit, technical adequacy, and competence, domestic production.

320.2. The Technology-Oriented Industry Action Program will be implemented as an end-to-end support mechanism. Within the scope of the program, R&D and investment subsidies and tax incentives will be provided through a single window. Complementary elements such as financing packages and export supports will be included in the scope of the Program to generate sustainable high value-added investments.

320.3. Investments in the scope of the program will be monitored and the problems faced by investors will be solved.

321. The existing investment incentive system will be reviewed to make it effective and competitive. In this context, a flexible system with measurable impact, including cash-based incentives as well, will be established.

321.1. The investment incentive system will be updated within the framework of the needs of the priority sectors which are envisaged and will be implemented without any change throughout the Plan period to ensure the predictability of investment decisions.

321.2. The grant support for main and sub-industry investments in priority sec-

tors within the scope of the investment incentive system will be provided during the investment period, proportionately with the level of investment completion.

321.3. Investment issues that will benefit from regional supports within the scope of the current incentive system will be re-designed in accordance with the clustering approach, taking into account the development levels of districts within the province.

321.4. In the current investment incentive system, instead of the fixed incentive packages offered to the investor, a flexible system will be implemented in which the investor can benefit from the support which is needed.

321.5. Within the scope of investment incentive practices, the number of Treasury-owned immovable properties to be offered to investors who have investment incentive certificates will be increased.

321.6. Arrangements will be implemented which provides public investments as an incentive within the scope of investment incentives.

321.7. In the manufacturing industry sectors, investment requirements arising from technical regulation in export markets will be supported within the scope of investment incentives.

321.8. Investment incentives will not be given for products with excessive capacity.

322. The services provided in the industrial and technology zones (OIZ, SIZ, Industrial Zones, Technology Development Zones, Free Zones) will be improved so that these

regions will contribute more effectively to the competitiveness and efficiency of the industry.

322.1. Turkey Industrial Areas inventory will be issued and announced. The inventory, which is kept up-to-date, by which lands, structures and investment incentive mechanisms applicable these lands can be used will be presented to the industrialists through a digital platform.

322.2. During the establishment of industrial and technology zones, considering the priority sectors and development areas of the Plan, the number, capacity, daycare centre, and transportation facilities, cooperation and integration levels with each other will be improved in view of current and future needs.

322.3. Long-term land and building leasing and sale models will be developed and operationalized at Organized Industrial Zones (OIZ).

322.4. Innovation Centers will be established in OIZs to support companies on business development, government support, and project preparation, cooperation with the university, lean production, efficiency, technology management, clustering and digitalization.

322.5. Productivity Support Program will be implemented in OIZs to ensure the productivity transformation of SMEs.

322.6. Exceptional R&D support mechanism will be established for companies operating at Technology Development Zones (TDZ).

322.7. The Technopark Technology Commercialization Program, which includes support for activities such as consultancy, marketing, strategic partnership and access to venture capital for companies in TDZs, will be launched.

322.8. In the spatial construction of new OIZs and the transformation of existing ones, the requirements of environmental regulation and social reinforcement will be improved.

322.9. Impact assessment of industrial and technology zones will be conducted and innovative applications will be developed.

322.10. By attracting strategic and high value-added investments in free zones and contribution of these regions to our country's competitiveness will be increased; technological and R&D-based activities towards value-added production will be supported in these regions.

322.11. Target and performance-oriented technology development zones will be established for innovative entrepreneurs in priority sectors and digitalization.

322.12. Techno-Catalog application, which is carried out by the State Supply Office, will be improved and additional supports will be provided to the products included in the catalog.

322.13. The Public University-Industry Collaboration Portal will be improved and project catalogs will be prepared including the projects developed, implemented and completed in industrial and technology regions.

322.14. In line with the vertical integration of companies in the OIZs and TDZs, a mechanism will be developed to centrally plan and structure the needs for rapid data communication, industrial cloud, industrial data center, efficient energy use, and cybersecurity and these zones will be supported through this mechanism.

322.15. Priority will be given to sectoral and thematic areas in the establishment of industrial and technology zones and studies will be carried out to differentiate the supports in these zones.

322.16. Development Agencies will take an active role in the identification and development of industrial areas in line with the regional development objectives and the economic expectations of the cities.

323. It will be ensured that cities, which are in the focus of manufacturing and export, will rise to higher levels of value chains in medium-high technology products and integrate with global value chains. In this context, The Producing Cities Program will be developed to support the institutionalization, marketing, innovation, and transportation infrastructures of these cities and to increase the employment of qualified labor force by raising the quality of life.

324. To increase domestic production in priority sectors, the public procurement system will be used as a leverage.

Increasing Foreign Direct Investments

325. Legal infrastructure related to investments will be improved.

325.1. Investment legislation and administrative procedures shall be established and

implemented under the principles of lawfulness, legal trust, equal treatment, certainty, respect for acquired rights, transparency, the irrevocability of provisions against the past and concluding in a reasonable period of time.

325.2. The use of dispute resolution methods such as international arbitration, amicable resolution, reconciliation, mediation will be increased for the resolution of investment disputes.

325.3. The policies regarding the right of foreign investors (i) to invest in freedom and (ii) to transfer of their net profit, dividends, sales, liquidation and compensation fees arising from operations in Turkey and to transfer of amounts which are payable in exchange for license, management and similar agreements and to transfer of external loan principal and interest payments abroad via banks or private financial institutions will continue to be implemented within the framework of free-market rules.

325.4. The relevant legislation related to intellectual property will be reviewed for more effective protection of commercial secrets; intellectual property legislation will be developed and implementation will be strengthened.

326. High-quality information will be provided to investors and information systems will be developed to accelerate bureaucratic processes related to investments.

326.1. Simulation of investment location selection will be performed to determine Turkey's position compared to competing countries and areas of development, concerning foreign direct investment.

326.2. All relevant public institutions and organizations determined by the Presidency Investment Office will prepare sector reports in Turkish and needed foreign languages and these reports will be updated annually by the related institutions and organizations.

326.3. Sectoral Investment Roadmaps will be prepared to guide the investors about the processes of permits, approval and licensing related to the investment and operation periods.

326.4. Central Investment Information System will be established, where regular information entry will be done by the related administrations, to monitor the processes of permission, approval, and license, etc. related to the investments.

326.5. Studies will be completed to establish Investment Climate Performance Criteria; the investment climate of our country will be evaluated regularly in comparison with the previously selected countries and possible improvement areas will be determined; the system to be established will provide input to the planning studies on this subject.

326.6. The Investment Climate Assessment Survey for the investors will be conducted by the Presidency Investment Office and problems and suggestions will be identified first hand.

326.7. The major investment feasibilities of the provinces and regions will be determined with the contribution of the Development Agencies and promoted to the investors in cooperation with the Presidency Investment Office for the realization of these investments.

327. Incentive programs will be implemented to increase foreign direct investments which would enable the production of high-tech products in Turkey.

327.1. In the project-based incentive system, priority will be given to the investments coming to our country for the first time, aim at the production of strategic products, enabling integration to the global value chains, and increasing our technological level and export capacity.

327.2. Domestic companies operating in high technology sectors with high growth potential will be matched with international investors and their investments based on technology transfer will be supported.

328. Appropriate instruments will be developed to attract foreign direct investments to our country.

328.1. Public institutions and organizations' PPP projects which have the poten-

tial of private sector investment, public procurement, license provision, offset, etc. will be carried out with the perspective of bringing foreign direct investment and technology transfer to our country within the framework of the decisions of the Industrialization Executive Committee.

328.2. The sectors in which our country has an advantage in attracting foreign direct investments will be identified and clustering efforts in these sectors will be supported and promotion activities specific to these clusters will be carried out in coordination with the Presidency Investment Office and the Ministry of Industry and Technology.

328.3. Priority and convenience will be assigned in granting residence and work permits to foreign persons and their families who take part in carrying out, managing or operating the investments in priority sector investments.

Table 15: Targets of Business and Investment Climate

	2018	2023
Ranking in Dong Business Index	43	30
Turkey's Share in Global FDI (%)	1.00	1.50
Ratio of Planned Industrial Areas (IZ, OIZ, SIZ) to Total Surface Area of Country (%)	0.15	0.20

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

2.2.1.1.4. Human Resources

a. Objective

329. The main objective is to provide the labor force with the skills required by the digital transformation in the manufacturing industry, to integrate vocational education and higher education with the business

world, to simplify employment incentives regarding human resources and to focus on priority sectors with these incentives.

b. Policies and Measures

330. The digital skills of the labor force in the manufacturing industry will be improved.

330.1. Active labor market programmes will be implemented to raise the level of digital skills required by the priority sector.

330.2. Certified training will be supported to increase the digital competencies of the employees.

331. Vocational training will be developed to improve the quality of the labor force.

331.1. Education - industry cooperation protocols will be signed to strengthen the relationship between education-employment-production.

331.2. Supported areas of special vocational and technical Anatolian high schools and education and training supports of vocational schools will be updated and these schools will be specialized to meet the needs of the priority sectors.

331.3. The efficiency of existing trainee support programmes will be increased, vocational trainees will be supported in companies over a certain scale in order to ensure that students work part-time in production facilities.

331.4. The structure of the vocational training courses organized by the Turkish Employment Agency (İŞKUR) will be re-designed within the scope of “Job of the Future Project” by the end of 2020 to respond to the needs that will arise in the context of technological advancements shortly.

331.5. “The Skills Inventory Project” will be conducted by İŞKUR and a country-wide professional skill inventory will be issued by the end of 2020; in this framework, job matching services will be developed based on skills.

331.6. The labor force profile required by the industry will be determined and the curriculum of vocational and technical education, secondary education, science high schools and higher education institutions’ will be updated to respond to these needs.

331.7. A vocational and technical education portal will be created to provide to gather the data of all stakeholders related to vocational and technical education, to facilitate the access to vocational and technical education data from a single point, to provide matching of market supply and demand and to support individuals in their professional guidance and career process.

331.8. Harmonization will be ensured between vocational and technical education fields and provinces and regions throughout the country and the sector cluster by the preparation and updating the vocational education map; the capacity of education will be linked with real employment and vocational and technical education institutions will be aligned with the industry at the national scale.

331.9. Free boarding opportunities will be increased in vocational and technical education schools and institutions; scholarship payments and student insurances will be improved.

331.10. Vocational and technical education schools and institutions will be updated in line with the demands and needs of the sector; the physical environment and material needs of these schools will be improved.

331.11. Micro credits will be provided to projects deemed worthy of support in national and international competitions in

cooperation with the Ministry of Industry and Technology, Scientific and Technological Research Council of Turkey (TUBITAK) and similar Institutions.

331.12. Industry-education cooperation will be ensured to improve the educational environments of vocational and technical high schools that train human resources according to the priority of manufacturing industry sectors, to develop educational programs and to employ graduates.

331.13. The number and diversity of vocational and technical high schools in the Organized Industrial Zones will be increased and their technological equipment will be strengthened.

332. The quality of the existing labor force will be increased in the priority sectors and priority will be assigned to the training of human resources capable of working in these sectors.

332.1. The workforce working in the priority sectors will be supported to obtain a vocational qualification certificate.

332.2. Certified training programs organized by non-governmental organizations to improve the skills of existing employees in the priority sectors will be supported.

332.3. A project pool will be established by the industrial sector in the priority sectors areas; and in case of selection of doctorate and master thesis subjects from this pool; student and thesis advisors will be supported with the contribution of the relevant professional organizations and companies within the framework of the standards established by the Council of Higher Education (YÖK).

332.4. Graduate programs will be established in cooperation with universities and industry to improve the human resources capacity of the companies in the priority sectors regarding the Research-Development and innovation processes.

332.5. The number and diversity of associate degrees, bachelor's and master's degree programs for priority sectors will be increased and special importance will be attached to the R&D activities in these fields by universities.

332.6. Training programs for suppliers conducted in the training units established by big companies will be stimulated.

332.7. Employment incentives will be developed to encourage more qualified employment in priority sectors.

332.8. In addition to Turquoise Card, a mechanism will be established to encourage qualified and highly experienced foreign labor force.

332.9. Cooperation studies will be conducted with relevant sectors to raise the qualified labor force that international investors need in priority sectors.

2.2.1.1.5. Logistics and Energy Infrastructure

a. Objective

333. The main objective is supplying the energy required by the manufacturing industry in an uninterrupted, quality, safe way and with minimum production costs; focusing on freight transport in railway investments; developing maritime infra-

structures the right locations and scales; increasing efficiency and competitiveness via extending inter-modal transportation and minimizing logistics costs.

b. Policies and Measures

334. To extend the inter-modal transportation and increase the competitiveness of the industry; railway branch lines and logistics centers, which will serve petrochemical plants, manufacturing facilities for the automotive industries, ports, OIZs, and mining sites, will be completed and the share of railways will be increased in freight transport.

334.1. The share of railways in modes of national territorial transport systems will be increased from 5.15 percent to 10 percent.

334.2. A total of 294 km of branch lines will be constructed for 38 OIZs, private industrial zones, ports and free zones in addition to 36 manufacturing facilities.

334.3. While keeping the focus on primary sectors; the standards of the existing and to be completed logistics centers will be increased especially at the Çukurova, West Black Sea and Marmara regions, and the newly planned freight and logistics centers will be accommodated on the railway corridors where the demand for freight is considerable.

335. Bottlenecks on main railway lines will be eliminated, additionally single-track railways will be transformed to double-track railways in line with the traffic density, all signalisation and electrification investments will be completed in an attempt to increase the utilization of rail network and the shares in general freight transport.

335.1. The Halkalı-Kapıkule Railway Project will be completed in order to serve the manufacturing industry, export opportunities for the region will be increased, and the transport costs will be reduced.

335.2. The Bandırma-Bursa-Yenişehir-Osmaneli railway line, which will serve the manufacturing industry sectors in Bursa and Bilecik and the neighboring cities, will be completed.

335.3. The Konya-Karaman-Nigde-Mersin-Adana-Osmaniye-Gaziantep railway line will be completed and the access of the manufacturing industry sectors to Adana, Mersin and Iskenderun ports will be facilitated.

335.4. Construction of the Kırıkkale-Çorum-Samsun railway line will be started with the intention of reducing transportation costs of manufacturing industry sectors and increasing export opportunities.

335.5. The Aliğa-Çandarlı-Bergama-Soma railway line and Çandarlı Port branch line will be completed and the port connectivity of manufacturing industry sectors in the region will be provided and the export processes will be streamlined.

335.6. Railway modernization works on the Kars-Erzurum-Erzincan-Sivas-Malatya Gaziantep route will be completed, the bottlenecks in the corridor will be eliminated, and the logistics operations of the manufacturing and mining sectors in the region and the Middle Corridor will be improved.

335.7. Construction of the second railway track of the Selçuk-Aydın-Denizli rail line will be started to increase the rail freight

transport of manufacturing industry sectors in the cities of the region.

335.8. Construction of the Eskişehir-Kütahya-Afyonkarahisar-Isparta-Burdur railway line will be started and railway connection focused on freight transport will be provided to the Antalya Port.

335.9. The Sincan OSB-Yenikent-Kazan railway and the Diyarbakır-Mazıdağı branch line projects will be completed to reduce logistics costs of manufacturing industry and mining sectors.

335.10. The Gaziantep-Şanlıurfa-Mardin-Habur railway line, that will particularly serve the machinery sector together with other manufacturing industry products in the region and provide logistics services to Habur border gate, will be started.

335.11. The modernization, renewal, and maintenance of railway infrastructures will proceed, and 2,657 km of electrification and 2,644 km of signalisation investments will be carried out in the existing lines.

335.12. The Torbalı-Kemalpaşa-Alsancak Port railway line will be completed, the access of regional manufacturing companies to ports will be effectively provided.

335.13. The remaining work packages of the Turkey-Georgia-Azerbaijan railway line will be completed in coordination with the neighboring countries.

335.14. Construction of the Adapazarı-Karasu Ports and its rail connection to industrial facilities will be completed.

336. Large-scale port investments will be completed to ensure Turkey to become a

regional and continental transfer hub and effective in Belt and Road Initiative.

336.1. Construction of Filyos Port will be completed.

336.2. In the Eastern Mediterranean region, the main cargo port will be constructed with a focus on transit cargo, which will be an exit door to the Middle East and Central Asia.

336.3. Çandarlı Port, which will serve the Aegean hinterland, will be put into service.

336.4. Regulations for transit trade will be updated following international standards to ensure the blending of transit liquid bulk cargoes.

336.5. To increase the effectiveness and attractiveness of Central Corridor, cooperation will be improved with the corridor countries with the leadership of Turkey, bottlenecks - especially the Caspian transition will be minimized through the inclusion of Turkey's initiative, a commercial venture under the leadership of Turkey in the field of logistics will be implemented.

337. The infrastructure of the customs gates and customs offices will be improved to increase the capacity of the customs administrations and to expedite the business processes.

337.1. A study will be conducted on identifying the transaction volume and needs of the customs administrations and their institutional capacities will be optimized.

337.2. Customs gates and customs administrations will be modernized and they

will be provided with new service facilities by the re-engineered workflow processes, which allows the transactions to be concluded in a fast and accurate way and.

337.3. The ongoing study on the Land Border Gates Master Plan, which aims at coordinated planning and implementing with the neighboring countries regarding modernization of land customs gates and efficiency of the controls, will be completed.

337.4. Transportation Electronic Monitoring and Control System will be integrated with the customs system.

338. Istanbul region will be aimed to become an international air cargo, maintenance and transfer center; Çukurova Airport, which will also address the Middle East and African regions will be completed.

338.1. In order to ensure the coordinated progress of transit flight planning and inspection and control procedures, more robust risk analysis criteria will be established and the measures to ensure document control rather than physical inspection will be implemented, logistics processes will be streamlined.

338.2. Çukurova Airport will be completed and its connection with the main rail-network will be provided.

338.3. Istanbul and Sabiha Gokcen Airports will be aimed to become an international air cargo, maintenance & repair and transfer center, the rail connection will be provided between these airports and their integration to the national rail route.

339. The existing road network will be utilized more efficiently and safely by eliminat-

ing the traffic flow bottlenecks according to the needs of priority sectors and maintaining traffic flow at the required service level.

339.1. Filyos-Zonguldak, Filyos- (Çaycuma-Bartın Junction), Zonguldak-Ereğli (including Ereğli Transit Road) highway projects that will ensure the connection of Filyos Port with Adapazarı and İzmit region, and Akçakoca Port-Kocaali section of Adapazarı-Karasu-Akçakoca highway project will be completed.

339.2. The Şile - Ağva - Kandıra - Kaynarca State Highway and the Kaynarca-Karasu Highway, which connects to the North Marmara Motorway by alleviating the congestion of İzmit Region, will be completed.

339.3. Çukurova Regional Airport Connection Road will be completed.

339.4. Trabzon-Aşkale State Road, which links the Eastern Black Sea Region to the inner regions and Iran and Azerbaijan, will be completed.

339.5. Erdemli-Silifke-Taşucu-13th Region Border State Highway and Alanya-Gazipaşa-5th Region Border state highway, that connects the Eastern Mediterranean region to the Western Mediterranean region, will be completed.

339.6. The modernized Hamzabeyli Border Gate will be connected to the D-100 highway and TEM highway via a divided motorway.

339.7. Ceyhan - Yumurtalık Separation-BOTAŞ facility highway, which will serve to Ceyhan Industry Specialized Region and BOTAS Port, will be improved to 1A standard with BHM coating.

339.8. Adana South Transit highway, which connects Adana and Osmaniye Organized Industrial Zone and Ceyhan Industry Specialized Zone to Yenice Logistics Center and Mersin Port, will be completed.

340. The development of the Turkish owned maritime mercantile fleet will be promoted.

340.1. A long-term and low-interest financial support mechanism will be established for the development of the Turkish owned maritime mercantile fleet

341. Energy efficiency will be improved in the manufacturing industry.

341.1. Subsidy mechanism will be established for the replacement of inefficient electric motors used in industry with efficient ones.

341.2. It is ensured that cogeneration systems will be expanded in large industrial plants using heat.

341.3. To promote and disseminate exemplary energy efficiency practices, energy efficiency projects will be supported by competitions and it is ensured that legislation and technical infrastructure will be established concerned with implementation.

341.4. Heat market legislation will be established to expand energy-efficient district heating and cooling systems throughout the country and to enable heat trade.

341.5. Projects with high savings potential will be supported by improving efficiency increasing project implementation processes.

341.6. Support will be provided for OIZs, to prepare and present Productivity Action Plans by completing their Energy Management Unit and ISO 50001 Energy Management System establishment.

342. Natural gas infrastructure will be delivered to the OIZs which concentrating of priority sectors and providing certain criteria, transmission investment will be made for the secure supply of energy, access to energy will be ease through various support mechanisms.

342.1. Access to the natural gas will be provided to the OIZs which are technically and economically satisfy the legal requirements.

342.2. In order to support the manufacturing industry, Turkey Electricity Transmission Company (TEİAŞ) will conduct new transmission line and substation projects.

342.3. In order to meet the electricity needs of the Thrace Region more reliably, the power plants which are inactive in its located region and have sufficient power above certain efficiency will be transferred to the region. Furthermore, Lapseki 3-Sütlüce 3 and Hersek Joint Hole - Dilovası Joint Bay submarine cables and land connections will be built between Thrace and Anatolia.

Table 16: Logistics Targets

	2018	2023
The Rank of Turkey in Logistics Performance Index ¹	47	25
Share of Railway in Total Freight Transport (in modes of national territorial transport, %)	5.15	10
Railway Line Efficiency (Passenger-Km+Tonne-Km)/(Length of Main line)	1.48	2.77
Railways Freight Transport (Billion, Nettonne-km)	14.5	32.4
Electrified Line (%)	43	77
Signalled Line (%)	45	77
Length of Railway Branch Line (km, cumulative)	433	727
Total Container Handling (Million TEU)	10.8	13.5
Transit Load Ratio in Maritime Cargo Handling (%)	15.5	17.3
Turkish Owned Maritime Merchant Fleet of 1,000 GRT and Over (Million DWT)	28.6	36.0
Airways International Total Cargo Traffic (Thousand Tons)	1,355	1,529

Source: The data for the year 2018 are taken from the Ministry of Transport and Infrastructure and TURKSTAT. Data for the year 2023 are estimates of the Eleventh Development Plan.

(1) World Bank data. Data for the year 2023 refers to the rank targeted in the report to be published in 2022.

2.2.1.1.6. Digital Transformation

a. Objective

343. The main objective is to boost productivity and competitiveness in priority sectors by accelerating digital transformation.

b. Policies and Measures

344. Interfaces and standards that will strengthen cooperation and information sharing for digital transformation of manufacturing industry will be established and awareness will be raised in this respect.

344.1. The Digital Transformation Platform in Industry will be institutionalized in order to steer digital transformation process in industry, ensure coordination

among stakeholders and establish an efficient and effective governance structure, and permanent committees (digital curriculum follow-up and recommendation committee, data communication standards committee, focused digital technologies committee) will be established within it.

344.2. In the manufacturing industry, studies will be conducted to disseminate international standards related to digital transformation and creation of national standards and; and usage of a common language will be assured through the preparation of a Digital Transformation Glossary that contains relevant concepts and explanations.

344.3. Digital maturity measurement methodology will be developed that enables the determination of digital maturity

levels of manufacturing industry firms in the priority sectors, comparison between firms and predicting the return of digital transformation investments.

344.4. A portal with a digital transformation sample applications library will be created to enable enterprises to access information and instruments such as technology solutions for digital transformation, good practices, usage scenarios, training materials, standards, guidance documents and self-assessment tools. Sharing digital transformation case studies at sector and firm level will be encouraged.

345. The development and use of smart products and systems necessary for digital transformation process of the industry will be ensured, focusing on the priority sectors.

345.1. An inventory of competencies of domestic digital technology developers and practitioners and their product and service portfolios will be created.

345.2. Digital Transformation Product Development Support Program will be implemented in order to develop, improve and commercialize domestic products and systems aiming to meet the digital transformation needs in priority sectors.

345.3. Digital transformation projects to be developed by manufacturing industry companies operating in the priority sectors in cooperation with domestic product and service providers will be supported.

345.4. Competence and Digital Transformation Centers will be established in OIZs and TDZs, to provide experiential training and consultancy services in the field of

digital transformation in priority sectors, to conduct awareness studies and to bring technology suppliers and users together.

345.5. A pool of competent and accredited consultants will be formed in the field of digital transformation in order to prepare firm specific digital transformation roadmaps, particularly for SMEs.

345.6. Awareness and competence of industrial enterprises on cybersecurity will be enhanced, protective security measures will be taken in factories and supply chains and end-to-end cybersecurity of companies will be tested periodically.

346. Establishment of industrial cloud platforms for priority sectors will be supported.

346.1. The industrial cloud platform will be established for the automotive sector initially where third-party service providers will develop applications and reach users and where digital infrastructure and services will be centrally offered to companies, with the participation of relevant professional organizations and the government. This business model will be extended to other priority sectors in light of the experience to be gained.

346.2. Technology suppliers will be encouraged to develop applications and services that can be offered on the industrial cloud platform such as artificial intelligence, advanced data analytics, simulation and optimization, product lifecycle and production management systems, and the use of this platform by companies will be encouraged through supports for digital transformation.

346.3. Technical standards for reference architectures and interfaces that will enable companies to share data with the industrial cloud platform will be established by partic-

ipating in international studies conducted in this field and taking into consideration the target markets of domestic technology suppliers.

Table 17: Digital Transformation Targets

	2018	2023
Number of SMEs Getting Service Over the Industrial Cloud Platform in Priority Sectors (Cumulative)	-	10,000
Number of Competence and Digital Transformation Centers (Cumulative)	1	14
Number of Digitalization Projects Developed by SMEs Operating in Priority Sectors in Cooperation with Domestic Product and Service Providers (Cumulative)	-	20,000

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

2.2.1.1.7. R&D and Innovation

a. Objective

347. The main objective is to strengthen the R&D and innovation capability of the manufacturing industry in order to enable value added production and to increase the capacity of innovative product development and to provide an innovation based structure.

b. Policies and Measures

348. R&D and innovation support system will be turned into an oriented form, covering the whole process from research to commercialization, differentiating for medium-high and high technology sectors and taking into account the needs and development potentials of the sectors.

348.1. Output and impact-oriented monitoring and evaluation systems will be developed regarding supports, and impact analysis of R&D, innovation and entrepreneurship support programs will be conducted.

348.2. R&D and innovation supports will focus on the intersection of priority sectors and critical technology areas in line with the technology roadmaps that will be prepared.

349. The number and quality of researchers in the private sector will be increased.

349.1. It will be ensured that the qualified human resources with the PhD degree required in the industry are raised with the university-industry collaborations and the employment of the researchers who have PhD will be incentivized in the industry.

349.2. It will be compulsory to employ researchers with PhD degree at varying rates according to the sector and scale in the private sector R&D centers.

349.3. Graduate programs will be developed for the needs of the industry, especially the priority sectors, through the cooperation of universities and industry, and the universities that offer these programs will be incentivized.

350. Support mechanisms will be implemented to increase the transfer of knowledge and technology through cooperation between universities, research infrastructures and the private sector, and the institutional capacity of intermediary organizations will be improved and their effectiveness will be increased.

350.1. Research universities will be matched with priority sectors taking into account their competencies, and business models will be implemented based on projects created to achieve the specified targets and these collaborations will be supported.

350.2. Projects will be carried out in order to develop new technologies and products in cooperation with the companies in the priority sectors by increasing the capacities of the research centers within TUBITAK.

350.3. Competent research infrastructures in priority sectors will be included in the scope of Law No. 6550.

350.4. Research projects with high commercialization potential of high-tech platforms formed by research infrastructures in cooperation with private sector R&D centers and public R&D units will be supported under the Centers of Excellence Program.

350.5. The efficiency of the Technology Transfer Offices (TTO) will be analysed, and domestic and international best practices will be identified and disseminated.

350.6. The institutional structure and human resources capacity of TTOs will be improved and supported in a performance-oriented manner.

350.7. Legislation will be improved to enable the commercialization of intellectu-

al property rights registered on behalf of higher education institutions by TTOs with different status, and to ensure the allocation of income both to the university and to the inventor, and to maintain financial sustainability of TTOs.

350.8. Innovation Voucher Program will be implemented to provide financial support to SMEs receiving R&D and innovation project services from research infrastructures.

350.9. The academic incentive system will be structured by adding criteria that take knowledge and technology transfer activities into account.

350.10. R&D platforms will be formed to enable research infrastructures, especially in the priority sectors, to cooperate among themselves and industry and at national and regional levels.

351. The amount and diversity of supports will be increased in order to accelerate the commercialization of new technological products and complementarity of the supports will be ensured through public procurement mechanisms.

351.1. High-tech product development and commercialization activities of the company consortiums will be supported in Industrial Innovation Network Mechanism Program with special attention to priority sectors.

351.2. Technology application centers and support mechanisms will be established for conducting prototype development, scaling and technology verification studies so that the R&D results can be commercialized.

351.3. Technologies, that are developed as a result of R&D and innovation projects and that are protected by patents, will be transferred to companies settled in Turkey via licensing or assignment.

351.4. The duration of the supports applied to the private sector R&D and design centers and TDZs will be extended and studies will be carried out to provide the supports on a performance basis.

351.5. The critical components, devices and materials required in the priority sectors will be developed with the co-financing of the public authorities in need.

352. Innovative entrepreneurship will be supported and R&D partnerships between large enterprises and entrepreneurs will be developed. In this framework, large companies will play a pioneering role in the development of R&D and innovation ecosystems in their sectors and support the establishment and growth of new enterprises.

352.1. Large companies will be incentivized to establish funds like venture capital to support initiatives in their sectors.

352.2. A support program will be established aiming the large companies to guide and co-finance the R&D projects of SMEs which are working as their suppliers.

352.3. The start-up companies that can develop innovative, high-tech products and services will be supported within the framework of a progressive program which begins with mentoring support.

353. To achieve a higher value-added share in the global value chain, frontier researches will be carried out in our country.

353.1. Frontier R&D laboratories to be established in Turkey by national or international firms that generate scientific and technological knowledge in their fields will be supported.

353.2. To increase the use of accelerators and irradiation technologies in the manufacturing industry, participation in the studies in the domestic and foreign research centers will be ensured and the activities of the industry in this field will be supported.

Table 18: Targets in R&D and Innovation

	2018	2023
Share of Private Sector in R&D Expenditures (%)	56.9 ¹	67
Share of R&D Personnel in Private Sector (%)	57.3 ¹	67

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.

(1) The data for the year 2017.

2.2.1.1.8. Critical Technologies

a. Objective

354. The main objective is to improve the ability to developing and adapting technology in critical technology areas that are expected to generate high value-added in the

coming years to ensure technological transformation and to increase competitiveness in the priority sectors and areas.

b. Policies and Measures

355. In order to achieve National Technology Act, road maps will be prepared for

artificial intelligence, internet of things, augmented reality, big data, cybersecurity, energy storage, advanced material, robotics, micro/nano/optoelectronics, biotechnology, quantum, sensor technologies and additive manufacturing technologies and the necessary infrastructures will be established, the qualified human resources in need will be trained and the social orientation will be ensured to focus on these areas.

355.1. Technology roadmaps including the general outlook of the human resources in critical technologies and the ability of the private sector to develop and adapt the technology will be prepared by taking the development potential of technologies and the long-term supply and demand dynamics into consideration.

356. Human resource capacity will be increased in critical technologies.

356.1. The skills and competencies needed for critical technology areas will be determined through an analysis study to be conducted.

356.2. Interdisciplinary undergraduate and graduate programs specialized in critical technologies will be started to meet these capabilities and competences.

356.3. Scholarship programs will be initiated to send graduate students to international educational institutions that have proven perfection in critical technology fields with varying amounts of support compared to other fields.

356.4. Part-time employment of competent academicians and researchers from abroad

will be incentivized at universities with specialized programs in critical technologies.

357. Research infrastructures in critical technologies will be strengthened.

357.1. The laboratory infrastructure of the universities specialized in critical technologies will be improved according to the needs of R&D studies related to these technologies.

358. The capacity of the private sector in critical technologies will be improved.

358.1. The R&D support program will be created particularly for innovative entrepreneurs in critical technology areas.

358.2. In case large scale companies carry out R&D studies in critical technology areas for product development with universities or public research institutions, public finance will be provided to cover a certain part of the project's cost to the entrepreneur.

358.3. The collaborations of the private sector towards joint R&D projects, infrastructure usage, and human resource development in the area of critical technologies will be supported.

358.4. Strategic countries to cooperate with for R&D and innovation in critical technology areas will be identified, and bilateral and multilateral R&D and innovation collaborations involving private sector-university and private-private partnerships will be supported with these countries.

2.2.1.2. Priority Sectors

2.2.1.2.1. Chemical Industry

a. Objective

359. The main objective is to make sustainable and coordinated investments that use high technology, produce high value added, environment-friendly and competitive products in the chemical sector, thereby reducing the import dependency of our country and increase the sector's share in the world production and export.

b. Policies and Measures

360. In the chemical sector, import of the intermediate goods will be reduced and the production and export of high value-added, human and environmental health sensitive products will be increased.

360.1. A large-scale petrochemicals plant will be established in Çukurova region. The large-scale investments to be started in Ceyhan Energy Specialized Industrial Zone will be completed and an integrated production structure including basic petro-chemicals will be established.

360.2. The companies which can domestically provide the very high temperature resistant composite materials needed in the installation of nuclear power plants will be supported.

360.3. The facilities to produce Ferrob- or, Boron Nitride and Boron Carbide will be completed and put into operation. The production amount of refined boron products, R&D capacity and competencies will

be strengthened and sales and marketing activities of the developed products will be promoted.

360.4. Biomass and wastes will be used efficiently and utilized as alternative input in the chemical production.

360.5. The necessity predictions for advanced materials used in the components of technological products will be made, and support will be provided for domestic R&D and production activities of these advanced materials.

361. Practices that will enhance the R&D and sustainability capabilities of chemical sector will be launched.

361.1. Legislative arrangements will be introduced; and R&D and investment supports will be provided to encourage the use of bioplastics which can be produced from several natural products, primarily hemp and corn, and which are completely dissolved in nature.

361.2. The lignite reserves in our country will be evaluated and feasibility studies will be carried out in order to establish gasification reactors that enable the production of coal-sourced chemicals (ammonia, methanol, monomer, synthetic natural gas, hydrogen, synthetic liquid diesel fuel, etc).

361.3. The chemistry sector will be supported for compliance with the Regulation on Registration, Evaluation, Authorization and Restriction of Chemical Substances (REACH) and the Regulation on the Prevention of Major Industrial Accidents (SEVESO Directives).

2.2.1.2.2. Pharmaceuticals and Medical Devices

a. Objective

362. The main objective is to increase the competitiveness in the global market in the pharmaceutical and medical devices sector and to move our country to a higher position in the value chain.

b. Policies and Measures

363. In the pharmaceutical and medical devices industry, TÜSEB's competencies will be increased and the actions will be taken to fund start-ups besides R&D, production and training activities; to create simulation centers, to establish partnerships with other companies when necessary, to lead establishing a health valley and health technologies development zone and to enable developing export oriented higher value-added products.

363.1. In order to improve the R&D and production capacity of our country in the field of pharmaceuticals and medical technologies, Health Valley will be launched as an integrated health ecosystem that includes all stakeholders of the sector such as universities, research centers, laboratories, technology firms, application centers, physicians and engineers .

363.2. Health technology development zones will be established in which pharmaceuticals and medical devices production areas will take place, technological facilities to serve common use, and support for clustering will be provided.

363.3. Through the Health Industries Transformation and Research Platform, a pool of

new generation health entrepreneurs will be established in the field of pharmaceuticals and medical devices and entrepreneurs, industrialists and investors will be brought together through various activities.

364.4. An accredited center of excellence will be established to accommodate analysis, verification, testing and measurement activities towards R&D, pre-clinical studies, prototype development, production and post-production processes of medical devices.

363.5. Information programs on several subjects such as; incentives to accelerate the commercialization process and intellectual property rights will be organized for relevant professionals, primarily researchers at universities.

363.6. An internationally recognized test and analysis infrastructure will be developed in the field of testing, certification and licensing for the pharmaceuticals and medical devices sector.

364. Necessary ecosystem will be established in our country, particularly in areas requiring high technology such as biotechnological drugs, R&D, production, qualified human resources and legislation.

364.1. Personnel will be trained as to be qualified to take part in laboratory testing and analysis processes and product certification processes in compliance with the new EU medical device directives to be implemented in 2020.

364.2. The criteria for the additional payment received by medical doctors from the revolving fund will be rearranged so that

they can devote more time to R&D activities.

364.3. The infrastructure for the production of chemical, herbal, biological and radio-pharmaceutical (nuclear) raw materials will be developed.

364.4. Infrastructure and competencies will be improved in order to increase R&D activities for biotechnological drugs.

365. In order to support the production of pharmaceuticals and medical devices; the outputs of the supports and incentives provided will be closely monitored.

365.1. A support program will be established for the domestic production of pharmaceuticals and medical devices in line with the policies set by the Industrialization Executive Committee.

365.2. A system will be developed to monitor and evaluate the results of the public support programs related to the pharmaceuticals and medical devices sectors.

366. It shall be ensured that our country becomes the leading country of the region in clinical researches.

366.1. Clinical research conducted before licensing will be included in the scope of R&D activities without any other condition, and the R&D supports for the clinical studies will be differentiated.

366.2. Pre-clinical research centers holding internationally recognized Good Laboratory Practices certificate will be established in order to carry out R&D activities of pharmaceuticals and medical devices before clinical research.

366.3. The awareness of clinical research will be raised among the parties of clinical research and the public.

366.4. Participating in clinical research will be included in the performance, academic appointment and promotion criteria.

366.5. In order to increase the share received from international supports (e.g. EU funds and NIH funds) for clinical researchers, membership to the networks that will ensure visibility of Turkey at international level will be provided.

367. It will be provided that the Health Industries Steering Committee, which is authorized to increase investment, production, export and technology development in the field of health industries, will function effectively.

2.2.1.2.3. Electronics

a. Objective

368. The main objective is to increase competitive production and exports based on R&D in the electronics sector.

b. Policies and Measures

369. R&D and production activities of domestic electronic communication network and infrastructure components including 5G and higher technologies will be encouraged.

369.1. 5G base station development studies will be completed.

369.2. Domestic production and R&D activities will be supported within the scope

of new generation mobile communication technologies.

370 Domestic production of hardware and software products used in M2M and IoT ecosystem including all vertical sectors will be supported.

370.1. It will be ensured that the applications will be developed and the domestic standards will be established in smart factories, transportation, energy, agriculture, health, environment, disaster management, etc.

371. The necessary investments will be made to increase the competitiveness of the sector.

371.1. Supports and incentives will be provided for transferring capabilities acquired in defense electronics to the civilian domain as well as ensuring commercialization in this field.

371.2. One among existing or to be established Technology Development Zones established in Istanbul, Ankara and İzmir will be converted into Specialized Electronics and Communication Technology Development Zone or the establishment of TDZ's in these areas will be supported; cluster development support will be provided in these areas and electronic testing and analysis laboratories suitable for common use will be established.

372. Special support programs will be created to increase production and ensure sectoral transformation.

372.1. Costs related to patents purchased from abroad will be supported on the con-

dition that an advanced patent is developed within a certain period of time in the same subject of patent received.

2.2.1.2.4. Machinery and Electrical Equipment

a. Objective

373. The main objective is to increase our competitiveness in the global market by improving the competitive and efficient domestic production infrastructure in the machinery and electrical equipment sectors and to move our country to a higher position in the value chain.

b. Policies and Measures

374. The effectiveness of market supervision activities in the machinery sector will be increased.

374.1. The testing and inspection infrastructure of TSI (Turkish Standards Institute) will be strengthened.

375. Arrangements will be made in investment incentives to support the purchase of domestic machinery.

375.1. Grants or additional financial support will be provided when domestic machinery is preferred within the scope of investment incentive system.

375.2. The domestic production of machinery and equipment subject to R&D support will be encouraged.

376. Clustering in the machinery sector will be supported.

376.1. In line with the development of a limited number of supported clusters in the sector, 5 large-scale machine clustering programs will be implemented.

376.2. Inventory of natural cluster structuring in machinery sector will be established and cluster development activities will be carried out.

377. Domestic production will be improved through public procurement and regulations.

377.1. In the case of large-scale public tenders, the requirement for use of domestic products, particularly for elevators and air conditioning products, will be introduced.

377.2. Domestic machinery will be used in PPP projects.

377.3. The share of domestic products in the machinery and equipment supplied by SSO (State Supply Office) will be increased.

378. Investments will be made in the R&D infrastructure necessary for increasing the competitiveness in the electrical equipment and technological transformation will be supported in the sector.

378.1. In order to test and commercialized the prototypes resulting from the R&D studies, an independent and accredited International High Power and High Voltage Test Laboratory will be established to render the necessary tests of products so that these products be accepted in the national and international markets.

378.2. The R&D studies and clustering activities for the advanced technology production of silicon steel sheet, which is a

strategic product used in the production of transformers and electric motors, will be supported and studies on investment model will be carried out in this field.

378.3. The existing capacity for accumulator and battery production will be developed in accordance with the new technologies, and the development of sub-components (software, hardware, raw materials, etc.) of these technologies and related test and characterization infrastructures will be supported.

378.4. In the field of renewable energy; new investment models will be implemented with mechanisms involving domestic equipment use, R&D, technology transfer and public procurement.

378.5. Domestic production of new generation lighting devices will be supported by regulations providing for saving energy and using domestic production equipment in the province, district and town municipalities for the open area lighting.

378.6. An inventory report will be prepared to identify the energy equipment that can be produced domestically and the needs analysis will be conducted for the products that can be produced locally.

378.7. Priority will be given to the production of energy equipment which are needed and which would provide competitive advantage.

379. Special support programs will be established in order to increase production and ensure sectoral transformation in the electrical equipment and domestic appliances sector.

379.1. The cluster development support will be provided, and the test and certification support will be offered for the companies producing electrical equipment for nuclear power plants.

379.2. In the domestic appliances sector, the need for additional investments due to product designs that comply with the new eco design and the new energy label regulation, which will take effect on 1 March 2021 in the EU, which is the main export market of sector, will be supported within the scope of investment incentives.

379.3. A special support program will be designed for engineering and consultancy firms, and local engineering firms will be given priority for integrated machine park design.

380. Domestic production in the sector will be improved through activities aiming at promoting energy efficiency in the electrical equipment and domestic appliances sector.

380.1. The replacement of energy-inefficient motors used in industrial plants with more efficient motors will be supported.

380.2. Awareness will be raised on efficiency improvement potential by applying energy labels on the electrical motors used in industrial plants.

2.2.1.2.5. Automotive

a. Objective

381. The main objective is to increase the international market share by developing

high-tech domestic brand vehicle production and the highly competitive supply industry.

b. Policies and Measures

382. Automotive support program will be implemented to improve competitiveness. With the program; technology and production capabilities in areas such as sensors, batteries, fuel cells and software will be improved.

382.1. By developing the incentive mechanism for the domestic brand automobile project, the project will be completed.

382.2. Branding will be encouraged through the domestic brand vehicle project aimed at the needs of the domestic and foreign markets.

382.3. Promotional activities will be carried out to ensure that the sector can benefit from the cluster support program and the cluster cooperation in the automotive industry will be supported at a higher level within this scope.

382.4. Feasibility reports will be prepared for determining the locations of specialized OIZs if requested for the automotive supply industry, and the number of automotive specialized OIZs will be increased.

382.5. Information sharing organizations will be supported within the scope of taking measures to ensure cooperation and integration between the automotive sector and other sectors such as electronics, software, electrical machinery, basic metals and defense.

383. A well-equipped workforce capable of adapting to digitalization and technological developments will be raised.

383.1. It will be ensured that the sector takes part in decision-making bodies in automotive vocational and technical high schools.

383.2. In order to meet the need of qualified labor force in Kocaeli, İstanbul, Bursa, Sakarya, Ankara, İzmir, Aksaray and Adana, where the automotive industry is concentrated, it will be ensured that automotive industry vocational high schools and vocational schools will be established in these regions and their capacities will be improved.

384. In order to maintain and improve the competitiveness of the automotive industry; within the framework of global developments, new technologies and changing customer expectations; developing critical technologies like; environmental technologies, connected and autonomous vehicles and smart mobility will be emphasized.

384.1. National joint project platforms will be established and supported for the development of national production and R&D activities in automotive information technologies.

384.2. A support program will be implemented for sectoral market surveys and researches on subjects such as technological development, manpower needs, marketing and branding.

385. Appropriate infrastructure will be established for new generation vehicles.

385.1. A research will be conducted to establish an effective infrastructure for vehicles with alternative power systems.

385.2. The technical legislation and infrastructure need for the development and use of autonomous and related vehicles will be identified.

385.3. Battery investment will be made for electrical automotive production.

385.4. Uncertainties regarding legislation and implementation about the collection, use and transformation of data from new generation vehicles into value added services will be eliminated.

385.5. Supports will be provided and arrangements will be made to expand the use of domestically manufactured electrical buses in urban and suburban transport.

386. Foreign market and export opportunities will be improved.

386.1. In order to reduce the risks of the automotive industry to mainly export markets, researches will be conducted for new markets and investments abroad.

2.2.1.2.6. Rail System Vehicles

a. Objective

387. The main objective is improving R&D, design and manufacturing capabilities of the domestic industries for manufacturing the rail system vehicles and its critical components with domestic capabilities and creating a national brand in this sector.

b. Policies and Measures

388. In order to ensure coordination among related institutions for domestic manufacturing of rail system vehicles and fallow up with the domestic value added the necessary regulations and financial measures will be adopted by the decision of the Industrialization Executive Committee so that public institutions and municipalities procure domestically manufactured vehicles.

388.1. The Ministry of Industry and Technology, together with the Ministry of Transport and Infrastructure will conduct a rail system vehicle inventory study in addition to ademand & supply planning, and will submit them to the Industrialization Executive Committee; decision on public procurement and long-term ordering methods will be taken by the Committee.

388.2. The Ministry of Transport and Infrastructure will prepare an inventory of the rail system vehicles and identify the demand expected in the medium term and existing public-private production structure and capabilities on the the supply side.

388.3. Rail vehicle standards will be developed for tram, light rail system and subway vehicles to be used in urban transport, and urban rail vehicle registration system will be established.

389. Efforts will be made for designing and production of all rail system vehicles through national capabilities.

389.1. Critical components of rail system vehicles primarily including traction system, bogie, train control system, passenger information system, pneumatic systems,

vehicle body design, system integration and gear box will be designed and manufactured through domestic capabilities.

389.2. The production of national electrical multiple unit will be completed in 2020.

389.3. The serial production of the national electric locomotive will be started in 2022.

389.4. The prototype of the national high-speed train will be completed in 2023.

389.5. In 2023, 80 percent locality level will be achieved in all rail system vehicles including metro and tram production.

389.6. The institutional capacity of public and private sector organizations producing rail system vehicles and components will be increased through joint studies with universities; foreign market and export opportunities will be improved by developing sales, marketing and branding strategies.

389.7. Training programs will be developed to meet the needs of project managers, system managers, system engineers and design engineers to take part in the design, development, production, testing, and certification processes of rail system vehicles.

389.8. In order to ensure the continuity of quality and reliability of the domestic rail system vehicles produced in our country, the National Rail Systems Testing and Research Center in Eskişehir, which would provide serve at national and international level will be completed, an independent structure will be established will be established with an operational model involving the related institutes and research centers.

2.2.1.3. Other Manufacturing Industries

2.2.1.3.1. Textile-Clothing-Leather Industry

390. The main objective is to be one of the leading countries that directs the value chain with a focus on fashion design and branding in the textile, leather and clothing sector.

391. Fast and flexible production, innovation, customer focus, integrated production structure, social responsibility and environmental awareness, retailing and organizational skills will be developed in the sector.

392. With regard to technical textiles, which is one of the key areas in the transformation of high value-added structure in the sector, companies will be supported to select optimum technology, comply with the environmental protection legislation, energy efficiency and waste re-use activities and cooperate with other stakeholders in the value chain (in particular machinery, fiber and technical end-use manufacturers).

2.2.1.3.2. Non-Metallic Mineral Products Industry

393. The main objective in the non-metallic mineral products sector is to reduce input costs and supply risks, particularly in terms of energy, and to improve sustainable production, efficiency and competitiveness.

394. Within the framework of the needs of the non-metallic mineral products sector, the development of transportation infrastructure in required regions will be ensured, the use of domestic and innovative

products will be prioritized through public regulations, R&D and investments for refractory materials and advanced ceramic products which are currently imported will be supported and the awareness will be improved on P&D and innovation.

2.2.1.3.3. Basic Metal Industry

395. The main objective is to improve the production structure in the basic metal industry to produce qualified products; raise the variety of high value-added products and increase the share of the ore-based production method without causing idle capacity.

396. In the iron and steel sector, importance will be given to expanding exports and export markets, preventing the imports of non-standard low quality products, improving the domestic supply chain on the basis of quality and size of the steel types used in strategic areas such as ; defense industry, railways, mega projects and nuclear power plants and guaranteeing input supply.

397. In the aluminum sector, R&D and investment activities will be encouraged for the domestic production of high-alloyed, heat-resistant, high-value-added products required for the sectors such as aviation, defense and automotive industries.

2.2.1.3.4. Ship-Building Industry

398. In order to improve the competitiveness of our marine technologies and shipbuilding subsidiary industry, Marine Technologies and Industry Technical Committee will be established, R&D and innovation culture will be disseminated among the companies operating in the sector in

order to contribute to the high value added production and export goals.

399. A program will be launched to convert the vessels used for short-distance passenger and vehicle transportation in our country into environment friendly and energy-efficient fully electrical vessels, and support will be provided to rolling out similar practices.

2.2.1.3.5. Furniture Industry

400. The main objective is to improve the design and branding capacities in order to increase the value added in the furniture industry.

401. In order to reduce informality, which is one of the biggest problems of the sector, works will be carried out with the participation of sectoral NGOs. Market researches will be carried out for the export-oriented transformation of the existing production structure of the sector and design, branding, company collaborations and logistics capacity will be improved.

2.2.2. Priority Development Areas

2.2.2.1. Agriculture

a. Objective

402. The main objective is to create an efficient agricultural sector that is environmentally, socially and economically sustainable, which has increased its international competitiveness with its production structure that considers supply and demand balances as well as adequate and balanced nutrition of the people of the country.

b. Policies and Measures

403. By providing accurate and reliable data at macro and micro level, the whole chain extending from seed to table will be fully recorded, annual monitoring and evaluation activities will be institutionalized, agricultural information systems will be completed and effective use will be ensured.

403.1. Census of agriculture will be conducted.

403.2. Agricultural information systems will be developed with digitalization, artificial intelligence and data-based business models and will be made available to all segments.

403.3. Market information and monitoring system will be established for monitoring agricultural input and product price fluctuations, protecting competition and eliminating market failures.

404. The efficiency of agricultural subsidies will be increased.

404.1. The impact analysis of agricultural subsidies will be made.

404.2. Agricultural subsidies will be increased and a dynamic structure that focuses on water constraint, quality in production, farmer cost and income, supply and demand balance will be provided.

405. Protection, effective use and management of agricultural lands will be ensured.

405.1. Detailed soil surveys depicting soil capabilities throughout the country will be made, mapped and classified.

- 405.2.** Preparation of agricultural land use plans based on soil information system will be completed.
- 405.3.** Regulations to reduce the pressure of non-agricultural use of agricultural lands will be completed and inspections will be increased.
- 405.4.** Arrangements will be introduced for the establishment of a land banking system in order to develop an agricultural land market, especially in bringing idle lands into agricultural production, and contract farming will be supported and encouraged.
- 405.5.** Studies will be carried out for land acquisition, primarily through leasing, so that the scale of agricultural enterprises reach the size of agricultural land with sufficient income, while protecting small family enterprises.
- 405.6.** The division of agricultural lands by inheritance and sale will be prevented and financial support will be provided to heirs for land acquisition.
- 405.7.** Land consolidation activities will continue in an integrated manner with irrigation investments and arrangements will be made to accelerate the registration procedures.
- 406.** Investments will be prioritized and maintained in order to expand irrigated areas, and efforts towards quality and quantity wise preservation and efficient use of water will be furthered.
- 406.1.** During the Plan period, 2 million hectares of land is planned to be opened for irrigation. Budgetary funds will be allocated for irrigation of 750 thousand hectares of this total. For the remaining area, alternative new domestic and foreign finance methods will be devised by the Ministry of Agriculture and Forestry together with other related ministries and these investments will be completed this way.
- 406.2.** Public irrigation investments will be maintained regarding the criteria such as level of progress, condition of storage facility, availability of gravity irrigation system, irrigation ratios of comparable projects, potential for completion in the very near term and necessity to be carried out simultaneously with other projects.
- 406.3.** Modern irrigation systems such as sprinkling and drip irrigation will be disseminated to ensure efficient use of water in agriculture.
- 406.4.** Measures to prevent agricultural water pollution will be expanded.
- 406.5.** In order to prevent water losses due to evaporation by taking into account the effects of climate change, studies will be carried out to establish underground water basins and dams.
- 407.** Plant production will be increased.
- 407.1.** In order to ensure the sustainability of plant production, input supports will be determined by taking into account the changes in costs, particularly diesel fuel and fertilizer.
- 407.2.** In order to increase product reliability, diversity and production, particularly for high value added medical and aromatic

plants, good agricultural practices, organic farming, contract farming, clustering, research, marketing and branding activities will be supported.

407.3. In addition to the establishment of modern greenhouses for undergrowth cultivation, investment and operational financial support will be provided for the modernization, expansion, packaging and storage facilities of existing greenhouses.

407.4. In cooperation with private sector seed companies, production areas of certified seeds will be expanded and elite seed production will be undertaken and the production of new varieties will be maintained.

407.5. Regulations will be introduced to expand the industrial use of fibrous plants, primarily hemp.

407.6. Renewal of planting areas will be supported in order to increase the productivity of long-lasting and high value-added crops such as tea and hazelnut that have completed their economic life and reduce their yield.

408. Livestock farming will be developed.

408.1. In order to reduce reproductive losses in cattle and increase the rates of flesh, combined breeds and their hybrids arising from artificial insemination, criteria for support of calf, vaccine and disease-free holdings will be re-determined and their subsidy amounts will be increased.

408.2. In order to meet the need for breeding material domestically, purchases from the enterprises registered in the Genealogical Information System and from heifer breeding centers will be supported.

408.3. In order to increase the number of maternal animals in sheep breeding and to increase the rate of sheep and goat meat in red meat production, additional support will be given to each head of female lamb and goat added to the herd to be used as a breeder within the scope of the Herd Growth and Renewal Support Project.

408.4. The identification, limitation and registration processes for pasture, plateau and barracks will be accelerated, pastures will be rehabilitated to boost the production of high quality forage production and forage crop production will be supported.

408.5. Modernization and expansion of shelters and the purchase of livestock, tools and equipment will be supported so that family holdings reach the capacity of 10 heads of cattle and 300 heads of sheep and goat.

408.6. Product and market diversity will be increased in the export of poultry products.

408.7. Breeding needs will be met and product diversity will be increased in beekeeping.

408.8. In the silk industry, traditional production will be replaced by modern production in order to ensure high quality and high yield material supply.

409. Production and exports will be increased in the aquaculture sector.

409.1. New potential aquaculture production areas will be identified and opened to the use of entrepreneurs and production will be encouraged with various government supports.

409.2. Sustainability of fish stocks will be ensured by considering the balance between conservation and utilization of resources.

409.3. Increase in international competitiveness will be supported by product diversification and branding.

409.4. The use and dissemination of closed circuit systems in production will be ensured with additional supports.

410. In order to ensure food safety, efficiency of inspections will be increased, the services for combating plant and animal disease and pests will be developed.

410.1. Single health policy for human and animal health will be implemented, including animal welfare, through Enterprise-Oriented Preventive Veterinary System.

410.2. A veterinary medical product control center will be established to conduct all tests and analyzes of veterinary medical products offered to the market in our country and the center will be international accredited.

410.3. In cooperation with the private sector, a vaccine production center will be established to produce veterinary vaccines and diagnostic kits.

410.4. Inspection and training activities will be increased to combat unconscious pesticide use in plant production and alternative biological and biotechnical combat practices will be supported and disseminated.

410.5. Food control laboratory infrastructure will be strengthened and the efficiency of control services will be increased.

410.6. Action plans will be prepared to combat invasive species and agricultural pathogens in connection with climate change.

411. The rules and capacities for market regulation will be improved in order to ensure food safety, efficient inventory management, reducing losses in the supply chain and preventing waste.

411.1. Product conservation and analysis supports will be increased in order to expand the licensed warehousing system.

411.2. The logistics infrastructure for the establishment of the cold chain in agricultural products will be improved.

411.3. Consumer awareness will be increased to prevent food losses and waste.

411.4. Arrangements will be introduced for the efficient and safe conduct of e-commerce in agricultural products.

411.5. Promotive production models will be implemented for the development of agricultural-industry integration and cooperation.

411.6. Product pattern change scenarios in agriculture will be established in order to adapt to climate change.

412. In agricultural production, biodiversity in the field of local animal breed and seeds will be preserved and made sustainable.

412.1. The biodiversity inventory will be completed, critical species and specific areas will be monitored, a mechanism for sha-

ring the benefits obtained from genetic resources and related traditional information will be established, traditional knowledge based on biodiversity will be recorded and made available for R&D purposes.

412.2. Arrangements will be made for the establishment of accredited nature farms in order to ensure that the presence of local race livestock and seeds reach sufficient quantities.

412.3. In nature farms, local seeds fruit, cereals, medicinal and aromatic plants, primarily winter vegetables will be reproduced as well as local animal breeds and converted into sustainable value-added products.

413. Cooperatives and producer unions will be actively incorporated into the system in order to reduce the number of intermediaries in the distribution chain in the marketing of agricultural products, to ensure the consumer access to the product at reasonable prices and to establish a direct connection between the producer and the consumer.

413.1. In order to increase the organizational capability of the producers and increase the operational efficiency of these organizations, their access to finance will be eased and professional management, supervision and organizational infrastructures will be improved.

413.2. Arrangements will be made in order to facilitate the commercial activities of producer associations.

413.3. Through a distribution model with a solid supervision and management infrastructure, arrangements will be made to ensure so that agricultural products can be

offered to the market faster and at affordable prices.

414. Mechanisms will be established to ensure that agricultural products produced at local and regional level achieve the added-value they deserve.

414.1. The product value of local products, geo-marked agricultural products and medicinal and aromatic products will be increased through improvements for promotion, marketing and branding.

414.2. Besides traditional tea products, high value-added products such as cold tea, organic tea and white tea will be developed from the tea plant.

415. The contribution of forests to the economy will be increased through sustainable forest management.

415.1. National Forest Inventory study will be completed.

415.2. The capacity to combat diseases, pests and wildfires in forestry will be strengthened.

415.3. The support provided for forest villagers will be maintained within certain programs, and professionalization will be raised through training activities in order to increase quality production and labor productivity in forestry.

415.4. In order to meet the wooden raw material needs, industrial plantations will be facilitated with fast-growing species.

415.5. The use of wood will be expanded and standards will be set.

416. The efficiency and quality of agricultural R&D activities will be increased by improving coordination and cooperation between public, university, private and industrial sectors in agricultural research activities.

416.1. The results of agricultural research projects will be shared with relevant institutions and duplications in research activities will be prevented.

416.2. Studies carried out in research institutes primarily on animal and plant breeding, biotechnology and biodiversity conservation areas will be supported within the framework of public, university and private sector cooperation.

416.3. Research activities aimed at increasing agricultural production and productivity will be given importance in cooperation with the Ministry of Agriculture and Forestry, particularly with the relevant universities within the scope of the Regional Development-Focused Mission Differentiation and Specialization Program.

416.4. Innovative and environment-friendly production techniques, especially smart agricultural technologies, will be developed and supported.

417. Activities to protect the income of producers in agriculture will be supported.

417.1. In agricultural insurance, the scope will be expanded on product and risk basis and efforts will be maintained to introduce income insurance.

417.2. Efforts will be made to facilitate the inclusion of young population employed in agricultural sector into the social security system.

418. The effectiveness of agricultural training and extension activities will be increased and expanded.

418.1. Training will be provided for the reduction of production costs, use of technology, production of high-quality and healthy products, especially for women and young farmers, and publication and certification programs as well as courses to improve agricultural skills will be organized.

418.2. The participation of academicians and research staff in training and extension programs will be increased and the relationship between R&D and extension will be strengthened.

418.3. The capacity of producer organizations to provide training and extension services will be improved.

Table 19: Targets in Agriculture Sector

	2018	2023
Land Consolidation Activity Area (Million Hectares, Cumulative) ¹	8.2	8.5
Land Consolidation Area for which Registration Procedures are Completed (Million Hectares, Cumulative) ¹	3.6	6.2
Irrigated Net Agricultural Area (Million Hectares, Cumulative) ¹	3.34	5.34
Pressurized Irrigation System Installed Area (Thousand Hectares, Annual)	40	200
Irrigation Rate (%)	64	68
Ratio of Agricultural Supports Provided from Central Government Budget to Agricultural Value Added (%)	6.8	7.2
Oil Seed Production (Million Tons)	4.02	5.40
Production Amount of Medicinal and Aromatic Plants (Thousand Tons)	700	1,200
Ratio of Culture Breeds in Cattle Presence (%)	49	56
Red Meat Production Amount (Million Tons)	1.12	1.70
Pasture Reclamation and Management Area (Thousand Hectares, Cumulative)	68	518
Ratio of Forest Areas to Country Area (%)	29	30

Source: Data for 2018 belongs to the Ministry of Agriculture and Forestry, General Directorate of State Hydraulic Works (DSI) and General Directorate of Forestry. Data for 2023 are estimates of the Eleventh Development Plan.

(1) Based on the activities of the Ministry of Agriculture and Forestry and DSI.

2.2.2.2. Defence Industry

a. Objective

419. The main objective is to strengthen the defense industry ecosystem in order to meet the needs of our Armed Forces and security forces with the understanding of continuous development with national technologies and domestic opportunities to the maximum extent and to increase defense exports, and to ensure the spread of skills acquired in the defense industry to the civil sector.

b. Policies and Measures

420. Projects will be implemented to minimize foreign-source dependency in the defense industry through national technologies and domestic facilities.

420.1. Through national technologies and domestic opportunities, the advanced versions of products with technical specifications continuously improved and the approach of having a product range that can address different operational needs and task areas will be adopted.

420.2. While developing defense industry products, external dependency will be minimized at the system, sub-system and component levels.

420.3. In order to identify the existing capabilities of our defense industry to cover the whole country, industrial competence data infrastructure will be developed and a skills inventory will be established.

420.4. Localization Roadmap will be prepared and implied, and the defense industry local content rate will be increased.

420.5. During the plan period, Altay tanks, domestic air defense systems and marine platforms will be added to the inventory; the number of UAVs in the inventory will be increased; UAV engine prototype and land vehicle engine will be delivered.

421. In order to strengthen the defense industry ecosystem and ensure sustainability; the training infrastructure will be strengthened so that qualified human resources need can be met, support will be provided to sector companies, primarily SMEs, and measures will be taken to increase cooperation in exports and ecosystems.

421.1. Training will be provided through the Defense Industry Academy in order to increase interest and familiarity for technology.

421.2. Within the scope of the Visionary Young Project, sectoral knowledge such as internship, job opportunities, and technology competitions will be presented to young people.

421.3. The needs analysis of the vocational and technical schools related to the fields of defense industry will be conducted and standardized; and these schools will be opened in provinces where necessary.

421.4. Through Industrial Competence Assessment and Support Program (EY-DEP) financial assistance focused on training, consultancy and guidance support will be provided to companies.

421.5. Financial support will be provided to all companies operating in the defense industry,, including SMEs, under the Defense Industry Investment and Development Activities Support Program.

421.6. Country and project based export strategies will be defined in order to increase sector exports.

421.7. Various activities (Defense Industry Council, collective wisdom workshops, regional industry meetings, technopark meetings, clustering meetings and OIZ meetings) will be organized every year to strengthen cooperation, coordination and sharing among all stakeholders in the sector.

422. In defense industry, the process of transformation will be managed, national technology breakthrough will be boosted with dissemination of multi-use in sectors that can feed each other technologically.

422.1. Projects and investments based on basic and advanced technologies will be realized and supported in line with the visions of creating 100 percent national defense industry in critical technologies for defense industry and shaping up the war concept of the future.

422.2. By analyzing the multipl use opportunities between sectors, a model will be developed to transform them into concrete projects.

Table 20: Targets in Defense Industry

	2018	2023
Defense and Aviation Industry Turnover (Billion Dollars)	6.7	26.9
Defense and Aviation Industry Exports (Billion Dollars)	2.0	10.2
Defense and Aviation Industry Employment (Thousand People)	44.7	79.3
Defense Industry Domestic Rate (%)	65	75

Source: Data for 2023 are estimates of the Eleventh Development Plan.

2.2.2.3. Tourism

a. Objective

423. The basic objective is to diversify and to develop tourism sector in line with changing consumer behaviors and technological developments, extend the duration of the tourism season, ensuring increase in accommodation period and non-accommodation expenditures through improving the service quality and attracting visitors who tend to spend more to our country; realizing transformation of the sector within the framework of destination-specific and focused perception, and contributing to economic and social development by considering conservation and utilization equilibrium.

b. Policies and Measures

424. Number of visitors will be increased through strengthening and improving of our existing source markets as well as developing new ones.

424.1. Studies will be performed to create new source markets for our country from emerging markets in the world, mainly from far eastern countries.

424.2. The number of direct scheduled flights, that have been launched from selected

cities of our main source market countries to our touristic destinations having high accommodation capacity and the number of destinations will be increased.

424.3. Turkey Tourism Promotion and Development Agency in which private sector will be involved in financing and decision making processes will be formed for the promotion of tourism and to increase investments.

424.4. Abroad perception and image studies will be conducted, particularly in main and emerging target markets, and management plans will be prepared within this scope.

424.5. In order to meet growing number of tourists, bed capacity will be increased by 300,000 during the Plan period, in addition to 212,038 beds in investment process.

424.6. Risk and crisis management plans will be prepared to prevent the sector being affected by such occurrences.

425. Per capita expenditure will be increased through development of tourism offerings leading to more revenues, prolong the length of stay, creating non-accommodation expenditure options and attracting visitors with greater expenditure tendency.

425.1. The markets where high levels of demand for tourism types yielding more revenues such as gastronomy, golf, health, cruise, wedding, religion, congress and shopping will be identified and studies will be conducted to increase the number of visitors from these markets.

425.2. Promotion and investment activities will be undertaken towards the development of health tourism which would contribute to increase the average length of stay and ensure the yearlong tourism.

425.3. Through building comprehensively planned tourism cities having diverse tourism offerings with different uses, visitors' length of stay will be increased, their non-accommodation expenditures will be increased through shopping, entertainment and sports activities.

425.4. Planning and land allocation studies will be conducted to enable large-scale tourism investments, tourism infrastructure investments will be undertaken to diversify tourism and extend the duration of tourism season through a sustainable approach.

425.5. Country's tourism assets will be introduced and grouped on the basis of destination.

425.6. In order to contribute to maritime tourism, if marinas designed suitably for demand and natural features and if they are feasible then these projects will be realized using public-private-partnership model, and yacht parking capacity will be increased by 4,500 yachts with investments to be started during the Plan period.

425.7. A new cruise port will be built in İstanbul to make İstanbul a start-destination point for cruise trips.

425.8. Business class or comfort class options will be increased for the main touristic destinations in terms of dissemination and frequency, in order to increase the visitor traffic with high propensity of spending.

425.9. Touristic train trips will be launched.

425.10. By reviewing the dispersed legislation related to tourism sector regarding current needs, the Tourism Principal Law will be enacted to regulate all matters concerning the sector; diversification of tourism services, supporting the investments, promoting the tourism industry and reducing the cost burden on the sector will be ensured.

426. At destination-base and within the scope of a focused perception; the tourism development including investment planning and the management will be handled with a holistic approach by regarding planning hierarchy; sustainable tourism practices will be developed with an environment-friendly and responsible tourism perception.

426.1. Destination-based strategies, master plans and physical plans will be prepared and projects will be conducted.

426.2. Integrated coastal area management and planning will be realized in accordance with the demands of tourism sector and regarding conservation and utilization equilibrium.

426.3. Bearing capacities of tourism sites will be identified by taking into consideration the conservation and utilization equilibrium and those areas will be managed accordingly.

426.4. In tourism areas infrastructure investments for drinking water, sewage, solid waste disposal and waste water treatment will be carried out.

426.5. Within the framework of sustainable tourism perception, a legislation will be enacted to increase the number of environment-friendly tourism facilities and to improve their qualifications.

426.6. Studies to identify the effects of climate change on tourism sector will be conducted.

427. The level of services offered in tourism sector will be raised to higher standards.

427.1. Qualified intermediate staff needed for the tourism sector will be met through an applied training program to be implemented within the framework of the protocol signed between the Ministry of Culture and Tourism and the Ministry of Education.

427.2. Efforts to increase the participation of tourism sector employees into the training programs conducted by the Ministry of Culture and Tourism will be exerted and the training programs that meet sectoral needs will be provided.

427.3. To facilitate the qualified personnel employment and to meet their housing needs in more comfortable ambiance, staff residence sites will be allocated to facilities.

427.4. A legal arrangement will be introduced and put into force to improve the physical conditions of the facilities through renovation.

427.5. The certification system for the facilities will be rearranged to enable an improvement in the standards of establishments to be used in the tourism services.

428. Arrangements will be introduced so that tourism sector can benefit from the sharing economy more effectively, notably through internet-based applications, and the technology-based applications will be supported through R&D activities in the sector.

428.1. A survey will be conducted on digitalization ratios in tourism and sector's propensity to digitalization.

428.2. Big data collection and analysis study will be conducted, for use in product development, promotion and marketing in the tourism sector.

428.3. Technology supported projects will be developed to increase visitors' experience.

428.4. Our country's legislations will be aligned, primarily with regard to financial issues concerning foreign mobile and internet applications.

428.5. Domestic tourism measurement system will be established.

428.6. Tourism investment process will be moved to electronic environment in order to eliminate differences in procedures and bureaucratic difficulties, and doing business will be eased for investors.

Table 21: Targets in Tourism Sector

	2018	2023
Tourism Revenue (Billion US Dollars)	29.5	65.0
Number of Visitors (Million)	46.1	75.0
Number of Foreign Visitors (Million)	39.5	67.7
Average Spending per Visitor (US Dollars)	647	867
Average Length of Stay (Overnight)	9.8	10.0
Overnight Revenue per Visitor (US Dollars)	66	86.7

Source: 2018 data belongs to TURKSTAT and the Ministry of Culture and Tourism. 2023 data is the estimate of the Eleventh Development Plan.

2.2.3. Sectoral Policies

2.2.3.1. Public Investment Policies

a. Objective

429. The basic objectives are increasing the resources for public fixed capital investments, rationalization of public investment programme, utilizing the allocated resources primarily for the established goals of major sectors and development areas in an efficient and results oriented manner, ensuring coherency of PPP implementations with macroeconomic policies.

b. Policies and Measures

430. The complementary relationship between public and private investments will be enhanced; and the necessary public infrastructure investments will be carried out to pave the way for the private investments that create high value added, that increase employment contribute to lowering current account deficit and increase productive capacity.

430.1. The share allocated to public investments relative to the national income will be increased over the Plan period against the baseline in 2019.

430.2. Public investment program will be reviewed and non-urgent, inefficient, out of priority projects and the incomplete ones deemed satisfactory with their realizations will be excluded from the investment program.

430.3. Education sector will be the sector with the highest rate of increase in the public investments during the Plan period. Also for the period 2020-2023, education sector will have the largest share in total investment program.

430.4. As for the breakdown of investments in the education sector, the investments for transition to single-shift education and the expansion of preschool education will have a significant share, while the modernization of vocational and technical education workshops, establishment of design and skill workshops, and increasing the quality of education at all levels will be other prominent investment areas.

430.5. In public investments, priority will be assigned to priority manufacturing industry sectors of the Development Plan as well as the horizontal areas that would strengthen the human and physical infrastructure for these sectors such as R&D, digitalization, human resources, logistics and energy, in addition to agriculture, tourism and defense industry.

430.6. Focus will be put on the infrastructure of industrial and technology zones and the R&D and innovation investments that will increase TFP.

430.7. In order to strengthen the logistics infrastructure required by the industry, the share of investments in railway freight transport in total transportation sector investments will be increased.

431. In the cases where expenditure efficiency is higher than that of utilization of public resources, in order to finance increasing infrastructure investments, the alternative financing methods channelling the resources of private sector and institutional investors into infrastructure financing, will continue to be used extensively during the upcoming period as well.

432. A new framework regulation will be introduced to ensure effectiveness, efficiency and value for money in PPP implementations.

432.1. The fragmented PPP legislation and the different practices during the preparation and authorization stages will be revised to provide a common basis for principles and procedures which also involves the flexibility needed by projects.

432.2. The accounting and financial reporting of PPP implementations and the impact of potential risks and obligations on public finance will be included in the reporting system.

432.3. In the implementation of PPP projects, obligations assumed by the public sector and budget balances will be taken into account, and projects will be executed through the optimum risk sharing between public and private sector.

433. Public investments will continue to be allocated in such a manner to reduce regional development disparities and untap regional development potentials.

434. In order to maximize the utilization of existing capital stock, the alternative of making maintenance and repair and rehabilitation expenditures for the current investments will be evaluated on a priority basis before developing new investment projects.

434.1. General Directorate of Highways, General Directorate of Turkish State Railways, and General Directorate of State Airports Authority will launch pilot schemes which enable them to manage their fixed capital stock in an “effective, efficient and economical” manner and develop solutions to keep investment costs at low levels.

435. In order to strengthen public investment management process, perform necessary interventions on time and achieve more effective results, standardization will be assured over the processes of preparation, implementation, monitoring and evaluation of investment projects, including PPP projects, across all public institutions including local administrations and institutional capacity will be enhanced.

435.1. Training programmes will be organized on project preparation, implementation, monitoring and evaluation of public and PPP investments.

435.2. Standard guidelines will be prepared on project preparation, implementation, monitoring and evaluation processes of public investments.

435.3. A monitoring and evaluation unit will be established within the Presidency

for the investment projects and related expenditures of all public institutions, including local administrations.

435.4. Standard guidelines will be prepared for the preparation, procurement and contracting processes of PPP projects.

435.5. PPP projects that are in operation will be analyzed in order to measure the efficiency of the choice of PPP method in the implementation of public investments.

436. The institutional structure will be strengthened in order to form and execute a national PPP policy among the project demands of the administrations responsible for PPP implementations by considering the country's macro fiscal balance and investment policies.

437. It is envisaged to use the PPP model for the implementation of some of the pri-

ority projects planned to be started during the Plan period, such as Canal İstanbul, 3-Story Grand İstanbul Tunnel, Filyos Port Superstructure and Operation, Çandarlı Port Superstructure and Operation and various other urban environmental infrastructure projects.

438. The PPP model projects under construction, including 11 city hospitals with a total bed capacity of 18,716 beds and Gebze-Orhangazi-İzmir Motorway, North Marmara Motorway Kurtköy-Akyazı and Kınalı-Odayeri sections, Kınalı-Tekirdağ-Çanakkale-Balıkesir Highway Malkara Çanakkale section, Menemen-Aliğa-Çandarlı Motorway, Ankara-Niğde Motorway, Aydın-Denizli Motorway, İstanbul Airport 2nd Stage, Çeşme Airport, Salıpazarı Cruise Port, Haliç Marina Complex projects will be completed.

Table 22: Public Sector Fixed Capital Investment Goals

(2018 prices)

SECTORS	Eleventh Development Plan Period (2019-2023)	
	Million TL	% Share
Agriculture	46,032	6.1
Mining	24,008	3.2
Manufacturing	5,989	0.8
Energy	39,772	5.2
Transportation	262,343	34.8
Tourism	1,921	0.3
Housing	8,521	1.1
Education	144,280	19.1
Health	32,229	4.3
Other Public Services	188,973	25.1
<i>Technological Research</i>	35,176	4.7
TOTAL	754,068	100

Source: Presidency of Strategy and Budget. 2019-2023 period data are Eleventh Development Plan estimates.

Note: Local administration investment and investment labor are included.

2.2.3.2. Science, Technology and Innovation

a. Objective

439. The basic objective is to improve the capacity to produce and use knowledge by establishing an efficient functioning research and innovation ecosystem, and to increase R&D and innovation activities that would support high value-added products and services.

b. Policies and Measures

440. The role of universities in the R&D ecosystem will be strengthened.

440.1. The budgetary resources allocated to universities will be increased to strengthen their R&D infrastructure and improve their scientific research projects both qualitatively and quantitatively.

440.2. A coordination and support unit will be established within the Council of Higher Education in order to ensure the harmonization of the scientific research project budgets of the universities with the macro targets, to ensure the realization of the projects in an effective and efficient manner, to increase the coordination and cooperation among universities and to strengthen the linkages between the objectives of the Plan and the scientific research projects. Additionally, a policy document will be prepared on scientific research projects, project monitoring mechanisms and new performance-based resource allocation methods will be developed.

440.3. The Research University Program will be strengthened for the universities to

carry out R&D and innovation activities that will support high value-added production. Also, the capacities of universities included in this program will be increased through special supports.

440.4. Regulation will be made for the foundations of higher education institutions to obligate the allocation of at least 1 percent of their annual student tuition revenues for R&D expenditures.

441. The efficiency of research infrastructures in R&D and innovation ecosystem will be increased by conducting frontier research, employing qualified human resources and working in cooperation with the private sector.

441.1. In order to increase the accessibility of research infrastructures within higher education and public institutions and to prevent repetitive investments, an inventory of machinery-equipment, human resources, research activities and testing services will be prepared.

441.2. The number of infrastructure specialized in critical technologies within the scope of the Law No. 6550 on Supporting Research Infrastructures will be increased.

441.3. Regulations will be made to monitor the output and impact-oriented performances of research infrastructures within Law No. 6550 and to encourage their activities in critical technology areas in line with their product missions.

441.4. The definition of Application and Research Center under Higher Education Law No. 2547 will be revised to take into account the differentiating qualifications of

technological research centers within higher education institutions.

441.5. A regulation will be introduced for the technological research centers of higher education institutions which are not covered by Law No. 6550 within the framework of the new definition, so that their budgetary needs can be met based on their performance.

442. The number and qualifications of R&D staff will be increased.

442.1. The employment of post-doctorate contracted researcher staff will be increased at research universities.

442.2. The qualified researchers, conducting high-level scientific and technological studies abroad, will be supported to come to Turkey and educate researchers within the scope of International Fellowship for Outstanding Researchers Programme.

442.3. A mechanism will be established in which laboratory infrastructure and research fund will be provided to the leading Turkish scientists abroad, enabling them to carry out part-time training and research activities in Turkey.

442.4. The number of R&D personnel in research infrastructures covered by Law No. 6550 will be increased and regulations will be introduced to take measures to facilitate the employment of foreign personnel in these infrastructures.

442.5. In order to strengthen the effectiveness of research centers and institutions within ministries in the ecosystem, regulations will be introduced so that they can employ qualified R&D staff.

442.6. In order to increase qualified human resources with research experience, more undergraduate, graduate and doctoral scholars will be included in the public supported R&D projects.

442.7. In order to meet the need for R&D staff, the conditions of YÖK 100/2000 doctorate scholarship program will be improved and the number of beneficiaries of the program will be increased.

443. The qualified researcher capacity and research activities in basic sciences will be increased in order to meet the needs in priority sectors and technology areas and special graduate scholarship programs will be developed for these areas.

443.1. The amount of scholarship payments and the number of beneficiaries will be increased for graduate scholarships programs in basic sciences.

443.2. Research projects in technology readiness level between 1 and 3 that are carried out by private sector R&D centers in cooperation with universities and research infrastructures will be supported.

443.3. Frontier research projects that are likely to have a high impact on value added in basic and applied areas will be supported.

443.4. National and international education and research themed scientific activities will be organized in order to support qualified scientific studies and pioneering and groundbreaking researches and to increase the capacity of human resources in the field of basic sciences in particular.

444. Regional and global level partnerships will be developed, particularly with the EU countries, on R&D activities, research infrastructures and researcher human resources.

444.1. Promotion, information and capacity building activities, support and reward programs will be realized in order to ensure our participation to the EU Research and Innovation Framework Programs through qualified projects and to increase the return rates of the programs. The national support programs will be implemented in a harmonized and complementary manner with the EU Framework Programs in order to integrate into the European Research Area.

445. Starting from an early age, the education of the young people in the technology area will be ensured for the development of technology producing human resources in Turkey.

445.1. Try It-Do It Technology Workshops will be disseminated and 50 thousand

young individuals will be trained under the program.

445.2. Science workshops and mobile science exhibitions will be expanded and made more accessible.

446. The international position of our country in terms of polar researches will be strengthened.

446.1. The institutional capacity for polar researches will be improved and preparatory work on the establishment of a station in Antarctica will be completed.

447. The position of Turkey in the global competition in the field of aviation and space will be strengthened.

447.1. National Space Program will be prepared and put into practice.

447.2. The institutional capacity and the efficiency of the Turkish Space Agency will be increased.

Table 23: Science, Technology and Innovation Goals

	2018	2023
Ratio of R&D Expenditures to GDP (%)	0.96 ¹	1.8
Number of R&D Personnel in Full Time Equivalent (FTE)	153,552 ¹	300,000
Number of PhD and FTE R&D Personnel per Million	352 ¹	863

Source: Data for 2023 are estimates of the Eleventh Development Plan.

(1) The data for the year 2017.

2.2.3.3. Entrepreneurship and SMEs

a. Objective

448. The main objective is to improve the entrepreneurship culture and technology-based and innovative entrepreneurship capacity, to strengthen the entrepre-

neurial ecosystem that improves access to finance, information and the market, and to provide scale-up of firms.

b. Policies and Measures

449. Innovative financing opportunities for SMEs and entrepreneurs will be developed.

449.1. Alternative financing methods such as corporate and individual venture capital, mass funding, impact investment will be strengthened and their use will be increased.

449.2. The credit guarantee system will be developed and the use of initiatives in financing innovative business models, R&D and innovation projects will be expanded.

450. An Enterprise Support Package will be implemented to address the needs of technology-oriented enterprises at all stages, starting from the idea to the institutionalization stage.

450.1. To the benefit of all stakeholders involved in the entrepreneurship ecosystem in Turkey, an entrepreneurship ecosystem platform of Turkey will be founded and updated regularly, that includes information about entrepreneurs, introduces investors, has the information about incubation and acceleration centers available to entrepreneurs, summarizes supports for entrepreneurs, and lists educations.

450.2. Priority will be assigned to the development of structures appealing to all stakeholders in order to strengthen the entrepreneurship ecosystem.

450.3. Mechanisms will be developed to encourage corporate companies and their executives to participate in acceleration programs for early stage ventures and become investors, offer mentoring support, and provide order support.

450.4. In the priority sectors, platforms will be established to improve the cooperation capacities of start-ups, innovative SMEs and large firms, and twinning and

joint project development support will be provided.

450.5. Bureaucratic and legal predictability will be increased and legislation will be simplified to develop entrepreneurship.

450.6. Facilitating arrangements will be introduced to attract foreign entrepreneurs in our country.

450.7. Arrangements will be implemented to make it easier for academicians and employees in corporate companies to become entrepreneurs in addition to their professional jobs.

451. The competitiveness and capacities of craftsmen and artisans will be increased such that they can adapt to changing economic and social conditions; cooperation and joint working culture will be increased by supporting social and innovative cooperatives.

451.1. Within the associations of chambers of craftsmen and artisans, units that will provide training, consultancy and information support to craftsmen and artisans on export processes, entrepreneurship, R&D and innovation, and state aid will be established.

451.2. The variety of financial supports will be increased by renewing the Craftsmen and Artisans Support System and appropriate credit subsidies will be maintained considering economic contribution. The effectiveness of the loans granted by the Treasury will be increased by providing additional interest support to the craftsmen and artisans head towards the manufacturing sector, export, branding, and e-commerce.

451.3. Cooperative Support System will be implemented and financial support tools will be developed. Within this framework, the machinery and equipment purchase of cooperatives, employment of qualified personnel, and purchase of fixtures and promotional expenditures of cooperatives will be supported with subsidized loans. Over the Plan period, support will be provided to cooperatives operating in priority sectors, particularly agricultural sales cooperatives, women's cooperatives, and social cooperatives.

451.4. Efforts will be made to raise public awareness about cooperatives and to implement cooperative entrepreneurship in different fields.

452. Entrepreneurship culture will be developed; target and performance based support models will be created.

452.1. Istanbul will be made one of the regional and then global centers of entrepreneurship. In this context, the International

Istanbul Entrepreneurship Program will be launched with support and arrangements that will make it attractive for ventures, entrepreneurs and ecosystem actors to come to our country from abroad.

452.2. In order to increase the international competitiveness of fast growing companies, a flexible support model tailored specifically for these companies will be developed, based on their performance.

452.3. Internship support will be provided for the undergraduate students who will take part in R&D projects carried out by companies in TDZs and private sector R&D centers.

452.4. Social entrepreneurship will be regulated, the capacity for measurement of social impact will be enhanced, and the amount of support will be increased gradually in proportion to the contributions of good practices to the society based on analysis results.

Table 24: Entrepreneurship and SME Targets

	2018	2023
Share of SMEs in Exports (%)	56.2 ¹	60.0
Share of SMEs in R&D Expenditures (%)	19.6 ¹	25.0

Source: Data for the year 2023 are estimates of the Eleventh Development Plan.
(1) 2017 year data.

2.2.3.4. Intellectual Property Rights

a. Objective

453. The main objective is to strengthen the legal infrastructure and enforcement in the intellectual property system, to develop an ecosystem that supports the creation of intellectual property rights and to accelerate the commercialization of these rights.

b. Policies and Measures

454. It will be ensured that the importance of the products created as a result of intellectual labor will be adopted to all segments of society through programs executed at all levels of education; social consciousness will be strengthened through promotion, awareness raising and information activities.

454.1. Information and awareness raising activities will be carried out on innovation and intellectual property rights suitable for target audiences in all levels of education and emphasis will be placed on invention and design issues in vocational and technical education.

454.2. The subject of intellectual property rights will be added to curricula in undergraduate and graduate programs at the faculties of basic sciences, economics, business administration, architecture, engineering, communication, fine arts, and the establishment of departments on intellectual rights will be disseminated at the faculties of law.

454.3. Modular and certified trainings will be provided to the interested groups and awareness raising and information activities will be carried out within the Intellectual Property Academy.

454.4. Information activities will be carried out in order to raise public awareness about copyrights.

454.5. Hezârfen Project will be rolled out and modular programs will be developed in this scope to increase the awareness and capacity of SMEs about industrial property rights.

454.6. TURKPATENT Information and Document Units will be expanded and their role in awareness raising activities towards industrial property stakeholders will be strengthened.

454.7. In the software and informatics sector; informative and promotional activities will be carried out in order to increase the efficiency and familiarity of the copyright registration practice.

455. The contribution of products and works subject to intellectual property rights to national economy will be identified, monitored and evaluated, and the relevant information and data infrastructure will be strengthened.

455.1. The existing records, data and national statistics on the cultural industries subject to copyrights will be diversified.

455.2. A measurement report will be prepared on the economic dimension of the cultural industries subject to copyrights.

455.3. Reports will be prepared in which data and statistics related to industrial property rights are evaluated comprehensively and, their comparative analysis are made with general economic data; and also, regular communication will be established with rights holders and follow-up reports will be prepared related with sales and licensing of patents and designs.

455.4. The database of intellectual and artistic works will be integrated with the databases of collecting societies and will be enriched to include up-to-date data on copyright ownership.

456. Human and institutional capacity in the units concerned with the protection, enforcement and implementation of intellectual property rights along with the legislation governing this field will be developed in line with technological advancements and needs; and the cooperation between among the related institutions and organizations will be strengthened.

456.1. The number of Intellectual and Industrial Property Specialized Courts will be increased.

- 456.2.** The specialization of the magistrates' judiciary will be provided, in where complaints, search-seizures and appeals to court decision will be presented.
- 456.3.** The case-law of intellectual property proceedings will be shared with the implementing institutions.
- 456.4.** Regular specialty training will be provided to judges, prosecutors, mediators and court experts who will work in the field of intellectual property law.
- 456.5.** The relevant legislation for more effective protection of trade secrets related to intellectual property rights will be reviewed, intellectual property legislation will be developed and enforcement will be strengthened.
- 456.6.** A guideline will be prepared on the code of conduct for patent and trademark attorneys and legislation will be updated with the contribution of related parties.
- 456.7.** In the new technology fields, research activities will be conducted by following up global developments related to intellectual property protection and enforcement, and studies will be carried out to establish legal infrastructure in this field where necessary.
- 456.8.** Studies will be conducted to keep the industrial property rights ownership in Turkey for technologies which have strategic importance for our country.
- 456.9.** A database including information concerning patent applications related to digital transformation in industry will be created and shared with researchers.
- 456.10.** The institutional capacity and effectiveness of TURKPATENT as International Searching and Preliminary Examining Authority will be strengthened.
- 456.11.** The legislation on employee inventions will be effectively enforced, guidance will be provided on implementation and standard methods will be developed in this field.
- 456.12.** With regard to the industrial property rights developed within universities or through the cooperation of universities and other public institutions or private sector; the legal barriers reducing the efficiency of revenue sharing and commercialization stages will be eliminated.
- 456.13.** Auction halls and art galleries where fine art works are offered for sale will be identified and legislative work will be carried out to certify them.
- 456.14.** The Regulation on Fees for the Copyright and Adaptive Works Payable by Public Institutions and Organizations will be updated to include issues of works and related rights.
- 456.15.** Regular trainings will be provided to the commission members to ensure uniformity in implementation and inform them about the legislation in order to increase the effectiveness of provincial audit commissions.
- 457.** An impact analysis will be carried out on supports provided for intellectual property rights, duplicated supports will be eliminated and supporting system will be restructured.

- 457.1.** Design supports carried out by different institutions will be evaluated within the framework of an impact analysis.
- 457.2.** Supports for patent application and registration will be evaluated within the framework of an impact analysis.
- 457.3.** An analysis report will be prepared for existing supports provided to copyright-intensive industries.
- 457.4.** The projects for copyright-based cultural industries will be supported by observing the Convention on the Protection and Promotion of the Diversity of Cultural Expressions of the United Nations Educational, Scientific and Cultural Organization (UNESCO).
- 458.** The conversion of the industrial property portfolio into commercial value will be supported and specific programs will be developed for copyright-intensive industries.
- 458.1.** The linkages of R&D and commercialization supports with the intellectual property system will be strengthened.
- 458.2.** Tax incentives for the commercialization of intellectual property rights will be reviewed.
- 458.3.** An inventory of intellectual properties such as patents, utility models, designs, etc. belonging to public institutions and organizations including universities will be prepared; and informative activities will be carried out in order to enable the private sector to benefit from this inventory, and, priority will be assigned to the incentives for the commercialization of these rights if private sector so requests.
- 458.4.** A web portal will be prepared to provide information for the access of SMEs and industrialists to patented technology.
- 458.5.** Special support programs for copyright-based cultural industries will be developed.
- 459.** It is ensured that intellectual property assets will be used as a common means of access to finance.
- 459.1.** The valuation capacity of intellectual property assets will be increased and their use in banking and accounting system will be ensured.
- 459.2.** Valuation and consultancy services will be developed for converting industrial property assets to economic value.
- 460.** Copyright revenues will be increased by improving the collective rights management system for copyrights and creating a nationwide and fair licensing system.
- 460.1.** The applicable legislation will be updated in order to enable the collecting societies to operate more efficiently and transparently.
- 460.2.** A guideline will be prepared and implemented in order to increase the institutional capacity of collecting societies on collective rights management including professional management, data production, human resources and digital environment.
- 461.** The registration and use of geographical indications will be supported in order to enhance the competitiveness of our traditional, regional and local products at national and international scale.

461.1. Governance processes in the field of geographical indications will be developed, new platforms will be established for their trade and audit activities will be strengthened.

461.2. Registered geographical indications which have an export potential will be selected, and these geographical indications will be registered and promoted abroad.

461.3. The requirements will be identified in relation to the pre-application preparati-on process of the geographical indications that have the potential to be registered and

the development of their post-registration sales and marketing network; and based on this, capacity building projects will be implemented with the relevant stakeholders.

462. The linkages between our natural and cultural values consisting of traditional knowledge and folklore based on genetic resources and intellectual property system will be strengthened.

462.1. An inventory study will be carried out in order to improve the capacity of our country on traditional knowledge and folklore based on genetic resources.

Table 25: Targets on Intellectual Property Rights

	2018	2023
Share of Resident Patent Applications in Total (%)	39.7	53
Turkey's Position in Global Ranking of Resident Patent Applications	13	10

Source: Turkish Patent ve Trademark Office, World Intellectual Property Organization. Data for the year 2023 are estimates of the Eleventh Development Plan.

2.2.3.5. Information and Communication Technologies

a. Objective

463. Increasing productivity and competitiveness in the economy through development and use of information and communication technologies, thereby transformation of business processes is the main objective.

b. Policies and Measures

464. The fixed and mobile broadband infrastructures providing high speed and high quality access will be expanded, and the joint use of physical infrastructures will be encouraged.

464.1. The permit and right of way processes associated with the installation of electronic communication infrastructures will be streamlined, and regulations will be introduced on electronic communication information systems, fiber networks, base stations, right of way and facility sharing arrangements in order to expand the high-speed and high-quality broadband electronic communication infrastructures across the country.

465. Broadband infrastructures will be established and operated with government support in commercially inaccessible regions.

465.1. Infrastructure installation will be encouraged in regions where it is difficult to develop broadband infrastructures, taking into consideration regional disparities.

465.2. Infrastructure will be established in settlement areas where mobile communication infrastructure is not available.

466. The regulations in the electronic communications sector will be updated in accordance with the impacts of convergence in services and infrastructures, technological advancements and regional differences in supply and demand dynamics.

466.1. Impacts of convergence and emerging technologies will be taken into consideration in the regulations to be made regarding authorization, access, interconnection, user rights and universal service in the electronic communications sector.

466.2. Frequency resources will be allocated in accordance with technological developments and decisions of international organizations in the process of transition to 5G and beyond mobile communication technologies.

466.3. Within the scope of market analyses, potential regional differences geographical markets will be examined, periodic analyzes will be carried out to differentiate the obligations imposed by market analysis, in case appropriate conditions are met.

467. An infrastructure inventory will be created and kept up-to-date that enables effective enforcement of regulations in the electronic communications sector and qualified policy making.

467.1. Electronic communication infrastructure information will be entered into the Electronic Communication Infrastructure Information System by the operators.

468. Domestic value added in the ICT sector will be increased through public procurements and provisions incorporated into the authorization contracts signed by the government with private operators. The scale and qualifications of the services required by public institutions will be associated with the conditions to be satisfied by the firms that can provide these services, and a sound competitive environment will be established to allow for the development of SMEs and startups as well.

468.1. Principles and procedures will be established for increasing domestic value-added in the ICT investments of public institutions, and institutional procurement plans will be prepared for this purpose.

468.2. Procedures and principles to be followed in the execution of contracts for the ICT procurement of public institutions will be established and criteria will be set for the companies that are eligible to supply ICT products and services to public institutions.

468.3. Domestic production supports will be provided for 5G and beyond technologies and certain rate of domestic contribution will be introduced for the authorizations of 5G services.

469. In order to improve value-added satellite services and increase the global coverage of Turkey's satellite network, activities will be carried out for the development of satellite technologies using domestic resources and cooperation initiatives will be undertaken with satellite operators of other countries.

469.1. TURKSAT 5A, 5B and TURKSAT 6A to be developed by domestic capabilities, will be commissioned.

469.2. Satellite communication service coverage area in air and marine fields will be expanded through cooperation with the satellite operators of other countries.

470. In order to position Turkey as a regional hub for data storage, processing and transmission activities, necessary regulatory framework and incentive mechanisms will be designed and implemented.

470.1. Procedures and principles for establishing an Internet Exchange Point (IEP) will be determined and the IEP will be established.

470.2. Regulatory framework and an incentive mechanisms will be established to develop data center sector, and cooperation initiatives will be taken for the provision of cloud services with the countries having intensive trade relations with Turkey.

471. The maturity level of domestic software companies will be raised.

471.1. A sectoral data infrastructure, which covers operation areas, labor qualifications and maturity levels of the domestic software companies, will be established.

471.2. Diffusion of software development standards and acquisition of quality certifications will be financially supported.

471.3. Government incentives to the software sector will be restructured to cover R&D, P&D and marketing processes in a holistic way.

472. Open-source software ecosystem will be developed in order to boost domestic value-added and reduce security risks in the

field of software and qualified manpower will be trained to support this ecosystem.

472.1. Turkey Open Source Platform will be launched, critical software needed by the public and private sectors will be produced over this platform through crowdsourcing, service providers that can export these products will be formed and the software developer pool of our country will be expanded.

472.2. The young people with individual skills suitable for software development will be attracted into the software sector through internationally recognized certification programs.

472.3. Widespread and online training programs will be implemented to raise the qualifications and number of software developers, a training model and competency assessment system will be established to this end.

473. A national policy will be developed for the advancement and use of AI-related technologies.

473.1. A roadmap will be prepared for the national-scale studies aimed at the development of domestic technology production capabilities and roll out the efficient use of these technologies across the whole economy, in the field of artificial intelligence technologies.

474. An institutional structure will be set up through national cyber security regulations and technical infrastructure will be strengthened.

474.1. National Cyber Security Strategy will be updated, the regulations and tech-

nical infrastructure for cyber security will be strengthened and a strong coordination structure will be established.

474.2. Work will be conducted to ensure harmonization with EU's Directive on Security of Network and Information Systems (NIS).

474.3. Cyber security standards will be established in required areas.

474.4. Procedures and principles will be established and implemented for the installation of information security management system at critical infrastructures.

474.5. By establishing a cyber threat intelligence sharing network on threats against information and communication technologies infrastructures, capacity to intervene and coordinate national cyber security incidents will be increased and resources provided for cyber threat intelligence will be enriched.

475. Cyber security ecosystem will be developed based on national solutions.

475.1. In order to benefit from the cyber security ecosystem and to develop higher value-added products and solutions in this field, cyber security product and technology projects will be developed with the participation of public research institutions and universities and the outputs of these projects will be shared with the cyber security ecosystem as open source.

475.2. Export incentives will be offered to companies included in cyber security clusters.

476. Cyber security culture and human resources will be improved in all segments of society.

476.1. An integrated cyber security training and awareness platform will be established.

476.2. Cyber security trainings will be organized and activities aimed at awareness raising will be carried out.

476.3. Cyber security undergraduate and graduate programs will be established in universities, and cyber security curriculum of existing undergraduate informatics programs will be improved.

477. Necessary actions will be taken to ensure safer use of internet and to protect users from disinformation and illegal activities conducted via internet. Regulations in this field will be updated in line with international trends, and mechanisms will be established to ensure legal validity of electronic transactions.

477.1. Online platforms and fact-checkers will be supported to detect and flag disinformation campaigns.

477.2. Regulations for trust services (e.g., e-seal, SSL certificates, e-signature, PEP) will be updated to ensure compliance with the EU Trust Services and Electronic Identification Regulation.

477.3. Internet Law No. 5651 and related secondary regulations will be updated in line with international trends and principles.

477.4. Awareness raising activities will be carried out for the safe use of internet, and

Secure Internet Service will be promoted and introduced to a wider population.

478. Legal arrangements will be made to set out the basic approach and rules for cross-border data transfers, and methods will be explored to use digital data in a manner that creates higher value added.

478.1. A framework legislation will be adopted to allow for the identification of the definition, security level, storage and communication standards for data that should be stored in Turkey for security reasons and that bear strategic importance, in cooperation with the related stakeholders.

478.2. The methods and mechanisms for sharing digital data held by the economic actors at the largest possible scale, without prejudice to the principles of commercial secrecy and privacy, will be examined and relevant recommendations will be developed.

479. The regulations governing the protection of personal data will be updated in line with innovations brought by technology and new approaches adopted on the international platforms, and technological advancements will be encouraged in this field.

479.1. Law No. 6698 on the Protection of Personal Data will be updated in line with the EU's General Data Protection Regulation.

479.2. The development and use of privacy-enhancing technologies will be supported.

480. The disparities in internet access and usage among different income, region, gender and age groups will be reduced.

480.1. Internet access will be expanded through universal service resources.

480.2. Electronic communication tariff campaigns aimed at reducing digital divide will be supported within the framework of relevant regulations.

480.3. Digital divide will be reduced by means of instruments like awareness-raising trainings and development of digital content.

481. Accelerator centers will be set up for the emergence and maturation of internet ventures and their contact with investor networks.

481.1. Accelerator centers that enhance the development and success opportunities of innovative internet ventures will be established to increase cooperation among universities, investors and the business world.

482. Switchover process to digital broadcasting via terrestrial transmitters will be completed and broadcasting infrastructure will be consolidated in certain sites to avoid visual pollution.

482.1. Auctions for digital terrestrial broadcasting (TV) licenses will be held.

482.2. Auctions for digital terrestrial broadcasting (radio) licenses will be held.

482.3. Broadcasting towers will be constructed in certain sites to provide infrastructure for digital broadcasting.

483. Digital transformation ecosystem will be established by improving cooperation among public sector, private sector, universities and NGOs.

484. Researches needed in the field of digital transformation will be conducted and statistics will be reproduced.

484.1. The Digital Transformation Research Program will be launched covering technical analyses, academic and field studies

and similar activities in the field of digital transformation.

484.2. Up to date statistics in the field of digital transformation will be compiled and they will be used effectively in national and international index studies.

Table 26: Information and Communication Technologies Targets

	2018	2023
Mobile Broadband Penetration (%)¹	74.5	100
Fiber Broadband Penetration (%)²	3.4	11.5
Turkey's Rank in UN-ITU Global Cyber Security Index	20/175	14/175
Rate of Internet Use Among Women (%)³	65.5	90

Source: Data for the year 2018 were taken from the Information and Communication Technologies Authority, TURKSTAT and the International Telecommunications Union. Data for the year 2023 are estimates of the Eleventh Development Plan.

(1) The ratio of the number of mobile broadband subscribers to the population.

(2) The ratio of the number of fiber broadband subscribers to the population.

(3) The ratio of internet users among the women in the 16-74 age group.

2.2.3.6. Energy

a. Objective

485. The basic objective is to ensure uninterrupted, high-quality, sustainable, reliable and affordable energy supply.

b. Policies and Measures

486. A competitive investment environment will be developed to meet the growing demand for energy while observing the viability of an energy market that is financially strong, stable, transparent, and predictable and that protects consumers and takes sustainability into consideration.

486.1. Medium and long term energy supply-demand planning will be made.

486.2. Cost-based pricing practices will be adopted to ensure competition in the electricity and natural gas markets.

486.3. A market infrastructure will be established to ensure demand side participation.

487. Rehabilitation of the publicly operated power plants will be completed.

487.1. Rehabilitations of Afşin-B Thermal Power Plant, Keban Hydroelectric Power Plant (HEPP), Karakaya HEPP and Hirfanlı HEPP will be realized.

488. Nuclear Power Plants (NPPs) will be included in the electricity generation portfolio, efforts will be continued to increase the share of nuclear energy in electricity generation and institutional capacity will be strengthened.

488.1. Construction of the first unit of Akkuyu NPP will be completed and electricity production will be started in 2023.

488.2. In addition to the Akkuyu NPP, the work on the installation of two additional NPPs will continue.

488.3. Due to technology transfer in NPPs, measures will be taken to reduce dependence on foreign technology in nuclear technology.

488.4. Nuclear Technical Support Joint Stock Company will be operated to provide technical support, analysis, consultancy, supervision, training and certification services required by the Nuclear Regulatory Authority.

489. The use of domestic lignite reserves in the production of electrical energy in accordance with environmental standards will be increased.

489.1. Dependence on imported sources in electricity generation will be reduced and employment will be provided by generating electricity from public lignite fields.

489.2. Measures to reduce carbon emissions will be developed through additional measures such as energy efficiency gains and increasing forest assets.

489.3. R & D projects related to clean coal technologies will be supported.

490. Natural gas supply security will be strengthened and access to natural gas will be increased.

490.1. Tuz Gölü Natural Gas Underground Storage Project and North Marmara Na-

tural Gas Storage Extension Project will be completed and total natural gas underground storage capacity will be increased to 10 billion cubic meters.

490.2. Floating LNG Storage and Regasification Unit (FSRU) vessel will be provided and FSRU connection systems will be completed in order to increase the diversity of source country and routes in natural gas.

490.3. Natural gas transmission and distribution infrastructure will be strengthened, access to natural gas will be ensured in places which have necessary conditions.

491. Electricity generation from renewable energy sources will be increased and necessary planning and investments will be realized in order to ensure the safe integration of renewable energy generation to the grid.

491.1. Thanks to YEKA-like models, renewable resources will be used more intensively in the generation of electrical energy.

491.2. The integration of renewable energy generation facilities into the grid and related technical assistance projects will be implemented.

491.3. Energy storage systems, including pumped storage HEPP, will be installed in order to eliminate the constraints of increasing renewable energy on the grid.

492. Buildings that are more efficient and produce their own energy will be expanded.

492.1. Energy efficiency in existing buildings will be promoted through support-systems.

492.2. National Green Building Certificate System will be established.

492.3. Unlicensed solar power plant and wind power plant applications will be extended to meet their own electricity needs.

492.4. Energy Efficiency in Public Buildings Project will be implemented.

493. Electrical networks and systems will be strengthened and made more flexible.

493.1. Smart network applications will be expanded.

493.2. Regional competence in electricity supply will be ensured, electricity transmission infrastructure investments will continue to be implemented in a way to ensure the security of the system and the supply and demand conditions of the regions.

493.3. Technical and non-technical losses in electricity will be reduced. In this framework, awareness-raising, incentive and sanction practices will be established to reduce non-technical loss, the use of systems such as smart meters and remote reading will be expanded and inspections will be increased.

494. Cross-border trade opportunities will be improved by increasing the international electricity interconnection capacity.

494.1. Van Back to Back System and connection lines which enable electricity trading between Turkey and Iran will be implemented.

494.2. Tortum-Georgia energy transmission line project will be completed.

494.3. The capacity of technical infrastructure and market infrastructure required increase foreign trade in electricity will be increased.

495. Activities will be carried out effectively for being an energy trade center by using the geostrategic position of our country, which is located between the producer and consumer regions in energy and develop electricity and natural gas trade platforms within the Energy Market Operations Inc. (EPIAŞ) with the new market products.

495.1. The Turkish Stream Land Section-1 Natural Gas Pipeline Project, which constitutes the part of the Turkish Stream Pipeline project that is the responsibility of our country will be complete.

495.2. Infrastructure for gas transmission from Caspian basin to Europe will be put into service by completing the remaining parts of the Trans Anatolian Natural Gas Pipeline Project.

495.3. The deepening of trade in the organized wholesale natural gas market and the formation of derivative markets that will pave the way for futures transactions in the electricity and natural gas market will be provided in the continuous trading platform operated by EPIAŞ.

496. The operation of energy infrastructure will be maintained in an effective and safe manner.

496.1. A Cyber Security Operation Center will be established for the safe operation of critical energy infrastructure.

496.2. Efforts will be made to develop a Management System (National SCADA) National Intelligent Network (Smart Grid) for use in energy SEEs.

Table 27: Energy Sector Targets

	2018 ¹	2023
Primary Energy Demand (kTOE)	147,955	174,279
Electrical Energy Demand (TWh)	303.3	375.8
Primary Energy Consumption Per Capita (TOE/Person)	1.81	2.01
Electrical Energy Consumption Per Capita (kWh/Person)	3,698	4,324
Share of Natural Gas in Electricity Production (%)	29.85	20.7
Share of Renewable Resources in Electricity Generation (%)	32.5	38.8
Amount of Electricity Produced from Domestic Sources (TWh)	150.0	219.5
Installed Power Capacity (MW)	88,551	109,474

Source: Data for 2018 were taken from the year the Ministry of Energy and Natural Resources and TEİAŞ. Data for 2023 are estimates of the Eleventh Development Plan.

Note: TOE: Tonne of Oil Equivalent, kTOE: Thousand TOE, kWh: Kilowatt-hour, TWh: Billion Kilowatt-hour, MW: Megawatt.

(1) Data for 2018, excluding electricity installed power, are estimates.

2.2.3.7. Mining

a. Objective

497. The basic objective of the mining sector is to ensure the security of raw material supply and to improve the contribution of the mines to the national economy by increasing the value added by processing the minerals in the country.

b. Policies and Measures

498. In order to reduce the import dependence and current accounts deficit in energy, exploration, generation and R & D activities will be increased for high potential domestic resources such as geothermal and shale gas, especially lignite.

498.1. Exploration of lignite reserves will be completed and the plant will be ready for tender.

498.2. Extensive exploration activities about shale gas and methane gas will be conducted.

498.3. Studies on the generation of synthetic oil from bituminous shale will be initiated.

499. Compliance of mining sector with environmental and occupational safety legislation will be improved within the framework of sustainable development principles.

499.1. Awareness of compliance with environmental and occupational safety legislation will be improved.

499.2. Training and certification activities will be maintained and mining-specific corporate occupational safety infrastructure will be developed.

- 500.** Efficiency of the bureaucratic structure will be ensured in the permit processes and investment guarantee will be improved.
- 500.1.** Infrastructure for authorization of permissions and licences in mining activities will be established electronically.
- 500.2.** Permission processes to ensure investment guarantee will be simplified and investment licence procedures will be accelerated and administrative burdens on the investor will be eased.
- 501.** The expansion of the firm and enterprise scales will be encouraged.
- 501.1.** Efforts will be accelerated to improve the cost effectiveness and occupational safety in watershed mining and nearby areas.
- 501.2.** Measures will be taken to strengthen the technical and financial structures of mining firms.
- 502.** With the object of increasing value added in mining sector, priority will be given to the domestic processing of minerals and development of end products and the domestic production of machinery and equipment used in mining will be supported.
- 502.1.** The application of generation conditions including advanced stages in the tender of the mining license areas will be expanded.
- 502.2.** Production infrastructure of mines with high economic potential and other critical raw materials will be set up.
- 502.3.** Domestic production of energy and mining machines and equipment will be improved.
- 503.** Exploration activities in Turkey and abroad will be increased in order to meet the raw material demands of the energy sector and industry; priority will be given to the exploration of rare earth elements, boron and other economically potent mines.
- 503.1.** Exploration activities in Turkey and abroad will be accelerated in order to meet the needs of oil and natural gas and geothermal resources of energy sector and raw materials of the industry.
- 503.2.** Offshore seismic research and drilling activities for oil and natural gas exploration on sea fields, including Turkish Republic of Northern Cyprus sea fields, will be intensified and the total number of offshore drillings to be carried out by the end of 2023 will be increased to 26.
- 503.3.** Projects will be developed for the exploration and research of critical raw materials and rare earth elements identified by countries and country groups.
- 503.4.** MRE's overseas investment and production opportunities will be determined and projects will be developed in cooperation with other country entities in terms of mineral exploration and investment.
- 504.** In order to increase the exploration activities of the private sector, studies will be carried out to reduce the financial risks.
- 504.1.** A mechanism will be established to reduce mining exploration risks financially.

504.2. A Mining Investment Partnership model will be established so that the mining operation and exploration could be carried out in international standards.

504.3. Studies will be conducted for the preparation of exploration and reserve reports in accordance with international standards.

505. Basic and critical mines for Turkish economy will be determined.

505.1. A roadmap will be prepared for the safe supply of basic and critical mines and rare earth elements.

505.2. The regulations regarding the strategic reserve, stocks and export restrictions for these metals will come into force.

Table 28: Mining Sector Targets

	2018	2023
Ratio of Mining Value Added To GDP (At Current Prices, %)	0.85 ¹	1.3
Mining Exports (Billion Dollars, Current Prices)	3.4	10.0
Proved Lignite Reserve (Billion Tons)	18.9	20.0
Number Of Offshore Drilling (Total Offshore, Cumulative)	2	26

Source: The data for 2018 are from TURKSTAT and Ministry of Energy and Natural Resources. 2023 figures are forecasts of the Eleventh Development Plan.

(1) Realization estimate.

2.2.3.8. Logistics and Transportation

a. Objective

506. Improving intermodal and multimodal transport practices while utilizing geographical advantage of Turkey; increasing shares of railways and maritime transport in modal split; reducing logistics costs, facilitating trade, and increasing the competitiveness of Turkey by establishing a rapid, flexible, safe, reliable and integrated transport system is the main objective.

b. Policies and Measures

507. Integration between transport modes will be strengthened and measures will be taken to eliminate barriers to entry into the sector.

507.1. The dispersed status of logistics legislation will be integrated and simplified,

and the combined transport legislation will be published.

507.2. A program package will be prepared for the administrative and financial incentives of combined freight transport services, combined freight terminals, and hubs.

507.3. Along with the standards for the, logistics centers and branch lines, the operation and management models will be determined.

507.4. Freight forwarder license will be issued in a way to increase the level of liberalization and competitiveness in the sector, and its compatibility with other licenses will be ensured, in addition to that, barriers to entry to sector and sectoral informalities will be reduced with those regulations to be made, and the predictability and institutionalization level of the sector will be improved.

507.5. Secondary legislation on promoting private railway operations and improving liberalization on railways will be completed.

508. Service level parameters such as flexibility, speed, predictability, safety, quality, economies of scale and innovation will be improved in logistics activities.

508.1. A dynamic transport database will be established to measure freight mobility, utilization of idle capacity, optimize costs and prevent informality activities in road transport, and this database will be made accessible to all stakeholders, and necessary arrangements will be made to implement sharing economy models through digital platforms and applications.

508.2. Operational inspections in road transport will be increased and enabled to improve measures for safety of life, property and environmental safety in the road network.

508.3. Necessary legal and physical infrastructure projects in transportation and customs services will be completed in order to facilitate use of blockchain applications.

508.4. Diplomatic channels will be utilized to the highest level in order to protect the rights of our country within the scope of international law in order to eliminate restrictions on road transit transport to EU countries.

509. In order to ensure more efficient use of resources, increase efficiency, and ensure a task-oriented organizational structure; the split of tasks in the railway sector institutions will be reorganised into infrastructure

construction, operations and maintenance, as well as train operations, maintenance and repair divisions.

509.1. Railway infrastructure construction, maintenance, infrastructure access and allocation, network notification, safety management, regulation and supervision, railway operation, ownership of railway vehicles, manufacturing and maintenance of rolling stock activities will be separated from each other organizationally, as well as an effective working mechanism will be established between these activities and thus the sector will be restructured.

509.2. The duty of fulfilling the public service obligation of railway passenger transport will be rearranged, and public service obligations will be accomplished through tenders, in addition to that railways will be opened to alternative rail operators.

510. Port investments of public and private sectors in our country will be coordinated holistically, environment friendly, sustainable port practices will be expanded.

510.1. Necessary measures will be taken by the Ministry of Transport and Infrastructure through coordinating the relevant partner institutions in order to prevent small-scale, disorganized, inefficient and low-quality port infrastructure.

510.2. Port service items will be identified and standardized in all ports.

510.3. Green Port applications will be supported to increase energy efficiency in port operations, minimize environmental impacts and ensure sustainability.

511. An organizational structure will be established to ensure the timely and adequate coverage of maintenance and repair services in the transport sector and the necessary investments will be focused on keeping the transportation infrastructure at a sufficient level of service.

511.1. An asset management system based on the concept of preventive maintenance on highways will be established; BHM coating construction will focus on routes with heavy vehicle traffic above 1,000 AADT.

511.2. In construction and technical consultancy related tenders, procurement of services will be made without compromising on quality. Necessary legal and institutional arrangements will be put into practice for maintenance and repair services to be carried out mainly by private sector through performance based contracts.

511.3. Maintenance and repair activities of railway infrastructure and railway vehicles will be improved and an asset management system based on the concept of preventive maintenance will be established.

511.4. An asset management system based on the concept of preventive maintenance in airports infrastructures will be established.

511.5. The architecture relating to Intelligent Transportation Systems (ITS), which ensures energy and time saving in the road network, traffic safety, and efficient use of highway capacity will be completed in partnership with the local authorities and put into practice.

512. Casualties, injuries and damages caused by road traffic accidents will be minimized.

512.1. The Secure System Approach, which assumes that road users would make violations and considers road safety as a common responsibility of all actors in the traffic system, will be adopted and institutional structure will be established accordingly.

512.2. The bottlenecks in the road network will be eliminated, the accident black spot areas will be improved and a total of 2,872 km of multi-lane highways will be constructed.

512.3. Coordination and data sharing among existing institutions and organizations in traffic safety will be maximized.

512.4. In order to ensure the highest level of traffic safety, enforcements will be improved by taking advantage of developments in road technologies and road users will be informed about traffic safety.

512.5. Electronic Speed Control Systems will be based on average speed control instead of instant speed control.

513. Demand management concept will be adopted to ensure the sustainability of the transportation system and the efficiency of the existing infrastructure and transport investments will be rationalized based on efficiency.

513.1. Demand management system will be implemented with dynamic pricing on motorways and bridges.

513.2. Transport investments will be reviewed with a focus on priority and efficiency, and projects that have lost their priority and feasibility will be terminated to ensure the rationalization in investments.

514. National spatial plans and transport master plans will be handled in a holistic way; urban logistics plans, strategic spatial plans on macro scale, environmental management plans and logistics master plans will be prepared and implemented in coordination.

514.1. Logistics Master Plan of Turkey and National Transport Master Plan will be completed in a coordinated manner.

514.2. The legislation will be made for the preparation of urban logistics plans, and guidance documents will be published.

515. Service quality will be improved through customer-oriented demand management and modern train operation in railway passenger transport; rapid, safe, secure and

comfortable railway transportation will be provided.

515.1. Safety standards will be increased in railway transportation, and level crossings will be transformed into controlled pass systems, additionally barrier-free transportation systems will be devised in railway stations and terminals.

515.2. Rapid and high speed train lines under construction will be completed in order to create a more balanced modal split and increase passenger comfort.

515.3. Train planning activities will be based on supply & demand levels in high speed train lines, and travel times will be shortened by increasing express train services.

Table 29: Logistics and Transportation Sector Targets

	2018	2023
Length of Rapid and High Speed Train Lines (km, cumulative)	1,213	5,595
Share of Railway Passenger Transportation in Total (in modes of national territorial transport, %)	1.3	3.8
Share of Double-Track Railway Length in Total Main Line (%)	12.4	26.3
Share of Cargo Handled in Cabotage Line in Total Handling (%)	12.9	18
Airport Total Passengers (Including Direct Transit) (Million)	211	266
Multi-Lane Divided Highways (motorways included)	26,642	29,514
Motorways (km , cumulative)	2,842	3,779
Bituminous Hot Mix Coated Road Network (km, cumulative)	25,215	31,478
Number of Improved Accident Blackspot	70	75
Casualties Caused by Traffic Accidents	6,675	4,900

Source: 2018 data are from Ministry of Transport and Infrastructure and TURKSTAT. Data for 2023 are estimates of the Eleventh Development Plan.

Postal Sector

a. Objective

516. The main objective is to establish a competitive environment in the postal sec-

tor in order to provide fast, high quality, affordable, diverse and reliable services which contribute to sustainable development and employment.

b. Policy and Measures

517. During the liberalization process of postal market, a competitive market will be established in the sector through effective regulation and supervision.

517.1. The monopoly area allocated to the universal service liabilities will be identified on the basis of quantitative criteria.

517.2. Legislation will be enacted to eliminate the duplications and inconsistencies between Road Transport Law, Postal Services Law and secondary legislation.

2.2.3.9. Services for the Promotion of Trade and Consumer Protection

a. Objective

518. The main objective is to make our country one of the important trade hubs where trade is easy and safe and consumer rights are protected with quality-oriented, innovative approaches and practices.

b. Policies and Measures

519. The disruptions that may be encountered in the functioning of the market in wholesale and retail trade sector will be eliminated by taking the developments in the agricultural and manufacturing industry sectors and the benefits of consumers into consideration.

519.1. The Retail Information System (PERBIS) will be completed and PERBIS Regulation will be prepared and put into practice.

519.2. Legislative works will be completed to ensure the modernization of wholesale

food markets and similar structures in order to promote wholesale trade practices.

520. Studies to ensure confidence in e-Commerce will be completed, the market shares will be increased, especially in regions that Turkey has competitive advantage thanks to geographic and cultural proximity

520.1. The use of Trust Mark System will be increased.

520.2. The software operations of the E-Commerce Information System will be completed and the system will be put into practice in order to make the e-commerce enterprises accessible and to follow the e-commerce data in a healthy way.

520.3. In regions where Turkey has competitive advantage, e-commerce market share will be increased through bilateral and multilateral agreements.

520.4. In order to make Turkey a regional hub for trade in e-commerce, a regional center will be established in a location close to Istanbul Airport, where storage, customs clearance, shipping and return processes can be carried out together and all relevant institutions will serve in coordination.

520.5. In order to increase exports through e-commerce, local companies will be supported to participate in electronic market places.

520.6. Legislative arrangements will be made and implementation will be improved with the coordination of the relevant institutions to facilitate the return process of products in cross-border e-commerce.

520.7. A model that ensures product safety controls in e-commerce will be developed and necessary legal regulations will be made.

521. The legislation on consumer protection will be reviewed and practices will be improved.

521.1. The legislation on consumer protection will be reviewed in line with current

developments and the effectiveness of market surveillance and inspection activities will be increased.

521.2. Promotion and awareness raising activities will be carried out to promote conscious consumption.

521.3. Service satisfaction index for consumers will be created.

Table 30: Targets on Trade and Consumer Protection Services

	2018	2023
Number of Licenced Storage	70	140
e-Commerce Share in Retail Trade Market (%)	4.5	10
Number of e-Commerce Sites Receiving Trust Stamp	-	5,000
e-Commerce Transaction Volume (Billion TL)¹	138.9	300.0
Ratio of Online Shoppers (%)²	29.3	43.0

Source: Data for the year 2018 were taken from Ministry of Trade, TURKSTAT and The Interbank Card Center. Data for the year 2023 are estimates of Eleventh Development Plan.

(1) The amount of card transactions occurred over the Internet.

(2) The Rate of Individuals Who Purchased Goods or Services over the Internet for Personal Use.

2.2.3.10. Customs Services

a. Objective

522. The basic objective is to reduce bureaucracy and costs, facilitate trade and travel, prevent smuggling by applying effective control methods and ensure transparency and predictability in procedures, in line with international standards and our obligations.

b. Policies and Measures

523. The control, permit and approval processes implemented by various government agencies and the documents required for these processes will be reviewed by the relevant agencies with a view to make them rational and the bureaucracy will be reduced through digitalization.

523.1. The ongoing works for obtaining the documents, supplied by different agencies for customs processes, in electronic form from a single point will be completed.

523.2. All the documents lodged to the delivery offices for the allocation of clearance certificates will be transferred to the electronic form and submission of of the documents in paper form will be terminated.

523.3. The facilitations provided to the Authorized Economic Operators by the current regulations will be actually implemented, and additional facilitation will be provided to these firms.

523.4. The penalties stipulated in the Customs Law will be reviewed and made more moderate.

524. The fees charged for documents, tests and approval procedures required by public authorities during the customs stage for exports will be reviewed and those fees which constitute an obstacle in terms of competitiveness will be re-determined.

524.1. The disinfection fees charged by the governorates at border gates and other practices which inflict additional costs will be reviewed and regulated accordingly.

525. Coordination among the government agencies involved in customs processes will be strengthened and customs services will be carried via single window.

525.1. The legislation to duplicated tests conducted at laboratories operated by different institutions, will be reviewed and the all the required analysis will be made on the basis of the principle of single sample – single analysis.

525.2. The customs administrations that need other relevant agencies to assign personnel will be identified and necessary assignment will be made.

525.3. Single card application will take effect at port entrances.

525.4. All the agencies performing at border posts will work on a 24/7 basis.

526. Information and communication technologies will be utilized at the maximum level in order to improve efficiency of customs services.

526.1. New BİLGE (Computerized Customs Activities) Project will be implemented.

526.2. The automation systems operated by various government agencies will be integrated.

526.3. All payments will be enabled to be made by cards and electronic systems means at land border posts and internal custom offices.

527. In order to ensure uniformity in practice, the authorizations and responsibilities for customs processes will be further clarified, human resources will be improved both qualitatively and quantitatively, and the level of specialization will be increased.

527.1. Customs staff will be assigned at the necessary places and divisions on the basis of their skills and specialization.

527.2. Personnel needs will be determined and the necessary number of personnel with required skills will be employed.

527.3. Practical on-the-job and joint training programs will be organized and supporting guides will be published for the customs personnel.

527.4. The capacity of the Customs Training Centre will be expanded, and priority will be assigned to applied training.

528. In order to enhance compliance of traders and passengers to the customs legislation, the necessary information and documents will be published in an up-to-date, accurate, clear and easily accessible manner.

528.1. Customs Guide website will be used effectively for publishing the basic information and documents required by the traders

and passengers in an up-to-date, accurate and easily understandable manner.

528.2. Information on the customs related regulations, procedures, fees and documents applicable to the mandates of relevant institutions will be published on their website in an updated,, comprehensive and clear manner.

528.3. Seminars and training programs will be organized in cooperation with non-governmental organizations to to raise awareness on customs services.

528.4. Institutional social media accounts will be used effectively in publishing information.

528.5. The technical infrastructure of call centers will be improved, the number and qualifications of the relevant personnel will be raised.

529. The efficiency of customs controls and combat with smuggling will be enhanced.

529.1. The use of advanced technology systems and practices will be rolled out in the customs control of goods, vehicles and passengers, within budgetary capacities.

529.2. The safety of imported goods will be ensured within the framework of international agreements, and the legal, technical

and administrative infrastructure of inspections required for the identification of the compliance of these products with technical legislation and their safety status will be improved in view of our international obligations.

529.3. In order to efficiently carry out veterinary border controls, service buildings will be constructed at İstanbul Airport and Sabiha Gökçen Veterinary Border Control Directorates, location issues will be solved at Ambarlı, Derince ve Tekirdağ ports, and the required machinery and equipment will be provided.

529.4. Data Management and Targeting Software Project will be implemented.

529.5. In order to evaluate foreign trade transactions more analytically, the Institutional Decision Support System software will be updated and its capacity will be expanded.

529.6. The efficiency of risk-based controls will be improved, effectiveness and selectivity of ex-post control system will be strengthened.

529.7. The efficiency of the disposal transactions will be increased and disposal processes will be accelerated.

Table 31: Targets in Customs Services

	2018	2023
Total Number of AEO Firms	415	575
Turkey's Rank at Trading Across Borders Index ¹	42	37
Average Time, an Export Shipment Waits Under the Surveillance of the Customs at Ports (Days)	2.1	0.8
Average Time, an Export Shipment Waits Under the Surveillance of the Customs at Land Border Posts (Hours)	6.2	2.4
Rate of Export Declarations Cleared Within the First 4 Hours (%)	84	90
Decline in Red Lane Rates in Exports (%)	3.5	2.8

Source: Data for the year 2018 is from Ministry of Trade. Data for the year 2023 are estimates of Eleventh Development Plan.

(1) 2018 data taken from World Bank.

2.2.3.11. Construction, Engineering-Architectural, Technical Consultancy and Contracting Services

a. Objective

530. The basic objective is to make the construction industry a sector that is based on quality-focused competition that relies on high-quality supply and demand, that is human centric, environment friendly, and that has high design and technological capabilities and high R&D capacity and value added and make it a global brand abroad.

b. Policies and Measures

531. Domestic and innovative technologies shall be integrated into production processes in the construction sector and sectoral growth that relies on high-quality supply and demand shall be achieved.

531.1. Public procurement in construction works and technical consultancy services shall be conducted without compromising on quality.

531.2. The necessary legislative preparatory work will be completed so that local

expertise is also taken into account in domestic technical consultancy service procurements.

531.3. The building inspection system and its technological compliance capacity shall be improved.

531.4. Private sector construction contractors shall be classified according to their economic and technical qualifications, and the maximum contract values that they can assume shall be linked to their levels of qualification so as to protect consumers and to support qualified companies in the sector.

532. Overseas contracting and technical consultancy sectors shall continue to be supported.

532.1. Overseas contracting services shall continue to be supported towards positioning, strengthening and growing into a brand in international markets such that they can enter into new markets, can deepen in existing markets and can contribute to the export of Turkish construction products.

532.2. Trade policy instruments will be used so that the contracting sector can

undertake projects abroad and establish partnerships with companies from other countries, which could contribute to our companies in terms of technological advantage, access to finance and market penetration.

532.3. The overseas activities of Turkish technical consultancy firms shall continue to be supported.

Table 32: Technical Consultancy and Contracting Services Targets

	2018	2023
Overseas Technical Consultancy Services Annual Total Project Value (Million Dollar)	166	225
Overseas Contracting Services Contract Value (Billion Dollar)	20.8	35

Source: Data for the year 2018 figures were taken from the Ministry of Trade. Data for the year 2023 are estimates of the Eleventh Development Plan.

2.2.3.12. Management Consultancy

a. Objective

533. The basic objective is to bring management consulting services sector to a position that provides knowledge-based, qualified, visionary and strategic support to the private and public sector, that can export its services to the neighboring regions and advanced countries, as well as to make sure that the sector takes part in the national development process.

b. Policies and Measures

534. Management consultancy services shall be efficiently and widely utilized in all stages of development.

534.1. Knowledge sharing and training programs will be conducted for public institutions towards more efficient use of management consultancy services.

535. Management consultancy service providers will be enabled to develop capacities and competencies suitable for global competition.

535.1. Organizational structures and procedures shall be defined towards certifying vocational qualifications in the management consultancy sector.

2.3. QUALIFIED PEOPLE, STRONG SOCIETY

536. Sustainable development and inclusive growth are possible through a coordinated implementation and carrying out collectively of efficient economic policies targeting a stable economy and social policies targeting a peaceful society. The development perspective for Plan period has been prepared through an inclusive approach covering all sections of the society including children, youth, women, disabled individuals and elderly who require special policies.

537. It is aimed to train qualified people who will convert knowledge into economic and social benefit and are capable of using technology and tend towards production through the development of comprehensive and qualified education in all levels in order to strengthen the human structure of our country. In this framework, it is aimed that providing accessibility for all individuals to comprehensive and qualified education and lifelong learning possibilities. During the Eleventh Development Plan period, policies will be implemented and necessary arrangements will be made in all processes in the fields of education, culture, art and sports in order to raise productive and happy individuals.

538. Health services is another important factor in achieving development goals. In this context, It is aimed to provide quality health services in order to ensure that individuals are physically, socially and psychologically in well-being situation, to ensure their active and healthy participation in economic and social life through increasing their quality of life. Regional distribution in the provision of health services will be

improved, and the quality of physical infrastructure and human resources will be enhanced.

539. Policies taking into consideration the significant changes caused by digital transformation and technological developments in the labor market and offering decent job opportunities to all sections of the society will be implemented, during the Plan period, where solutions have been developed for the problems faced by youth, women and disabled people in entering and staying in the labor market.

540. In addition to the developments in the labor market, it is important that all sections of the society benefit the welfare created by the development in addition to the reduction of poverty. Improvement of the income distribution, taking care of the disadvantaged groups, and extending social assistance and social services will be the main policy priorities in this field.

541. Policies for strengthening family are the most effective and important one among the public policies on social integration and reducing the social risks. Significant policies and measures, towards making family policies with a participatory approach involving all stakeholders, improving the quality, extensiveness and effectiveness of the family related services will be implemented during the Eleventh Development Plan Period.

542. The establishment of a strong society is possible through the empowerment of women. Within this framework, efforts will be made to increase the accessibility of girls and women to education and training, and their participation in social and economic life, facilitate their access to resources, and

raise public awareness and development of status of women within the society.

543. Effective policies starting from early childhood will be implemented in order to turn into advantage and to make the best of the population potential of our country having the high rate of child and youth population. Within the framework of the Eleventh Development Plan, it is aimed to bring up/raise our children as individuals who have humanitarian and moral values, who are conscious, well-educated, respectful and self-confident.

544. During the Eleventh Development Plan which aims at putting forward the potential of youth as an important driving power of development; policies are being proposed aiming youth having high life skills, self-confidence, humanitarian and national values, equipped with requirements of information society, actively participating to social, political and economic life through their skills, education and choices, being sensitive to the society they live in and its problems.

545. It is aimed at increasing the quality of life of the elderly through establishing an environment where the elderly live independently, actively and healthy at its opinion, being involved in social and economic life.

546. Social adaptation of migrants will be ensured; the capacity of migration management will be strengthened.

2.3.1. Education

a. Objective

547. The basic objective is to raise happy and productive individuals who have ad-

vanced thinking, perception and problem solving skills, self-confidence, sense of responsibility, entrepreneurial and innovative peculiarities, internalized democratic values and national culture, who are open to sharing and communication, have strong sense of arts and aesthetics and are skilled at using technology, through enabling access to comprehensive and qualified education and lifelong learning opportunities for all individuals.

b. Policies and Measures

548. Access to education at all levels will be provided based on equal opportunity principle.

548.1. The age of five years will be included in the compulsory schooling for early childhood education, alternative early childhood education models will be set with flexible time options; and the additional classrooms needed for this purpose will be constructed.

548.2. Full-time schooling will be take place at all education levels in the Plan period; and the additional classrooms needed for this purpose will be constructed.

548.3. The efficient use of other educational buildings in the place where the classrooms are planned to be built will be taken into consideration, while planning the new classroom constructions, and the use of unused educational buildings will be given priority.

548.4. Schooling and graduation rates will be increased and the rate of absenteeism will be reduced at all levels of education.

548.5. Access to education opportunities of persons under temporary protection will be increased.

549. Educational environments taking into consideration children's mental and physical development will be established.

549.1. Educational buildings will be designed in accordance with the technology and environment, as safe, economic, aesthetic and accessible with high architectural standards and quality.

549.2. Design and skill studios will be established in accordance with the interests and abilities of the students at all levels of education.

550. The disparities of success among schools will be reduced by increasing the quality and facilities of schools at all levels of education.

550.1. Support programs will be implemented for the academic and social development of the students.

550.2. School lunch program will be implemented starting with the disadvantaged areas.

550.3. Quality assurance system will be established in education.

551. Learning content and curriculum will be prepared on the basis of national, moral and universal values and by taking into consideration the global developments and needs.

551.1. Teaching programmes will be formed as a flexible, modular and applied structure.

551.2. Mathematics and Turkish proficiency of students will be improved in all levels of education.

551.3. Mathematics and Turkish teaching programmes will be updated.

551.4. In-service trainings programs will be implemented to ensure the adaptation of mathematics and Turkish teachers to the new teaching programmes.

551.5. Course schedules will be restructured at the basic and secondary education levels.

551.6. The contents of the Education Information Network portal will be enriched by harmonizing with teaching programmes and the effective use of the portal will be spreaded.

551.7. Network infrastructure and interactive board will be established in schools in order to ensure access to technology.

551.8. The students at secondary education level will be provide to participate in scientific activities at the universities and benefit from the research and laboratory facilities of the universities.

551.9. The materials related to foreign language education will be enriched and a system will be developed to measure all skills in listening, speaking, reading and writing.

552. Human and physical facilities will be strengthened in order to make individuals with special education needs to benefit from the educational services.

552.1. Provincial surveys will be carried out in order to identify the individuals with

special education needs and needs maps will be produced.

552.2. Mobile platforms will be established for the expansion of special education services.

552.3. The physical infrastructure of the learning environments, richness of teaching parograms and materials, self-care skills, integration practices and the standards of guidance services will be improved.

552.4. A Board of Education, Science and Evaluation will be set up for the children with special talents.

552.5. In cooperation with universities, the quality of intelligence and talent tests will be improved, intelligence and talent diagnosis and monitoring centers will be established.

553. The motivation and professional development of teachers and school administrators will be increased and the social status of the teaching profession will be strengthened.

553.1. Teaching Profession Act will be enacted.

553.2. In the regions where housing opportunities are limited, housing investments that will meet the housing needs of teachers will be continued.

553.3. School administration will be transformed into a professional occupation and an accreditation structure for executive education will be established.

553.4. A competence and merit based career system will be implemented.

553.5. Minor degree programs and vocational guidance skills of primary school teachers will be developed.

553.6. In-service training programs will be organized to improve the qualifications of foreign language teachers.

553.7. Considering the student's educational attainment, incentive mechanisms will be established for teachers and school administrators in different rates depending on the type and location of their educational institutions.

553.8. Graduate level vocational specialization and development programs will be developed for horizontal and vertical career steps.

553.9. The contents of in-service training programs will be updated in line with the current needs of teachers and school administrators, and in-service trainings for vocational and technical education will be conducted in work environments.

554. To create an effecient and effective education system, data-driven policies will be determined and the impact analysis of policy implementations will be conducted.

554.1. Educational data bank will be established where the databases related to the education system are integrated and the data will be processed by artificial intelligence technologies.

554.2. Data analysis capabilites of institutions and organizations in the education system will be strengthened and data based planning and administration system will be implemented on school basis.

555. The understanding of lifelong learning aiming at the continuous development of individuals' personality and abilities will be extended to all segments of the society.

555.1. The diversity and the quality of lifelong learning programs will be increased and the certification of the achievements will be provided.

555.2. A national lifelong learning and monitoring system will be established to prevent duplications and to share the documents and the certificates among the institutions.

556. The School Development Model will be established in which all stakeholders are actively involved in the education processes.

556.1. The development of schools will be monitored and evaluated in accordance with their conditions and priorities.

556.2. The resources will be allocated supportively the development of schools in line with the objectives of the school development plan and on the basis of equal opportunity principle and the accountability level will be increased.

556.3. The interaction and harmony among teacher-parent-school will be strengthened.

557. Guidance and counseling system will be strengthened in order to manage the processes within the education and out of the education efficiently and to increase the readiness of children.

557.1. The structure and services of Guidance and Research Centers will be reorganized.

557.2. A career guidance system which supports the career selection processes allowing children recognize themselves and occupations will be established.

557.3. Guidance and consulting services will be strengthened for children and youth who are socioeconomically disadvantaged and under the risk of being pushed into crime, as well as their families.

557.4. Physical and emotional violence towards teachers and students will be prevented, it will be fought against drug and technology addiction, and family awareness on healthy living culture will be raised.

558. An efficient measurement, monitoring and evaluation system will be established to diversify and increase the students' educational attainments.

558.1. An e-file which will keep the records of each student's academic and other activities will be recorded.

558.2. The assessment and evaluation system will be strengthened on the basis of competence.

558.3. Students' participation in scientific, cultural, artistic, sportive and community service activities will be supported and their impact on student competence will be monitored.

558.4. To reduce the pressure created by the education system on the students, arrangements will be made on the exams held for the transition between educational levels.

559. Productive Structural Transformation and Employment Mobilization in Vocational and Technical Education will be started.

559.1. The workshops and laboratories of all vocational high schools will be modernized and aligned with the needs of today's education and employment in the Plan period.

559.2. Revolving fund revenues will be increased by using workshops more efficiently within the institutions and organizations in vocational education.

559.3. In line with the sectoral demands and developing technologies, the teaching programmes of the fields and branches will be updated in vocational and technical education.

559.4. Multiple vocational skills infrastructure will be established to enable students to get certification in more than one branch to ensure their transition between the occupational fields and to gain attainments related to different occupations.

559.5. The vocational upper-secondary schools and higher education institutions, especially the ones within OIZs, will be restructured to support each other in terms of programs, administration, human resources, financing and physical infrastructure.

559.6. The linkages between vocational and technical education and the labor market will be strengthened to meet the need for skilled manpower.

559.7. Career guidance will be strengthened in vocational and technical education;

promotional activities will be carried out to improve the perception of vocational and technical high schools and vocational colleges in the society.

559.8. Students will be encouraged to apply for inventions, patents and utility models.

559.9. Cooperation protocols between vocational and technical education institutions and the sector will be increased.

559.10. The payment of differentiated wages to the vocational and technical education graduates will be encouraged according to their vocational education fields and levels, and the priority for their employment will be given.

559.11. Subsidy payments will be provided for the students attending to private vocational and technical schools, investment incentives will be increased for the private sector to open schools, and the number and diversity of private vocational and technical schools, especially the ones in OIZs, will be increased.

559.12. Legislative arrangements will be made for enabling the private sector to establish private vocational training centers.

559.13. Graduates will be encouraged to take certified training and the courses accredited by the sector and the universities in order to ensure their knowledge and skills keep up-to-date.

559.14. National occupational standards and qualifications, which are the basis of vocational training programs and examination and certification activities, will be updated and their numbers will be increased.

- 560.** Diversity in higher education will be increased.
- 560.1.** The scope of the Regional Development-Focused Mission Differentiation and Specialization Project will be expanded.
- 560.2.** Women's universities where only female students are accepted will be established by analyzing the case of Japan.
- 561.** Higher education system will be equipped with having a globally competitive, quality-focused and a dynamic structure; and practices for increasing the quality of higher education institutions will be continued.
- 561.1.** It will be provided by 2023 that at least 2 of our universities will be ranked among the top 100, and at least 5 of our universities will be ranked among the top 500 universities, in the world academic achievement ranking.
- 561.2.** The number of PhD graduates will be increased to 15 thousand on average annually, particularly in the priority sectors over the plan period.
- 561.3.** The compliance of universities with the open access infrastructures will be provided in order to make the universities keeping up with the digital age, together with the implementation of open science practices and open access to the information.
- 561.4.** The lower limit of the appointment and promotion criteria of academic staff will be increased centrally.
- 561.5.** The quotas of higher education institutions will be determined by considering the sectoral and regional skills needs, capacities of the universities, supply and demand equilibrium and minimum occupancy rates of existing programs; the linkages between education and employment will be strengthened.
- 561.6.** The minimum achievement score requirement application will be expanded in the higher education programs that authorize professing directly after the graduation.
- 561.7.** The graduate monitoring system will be established to follow the career processes of the graduates and to strengthen the alumni-university cooperation.
- 561.8.** The data related to the education, research and innovation outputs of the higher education institutions will be regularly monitored and reported.
- 562.** Arrangements will be made regarding the education and training processes, academic and administrative structures, inspection and financial issues of the foundation higher education institutions.
- 562.1.** Private university legislation will be prepared.
- 562.2.** Arrangements will be made to bring the minimum levels of the financial and social rights of the academic staff of the foundation higher education institutions to the same level of the the academic staff at equivalent positions in the state universities.
- 562.3.** Necessary arrangements will be made to increase the number of research assistants in foundation higher education institutions.

563. Our country's level of internationalization in the field of higher education will be increased.

563.1. International access to the higher education system will be facilitated through effective promotional activities.

563.2. The number of qualified international students in the higher education system will be increased.

563.3. The share of qualified foreign academicians in the total employment will be increased.

563.4. The number of programs in foreign language will be increased, the accommodation facilities of higher education institutions for international students will be improved and institutional capacity for internationalization will be increased.

Table 33: Targets in Education

		2018	2023
Net Schooling Rate of the Age of 5 Years (%)		75.1	100
Rate of Students in Single-Shifted Education (%)	Primary	58.7	100
	Lower Secondary	66.4	100
	Upper Secondary	93.2	100
Participation Rate in Lifelong Learning (%)¹		6.2	8

Source: Ministry of National Education. The data for the year 2023 are the estimates of Eleventh Development Plan.

(1) Rate of adults aged 25-64 who participated in any education program during the last four weeks before the survey conducted.

2.3.2. Employment and Working Life

a. Objective

564. The main objective is to provide decent work opportunities to all segments of the society and to increase the employment of groups requiring special policies, especially women and young people.

b. Policies and Measures

565. The new skill needs will be determined within the framework of the effects of digital transformation and technological developments on the labor market and, the transformation caused by these developments in the professions will be monitored regularly.

565.1. Field studies will be done in order to measure the impacts of digitalization on jobs and professions.

565.2. A database of skills and qualification needs will be created through analyses conducted on the basis of jobs and occupations.

566. Vocational training courses and on-the-job training programs will be structured to provide flexibly the digital competencies and skills in order to train the labor force responsive to the emerging needs arising with the framework of digital transformation.

566.1. The courses and programs will be held in order to train the labor force needed in the new professional fields emerging as a result of digital transformation.

566.2. Active labor force programs will be strengthened qualitatively through conducting qualitative surveys and analysis with the employer organizations and sectoral businesses to determine the new skill needs.

567. Flexible working methods in accordance with needs of the labor market will be enabled and relevant inspections will be increased.

567.1. The efficiency of inspections on working hours will be increased.

567.2. Necessary changes will be made in order to increase the accessibility of part-time and flexible employees to social security.

567.3. Awareness raising activities on flexible working modes will be increased for all social parties.

568. The severance pay reform will be implemented.

568.1. The severance pay reform will be implemented through the consensus of the social parties involved.

569. Labor force and employment participation of groups requiring special policies will be increased.

569.1. Information programs will be organized for the employers on the practices concerning groups requiring special policies, and the employer consultancy services will be developed within the scope of job and vocational counseling.

569.2. Job placement services for groups requiring special policies will be developed in line with the needs of these groups and the labor market.

569.3. The number of Job Clubs and people benefiting from these clubs will be increased in order to provide more qualified

consultancy services to groups requiring special policies.

570. Practices that will facilitate women's participation in the labor market and increase their employment will be developed.

570.1. In order to increase women's employment in the labor market, women's opportunities for vocational training and skills development will be strengthened, especially in the areas of technology production such as coding and software.

570.2. Practices harmonizing work and family lives will be implemented dynamically, such as facilitating access to care services, in order to increase women's participation in the labor force and employment.

571. The active participation of young people in the labor market will be supported and their employment will be facilitated.

571.1. In order to ensure the transition of university students to the labor market, the implementation of university-private sector cooperation, especially through joint projects, will be improved.

571.2. The transition of young people to work will be facilitated through internship, entrepreneurship and on-the-job training programs.

571.4. Awareness raising activities will be carried out in order to improve the job search skills of young people and to ensure their adaptation to working life.

571.5. Young people will be encouraged to vocational training beginning from the secondary school to become the deman-

ded employees in the labor market, and the young people will be provided receiving appropriate education according to their abilities and market demands.

571.6. The training and grant programs will be implemented to make innovative and high value-added production attractive among young people living in rural areas.

571.7. Local administrations will support the practices aimed at increasing youth employment by taking into consideration the work and labor potential in their regions.

571.8. Innovative and sustainable projects which will reveal the potential in the provinces will be supported in order to increase the employment of young people.

572. Labor force participation and employment of disabled people will be increased.

572.1. Distant education programs will be developed for the disabled people to acquire a profession.

572.2. The general and vocational education, vocational rehabilitation, self-employment grant support and job and vocational counseling services will be improved in order to increase the labor force participation and employability of the disabled.

572.3. The awareness of the private sector employers will be increased on employment opportunities for the disabled and the incentives related to the employment of the disabled.

572.4. The qualifications of job and vocational counselors will be improved in order

to make them to provide better service to the disabled.

573. Active labor market programs will be expanded and the effectiveness of these programs will be increased.

573.1. It will be ensured implementing the active labor force programs focusing on the target group, sector and region in order to provide the participation of young people, women and social assistance recipients in the labor market, and that the trainees and participants gaining skills to facilitate the employment after the programs.

573.2. New programs will be developed within the scope of active labor programs in order to increase the employability of the long-term unemployed.

573.3. Vocational courses will be carried out in order to enable the beneficiaries of social assistance to live without relying on social aid.

573.4. Community Benefit Programs will be updated within the active labor force programs and vocational training courses and entrepreneurship training programs will be given priority.

574. Studies will be done for the development of the international labor force policies through taking into consideration of the global, regional, local and sectoral labor force dynamics, in order to contribute to the economic and social development of our country.

574.1. Sectoral studies and field visits will be organized to identify the sectors where

qualified foreigners can be employed in the labor market.

574.2. Overseas promotion activities will be carried out in order to bring qualified labor force to our country and to analyse the labor opportunities in the related countries.

575. The reasons of brain drain from our country to abroad will be analyzed, and the studies will be done to retain the qualified workforce in our country, within the framework of these analyses.

575.1. Studies will be done to prevent the brain drain and to increase the returns.

575.2. An international qualified labor network will be established for our citizens living abroad that having potential of working in our country.

576. Practices aimed at increasing the quality and efficiency of occupational health and safety services will be implemented.

576.1. A system will be developed to ensure transferring the data collected by different institutions related to occupational health and safety to a single database, determining the data that will be collected from firms, and using all of these data with a focus on prevention of occupational accidents and diseases.

576.2. Training, seminars and informative activities will be organized in cooperation with the relevant public institutions, universities, trade unions and NGOs in order

to develop and disseminate a culture of occupational health and safety.

576.3. Studies will be done to make the work equipment conform to the occupational health and safety standards, and local production of these equipment's will be encouraged.

576.4. Occupational standards and qualifications which are the basis of training programs in the fields needed by the market will be established; the knowledge, skills and competencies of the labor force will be certified, the occupational accidents will be reduced and the the qualification of the labor force will be improved.

576.5. The qualifications and the service standards of the institutions authorized in the field of occupational health and safety will be improved through effective inspections and regulations; Measurement and evaluation criteria will be developed for the training of occupational health and safety professionals.

577. Awareness-raising activities and inspections will be increased to effectively combat informal employment.

577.1. Risk-based inspection activities based on data analysis will be expanded to encourage formal employment.

577.2. Orienting and guiding inspection activities will be increased especially in the sectors where informality is widespread.

Table 34: Targets in Employment and Working Life

	2018	2023
Labor Force Participation Rate, Total (%)	53.2	56.4
Labor Force Participation, Female (%)	34.2	38.5
Employment Rate (%)	47.4	50.8
Unemployment Rate (%)	11.0	9.9
Youth Unemployment Rate (%)	20.3	17.8
Part Time Working Rate (%)	9.9	15.0
Informal Employment Rate (%)	33.4	28.5
Fatal Occupational Accident Rate (Per Hundred Thousand)	8.7	5.0

Source: The data for the year 2018 were taken from TurkStat, OECD and SSI. Data for the year 2023 are estimates of the Eleventh Development Plan

2.3.3. Health

a. Objective

578. The main objective is to ensure high-quality, reliable, efficient and financially sustainable health services provision supported by evidence-based policies, in order to improve the quality of living of individuals, to allow their active and healthy participation in economic and social life and thus improve the regional distribution of services as well as the quality of physical infrastructure and human resources.

b. Policies and Measures

579. With regard to non-communicable disease risks, healthy living style will be encouraged; the capacity of preventive and therapeutic services will be improved; cooperation and coordination between sectors and institutions will be increased in the fields of environmental health, food safety, sites suitable for physical activity, health literacy, occupational health and safety.

579.1. In order to encourage health living styles, awareness raising activities will be

conducted such as training programs, public spots and campaigns in order to promote healthy nutrition and active living habits.

579.2. Multi-stakeholder health responsibility model will be strengthened on subjects such as food safety, obesity, environmental health.

579.3. The effectiveness of early diagnosis services will be increased to reduce the risk factors on noncommunicable diseases.

580. Rational, effective and efficient use of the resources allocated to primary health care services will be ensured.

580.1. The need for health care services will be met at this stage through improving the quality and quantity of health care services provided by family physicians.

580.2. The number of healthy living centers will be increased, a strengthened and integrated family medicine structure will be established at these centers, and the required primary healthcare services will be provided at these centers.

580.3. The responsibilities of family physicians will be increased in processes such as screening and diagnosis of diseases, especially non-communicable diseases.

580.4. Family medicine performance system will be redesigned proportionally with the accuracy of diagnoses and treatments and the service load, in an integrated manner with the performance system in the secondary and tertiary levels.

580.5. Financial measures will be taken to ensure that primary healthcare services are used more commonly.

580.6. The in-service training programs for the primary level healthcare staff will be redesigned.

581. The access to healthcare services provided in the field of combating addiction will be made easier, and the effectiveness of activities in this field will be monitored periodically.

581.1. Budgetary capacities will be improved to provide required human resources, establish the necessary infrastructure and cover the current expenditures needed in order to increase the efficiency of public institutions and organizations, to expand the coverage of service delivery and to increase the accessibility in fight against addiction.

581.2. The number of centers will be increased and the quality of services will be improved in order to ensure easy access to the counseling, treatment and rehabilitation services for fight against addiction.

581.3. The number of specialized treatment centers where compulsory treatment

decisions can be implemented will be increased.

581.4. Awareness raising activities will be held to combat the use of harmful substances such as alcohol, tobacco and drugs.

581.5. The results of activities held to combat addiction and the frequency of substance abuse in the society will be monitored through periodic scientific researches.

582. The coverage of home care services will be expanded, the access to healthcare services offered to the elderly will be made easier particularly in rural areas, and the preventive and therapeutic services offered to the elderly will be strengthened.

582.1. The coverage of home care services will be expanded, and their accessibility, efficiency and quality will be improved, and intensive care, palliative care and geriatric services will be integrated with home care services.

582.2. Health monitoring will be carried out for the elderly, the preventive and therapeutic services for diseases increasing by age will be strengthened, and the number of centers providing geriatric and palliative care services will be increased.

583. The capacity of specialized health services such as emergency health, intensive care, oncology, organ transplantation services will be expanded and their speed and quality will be improved.

583.1. Specialized health services will be centralized and a management model will be established for the physicians providing service in these fields.

583.2. Alternative examination areas will be created where necessary, depending on the intensity of emergency service patients.

583.3. Effective use of ambulances in emergency health services will be ensured and the coordination between hospitals and 112 Hotline Control and Command Center will be strengthened.

583.4. Intensive care services will be used effectively and properly, at the public and private health service providers.

584. In order to improve the quality of healthcare services an accreditation system will be established for the service providers, a standard and effective process will be conducted to monitor and supervise clinical quality, and the use of clinical guidelines will be generalized.

584.1. Clinical quality in healthcare services will be measured and improved, and the application of clinical guidelines will be generalized.

584.2. The number of accredited healthcare institutions will be increased.

585. It will be provided to produce data that can be used as input in data and evidence-based policy making, that are suitable for use in scientific researches and analyses, and that meet the quality and detail levels required for making international comparisons.

585.1. Data quality will be improved by restructuring the health datasets, and a data infrastructure that allows for international comparisons will be established.

585.2. Cooperation and coordination will be improved in the field of inter-agency data sharing.

586. Legal arrangements will be completed in the field of conventional and complementary medical practices to ensure the product and service reliability and standardization, and a control- supervision mechanism will be established.

586.1. Legal arrangements on conventional and complementary medical practices will be completed.

586.2. The number of centers and the number of units within public hospitals on conventional and complementary medicine will be increased, and control- supervision mechanisms will be established.

587. An end-to-end management structure will be established to ensure the efficiency and sustainability of supply chain.

587.1. Legal arrangements will be prepared and information (IT) infrastructure will be established in the fields of needs planning, procurement, orders, stock, logistics and contract management.

587.2. In the scope of health market; acquisition costs will be reduced through alternative procurement methods for commonly consumed material groups at health institutions and those which face supply difficulty.

587.3. Simulation-Supported Education and Application Centers will be established to provide simulation-supported medical education, biomedical engineering education and hospital pharmacy education.

- 587.4.** Commissions for the evaluation of pharmaceuticals and medical consumables utilization will be established in order to prevent the unnecessary/inadequate use of them by comparing the treatment costs determined by the physicians for the same indication, and to promote the rational use of pharmaceuticals, medical consumables and laboratory practices.
- 587.5.** The level of awareness on rational use of pharmaceuticals will be raised, and monitoring and evaluation studies will be strengthened.
- 587.6.** Encouraging and compulsory mechanisms will be established for rational use of pharmaceuticals, especially antibiotics, respiratory system drugs and drugs used in psychiatry.
- 587.7.** Awareness will be raised on rational use of drugs, particularly among geriatric patients and individuals with chronic diseases by public awareness facilities.
- 587.8.** A decision support system will be established to support and supervise physicians on rational use of pharmaceuticals.
- 587.9.** The joint studies will be conducted by the related institutions on the rational use of medicines used in veterinary in order to reduce antimicrobial resistance.
- 588.** The predictability and sustainability of pharmaceutical expenditures will be increased and the efficiency will be provided in expenditures.
- 588.1.** The evidence-based models used for determining the drug prices and reimbursement coverage will be strengthened.
- 588.2.** The drug reimbursement list will be reviewed periodically.
- 588.3.** An effective budget control will be provided in the product groups like imported drugs.
- 589.** The recognition and the preferability of our country in the field of health tourism will be improved and the capacity of health tourism will be developed in both qualitatively and quantitatively.
- 589.1.** The legal arrangements in the field of health tourism will be completed, and the accreditation and inspection infrastructure will be strengthened.
- 589.2.** Medical tourism will be integrated with elderly and rehabilitation tourism besides thermal tourism.
- 589.3.** Advertising and marketing activities will be carried out for our country in the field of health tourism.
- 590.** The roles of the service provider and payer in the health system will be strengthened such that they can be performed more efficiently in terms of especially service quality, financial sustainability, inspection and performance.
- 590.1.** The inspection capacity of SGK will be expanded on health expenditures.
- 590.2.** The system and processes will be developed to ensure that service, price and cost efficiency analyses are done in the preparation and implementation processes of global budget agreements signed between public institutions and SGK.

590.3. A new and efficient pricing structure will be established by implementing the method of Diagnosis-Related Groups, in order to ensure that the service provision price structure used in the provision of health services will be in an accurate, realistic and encouraging productivity structure.

590.4. University hospitals will be provided with a sustainable structure in terms of their management, service provision and financial structures, such that they can efficiently provide education and training ser-

vices by separating their hospital management function.

591. Supply and demand side regulations will be realized in order to ensure efficiency in health expenditures.

591.1. Medical data will be better integrated into the system in order to reduce unnecessary tests, analysis and other processes.

591.2. A monitoring and information system will be established for medical inspections and analysis done above averages.

Table 35: Health Targets

	2018	2023
Number of Patient Beds per 10,000 People	27.9 ¹	30
Number of Physicians per 100,000 People	186 ¹	230
Number of Nurses per 100,000 People	206 ¹	280
Population per Family Medicine Unit	3,207 ¹	2,700
Ratio of Qualified Patient Beds to Total Patient Beds (Ministry of Health) (%)	60.3 ¹	84
Infant Mortality Rate (per 1,000 live births, all weeks)	9.1 ¹	8.5
Maternal Mortality Rate (per 100,000 live births)	14.6 ¹	13
Obesity Incidence (age 15+) (%) (based on research)	30 ²	29.1
Frequency of Use of Tobacco Products in Population Aged 15+ (%)	31.6 ³	27

Source: Data for the year 2018 were taken from the Health Statistics Yearbook 2017 of Ministry of Health. Data for the year 2023 are estimates of the Eleventh Development Plan.

(1) 2017 data.

(2) Preliminary results of Turkey Nutrition and Health Survey 2017.

(3) 2016 data. Results of the Global Adult Tobacco Survey of Ministry of Health.

2.3.4. Strengthening the Family

a. Objectives

592. The main objective is to strengthen the family institution for the sustainability of the social structure and development in a reliable way.

b. Policy and Measures

593. Research, training and consultancy activities will be continued in order to

ensure comprehensive, standard, effective and widespread services provided for the family.

593.1. The contents of the Family Training Program will be reorganized by taking into consideration with the emerging needs, family training will be carried out by using the new modules and training sets, and the number of formatters and trainers will be increased.

593.2. Awareness raising trainings, researches and projects will be carried out in order to reduce bad habits and addictions that negatively affect the family structure.

593.3. Modular family education programs will be realized for our citizens who live abroad.

593.4. Periodic research activities will be conducted to understand the transformations in the family structure.

593.5. The institutional capacity of the Family Social Support Program (ASDEP) will be increased.

593.6. Trainings and consultancy services will be expanded in order to encourage the continuity of existing marriages and increase of new marriages.

593.7. Psycho-social support services for individual, family and community will be provided in a coordinated and effective way in case of migration, disaster and emergency; and the capacity of service delivery will be enhanced.

593.8. Programs contributing the preservation of the dynamic and young population structure will be developed, large and extended family models will be encouraged and intergenerational solidarity will be strengthened.

594. Programs will be developed and implemented for harmonizing family and work life.

594.1. Awareness raising training activities will be implemented on the fair sharing of domestic responsibilities, at all levels of education.

594.2. High quality, economic and easily accessible child, disabled and elderly care opportunities will be expanded.

595. It will be struggled with all the activities that would encourage the tendencies threatening the national and moral values, the continuation of healthy generations, and the family institution; and the social awareness will be strengthened in this field.

596. The negative impacts of media on the family will be reduced, and media tools will be used in a way to strengthen family ties.

596.1. Support will be provided to ensure family-oriented media management and to increase the number of publications that are family-friendly and that strengthening family ties.

596.2. Awareness raising trainings will be organized to reduce the negative impacts of visual, audial and social media on the family.

596.3. Training programs on family, marriage, family communication and interaction will be extended by using visual and audial media.

597. The effectiveness of protective and preventive services to prevent domestic violence, negligence and abuse will be increased.

597.1. The formal and non-formal education activities will be organized starting from the early childhood in order to eliminate the negative attitudes and behaviours that cause and reinforce domestic violence; and to raise the level of social awareness in this issue.

598. Studies will be carried out to expand the family-friendly environment and spaces.

598.1. The availability of the accessible places where family members can spend time together safely and enable their sharing will be increased.

598.2. The activities of local administrations within this scope will be supported.

2.3.5. Woman

a. Objectives

599. The main objectives are to prevent all kinds of discrimination against women, to ensure that women benefit from equally the rights, opportunities and facilities in all areas of the social life and to empower them.

b. Policies and Measures

600. The active participation of women in economic, social, cultural life and decision-making mechanisms at all levels will be encouraged, in the way of strengthening the equality of opportunity for men and women on the rights, especially beginning from the local level.

600.1. Researches, projects will be carried out and trainings will be provided to empower women in economic and social life.

600.2. Encouraging activities will be carried out to increase the active participation of women in politics.

600.3. The consultancy and guidance services in business development processes will be provided to female entrepreneurs,

and women will be given priority for subsidies offered in this field, in order to develop the economic activities of women.

600.4. Mechanisms aiming to develop the economic activities of women in digital environments such as websites, portals and applications will be established, and training programs and seminars will be organized to ensure the empowerment of women entrepreneurs in e-commerce.

600.5. Subsidies in the fields such as education, entrepreneurship and consultancy for the cooperatives established by women will be expanded, and the establishment of cooperatives by women will be facilitated through making necessary legal arrangements.

600.6. The practices such as training, internship and on-the-job-training will be continued effectively in order to increase the active participation of women in economic life, by taking into consideration the different labor needs of the provinces.

600.7. Awareness raising and encouraging activities will be carried out to ensure further involvement of women in the management and decision-making bodies in the private sector.

600.8. Awareness raising, guiding and encouraging methods will be developed to ensure further involvement of women in the management and decision-making bodies in the public sector.

600.9. Support mechanisms will be provided in order to increase women entrepreneurship in rural areas.

600.10. Activities will be carried out in order to lead the girls to the professions in the fields of science, technology, engineering and mathematics, by taking into consideration of newly emerging occupational fields within the framework of the changing needs of the labor market.

601. Full access and active participation of girls and women to all levels of education will be ensured.

601.1. The enrolment, attendance and graduation rates of women and girls will be increased at all levels of education.

602. Social awareness raising activities will be accelerated in order to prevent violence against women, early and forced marriages and all kinds of abuse, and the effectiveness and capacity of protective and preventive services will be enhanced.

602.1. The necessary studies will be done in order to ensure the effective enforcement of the regulations to prevent violence against women and early and forced marriages.

602.2. The awareness raising activities such as training, seminars will be carried on for all target groups, including the personnel of all public institutions and agencies, in order to prevent violence against women, early and forced marriages.

602.3. The capacities and inter-institutional coordination of the institutions providing services to the victims and perpetrators of violence will be increased in combating violence against women.

603. Health services provided to women will be improved and health awareness will be raised through awareness raising activities.

603.1. Awareness raising activities will be carried out in order to increase the participation of women in relevant target groups for cancer screening programs throughout the country.

603.2. Awareness raising activities will be carried out in order to improve health literacy among women.

604. The representation of women in the media will be improved and media literacy of women will be increased.

604.1. The participation of women in digital literacy trainings will be increased.

604.2. Best practices like news, advertisements, series, movies, cartoons, children's programs which contribute to the improvement of women's representation in the media will be rewarded.

604.3. Awareness raising training programs will be organized on the representation of women in media for the staff of regulatory and supervisory public institutions in the field of media.

604.4. The representation of women in media and related subjects will be included in the undergraduate and graduate programs of the universities.

Table 36: Targets on Woman

(percent)

	2018	2023
Schooling Rate, Female (Primary Education)	91.6	100
Schooling Rate, Female (Secondary Education)	83.4	100
Schooling Rate, Female (Higher Education)	47.4	60
Female Employment Rate	29.4	34
Female Labor Force Participation Rate	34.2	38.5
Women Representation Rate in National Parliament	17.3	20
Rate of Women in Self-Employed	17.8	20
Rate of Women in Employers	8.7	10

Source: Data for the year 2018 data are taken from TURKSTAT Social Structure and Gender Statistics, and data for the year 2023 are estimates of the Eleventh Development Plan.

2.3.6. Children

a. Objective

605. The main objectives are to support children's well-being, to increase the opportunities to realize their potentials and to reduce the inequality of opportunity, on the basis of children's best interest.

b. Policy and Measures

606. The provision, accessibility and quality of services for early childhood care, education and development will be increased.

606.1. Parental educations will be enhanced beginning from the prenatal period.

606.2. Materials including nutritional, educational, growth and play contents, suitable for the age and development levels of children will be developed for parents.

606.3. A co-regulation will be made for the institutions providing early childhood care

and education services, and the criteria for starting up and operating of these institutions will be determined in a way to allow for the diversification of services.

606.4. The number of institutions providing early childhood care and education services will be increased, their service delivery models will be diversified and inspections of them will be increased.

607. Cultural, artistic, scientific and sports activities that support the physical, social and mental development of children will be encouraged, expanded and made accessible.

607.1. Practices will be developed to encourage children to engage in sports, artistic, cultural and scientific activities.

607.2. The awareness of the children, families and teachers will be raised on volunteering activities, and children will be encouraged to participate in these activities.

607.3. Arrangements will be done so that youth centers provide services to children

as well, and the access of children to these centers could be facilitated.

608. Practices intending to meet the individual needs of children will be carried out in order to reduce the intergenerational transmission of poverty and to increase equality of opportunity.

608.1. Different and flexible practices will be developed to meet the individual needs of children such as transportation service, educational material, nutrition, taking into consideration the deprivations of children during their education life, beginning from the early childhood period.

608.2. Supports will be developed for children who are successful and talented in different fields but cannot progress in these fields due to their financial impossibilities, by taking into consideration the existing subsidies as well.

608.3. The efforts to reach the full occupancy rate in use of free quotas allocated for children who are in need at private education institutions will be increased.

608.4. Studies to increase access to protective and preventive services, and to ensure the equality of opportunities for children living in rural areas will be carried out.

609. Fight against child labor particularly in the streets, in heavy and dangerous works and paid mobile and temporary agricultural jobs except for family businesses will be carried out.

609.1. Public awareness on combating child labor will be raised.

609.2. Child Labor Units will be expanded in 81 provinces and will be made more effective in order to enhance the cooperation and coordination with the relevant institutions and organizations working in the field of combating child labor at local level.

609.3. Mobile teams will be strengthened within the scope of protective and preventive services for children who forced to work or are at risk of being forced to work in the streets.

609.4. The activities that will contribute to the development of the children of families working in seasonal mobile agricultural works will be made regular and permanent, and children's access to these opportunities will be increased.

610. The juvenile justice system will be restructured to include risk monitoring in line with preventive, restorative and improving mechanisms.

610.1. Psychological support programs for children at risk will be expanded; the specialization of care services will be continued; and the quality and quantity of the personnel working in the field will be increased.

610.2. The mechanisms will be developed for the implementation of measures specific to children and the monitoring of injunctions decreed in the Child Protection Law.

610.3. The juvenile justice system will be restructured with a restorative justice approach; reconciliation methods specific to children will be developed; a model for deferring the commencement of the public prosecution will be developed and it will be

ensured to give priority to the first-instance trials and legal remedies for the juvenile pushed to crime.

610.4. Alternative execution methods specific to children will be developed.

610.5. Child-specific protection mechanisms in the judicial processes will be strengthened, child-friendly interview procedures will be supported and the number of judicial interview rooms will be increased at the courthouses.

610.6. The capacity of institutions will be increased for prevention of children from being exposed to crime.

611. The efforts to enhance the educational levels of the children under protection and care and to accelerate their social and individual development, starting from early childhood will be increased; and their adaptation to social life in the post-care process will be supported.

611.1. The effectiveness of the Child Support Development and Education Program will be increased.

611.2. The guidance services will be developed for children under protection in order to support their adaptation to social life after the institutional care.

612. The development and the expansion of the family-oriented services for children in need of protection will be ensured.

612.1. The utilization of family-based services by the children under protection will be increased; and trainings, awareness raising and promotion activities will be de-

veloped in order to strengthen and expand the foster care service model.

612.2. The social support dimension of the Social and Economic Support Service will be strengthened.

613. The programs and practices will be developed to prevent negligence, abuse and violence against children; and the services and psychosocial support programs for the children who are at risk and their families will be expanded.

613.1. Scientific researches will be carried out to identify the current situation and the causes of negligence, abuse and violence against the children.

613.2. Awareness raising education will be given to children on negligence, abuse and violence and the life skills of the children will be strengthened starting from the early childhood.

613.3. The programs will be developed for increasing the capacity of professionals working with children to detect the negligence, abuse and violence and to provide the necessary guidance.

613.4. The legal infrastructure of the Child Monitoring Centers will be completed and the number of them will be increased.

613.5. The studies will be carried out to strengthen and to increase the effectiveness of Child Protection First Response and Evaluation Units.

613.6. Mobile Child Service Units will be expanded and strengthened.

613.7. The Directorates of the Judicial Support and Victim Services, which provide qualified support to children at court-houses, will be expanded.

614. Psycho-social support services will be expanded in line with the needs of children and parents; the developmental interventions, monitoring and guidance will be provided for the children at risk and making atypical progress; and health, social media and legal literacy will be increased among children.

614.1. The Guidance and Research Centers and the counselling services at schools will be strengthened.

614.2. Studies will be carried out for parental guidance at educational and health institutions.

614.3. Programs and activities will be carried out at schools and social service centers to strengthen health, nutrition, law and social media literacy skills.

614.4. Studies will be carried on to end childhood obesity and to increase healthy nutrition and physical activity.

615. Measures will be taken to protect children from the games and digital applications, books, social media and such contents that could negatively affect their healthy development.

615.1. Studies will be increased to protect children from digital risks and the harmful effects of written and visual media.

615.2. An independent game rating system in terms of age and content, which is

informative for the users and parents, will be established in accordance with the cultural structure.

615.3. Child-friendly publications will be supported.

616. The programs increasing the intercultural interaction and life skills will be carried out in order to enable the social integration and building up partnerships with their peers of the children under international or temporary protection.

616.1. The social adaptation programs will be expanded for the children under international or temporary protection.

616.2. The relevant institutions will be made to work more efficient in order to provide services for unaccompanied children.

617. The measures will be taken to protect children from addictive behaviors and substances, the quality and the quantity of treatment centers will be increased; and the social rehabilitation and adaptation services will be developed.

617.1. The number of the Treatment and Training Centers for Substance Addiction of Children and Adolescent (ÇEMATEM), and the number of qualified staff employed in these centers will be increased.

617.2. The number of professionals working with children in the field of addiction will be increased.

617.3. The awareness raising activities and trainings will be continued for children, families and the professionals working with children in order to fight against addiction.

2.3.7. Youth

a. Objective

618. The basic objective is to ensure that youth is raised with strong life skills, humanitarian and national values, and that they participate actively in economic and social life and decision-making mechanisms.

b. Policy and Measures

619. Cultural, scientific and sportive activities that relieve young people from the cycle of school-exam-job search, that support their physical, social and cognitive development and innovative and entrepreneurial skills as well will be encouraged, expanded and made accessible.

619.1. The programs will be developed to encourage young people engage in sports, cultural and artistic activities as well as the fields of especially science, technology, engineering and mathematics.

619.2. The number of youth centers will be increased depending on needs, and partnerships will be developed with organizations carrying out similar activities.

619.3. The activities aimed at increasing the reading, comprehension, thinking and leadership skills of the youth will be expanded.

619.4. A model will be developed to provide activities that support the physical, social, artistic, sportive, cognitive and cultural development of young people at schools out of school time; the services planned within this model will be provided by the related institutions by improving the physical and

human resource capacities and financial possibilities of the schools.

620. Young people will be encouraged to take an active role in social life and decision-making mechanisms; mobility programs will be expanded and diversified especially in accordance with the demands of disadvantaged youth in particular.

620.1. The number and quality of the activities and the programs organized to contribute to the personal and social development of youth will be increased, particularly the programs carried out by the Ministry of Youth and Sports at youth centers and youth camps.

620.2. The efforts to activate the National Youth Council of Turkey will be completed.

620.3. Mobility programs will be expanded and diversified according to the needs and demands of disadvantaged youth in particular.

620.4. Youth will be raised awareness and guided within the scope of volunteer activities, and their participation in voluntary activities will be encouraged.

620.5. The institutional capacity of CSOs that are engaged in the field of youth will be developed.

621. Psychological counseling and guidance services, which are appropriate to the characteristics of youth and their parents, will be expanded, in order to reduce the factors negatively affect and their effects on cognitive, physical and psychological development of youth; and health, social media and legal literacy will be increased among the youth.

621.1. The awareness raising activities and programs strengthening the skills on health, social media and legal literacy will be implemented at schools, dormitories for higher education students and youth centers.

621.2. Youth and parents will be informed about the risks they face with in the virtual platforms.

621.3. The employment of experts in the fields of psychological counseling and guidance will be expanded at youth centers.

622. It will be effectively fought against the addictive substances; the researches and services on determining the use of these substances will be continued; and the social rehabilitation and adaptation services will be developed.

622.1. The measures will be taken to eliminate the attractiveness of the addictive substances, and to make the accessibility of substances such as cigarettes and alcohol difficult.

622.2. The activities informing and raising awareness among the youth and the youth professionals about the fight against addiction will be continued.

622.3. The number of professionals working with youth to address addiction will be increased.

622.4. The number of Social Adaptation Units will be increased, the necessary legal arrangements will be done to increase the effectiveness of the post-treatment rehabilitation and follow-up services; and these services will be expanded.

623. The awareness and the skills of the intercultural interaction and coping with the challenges of the youth under international or temporary protection will be increased in order to minimize their social adaptation problems.

623.1. Sportive, cultural, educational activities and programs will be implemented and supported for the young people under international or temporary protection.

623.2. The personal and social development of young people under international or temporary protection will be increased on cognitive, physical, emotional aspects; the vocational guidance for employment will be provided to them.

623.3. By identifying the profiles of the youth who are not involved in the education and employment, an integrated approach focusing on individuals, families and the community will be developed for them, in order to support their participation in education, labor force and employment.

623.4. Incentive programs will be implemented in accordance with the reasons why these young people are not involved in the education and employment, in order to increase the participation of them in the labor force and employment.

623.5. A training needs analysis will be carried out to identify occupational areas for young people who are not involved in education, employment.

623.6. Short-term certification and diploma programs will be organized in innovative areas such as software, in accordance with the skills and talents of youth.

623.7. The institutions working with the young people will inform and guide them, especially those who are not involved in education and employment, about the vocational guidance, entrepreneurship and vocational services of KOSGEB and İŞKUR, and will direct them to these services.

623.8. The cooperation between the institutions working with youth and KOSGEB and İŞKUR will be increased.

623.9. Joint cooperation activities will be carried out with CSOs, working in the field

of youth, in order to adapt to the different youth groups and their rapidly changing needs and demands.

623.10. Programs contributing to the personal and social development of young people and their career planning will be implemented.

623.11. The quality of the data collected on youth will be improved and data sets allowing international comparisons will be generated.

Table 37: Targets on Youth

	2018	2023
Youth Employment Rate (Age 15-24, %)	35.0	39.5
Number of Youth Centers	283	350

Source: Data for the year 2018 were taken from TURKSTAT and Ministry of Youth and Sports. Data for the year 2023 are estimates of the Eleventh Development Plan.

2.3.8. Social Services, Social Assistance and Poverty Reduction

a. Objective

624. Enhancing the participation in the economic and social life, improving the quality of life of the groups at risk of poverty and social exclusion by ensuring easier access to the opportunities, improving the income distribution and reducing the poverty are the main objectives.

b. Policies and Measures

625. The programs for increasing the employability of poor groups and making them productive will be carried out more efficiently by strengthening the linkages between social assistance programs and employment; and the assistance for the

employable individuals will continue to be provided under certain conditions.

625.1. The social assistance beneficiaries who are able to work will be directed to the employment.

625.2. The social assistance provided to the employable social assistance beneficiaries, who are directed to employment but do not accept a job offered by İŞKUR for the third time without a valid reason, will be reduced gradually, for a period of one year.

626. The linkages between the social assistance and the social services will be strengthened.

626.1. The technical, legal and institutional capacity of the Family Social Support Program (ASDEP) will be increased.

626.2. A real-time data flow will be provided between ASDEP information system and the Integrated Social Assistance System.

626.3. The period of Social Assistance Plus will be started, and the access to the other public services needed will be provided for the citizens benefitting from the social assistance.

626.4. The access of social service beneficiaries to the public services they need will be made easier.

626.5. The scope of the implementation of ASDEP will be expanded to include the social assistance.

627. The effectiveness of social the assistance programs will be increased.

627.1. The effectiveness of the social assistance programs will be analyzed, and necessary revisions will be made in line with the research results obtained.

627.2. Mutual data sharing will be ensured with other public institutions and organizations, particularly with local administrations.

627.3. The accessibility of the social assistance in rural areas will be facilitated, and the role of local administrations in this field will be increased.

628. The diversification and expansion of the social service models will be ensured within the human-oriented social policy framework.

628.1. The standards for disabled and elderly care services will be developed, and the quality and the quantity of the personnel providing these services will be increased.

628.2. The social services will be expanded and made more effective, and the quality and the quantity of the social service programs for vulnerable groups will be increased.

628.3. Day care services will be expanded within the scope of community-based care services.

628.4. Implementations will be developed to facilitate the utilization of social services by the mobile agricultural workers.

Table 38: Targets in Social Services, Social Assistance and Poverty Reduction

	2018	2023
Gini Coefficient¹	0.405 ¹	0.38
Relative Poverty (%)²	20.1 ¹	18.0
Number of Households Reached by ASDEP	1,063,000	5,000,000
P80/P20³	7.5 ¹	6.5

Source: The data for the year 2018 data were taken from TURKSTAT and the Ministry of Family, Labor and Social Services. The data for the year 2023 are estimates of the Eleventh Development Plan.

(1) Data from the Survey of Income and Living Conditions, 2017, TURKSTAT.

(2) In the calculation of Relative Poverty rates, 60 percent of the median value of the equivalent household disposable income has been accepted as the poverty line.

(3) The ratio of the income of 20 percent of the population with the highest income to the income of the 20 percent of the population with the lowest income.

2.3.9. Culture and Arts

a. Objective

629. The basic objectives are to transfer the cultural richness and diversity to future generations by preserving and developing them, to disseminate the cultural and artistic activities, to strengthen the solidarity and social integrity around national culture and common values, and to increase the multi-dimensional impact of the culture on development.

b. Policies and Measures

630. Turkish cultural heritage at home and abroad will be protected in a way which will raise the public awareness of history, culture and aesthetics, contribute to the cultural tourism and consider the disaster risks. The immovable cultural properties of the foundations will be functionalized in accordance with their foundation deed.

630.1. National Perfection Center for Restoration will be established in universities.

630.2. The restoration and repair activities for the immovable cultural properties of the foundations at home and abroad will be improved qualitatively and quantitatively.

630.3. Urban design projects will be developed for historical urban fabrics, and these historical urban areas will be rehabilitated with an integrated approach according to these designs.

630.4. The identification and inventory studies for the conservation of immovable cultural properties at home and abroad will be continued, and the acquired data will be transferred to the digital environment.

630.5. The immovable cultural properties of the foundations like fountains, almshouses, soup kitchens will be functionalized in accordance with their foundation deed.

630.6. Thematic cultural routes on archeology, literature, history and nature will be determined and promoted, especially the areas under the protection of UNESCO.

630.7. The fundamental elements, the important persons and events of Turkish history, Turkish legendary characters and the elements of Turkish cultural richness will be promoted by drama, movies, documentaries, series and cartoons.

630.8. The martyrs' cemeteries and battlefields of Çanakkale will be ameliorated and the Historical Area of Çanakkale will be transformed into an open-air museum.

631. The architecture, management and administration model of the elements of cultural infrastructure will be functionalized in order to use them efficiently and effectively; flexible spatial designs which allow different activities will be developed.

631.1. Accessible, widespread and attractive buildings will be designed in order to adopt cultural buildings as the third spaces in the urban life.

632. The contribution of urban designs, city plans and mass housing projects and public buildings to the landscape, urban texture, aesthetics and identity of the cities will be taken into consideration. The adaptation of the urban transformation practices to the cultural identity and structure will be regarded.

632.1. The branding practices of local administrations and the related public institutions for important spaces that add identity to the city will be encouraged and expanded.

632.2. The establishment of private museums will be encouraged, and the quality and quantity of museums will be increased within the context of contemporary museology.

633. The opportunities of access to and participation in culture and arts will be increased.

633.1. Culture and art education will be provided as from early ages for the development of culture and art as a habit of life.

633.2. The librarianship services will be developed, the libraries will be restructured spatially and functionally by taking the advantages of new technologies and management approaches in this field. In order to create and spread the reading culture.

633.3. The number of mobile libraries will be increased.

633.4. The role of local administrations, the private sector and civil society in the provision of cultural and artistic services will be strengthened.

634. The activities will be organized to extend the Classical Turkish Arts.

634.1. It will be ensured that our cultural heritage is researched, conserved and transferred to today's society and future generations, by giving priority to our cultural heritage belonging to the different periods of Turkish-Islamic history.

635. All types of instruments like media, legal regulations and especially formal education will be used effectively in order to ensure the correct and perfect use of Turkish.

635.1. The etymological dictionary will be completed to record the richness of Turkish language.

635.2. The activities for teaching and promotion of Turkish language and culture abroad will be developed.

635.3. The perfect use of Turkish in all kinds of media and press environments will be encouraged; the richness of vocabulary usage will be encouraged in all works of art in which the messages are conveyed by language.

635.4. The reference texts about Turkish culture and civilization will be published by academically qualified universities, publishers and related public institutions within a specific program.

636. It will be ensured that the importance and the value of the products of intellectual labor will be indigenized to all segments of the society; and the information and data infrastructure related to the products and works subject to the intellectual property rights will be strengthened.

636.1. Promotion, awareness raising and information activities will be carried out for intellectual rights.

636.2. Cultural statistics will be developed in accordance with the international standards and gathered under a single database.

637. The impact analysis will be done for the existing subsidies for the cultural industries and cultural endeavours; inclusive, objective and easily accessible subsidy mechanisms will be developed.

637.1. The measures will be taken to prevent monopolization of the production, exhibition and distribution of the cultural products. The strategies for ease of branding, marketing and financing will be developed for the products specific to our culture.

637.2. The subsidies provided to the cultural industries will be increased, particularly for training, certification and R&D activities.

637.3. The supports to the private theaters will be increased.

637.4. The existing records, data and national statistics on cultural industries will be diversified.

638. The areas that promote our historical, national and cultural values, strengthen the sense of social unity and belonging will be given priority in the subsidies provided to the cultural industries; positive discrimination will be made to our classical arts.

638.1. The qualified events and exhibitions in the fields representing classical and contemporary Turkish art will be organized by the public and private sectors professionally, and the realization of these activities frequently in important cities of the world will be provided.

639. The development of the Turkish film industry will be supported and its internati-

onal competitive power will be increased in order to make it a recognized brand in the world.

639.1. National Cinema Museum and Archive will be established.

639.2. The foreign productions to be shot in our country will be supported to make our country an important film shooting center.

639.3. The arrangements will be made to prevent the monopolization in the production, distribution and screening of movies; and the use of cultural centers and similar structures as movie houses will be encouraged.

640. The arrangements including coordination and statistical infrastructure, will be made to increase the production and export of qualified audio visual content.

640.1. Legal and administrative arrangements will be made for the establishment of a mechanism to ensure the public institutions and the private sector act in coordination.

640.2. Secondary legislation will be made for supporting branding and promotion in order to ensure the efficient use of product placement activities.

640.3. Secondary legislation will be made to ensure the effective use of domestic content quotas in the field of broadcasting.

640.4. The statistical infrastructure in the field of audio visual contents will be strengthened in cooperation with all stakeholders.

641. The qualified culture and art professionals will be educated for the more effective management of culture and art institutions and the expansion of their fields of expertise. The departments of culture administration will be increased in the higher education.

641.1. The department of culture administration will be increased in the academic institutions, and the efficiency of the existing ones will be increased.

642. The contribution on the unity, togetherness, peace and tranquility of the society will be made by the qualified religious services; and informal religious education will be provided to all segments of the society.

642.1. The publications with religious content on the social problems will be reached a larger segment of the society.

642.2. The number of people reached by moral support will be increased.

643. Our culture will be promoted abroad. Cultural diplomacy activities will be developed. A coordination between the activities in the content of the cultural diplomacy carried out by the public and non-governmental organizations will be ensured. The constructive role of the culture will be benefited in the international relations.

643.1. The supports provided to the institutions operating abroad in the field of cultural diplomacy will be increased, and the administrative capacities of these institutions will be developed.

643.2. Cultural activities will be carried out in order to create a positive perception of Turkey in the world public opinion.

643.3. Turkey's scientific and academic knowledge will be introduced abroad.

644. The activities for the development of books and periodical publishing fields will be supported.

644.1. R&D activities for the development of publishing activities, including electronic publications, will be supported.

644.2. More works in e-book format will be provided as public publication in order to ensure the access of more readers to the qualified cultural publications.

644.3. The necessary promotional activities will be carried out to increase the sale of copyrights to the abroad and to increase the worldwide recognition of Turkish literature. The contents of the existing support programs will be improved.

644.4. The existing practice of the first literary work support will be improved, in order to encourage the literary production and to provide the qualified literary works, that couldn't find a chance to be published, to be reached to the readers.

644.5. The activities for promoting the Turkish literature and publishing abroad and the informative contents used in these activities will be made available in online platforms as well.

Table 39: Targets for Culture and Arts

	2018	2023
Number of Movable Cultural Properties Whose Restoration/Conservation Completed in Given Year (Thousand, Cumulative)	11.0	73.5
Number of Mobile Libraries (Cumulative)	53	81
Number of Cinema Projects Supported	195	1,170

Source: The data for the year 2023 are the estimates of Eleventh Development Plan.

2.3.10. Sports

a. Objective

645. The basic objective is to reach a level where sports have become a habit of life, where everyone who are willing can access sports activities, success has been achieved in international championships, and prestigious sports organizations are hosted and thus competitive worldwide in every branch of the sports.

b. Policies and Measures

646. Sports education will be provided beginning from early ages; the quality of physical education and sports courses in formal education will be increased; the regular participation of the citizens of all ages will be encouraged by developing the sports facilities in the local areas.

646.1. The projects and campaigns will be developed to inspire the public interest in sports, and the possibilities of access to sports facilities will be improved.

646.2. Sports education will be expanded in primary and secondary education levels beginning from pre-school; the diversity of the school sports competitions and the number of school sports clubs will be increased so that directing children to different sports branches will be provided.

646.3. Everyone, especially the disabled citizens, will be encouraged to participate in sports activities.

646.4. The coach-teacher qualifications will be improved for the participation of disabled persons in sports will be improved; enriched educational materials, visual and written documents will be prepared and put into practice.

646.5. For the easier monitoring and evaluation of the school and local sports clubs and providing their performance indicators be verifiable will be ensured by the digital integration of these clubs as well.

647. The students will be directed to the sports branches where they can be successful, which will allow to raise the elite athletes and the guidance for the branches that will encourage the active sports participation in lifelong will be done through the talent screening studies for the primary education students.

647.1. The systems of the selection, guidance and standartization will be developed for athletes who have the potential to compete in the elite category.

647.2. The standard talent screening model will be created to be implemented nationwide.

647.3. The individual development of talented athletes will be supported by reorganizing the sports activities in the educational institutions.

648. The construction and effective use of sports facilities will be ensured at national level, taking into consideration the geographical location, climate and demographic structure.

648.1. Models will be developed for the construction and especially the effective administration of the facilities.

648.2. The educational institutions and public sports facilities will be made open for the joint use and to citizens' access under the coordination of the Ministry of Youth and Sports.

648.3. By restructuring the data sets of the sports field, the data quality will be increased and a data infrastructure will be established that enables international comparisons.

649. Our country's share of the world sports industry will be increased through initiating the studies to develop high value-added sports products with international competitiveness.

649.1. The studies in the fields of the sports industry and technologies will be supported.

649.2. The companies operating in the sports industry will be provided to a competitive structure by utilizing the opportunities offered by the information technologies and e-commerce applications.

649.3. R&D studies will be done on trademarks and on the quality that will meet the competition requirements in accordance with the international criteria in the production of goods and services in the sports sector.

650. Sports health centers will be expanded with increasing the quality and diversity of services, and the measures will be taken to meet the need for sports physicians.

650.1. A study at the regional level on the determination of the, the current situation of and the needs for the sports health centers will be carried out, and new centers will be established according to the needs.

650.2. The need for sports physicians will be determined and sufficient number of specialist physicians will be trained.

651. The Turkish Sports Tourism Strategy, that will take into consideration the regional potentials and the sports branches with high competitiveness, will be prepared in order to ensure the long term and healthy development of the sports tourism, and our country's share of the world sports tourism market will be increased.

651.1. A comprehensive inventory analysis study will be done for the identification and evaluation of the areas and the regions suitable for sports tourism, and a road map of sports tourism will be prepared.

651.2. The development of the sports tourism will be provided by promoting traditional sports branches at the international level and by hosting sports organizations in Turkey.

652. The sub-occupation definitions and the vocational qualifications will be determined in the sports sector in order to prevent the unregistered employment, and to make it turn into sports a line of work and profession, and the role of sports as the primary line of business will be strengthened.

652.1. The arrangements will be done to facilitate the transition of national athletes to the secondary and higher education levels.

652.2. The curriculum of the sports high schools and the faculties of sports sciences will be updated to enhance employment opportunities in the field of sports.

652.3. The vocational guidance practices will be developed for the individuals who have been professionally interested in sports in order to make them to contribute to the sports or the other fields as active and productive individuals as well after their sports life.

652.4. The training programs for coaching, legislation, methods, post-education examination and evaluation processes will be rearranged, and the quality of the coaching will be increased.

652.5. The coaching career system will be put into practice.

Table 40: Targets for Sports

	2018	2023
Number of Beneficiaries of Facilities (Thousand)	8,500	15,000
Number of Young / Students Participating in Skill Analysis (One Thousand)	1,000	1,500
Number of Medals Won in International Competitions	5,739	13,400

Source: Data for the year 2018 were taken from the Ministry of Youth and Sports. The data for the year 2023 are the estimates of Eleventh Development Plan.

2.3.11. Population and Aging

a. Objective

653. The main objective is to protect young and dynamic demographic structure; and to increase the quality of life of elderly by enabling them participate in economic and social life effectively, maintaining their lives independently and actively, availing them of high quality long-term care, health and other services and creating active aging environments.

b. Policy and Measures

654. The young and dynamic population structure will be protected in order to be-

nefit from our demographic window of opportunity at the maximum level.

654.1. In order to keep the fertility rate above the replacement level, the impact assessment of the policies harmonizing the work and family lives implemented in the previous period will be done, and the necessary changes or additional measures will be realized.

655. The services for the elderly in need of long-term care will be diversified and expanded.

655.1. A sustainable and inclusive nursing assurance model will be developed.

655.2. The integrity and the inter-institutional coordination will be ensured in long-term home care services provided by different institutions, and arrangements will be made to enable local administrations to take a greater role in the provision of services.

655.3. The quality and quantity of the labor force that will work in aged care services at home and at the institutions will be increased.

656. The efficiency of the health services provided for the elderly will be increased.

656.1. An interdisciplinary method will be developed in the provision of health services; the number of experts in geriatrics will be increased and geriatric services will be expanded.

656.2. The fight against Alzheimer-Dementia disease will be carried out with an approach that includes all aspects of the issue like health, care and R&D.

656.3. The necessary arrangements will be realized inside the houses and in the environment in order to minimize the falling downs and the accidents that the elderly may experience.

657. The active aging opportunities will be developed by increasing the participation of elderly population in economic and social life.

657.1. The access to lifelong learning opportunities will be facilitated for the elderly.

657.2. The mechanisms enabling the elderly to keep in working life under certain conditions will be developed.

657.3. The active participation of the elderly in the social decision making processes will be ensured in order to benefit from their experiences.

658. An environment in which the elderly do not feel themselves isolated and lonely will be developed.

658.1. The social spaces and environments in which the ideas and the values can be transferred between generations will be developed.

658.2. The voluntary activities and projects to increase the intergenerational solidarity will be supported.

658.3. The care of the elderly within the family will be supported in order to increase inter-generational culture sharing and solidarity.

659. The services and the policies for the aging population will be developed on the basis of data.

659.1. A Turkey Care and Aging Study will be conducted in order to develop the services and the policies for the aging population on the basis of data.

Table 41: Population Estimates

	2018	2023
Total Fertility Rate (The Number of Children Per Women)	1.99	2.15
Life Expectancy at age 65 (Year)	17.7 ¹	18.0
Female	19.2 ¹	19.5
Male	16.0 ¹	16.3
Labor Force Participation Rate of the Aged Population (%)	12.2 ²	13.7

Source: Data for the year 2018 were taken from TURKSTAT. Data for the year 2023 were the estimates of Eleventh Development Plan.

(1) Data for the period 2015-2017

(2) Data for the year 2017.

2.3.12. External Migration

a. Objective

660. The basic objective is providing an external migration management which is safe, systematic, controllable, evidence based and compatible with human rights and befitting human dignity.

b. Policies and Measures

661. The institutional structure of the migration management will be strengthened and its effectiveness will be increased

661.1. The Migration Strategy Paper will be issued.

661.2. The institutional structure of migration management will be strengthened to enhance the integration of foreigners in our country to social and economic life.

661.3. The inter-institutional cooperation will be strengthened for planning, implementation and monitoring of the management of the international aids in the field of migration; and the capacity of the national institutions will be developed to benefit directly from the international funds.

661.4. The studies of the universities and research institutions will be supported in order to make scientific researches that contribute to strong and evidence based policy making in the field of migration.

661.5. The international cooperation will be improved to prevent the irregular migration and ensure regular migration.

661.6. The voluntary repatriation mechanisms will be expanded and effectively implemented.

661.7. The inter-institutional coordination will be developed to ensure the evidence-based policy making and service provision.

661.8. The foreigners covered by irregular migration will be effectively monitored and controlled.

661.9. The experience gained in the field of migration will be shared on international platforms by means of production of contents in foreign languages, organization of events, and exchange of national experts.

662. The adaptation of migrants under temporary and international protection into social life will be improved.

662.1. The awareness raising activities will be carried out in order to eliminate the information deficiencies, negative perceptions and prejudices about the people under temporary and international protection.

662.2. The adaptation of people under temporary and international protection into social life will be improved through Turkish language skills development.

662.3. The transition of children under temporary and international protection to lower and upper secondary schools will be increased and they will be directed to vocational and technical education according to their interests and abilities.

663. The ties of Turkish citizens living abroad with our country will be strengthened.

663.1. The activities and services aiming at solving the problems of Turkish citizens living abroad will be increased and the programs will be implemented to strengthen their ties with our country.

663.2. The academic, social and cultural development of our citizens living abroad will be supported.

663.3. Turkish children and young people living abroad will be provided to learn their native language and to recognize our cultural values.

2.4. LIVABLE CITIES, SUSTAINABLE ENVIRONMENT

664. Rapidly increasing population, urbanization, economic activities and diversified consumption habits increase the pressure on the environment and natural resources. Environmental problems such as environmental pollution, climate change, desertification, deforestation, loss of biodiversity and droughts more apparently affect human life and development process each day. It is seen that climate change accelerating due to high greenhouse gas emissions causes natural disasters and poses a serious threat to humanity. Sustainable environmental and natural resource management and building of liveable cities are becoming more and more important in the world where demand and consumption are increasing.

665. In Turkey, emphasis were given on the policies for the establishment of settlements that are people-oriented, respecting the nature and historical heritage, high quality of life and resilient and where basic urban services are provided in fair and accessible manner and local services are carried out by the subsidiarity principle.

666. In order to ensure the sustainable development of cities; the works, such as the establishment of an accessible high-link urban transport system, a disaster- and climate-resilient infrastructure, and a sustainable production and consumption mechanism, long-term integrated urban planning and design, and implementation of effective disaster management, require the participation and comprehensive cooperation of all stakeholders. While the needs and di-

versified preferences of the increasing population affect the development process, it is important to reduce the pressure on the environment. Within this framework, priority is given to the prevention of environmental pollution, to the conservation and sustainable use of biodiversity and natural resources.

667. In order to reduce the development disparities between regions, efforts are being carried out in order to increase the competitiveness of the regions and to strengthen economic and social integration. Improving the quality of life of the rural population, mechanisms are established and economic and social supports are provided to improve the disadvantages arising from the weak economy of scale. Improvements in regional disparities have been observed with the support and investments provided. However, socio-economic development disparities in between east-west and inland-coasts remain important.

2.4.1. Regional Development

a. Objective

668. The main objective is to transform our regions by developing their opportunities and capabilities based on innovation and cooperation on the basis of innovation and thus to ensure maximum contribution to the balanced development of our country and to reduce the differences in regional and interregional development.

b. Policies and Measures

669. The institutional structure and governance of regional development will be activated at central and regional level.

- 669.1.** The structures, duties and powers of the regional development administrations and development agencies will be reviewed and arrangements will be made for their efficient and productive activities.
- 669.2.** Laws, decrees and secondary legislation on regional development will be reviewed and implementation tools will be activated.
- 669.3.** Coordination of the support provided by the relevant ministries and institutions and organizations such as KOSGEB in the field of regional development will be ensured and duplications will be prevented.
- 669.4.** An official statistical infrastructure will be developed to measure regional development disparities, in particular production, income and employment data on regional, provincial and district levels.
- 669.5.** Research, analysis and reporting will be carried out, including the updating of the Socio-Economic Development Ranking Survey at provincial and district level, which will strengthen decision support processes at the design and implementation stages of regional development policies.
- 670.** The development of urban and industrial infrastructures in relatively underdeveloped regions, increasing employment in sectors with development potential and improving the quality of life will be supported.
- 670.1.** Development agency supports will focus on management consultancy with the aim of improving the capacity of institutions at local level, institutionalization, sustainability and efficiency of the private sector.
- 670.2.** The implementation of the Attraction Centres Support Programme will continue in the provinces which serve as a centre in terms of providing service to the surrounding regions in relatively underdeveloped regions.
- 670.3.** Development agencies will provide more focused and effective supports with result-oriented programs and innovative support mechanisms specific to the region.
- 671.** Social Support Program will be restructured and its implementation will be widespread.
- 671.1.** The Social Support Program will be restructured to encourage social entrepreneurship and social responsibility activities in order to ensure the more active participation of disadvantaged segments of the society in economic and social life and to improve employability by supporting productivity and talent.
- 672.** International resource utilization of Development Agencies will be increased.
- 672.1.** Effective use of funds for economic and social cohesion and other international resources by development agencies in line with the needs and priorities of the regions will be supported by training, consultancy and promotion activities.

Table 42: Regional Development Targets

	2018	2023
Ratio of Per Capita Income of the Highest Income Region to Per Capita Income of the Lowest Income Region (%)	4.28 ¹	3.85
Ratio of Graduates of Higher Education and Higher Education in Five Regions with Low Education Level (%)	10.9	16
The Lowest Five Regions of Industry and Services in the Regional Economy (%)	77.4 ¹	80

Source: TURKSTAT data for 2018. Data for 2023 are estimates of the Eleventh Development Plan.

(1) The data for the year 2017

2.4.2. Urbanization

a. Objective

673. The main objective is to create cities and settlements that are people-oriented, respectful to natural life and historical heritage, where basic urban services are provided in a fair and accessible manner, with high quality of life and producing value.

b. Policies and Measures

674. Cities, in coordination with the development vision, will be planned with an approach that supports polycentric, mixed-use, and provides accessibility; where harmonization with topography and addressing disaster risk, climate change, geographical characteristics and historical values in spatial plans will be taken as a basis.

674.1. New sub-centres will be defined in master plans and technical standards necessary for public transportation and pedestrian access to the sub-centres shall be determined in the sub-scale plans, and Regulation on Preparation of Spatial Plans will be revised in line with these standards.

674.2. In order to improve the original identity of the cities; a support program for local administrations will be developed by

İller Bankası A.Ş. (ILBANK) to preserve and revitalize natural, historical and cultural values.

675. Public spaces, primarily open and green areas, in cities will be protected, and restructured to improve accessibility and security, and by taking into account human-nature relationship and sensitive to women, children, elderly and disabled.

675.1. In order to increase accessibility and security of public spaces, local administrations will be supported to perform needs analysis for vulnerable groups on neighbourhood basis and to improve service quality.

676. Within the scope of green city vision, in order to improve the quality of life and adapt to climate change, Millet Gardens will be built in cities and the amount of green spaces will be increased.

676.1. In order to create healthy living spaces, to increase urban green space standards and quality of life in cities, Millet Gardens will be expanded to 81 provinces, and formation of Millet Gardens in 81 million square meters until 2023 will be carried out with the financing of the Ministry of Environment and Urbanisation, Housing Development Administration (TOKI), ILBANK and municipalities.

677. Spatial planning system will be developed within the framework of principles and rules determined in cooperation with central institutions to include effective participation mechanisms at neighbourhood level and monitoring and auditing processes; where planning and implementation carried out by local administrations will be taken as a basis.

677.1. An effective participation, monitoring and auditing model will be developed in planning process and legislation will be updated within this context.

677.2. It will be ensured that central institutions that have planning authority, will provide written statements about principles and rules of planning taken into account for issues that fall under their jurisdiction, and administrative arrangements will be made for this purpose.

678. In land development implementations, the integrity of land development plans will be preserved, plans will be enriched by implementation tools and land development implementations made in plan entirety will be disseminated.

678.1. Innovative approaches taking into account rural and urban settlements will be developed in the field of participation and financing in land development implementations.

679. Horizontal architecture will be the basis in urbanisation and strategies and implementations to develop urban common life, sense of belonging, neighbourhood culture and urban awareness will be disseminated.

679.1. Successful model settlements that are people-oriented reflecting horizontal

architecture will be identified and evaluation report will be prepared.

679.2. Guidelines will be prepared to form a basis for the issuance of “certificate of city cherishing our civilization” and “original neighbourhood certificate”.

680. In the field of mapping, positional accuracy, digitalization and the use of new technologies will be strengthened and duplications will be prevented through joint production and data sharing by ensuring coordination and cooperation among institutions.

680.1. Positional accuracy infrastructure in urban areas that will be based on national map production works will be renewed.

680.2. Multidimensional cadastre/map production will be completed.

681. In order to form the basis for investments to be made by public and private sector institutions, digitalized, up-to-date, reliable cadastral data will be presented and property data will be transferred to electronic media.

681.1. Property related transactions will be transferred to electronic media within the framework of legal restrictions.

681.2. Modernization of cadastre will be completed by switching to a single coordinate system in all Turkey.

681.3. All deed transaction documents will be transferred to electronic media to carry out deed transactions in electronic media regardless of location.

682. Measurement and evaluation tools will be developed to provide a basis for monitoring the level of quality of life in cities.

682.1. Institutional, technical and legal infrastructure will be strengthened to establish and share urban data infrastructure at provincial, district and neighbourhood scale.

683. Local administrations will be encouraged to prepare smart city strategies and road maps, smart city projects will be selected and implemented by taking into account the prioritized areas and capabilities at national level and development of domestic production for smart city applications will be supported.

683.1. Guidance with regard to National Smart City Strategy and Action Plan will be provided to local administrations to prepare smart city strategies and road maps.

683.2. Smart city projects will be prioritized by considering smart city maturity assessment and resource allocation constraints, giving priority to metropolitan municipalities and 51 provincial municipalities.

683.3. The methods of supporting domestic technology applications in smart city applications will be analysed, and criteria, such as domestic production rate, will be determined to be taken as basis in the tender processes.

683.4. The smart city ecosystem will be analysed and all stakeholders of the sector such as entrepreneurs, system developers, and technology providers will be brought together on a digital platform.

684. With the efficient management of real estate value increases, creation of resources will be provided to increase the quality of urban space and services, as well as dissemination and development of urban services.

684.1. To record the price and follow-up value changes in deed transactions, to determine the value increases arising from public investments and regulations, to contribute to site selection analysis and to create real estate value maps, a real estate value information centre integrated to the Land Registry and Cadastre Information System will be established and value data of real estates will be kept together with property information.

Table 43: Targets for Urbanisation

	2018	2023
Number of Cities Issued with the “(Charter) Certificate of City Cherishing Our Civilization”	-	26
Number of Settlements Issued with “Original Neighbourhood Certificate”	-	81
Number of Parcels Renewed / Digitized within the Scope of Cadastral Modernization (Thousand)	8,750	26,750

Source: Data of 2018 belong to Ministry of Environment and Urbanisation. Data of 2023 are predictions of Eleventh Development Plan.

2.4.3. Housing

a. Objective

685. Ensuring that everyone, especially those with low incomes, have access to an adequate, liveable, durable, safe, inclusive, economically affordable, sustainable, climate change-resistant housing with basic infrastructure services is the main objective.

b. Policies and Measures

686. Housing needs arising from urbanization, population growth, renewal and disasters will be met by taking into account supply-demand balance.

686.1. Housing stock will be determined in order to detect the housing needs on the basis of settlements.

686.2. During the Plan period, 250 thousand social houses will be produced for low income and disadvantaged groups.

687. The regulatory, supervisory, steering and supporting role of the public sector in the housing market will be strengthened.

687.1. A coordination mechanism will be established to ensure regular cooperation among the units responsible for housing in public administration.

687.2. Quality, safeness, accessibility, energy efficiency and disaster resilience standards will be developed in housing production and will be taken into consideration at every level.

688. Supply and demand side data sources that are needed in the housing sector will be developed.

688.1. Integrated access to the housing sector data will be ensured via a single data source.

688.2. Housing studies will be increased to determine housing demand and supply.

Table 44: Housing Targets

	2018	2023
Annual Number of Social Housing Produced (Cumulative)	20,802	270,802

Source: 2018 data belongs to TOKÍ. Data for 2023 is the estimate for Eleventh Development Plan.

2.4.4. Urban Transformation

a. Objective

689. Areas that are under disaster risk and hazard and as well as land and plots where risky buildings are located will be transformed in a way to ensure healthy and safe living in accordance with the norms and standards of science and art.

b. Policies and Measures

690. Urban transformation will be carried out with horizontal architectural approach, aiming the improvement of quality of life and urban awareness, and the renewal of historical centres.

690.1. Dissemination of the renewal of historical urban centres and creating a shared financing model with local administrations in urban transformation implementations

will be provided and in 81 provinces historical city centres will be transformed in a way to emphasize the identity of the city and their designs will be realized with horizontal architecture and people-oriented approach.

691. Urban transformation strategies prepared on provincial level will be taken as basis in urban transformation implementations.

691.1. Urban transformation strategies will be prepared at provincial and district level including data on risky and reserve areas, social structure analysis, economic integration, condition of the infrastructure, financing models and transformation targets in provincial level.

692. Urban transformation projects will be carried out harmoniously with urban fabric and area based considering participation principles, adopting the principle of on-site transformation in urban transformation areas, taking into account solutions for the spatial needs of the existing social structure.

692.1. Social impact assessment will be conducted before urban transformation implementations.

692.2. Participation principles in urban transformation projects will be defined and it will be ensured that the process progresses in cooperation.

693. Existing criteria for the identification and declaration of disaster risk areas will be developed and clarified, and high priority areas will be transformed immediately by prioritization with multi-criteria evaluation system.

693.1. In urban transformation implementations multi-criteria evaluation model for the prioritization based on settlement area will be developed within the scope of criteria and scoring system based on parameters such as disaster risks and hazard in terms of causing loss of life and property, the size of the population being affected, financial and fiscal necessity, availability of reserve area, and settlement areas will be prioritized in this context.

693.2. Urban transformation services of the dwellings throughout the country and industrial sites within the city will be carried out according to the demands and needs submitted from the provinces by risk prioritization of the structures in hazardous and risky areas.

693.3. In urban transformation projects a financing model will be developed to provide infrastructure for transformation areas, administrative and environmental regulations and rental assistance to meet the financial needs of beneficiaries.

693.4. Industrial parcels belonging to treasury will be sold to small industrial cooperatives to provide funds for urban transformation implementations.

693.5. Disaster and emergency gathering areas will be established throughout Istanbul by taking into consideration the population density when planning new areas and performing urban transformation implementations.

693.6. Accross Istanbul, areas close to fault line will be identified and prioritized in urban transformation studies.

693.7. Disaster risk prioritization of existing infrastructure systems will be carried out and ones needed to be renewed will be done in order to increase urban resilience by taking into consideration the building stock in the existing built areas in Istanbul.

694. Concerning urban transformation implementations, new areas to be opened for development and transformation of industrial areas, city planning practices will be carried out taking into consideration city disaster history, disaster risk and hazards.

694.1. Disaster Risk Mitigation System prepared by Disaster and Emergency Management Authority (AFAD) will be used in spatial planning activities.

694.2. Land development planning criteria will be developed considering disaster risks during the planning stage and it will be ensured that land development planning be made in accordance with disaster risks and hazards.

695. Urban transformation practices will be carried out in a way to support the production of domestic and innovative materials.

695.1. Legislation will be developed defining the procedures and principles for the implementation of urban transformation in a way to support domestic and innovative production.

Table 45: Urban Transformation Targets

	2018	2023
Number of Provinces within the Scope of Historical City Centre Project (Cumulative)	9	81
Number of Provinces that has Prepared Urban Transformation Strategy Document (Cumulative)	2	81

Source: Data of 2018 belong to Ministry of Environment and Urbanisation. Data of 2023 are predictions of Eleventh Development Plan.

2.4.5. Urban Infrastructure

a. Objective

696. The main objective is to provide safe and clean drinking water access for all population and to minimize the adverse effects of wastewater on human health and environment through the effective management. An active solid waste management system that help reducing harmful effects on human health and negative environmental impacts and ensuring eliminating, recycling and recovery present the sector's another main objectives. Besides, it is es-

sential to establish safe, time and cost effective and sustainable urban transportation systems.

b. Policies and Measures

697. Watershed planning, strategies and action plans will be implemented in an integrated way to address the protection, development and sustainable use of water resources.

697.1. Regarding the protection and effective use of water resources, River Basin Management Plans, Sectoral Water Allocation Plans, Basin Master Plans, Drought Mana-

gement Action Plans, Flood Management Action Plans and Drinking Water Basins Protection Action Plans will be completed in the 25 basins of the country.

697.2. The reuse of treated wastewater safely for beneficial purposes, primarily in agriculture will be planned at the river basin level, thus reducing pressures on water resources.

697.3. The quality and quantity of groundwater will be clarified.

697.4. National Water Information System will expand and become more sustainable.

698. Water and wastewater service provision will be adequate and efficient as well as making sure that the standards will be met. Responsible institutions will improve their operational performance and investment efficiency.

698.1. Each provincial borders will be equipped with water and sewerage administrations, which previously established only within the borders of the metropolitan municipalities, through legislation.

698.2. The repayment system will be improved to help that State Hydraulic Works will become self-sustaining in drinking water project finance.

698.3. Water, Sewerage and Infrastructure Project (SUKAP) will be further developed to decrease physical losses.

698.4. PPP model will be utilized to finance wastewater treatment needs, while at the same time some barriers, such as lack of technical skill, capacity and, control will be overcome quickly.

699. By enabling solid waste management, waste reduction, resource separation, separate collection, transportation, recovery, disposal phases and rehabilitation of irregular/wild dump areas will be developed technically and financially as a whole. Implementation tools, particularly PPP, will be developed to ensure resource efficiency and environmental responsibility in solid waste management.

699.1. Public awareness will be provided in the recycling of solid wastes.

699.2. Zero Waste Project implementations will be expanded.

699.3. Technical standards for the recovered secondary product will be developed and incentive and steering legislation will be improved.

699.4. Separate collection system of wastes will be expanded.

700. Domestic solid waste recovery and disposal facility projects and transfer station projects that local administrations with inadequate financial power have difficulty in financing will be supported within the scope of a program.

700.1. The implementation of the Solid Waste Program will be expanded.

701. Policies, decisions and investments related to zoning and transportation in cities will be evaluated in a coordinated manner, especially zoning plans and transportation master plans will be prepared and updated compatibly.

701.1. A coordination mechanism will be established to ensure that the spatial plans

and transportation master plans are compatible.

701.2. Regulations will be made regarding the review and approval of the urban rail system projects as well as the principles and procedures for the acquisition of municipal rail system projects by the Ministry of Transport and Infrastructure. Rail system design guidelines will be updated and statistical data infrastructure will be established.

702. In order to reduce traffic congestion, accidents and air pollution in cities, rather than private vehicles, the use of public transport systems will be encouraged by applying demand-side policies rather than supply-side policies in urban transportation.

702.1. Taking into consideration the traffic density and travel demand in urban public transport, bus, bus rapid transit and similar systems will be primarily preferred and rail system alternatives will be considered on the routes where those systems are inadequate.

702.2. The rail transit systems will be planned on the corridors where expected per hour-per direction travel demands in the expected year of operation to be at least least 7,000 passengers/hour for tram systems, 10,000 passengers/hour for light rail systems and 15,000 passengers/hour for metro systems.

702.3. A single card payment system will be implemented for the widespread use of public transportation systems.

702.4. Dynamic pricing will be utilized for infrastructure with bottlenecks such as par-

king areas, bridges tunnels, park-and-ride and dedicated lane practices will be implemented.

703. Environment friendly transport modes will be developed and non-motorized transport modes will be encouraged in urban transport.

703.1. Standards for pedestrian ways and sidewalks will be established for seamless pedestrian traffic.

703.2. Pedestrianized areas which are free of motor vehicles will be developed in city centers, historical and cultural points of interest, and shopping areas.

703.3. Legal and financial support mechanisms will be implemented to encourage the use of bicycles.

703.4. Bike path master plan and implementation plan will be prepared and within this scope new bike paths will be built.

703.5. Bike sharing systems will be implemented.

704. In order to use existing infrastructure more efficiently, to enhance traffic safety, to manage transport demand correctly and to make more effective planning, a national Intelligent Transport Systems (AUS) Strategy Document will be prepared, AUS architecture will be developed and AUS applications will be expanded.

704.1. National AUS Strategy Document and 2019-2022 Action Plan will be put into practice upon completion.

704.2. AUS architecture project will be completed.

704.3. Especially in metropolitan areas, information systems will be implemented in urban transportation network. dynamic driver, passenger and pedestrian

Table 46: Urban Infrastructure Targets

	2018	2023
Rate of Municipal Population That Have Access to Drinkable Water to Total Municipal Population (%)	98 ¹	100
Number of Drinking Water Treatment Plants	519 ¹	690
Rate of Municipal Population Served with Sanitation Network to Total Municipal Population (%)	90 ¹	95
Rate of Municipal Population Served with Wastewater Treatment Plant to Total Municipal Population (%)	87	100
Rate of Treated Wastewater Reuse (%)	1.2	5
Drinking Water Leakage Rate (%)	36	25
Recovery Rate of Waste within the Scope of Zero Waste Project (%)	13	35
Number of Buildings to which Zero Waste Program Implemented (Thousand)	13	400
Proportion of Municipal Population Given Landfill Services (%)	75	100
Urban Rail Systems Network Length (km, cumulative)	747	1,154
Bike Path Network Length (km, cumulative)	1,048	4,048

Source: 2018 data belongs to World Resources Institute, related metropolitan municipalities, TURKSTAT, Ministry of Agriculture and Forestry and Ministry of Environment and Urbanization. Data for 2023 are estimates of the Eleventh Development Plan. (1) TURKSTAT data for 2016.

2.4.6. Rural Development

a. Objective

705. The main objective is to increase the production capacity of producers associations and family enterprises and increase the employability of rural labour force, improve the quality of life, fight against poverty and increase the level of welfare of the rural community and keep the population in rural areas with the understanding of sustainable rural development.

b. Policy and Measures

706. The social and physical infrastructure of the rural settlements, forecasting and fol-

low-up of the investment and service needs for settlement and resettlement works and elimination of these needs will be provided.

706.1. In order to meet the local infrastructure and superstructure needs of the villages, financial support will be provided for construction of high quality and accessible road network, drinking water, wastewater facility, small irrigation facility within the within the scope of KÖYDES for non-metropolitan provinces and Rural Infrastructure Project of Metropolitan Cities (KIRDDES) for cities with metropolitan municipalities, settlements returning from villages and towns to the neighbourhood.

706.2. Within the scope of KÖYDES, KÖYDES monitoring system will be established for efficient and effective use of resources allocated for rural infrastructure services.

706.3. The maintenance and repair of roads deteriorated by climatic and topographic conditions and the construction of new roads will be ensured in order to protect the safety, security and public order of citizens living in rural settlements.

706.4. Appropriate structures will be constructed adjacent to the village or in the designated areas instead of the structures that threaten the safety of life and property within the scope of the resettlement and settlement activities required depending on various risk factors, with priority being expropriated in rural areas.

706.5. A coordination mechanism will be established for the efficient use of resources allocated for rural resettlement.

707. Rural development subsidies will be programmed with a focus on farmers and the environment; arrangements will be made to eliminate existing multi-headings in the implementation of supports, and complementarity and effectiveness will be provided in practice.

707.1. The general principles and procedures for the implementation of the complementarity between the Rural Development Support Program (KKYDP), the Instrument for Pre-Accession Assistance Rural Development Support Program (IPARD), the Development Agencies and other related support programs aimed at ensuring the unity of the target in rural development support will be reviewed.

707.2. Within the scope of IPARD and KKYDP Programs, support will be continued for rural agriculture, rural economic infrastructure investments and development of farm activities, rural tourism, handicrafts and information technologies in rural areas.

708. In order to raise the living standards in rural areas, institutional and local capacity for rural development will be improved and it will be provided to women, young farmers and so on. Positive discrimination will be provided, producer organizations will be pioneering institutions in social solidarity, cooperation, education and financing.

708.1. Within the scope of rural development support, family enterprises and small and medium-sized producers will be encouraged to organize in order to strengthen the production and financial structure and to benefit from economies of scale; production and logistics infrastructure and trademarking and marketing activities will be improved.

708.2. Environmental supports and incentives will be increased in order to improve the quality of life in rural areas and to make the rural areas protected, lived and produced.

709. Within the scope of improving the human capital of rural society and reducing poverty, efforts to combat poverty in villages will be focused on production and employment.

709.1. In order to develop the human capital of the rural community, activities in the fields of farmer training and agricultural

consultancy for family businesses shall be strengthened, and adult population, especially women and young entrepreneurs, shall have access to non-formal education courses and vocational training programs will be programmed on the basis of high value added local products.

709.2. Rural women and young farmers will be supported primarily in agricultural training and extension activities, rural support projects and occupational health and safety trainings in agriculture.

709.3. Priority will be given to households with disabilities, poor and elderly individuals and households engaged in seasonal mobile agricultural labour in the activities aimed at combating poverty in villages.

710. In order to ensure the sustainability of rural production and life styles, rural heritage will be preserved, natural and cultural assets will be protected.

710.1. In order to protect the production and life styles and natural and cultural assets in the villages; traditional crafts and handicrafts specific to villages, agro-tourism, geographically marked products, ornamental plants, viticulture, beekeeping, will continue to be supported.

711. Rural statistics for strengthening the data-based rural policy approach will be calculated by methods not affected by administrative changes, the definition of rural areas will be revised, basic rural data will be published on rural-urban and provincial / district level and village inventory will be updated.

711.1. In order to produce rural statistics on provincial and district basis, the definition of rural area will be revised, basic national data will be published on rural-urban and provincial / district basis and rural indicators information system will be established. In this context, TURKSTAT Population Density data and EU National Land Cover Classification data (CORINE) and rural / urban definition by provinces and Spatial Address Registration System data carried out by the Ministry of Interior will be used.

711.2. Statistical works will be conducted to measure the socio-economic level of rural areas such as rural poverty, production and employment.

711.3. The village inventory will be updated to cover all provinces and a village inventory information system will be established.

Table 47: Rural Development Targets

	2018	2023
Length of Village Road Built within the Scope of KÖYDES and KIRDES (km, Cumulative)	125,348	148,490
Number of Units Installed and Renovated in Villages (Cumulative)	64,700	69,700

Source: 2018 data belongs to Ministry of Interior and Ministry of Environment and Urbanization. Data for 2023 are estimates of the Eleventh Development Plan.

2.4.7. Protection of Environment

a. Objective

712. The main objective is to protect the environment and natural resources, improve quality, ensure effective, integrated and sustainable management, implement environment- and climate-friendly practices in all areas, and increase environmental awareness and sensitivity of all segments of the society.

b. Policy and Measures

713. By clarifying the duties, authorities and responsibilities of institutions and organizations on environment, coordination and cooperation between public, private sector, local administrations and NGOs will be improved, environmental awareness of the society will be increased and effective environmental management will be ensured.

713.1. Legislative studies will be carried out in order to improve the harmonization of public institutions and organizations with each other and local administrations in their authorities and duties, to eliminate conflicts and to strengthen coordination and cooperation with other stakeholders in implementation.

713.2. Environmental impact assessment, strategic environmental assessment, permitting, licensing, monitoring and auditing mechanisms and capacities will be developed, and regarding these issues, legislation will be strengthened and the need for required software, machinery and equipment will be fulfilled.

713.3. Training and awareness raising activities will be carried out on environment,

nature protection and sustainable production and consumption in order to raise the environmental awareness of the society.

713.4. Environmental labelling system will be expanded.

714. International climate change negotiations will be conducted within the framework of the Intended National Contribution with the principles of common but differentiated responsibilities and respective capabilities, and within the scope of national conditions, climate change will be tackled in sectors causing greenhouse gas emissions and the resilience of the economy and society to climate risks will be increased by capacity building for adaptation to climate change.

714.1. Within the framework of Intended National Contribution, activities for emission control will be carried out in greenhouse gas emitting buildings, energy, industry, transportation, waste, agriculture and forestry sectors.

714.2. Planning, implementation and capacity building activities including national and regional adaptation strategies to increase the capacity to adapt to the negative impacts of climate change will be carried out.

714.3. In order to adapt to climate change and to take the necessary measures, regional and city-scale needs will be identified and solution proposals will be determined, and Climate Change Action Plans will be prepared for 7 Regions, particularly for the Black Sea Region.

715. Air quality management practices will be enabled to prevent air pollution from production, heating and traffic, and air qu-

ality will be improved by controlling emissions.

715.1. Air quality action plans will be prepared at local level and legislation on pollution and emission control will be updated.

715.2. Air quality management capacity will be improved by strengthening regional clean air centres.

715.3. Research on air quality modelling and monitoring will be conducted and infrastructure will be developed.

716. Identification, registration, protection, sustainable use, development, monitoring and prevention of illegal trafficking of biological diversity and genetic resources will be ensured and the benefits obtained from genetic resources and related traditional information will be brought to our country.

716.1. The national inventory on biological diversity will be regularly updated through research and monitoring studies, and traditional information based on biological diversity will be registered and made available for R&D purposes.

716.2. Legislation will be developed for the protection, sustainable use and development of biological diversity and genetic resources and prevention of illegal trafficking.

716.3. A mechanism for access to genetic resources and the equal and fair sharing of the benefits derived from these sources and traditional information will be established.

717. In order to ensure the conservation, restoration and sustainable use of ecosys-

tems and ecosystem services, the amount of terrestrial and marine protected areas will be increased and effective management of nature conservation areas will be achieved.

717.1. The amount of terrestrial and marine protected areas will be increased and in order to ensure effective management of these areas, practices such as forming green corridor, planning and infrastructure works will be carried out.

718. Risk management practices to prevent major industrial accidents will be improved and effective management of chemicals will be ensured in a way that minimizes impacts on human health and environment.

718.1. Risk management and emergency response capabilities against major industrial accidents will be improved.

718.2. Within the scope of international obligations, legislation studies will be carried out for effective management of chemicals.

719. Evaluation and management of environmental noise will be improved.

719.1. Strategic noise maps of residential areas across Turkey will be prepared.

720. Regular production of environmental data and indicators in accordance with the standards, sharing with the public and effective use in decision-making processes will be ensured.

720.1. Environmental data will be improved in terms of collection, monitoring and evaluation processes and quality and capacity for data usage will be increased.

Table 48: Environmental Targets

	2018	2023
Number of Stations in the Air Quality Monitoring Network (Cumulative)	339	380
Share of districts in which air quality information is provided to citizen access (% , Cumulative)	16.2	100
Domestic Material Consumption per Person (Tons/capita)	12.9 ¹	11.8
Number of Planned Integrated Environmental Audits	1,695	2,165
Avoided CO₂ Emissions With Newly Installed Renewable Power Plants (Million Tons, Cumulative)²	-	18.0
Number of Protected Areas (National Park, Nature Park, Nature Monument, Nature Conservation Area, Wildlife Development Area, Ramsar Area, Wetlands of National Importance and Wetlands of Local Importance, Natural Site, Special Environmental Protection Area) (Cumulative)	1,429	1,595

Source: The data for 2018 belong to the Ministry of Environment and Urbanization, the Ministry of Agriculture and Forestry and TURKSTAT. Data for 2023 are estimates of the Eleventh Development Plan.

(1) Data of 2015.

(2) This indicator is under the responsibility of the Ministry of Energy and Natural Resources and the cumulative amount of carbon dioxide to be reduced is calculated by substituting the electricity production from natural gas with renewable electricity production.

2.4.8. Disaster Management

a. Objective

721. The main objective is; to increase social awareness against disasters, to build disaster resilient and safe settlements and to minimize loss of life and property caused by disasters through risk mitigation practices.

b. Policies and Measures

722. Disaster risk and damage reduction studies will be carried out by taking socio-economic and physical characteristics of the regions into consideration, by prioritizing according to different types of disasters and by increasing cooperation activities throughout the country.

722.1. Turkey Disaster Risk Reduction Plan on disaster risk and damage reduction actions will be prepared.

722.2. Provincial disaster risk reduction plans will be prepared by taking priority di-

saster types into consideration in order to reduce disaster hazards and risks.

722.3. Local disaster prevention projects for disasters that have occurred or are likely to occur will be prepared and implementation capacity will be increased.

722.4. Natural disaster insurance will be expanded and extended to cover all types of disasters, and effective monitoring of compulsory earthquake insurance declaration and payment will be ensured.

722.5. International cooperation activities for disaster preparedness and risk reduction will be increased.

723. Disaster hazard and risk maps will be prepared taking into account scenarios regarding the impacts of climate change throughout the country.

723.1. Disaster hazard maps will be prepared for all types of disasters.

723.2. Risk maps will be prepared according to the types of disasters in places with high levels of disaster hazard.

724. Risk mitigation and retrofitting works will be continued to minimize the loss of life and property after a probable earthquake in Istanbul.

724.1. Disaster resilience of critical infrastructure facilities in Istanbul will be increased.

724.2. Social facilities will be completed and their capacities will be increased considering the capacity of temporary shelter areas planned to be used during disaster and emergency situations in Istanbul.

724.3. It will be ensured that cultural and natural assets in Istanbul are resilient to disasters.

725. Priority will be given to the retrofitting of public places such as hospitals, schools, dormitories and critical infrastructures such as energy, transportation, water and communication, which are of special importance in disaster preparedness and post-disaster response.

725.1. Inventory of public service buildings and efforts to strengthen against disasters will continue.

725.2. Method for prioritizing critical infrastructure facilities will be identified.

726. Capacity will be strengthened for post-disaster recovery works.

726.1. The framework of the national improvement plan will be prepared by defini-

ning the procedures and principles of the post-disaster recovery plan.

726.2. Local post-disaster recovery plans will be prepared for high-risk areas.

727. In order to increase the efficiency of disaster management, uninterrupted communication infrastructure and disaster management information and decision support systems will be developed to improve information exchange among institutions to provide decision support through sustainable communication infrastructure.

727.1. Establishment of an uninterrupted and secure communication infrastructure for more effective response to disasters will be completed.

727.2. A decision support mechanism will be developed for the effective management of disasters, which is established on a geographical information system and can manage all resources effectively in case of a disaster.

728. Social awareness against disasters and emergencies will be increased and capacities of the units responsible for disaster management at local level will be strengthened.

728.1. Awareness-raising activities will be carried out across the country against disasters and emergencies, and social awareness will be increased through education and awareness centres.

728.2. Technical and administrative capacities of local disaster management units will be strengthened.

728.3. Required logistic shelter materials will be provided.

Table 49: Disaster Management Targets

	2018	2023
Number of Houses and Workplaces with Compulsory Earthquake Insurance (Million)	8.9	12.1
Number of Provinces where Disaster Reduction Plans will be prepared (Cumulative)	-	81
Number of Provinces Included in Digital Radio System	1	81

Source: The data for 2018 belong to AFAD and Natural Disaster Insurance Institution. Data for 2023 are estimates of the Eleventh Development Plan.

2.5. RULE OF LAW, DEMOCRATIZATION AND GOOD GOVERNANCE

2.5.1. Rule of Law and Democratization

729. Ensuring sustainable development and increasing economic and social welfare require strong ownership of rule of law, democratization and good governance principles by the government and effective implementation of these rules.

730. With the Constitution amendments in 2017, Presidential Government System was adopted and after the elections held in 2018, new government system was initiated. Being the result of people-oriented development which is the basis of the new government system, Rule of Law and Democratization has been one of the main axis of the Plan.

731. One of the most important priorities of the Plan period is to further strengthen, institutionalize and consolidate rule of law conception which contains adherence of legislative, executive and judiciary to the law, Constitutional protection of fundamental rights and freedoms, judicial review of administrative actions, independence and impartiality of judiciary, equity before law, providing citizens effective rights to legal remedies.

732. Predictability, non-retroactivity, generality, protection of vested interests, equal treatment, clarity and certainty of laws will continue to be the basis of the legislative activities.

733. Governance approach based on rule of law that accepts respect to public order

and individual rights as a principle; protects and improves fundamental rights and freedoms; struggles effectively with violations of rights will be strengthened. Sufficient consciousness of individuals about human rights is targeted.

734. The legislation and practice regarding freedom of expression will be reviewed and regulations will be made to develop the rights and freedoms of individuals.

735. The legislation and practice regarding the custody, detention and other protection measures will be reviewed and implementation of these measures appropriately will be ensured.

736. A new Human Rights Action Plan will be prepared and implemented effectively.

737. Related public institutions' capacities to protect and enhance the rights and freedoms will be developed and effective coordination will be realized.

738. Adherence to law, objectivity, transparency and accountability of executive will be empowered.

739. Mechanisms and methods will be introduced for the formulation of all administrative regulations according basic principles of law such as certainty, proportionality, objectivity and protection of vested interests.

740. Mechanisms for transparent public monitoring of administrative procedures and actions will be increased.

741. Through reviewing legislation, new regulations will be issued in order to establish effective mechanisms to increase the

accountability of public institutions and public officers.

742. One of the fundamental objectives of the Plan period is to strengthen democratic institutions and procedures in the public sector through establishing an understanding of transparent, accountable and effective democratic governance that takes citizen satisfaction as its basis, works with private sector and civil society in a participatory manner, and strongly mobilizes social potentialities.

743. It is aimed to increase the capacity of local administrations to provide services and to restore a more transparent and accountable structure in order to carry out public services by the administrative units closest to citizens and to increase the citizen satisfaction.

744. Advanced communication technologies contributes to the development of accountability and transparency for public institutions and officials that are using and exercising public authority to support efficient, economic and effective use of resources. On the other hand, the use of ICT supports the promotion of citizen participation in decision making, implementation and supervision processes as well as more efficient public supervision. In the Plan period, accountability, transparency and participation in the public sector will be strengthened through effective use of communication technologies.

745. It is important to benefit from the dynamic and flexible structures of NGOs which have become a key stakeholder of economic and social development as well as their

potential to respond to needs and problems at the national and international levels, from the perspective of the strengthening of democracy and enhancing efficiency and quality in public services. During the Plan period, it is aimed to improve active citizenship awareness, to ensure effective participation of NGOs in decision-making processes, to increase cooperation between civil society-public-private sectors and to develop social dialogue environment, and to strengthen institutional, human and financial capacities of NGOs.

2.5.1.1. Justice Services

a. Objective

746. In line with the requirements of the rule of law and supremacy of law, ensuring fast, fair, efficient functioning of the trial process, predictability, facilitating access to justice and increasing confidence in the justice system are the main objectives.

b. Policies and Measures

747. Effectiveness of ordinary and administrative judiciary will be improved; citizens' satisfaction with the justice services will be increased.

748. Transparency of the justice system will be enhanced and right to be tried in a reasonable time will be protected more effectively through "Target Time in Judiciary" practice.

749. The system for the appointment, transfer and promotion of judges and public prosecutors will be developed with objective and pre-determined criteria based on merits.

- 750.** Disciplinary procedures of the judges and public prosecutors will be rearranged with objective criteria; the rights of judges and public prosecutors during the disciplinary process will be strengthened and transparency of the process will be ensured through making disciplinary decisions public on condition that personal data is protected.
- 751.** The scope of the activity reports in ordinary and administrative judiciary will be extended and the public awareness will be raised.
- 752.** A regulation will be made for the establishment of the post of deputy judge and prosecutor.
- 753.** A new model and exam will be developed for admission to judicial, attorneys-hip and notary professions.
- 754.** The efficiency of court expertise system will be improved.
- 755.** In order to improve the quality of law education, the duration of the education and the success criteria for admission will be increased and the curriculum will be renewed.
- 756.** Access to justice as one of the basic conditions of supremacy of law principle will be facilitated; the right of defense will be strengthened.
- 757.** The legal aid system will be rearranged ensuring that priority is given to vulnerable groups.
- 758.** A regulation will be made to ensure the active participation of attorneys to the legal proceedings.
- 759.** Judges will be specialized as criminal and civil judges throughout their career.
- 760.** Special courts will be established in fields requiring expertise such as environment, public works and energy.
- 761.** Efforts will be carried out to enable specialized courts located in city centers to hear certain cases such as commercial cases, cases on intellectual and industrial property rights.
- 762.** Alternative dispute resolution methods will be extended to reduce the workload in judiciary and settle disputes in a cost-efficient, fast and friendly manner.
- 763.** A regulation will be made to extend the amicable settlement in disputes which the administration is one of the parties.
- 764.** The debt enforcement and bankruptcy system will be restructured by taking into consideration the sensitive balance between creditor and debtor.
- 765.** The new debt enforcement office model will be generalized mainly in the places with heavy workload and the virtual enforcement office application will be launched.
- 766.** A regulation will be made to reduce the number and the cost of the processes requiring notary attestation.
- 767.** It will be ensured that notary offices can carry out some non-contentious proceedings.
- 768.** The balance between offence and sanction and the execution system will be reviewed and re-regulated by taking into

consideration the right to a fair trial and deterrence of penalties.

2.5.1.2. Security Services

a. Objective

769. The basic goals are strengthening security by taking into consideration all aspects within the framework of the rule of law and the principles of the supremacy of law, under the principles of civilian oversight, transparency, accountability and comprehensiveness; pursuing the balance between fundamental rights and freedoms with social and individual security issues; increasing the effectiveness and quality of security services and providing the citizen participation through raising the consciousness on fight against crime.

b. Policies and Measures

770. The quality and the effectiveness of the security services will be increased, the capacity of the security units will be strengthened.

770.1. The collaboration and the infrastructure of common information systems among the security units will be developed; the collaboration and coordination among the national and international institutions will be increased.

770.2. Access to security services will be facilitated by covering all segments of society and initially the vulnerable groups.

770.3. The effectiveness of the fight against public order crimes will be increased in order to contribute nation-wide peace and security environment.

770.4. Information technologies will be used more effectively within criminal investigations and resolutions and the methods of analysis will be developed.

770.5. The efficiency of the units fighting against cybercrime will be increased.

770.6. The professionalization of the gendarmerie and coast guard institutions will be completed.

770.7. City Security Management System, License Plate Recognition System and Mobile License Plate Recognition System will be extended.

770.8. National Ballistic Test Center will be established.

771. Fight against terror will continue with a multi-dimensional and comprehensive perspective.

771.1. The financing of terror and money laundering will be combated effectively.

771.2. The public will be regularly informed about the services provided by the state for the fight against propaganda of terrorist organizations; the projects towards consciousness raising and expanding awareness in terms of fight with extremism leading to violence and radicalization leading to terror will be realized.

772. The production, trade, usage and transportation of any kind of drugs, stimulants and the chemical intermediates used in the production of these materials will be prevented in national and international levels.

772.1. The capacity of security units to fight against drugs will be increased.

772.2. Supporting works on raising public awareness about the fight with drugs will be continued.

772.3. The capacity of data collection will be strengthened in order to follow up the studies carried on fighting with drugs.

773. Border security will be increased in land and seas through developing the technological and physical infrastructure in the sense of integrated border management based on cooperation between institutions.

773.1. The duties, authorities and responsibilities within the border security institutions will be reviewed and reorganized.

773.2. Technological surveillance, determination and identification abilities and capabilities will be increased in the Turkish maritime jurisdiction through the Coast Surveillance Radar System Project.

774. The effectiveness of protective and preventive security services will be increased.

774.1. The community supported law enforcement approach will be strengthened in order to base the relations between the citizens and law enforcement institutions on confidence basis.

774.2. Preventive measures for fight against crime will be increased.

2.5.1.3. Civil Society

a. Objective

775. The main objective is to increase awareness about civil society, to consolidate organized civil society, to provide that CSOs (Non-Governmental Organizations-NGO) are in conformity with principles of transparency and accountability, and to ensure their effective participation to public decision-making processes.

b. Policies and Measures

776. Regulations will be made to strengthen the development of a democratic, participatory, pluralist, transparent and accountable organized civil society.

776.1. A comprehensive framework that strengthens the field of civil society and volunteering will be established.

776.2. Efforts to establish a CSO (NGO) database in line with international standards will be completed, secure and regular data will be collected and published in the field of civil society.

776.3. The internal and external audit processes of CSOs will be reregulated within the framework of the principles and practices of transparency and accountability.

776.4. Efforts will be carried out to increase the participation and effectiveness of CSOs in decision-making and legislation processes.

777. Regulations in administrative and financial fields will be made to contribute the sustainability of CSOs.

777.1. Tax regulations regarding support of natural persons or legal entities to the CSOs will be reassessed in order to increase the social and economic benefits.

778. Civil society-public cooperation will be strengthened and the capacities of the public and CSOs will be improved.

778.1. The institutional capacity of the General Directorate of Civil Society Relations will be strengthened in line with its mission, in order to ensure that policies, programs, activities and services for CSOs are carried out holistically.

778.2. Capacity building trainings for CSOs, particularly in the fields of project preparation and fund raising will be expanded.

779. Public awareness of civil society activities will be increased and researches in this field will be supported.

779.1. Visibility of CSOs' in the society will be increased via introducing their successful activities with public.

779.2. Data on the economic and social dimensions of the activities of NGOs will be compiled and studies will be conducted to measure the impact of these activities.

779.3. Practices will be initiated in schools for children to get acquainted with civil society activities from an early age and to create awareness of volunteering.

779.4. The participation of higher education students in volunteering and civil society activities and facilitating internship opportunities in CSOs will be encouraged.

779.5. Efforts will be carried out to expand civil society centers at the universities and to open civil society certificate and graduate programs.

2.5.2. Good Governance

2.5.2.1. Transparency and Accountability, Administrative Structure and Policy Making

a. Objective

780. The basic objective is to establish accountability in public administration, to strengthen participation, to ensure equal and fair treatment in providing public services and to increase transparency.

b. Policies and Measures

781. Arrangements will be made in order to ensure that administrative procedures are carried out effectively and quickly on the basis of justice and equality, to facilitate ways of legal remedies, and to strengthen the principle of legal certainty in the relationship between administration and individuals.

782. The active participation of citizens and all relevant sides to policy-making processes will be ensured.

782.1. Arrangements will be made to make the city councils more active.

783. It will be ensured that economic and social policies are designed and executed in line with a participatory understanding.

783.1. The coordination of economic administration will be strengthened.

783.2. Regulations will be introduced to turn the Economic and Social Council into an effective and functional structure.

784. The allocation and use of public resources will be made available to public in an understandable, traceable and comparable manner.

784.1. A web portal named *harcama.gov.tr* portal will be launched in order to share data regarding public expenditures in a holistic and user-friendly format.

785. Corruption will be effectively fought.

785.1. In order to combat corruption, the accuracy of public officials' asset declarations will be investigated, and an automatic tracking system will be established.

785.2. Decision-making processes such as zoning changes, resource allocation and prioritization will be made transparent in local administrations and will be published online.

785.3. Public procurement processes and results will be published online.

785.4. Regulations regarding to prevent the use of information, influence and expertise obtained during the public service against public and for private interest after leaving public service will be effectively implemented.

785.5. The audit and accountability mechanism will be strengthened in local administrations, including the affiliated and subsidiary companies.

785.6. Citizens will be informed about the rights granted to them by laws and administrative regulations and the authorities to which they can apply when faced with an unfair practice.

nistrative regulations and the authorities to which they can apply when faced with an unfair practice.

786. The right to petition and right to information guaranteed by the Constitution will be ensured to be used effectively and quickly through the Presidential Communication Centre (CİMER).

786.1. Citizen awareness about CİMER will be increased.

786.2. The response time to citizen applications on CİMER will be reduced.

786.3. In order to make CİMER more accessible, the efficiency of Hotline 150 will be increased.

787. New mechanisms to strengthen state-citizen relationship will be established in order to improve democracy standards.

787.1. Through implementing different ways of democratic participation public supervision over administration will be strengthened.

787.2. Through studies to collect and analyze citizens' opinions and suggestions regarding public administration, these opinions and suggestions will be used as inputs in policy-making processes.

787.3. Good practice examples will be expanded in order to increase citizen satisfaction.

787.4. New communication channels based on information and communication technologies will be developed.

787.5. The interaction of public institutions and organizations with citizens on social media will be measured and analyzed.

788. Focus will be put on setting standards of communication between public institutions and organizations and coordination in communication processes.

788.1. In line with the goals of the Presidential Government System, Communication Planning Guide for Ministries and Public Institutions will be issued in order to ensure the rapid functioning of institutions and to achieve common objectives with a holistic strategy.

788.2. Social media policy will be developed for public institutions and organizations.

788.3. In order to strengthen the coordination in cases of crisis, Inter-Institutional Coordination in Crisis Communication Document will be prepared.

788.4. New participatory mechanisms that enables citizens to submit their wishes, complaints and suggestions to decision-makers will be developed in order to ensure equality and justice in public services, and to contribute to the implementation of good governance principles.

2.5.2.2. Strategic Management in Public Sector

a. Objective

789. The main objective is to increase the efficiency of implementation of strategic management in public sector and to implement the understanding of accountability

in all stages of the management cycle from planning to monitoring and evaluation.

b. Policies and Measures

790. The capacity of strategy development units in public administrations will be improved.

790.1. Strategic management training programs for improving the administrative and human capacities in public administrations will be designed.

791. Strategic management legislations, guidelines and manuals will be reviewed and updated in a holistic manner by considering practical experiences.

791.1. The legislation related to the strategic planning, performance program and activity reports will be regulated as a single secondary legislation.

791.2. Arrangements will be made to strengthen the consistency between guidelines related to strategic management.

792. High level policy documents and institutional strategic plans will be monitored more effectively, and the level of implementation and orientation of these documents will be increased.

792.1. A monitoring and evaluation system will be established for effective reporting of high level policy documents, high level policy documents, particularly the development plan and institutional strategic plans.

793. The efficiency of internal control systems and internal audit practices in public administrations will be strengthened.

793.1. Capacity will be increased in public administrations through training and consultancy activities that will increase the efficiency of internal control systems and internal audit practices.

794. Accountability will be strengthened in public sector through performance audits that provide reliable information to the public on resource efficiency, effectiveness and economy.

794.1. The Performance Audit Guide will be updated and aligned with the secondary legislation and guidelines on the components of strategic management.

795. In order to strengthen policy-making and decision-making processes, more systematic and reliable data, statistics and knowledge production will be ensured.

795.1. In order to ensure that the decision-making, planning and monitoring processes in policy-making are based on evidence, a system that provides integrated information on the socio-economic structure of the population living in our country will be established and updated regularly.

2.5.2.3. Local Administrations

a. Objective

796. The main objective is to equip local administrations with an inclusive, financially viable, transparent and accountable structure whereby they can offer efficient, fast and high-quality services, observe the needs of disadvantaged groups and thus maximize the level of citizen satisfaction.

b. Policy and Measures

797. Alignment between the priorities of the local administrations' strategic plans and resource allocations will be increased.

797.1. A guide will be developed by the Ministry of Environment and Urbanization in order to prioritize services in municipalities that are obliged to prepare strategic plans.

797.2. In line with the guidelines developed by the Ministry of Environment and Urbanization, a benchmark study will be conducted on the relationship of service prioritization-strategic plan-resource allocation in the municipalities that are obliged to prepare strategic plans beginning with metropolitan cities.

798. A method will be developed to standardize local administration services and supervise compliance with these standards.

798.1. Administrative, financial and technical minimum standards of the services of local administrations will be determined; and legislation on the implementation of these standards will be made.

799. The level and capacity of specialization of human resources in local administrations will be increased.

799.1. Trainings will be provided to improve the qualifications of personnel working at local administrations.

800. Citizens' participation and supervision role in municipal decision-making processes will be strengthened.

800.1. The participation mechanisms of disadvantaged groups in the representation and decision-making processes of the local administrations will be strengthened, a certain amount of participation will be ensured in the city councils, and the needs of these groups will be taken into consideration more in the provision of local services such as public voting in important decisions to be taken.

801. Local administrations will be restructured to increase efficiency of their service provision.

801.1. The optimum service and geographical area size will be determined for local administrations, and modelling and legislation study will be carried out for the restructuring of local administrations based on multiple-criteria classification system in accordance with local service requirements.

801.2. Sustainability of the settled areas in villages will be ensured and service access will be facilitated in the metropolitan areas where villages turn into neighbourhoods.

801.3. The duty descriptions will be re-evaluated on an activity-based to eliminate service disruptions that arise due to conflicting authority and responsibilities of metropolitan municipalities and metropolitan district municipalities.

802. The urban well-being and security will be strengthened by taking into account the characteristics and dynamics of the cities in the provision of local administration services.

802.1. Local administrations' projects on urban well-being and security will be supported.

802.2. Financing model will be developed for social service structure projects of small municipalities.

802.3. Mechanisms will be established to enable the regulations and measures to be made for stray animals, and local administrations' projects on rehabilitating stray animals will be supported.

2.5.2.4. Human Resources in the Public Sector

a. Objective

803. The main objective is to create a more efficient civil servant system that provides quality service to the society that is capable of adapting to changing conditions.

b. Policies and Measures

804. Provision of human resources, which plays an important role in the provision of public services related to civil servants, effective and efficient service delivery and employee satisfaction will be increased.

804.1. Regulations will be made to increase efficiency, productivity and employee satisfaction in the provision of public services for civil servants.

805. Capacity of public institutions in human resources management will be strengthened.

805.1. Personnel units in public institutions and organizations will be structured with a human resources management perspective and the capacity of these units will be strengthened.

805.2. The capacity of the Presidential Human Resources Office will be increased.

805.3. Regulations will be held to raise ethical awareness and strengthen ethical practices in the public sector.

806. Personnel trainings in public institutions and organizations will be diversified and improved.

806.1. The digital skills of civil servants will be improved, and their adaptation to digital transformation and technological developments will be ensured.

806.2. In-service training programs to increase the quality of civil servants will be established and conducted regularly. Training programs aiming to provide management skills to personnel at all levels will be developed.

806.3. In-service training will be transformed into an easily accessible structure through the use of distance education systems that enhance the professional and fundamental skills of civil servants.

2.5.2.5. e-Government Applications in Public Services

a. Objective

807. The main objective is transferring public services to the electronic environment through modernization and process improvements that will ensure effectiveness and interoperability with a user-oriented perspective; and increasing service delivery and usage through e-Government Gateway.

b. Policies and Measures

808. e-Government efforts will be carried out with a view of user-oriented service delivery and effective public administration. Service delivery channels will be improved and channel diversity will be increased. The needs of disadvantaged groups will be prioritized.

808.1. Transfer of public services to e-Government Gateway will continue. Usage and cost effectiveness will be increased and security of services will be improved.

808.2. Services provided through e-Government Gateway will be simplified, integrated and matured.

808.3. Quantity and quality of local government services provided through e-Government Gateway will be increased.

808.4. In provision of services, channel diversity, particularly mobile services, will be increased and efforts to increase access of disadvantaged groups will be prioritized.

809. New technologies and trends will be used in provision of e-government services in order to increase efficiency, effectiveness, transparency and accountability of the public sector.

809.1. A guidebook will be prepared to regulate use of social media by public institutions.

809.2. Processes and technological infrastructure will be improved in order to utilize new technologies such as big data, cloud computing, mobile platforms, internet of things, artificial intelligence and blockchain in development of public services.

- 810.** Governance and coordination structure of e-government activities will be strengthened.
- 810.1.** Governance and coordination mechanism for e-government activities will be gathered together within the Presidential Government System and its effectiveness will be increased.
- 810.2.** Cooperation and coordination between central agencies and local governments in e-government activities will be increased.
- 811.** By following international technological trends and developments, the capacity of public institutions in managing digital transformation process will be improved and human resources in departments of information technologies will be strengthened.
- 811.1.** In order to harmonize managerial needs and technological infrastructure in public institutions and to carry out technology procurement and management processes, ICT expertise will be established for the ministries and affiliated and related institutions, not exceeding five employees per agency.
- 811.2.** Training programs and guidelines will be provided to increase capacity of public institutions in preparing and managing ICT projects.
- 811.3.** Institutional maturity and human resource competency models will be developed and disseminated in public institutions.
- 812.** Development of basic information systems, common infrastructure, services and standards needed for e-Government service delivery will continue and institutional information systems will be sustainable.
- 812.1.** e-Government Enterprise Architecture will be established and disseminated in public institutions.
- 812.2.** Data standardization will be ensured in public information systems and regulations will be issued to eliminate obstacles to data sharing among institutions.
- 812.3.** National data inventory and public data dictionary will be prepared.
- 812.4.** Central Service Design Platform will be established to improve public business processes.
- 812.5.** Public Integrated Data Center Project will be completed.
- 812.6.** e-Municipality Information Systems Project will be completed.
- 812.7.** National Geographic Information System Project will be completed.
- 812.8.** Regulatory works for the electronic identity card will be completed and it will be ensured that the identity card is used in all authentication applications.
- 812.9.** In order to reduce bureaucracy and ensure efficiency in business processes, all kinds of data, information and document sharing among public institutions will be carried out electronically without any correspondence, provided that necessary information systems are available.
- 812.10.** National Electronic Messaging Platform will be established.

- 813.** Open source software will be disseminated in public institutions and institutional capacity will be improved in this field.
- 813.1.** Regulation will be issued for preference of open source software in public ICT investments.
- 813.2.** Institutional plans for transition to open source software will be prepared.
- 814.** Mechanisms to protect public institutions against cybersecurity threats and to ensure personal information privacy in delivery of public services will be strengthened.
- 814.1.** Coordination of cybersecurity in the public sector will be centralised to increase effectiveness.
- 814.2.** Procedures and principles for establishing and auditing an information security management system in public institutions will be determined and public institutions will be guided in this regard with guidelines to be prepared.
- 814.3.** Cybersecurity exercises will be organized.
- 814.4.** Training and awareness activities of personal information protection for public sector employees will be carried out.
- 815.** Public data will be made available as open data under privacy principles in order to increase transparency, accountability and participation and to enable production of new value-added services.
- 815.1.** Regulations for sharing public data will be issued.
- 815.2.** National Open Data Portal, where public data will be shared, will be launched and the principles of data anonymization will be determined.
- 816.** It will be aimed to increase cost effectiveness, innovation and national added value in public procurement of ICT products and services.
- 816.1.** Procedures and principles will be determined on standards regarding technical characteristics of ICT products and services procured by public agencies.
- 816.2.** An electronic platform will be established to disseminate common procurement and demand consolidation.

Table 50: e-Government Targets

	2018	2023
Individuals Using e-Government Services (%)¹	45.6	70
e-Government Services Satisfaction Rate (%)²	90	95
Number of Registered Users of e-Government Gateway (Million)	40.7	53
Number of Services Provided via e-Government Gateway (Cumulative)	4,085	7,400

Source: The data for 2018 belongs to Ministry of Transport and Infrastructure and TURKSTAT. The data for 2023 are estimates for the Eleventh Development Plan.

(1) Proportion of individuals within the 16-74 age range benefiting from e-government services.

(2) The proportion of satisfied and moderately satisfied users in total e-government users.

2.5.2.6. International Cooperation for Development

2.5.2.6.1. National Capacity for International Cooperation

a. Objective

817. The main objective is to make Turkish international cooperation activities including humanitarian aids provide maximum contribution to the development of our country and other countries by considering the stability and needs of our country and the region and current obligations arising from international law and international humanitarian law, with an inclusive and strategic approach, in a more coordinated and effective manner.

b. Policies and Measures

818. Priorities and strategies for international development cooperation activities will be determined on the basis of countries and regions, and in the line with these priorities and strategies the activities of public institutions within this scope will be carried out in harmoniously.

818.1. The Development Cooperation Legislation will be completed with the aim of increasing the effectiveness of development assistance, strengthening the institutional, human, financial and legal infrastructure and setting out the principles and priorities in this area without losing any of the flexibility in the methods used by Turkey in the field of the development assistance.

818.2. A national strategy document will be prepared in order to enhance the effectiveness of Turkish development assistance.

818.3. Country strategies will be developed to ensure Turkish development assistances are distributed with the perception that these assistances contribute to capacity increases and to the development of mutual economic and commercial relations in the target countries including LDCs.

819. The development assistance of public, private sector and NGOs will be provided in coordination and the data will be collected in a proper way.

819.1. The independent aid activities of Turkish NGOs and the private sector will be handled in a strategic direction and carried out in coordination with public.

819.2. Current legislation regarding the collection and reporting of development assistance data provided by public institutions, local administrations and NGOs will be updated.

819.3. Information infrastructure of development assistance will be strengthened.

820. Turkey's coordination in international humanitarian assistance will be strengthened in national and international, the effectiveness and visibility of Turkish humanitarian assistances will be increased.

820.1. Legislative arrangement will be made in order to increase the effectiveness of Turkey's international humanitarian assistance.

820.2. The current situation of Turkey's international humanitarian assistance will be evaluated.

820.3. Institutional coordination between development and humanitarian assistance policies and practices will be improved.

820.4. A mechanism will be developed in order to strengthen coordination of Turkey's international humanitarian assistance at the national level and a communication strategy will be prepared in order to increase the visibility of assistance.

820.5. In order to ensure more effective and widespread usage of social media tools in the promotion of our humanitarian assistance, up-to-date information on foreign languages will be included in the websites of relevant institutions.

820.6. By actively participating in humanitarian aid meetings of the UN and other international platforms, regular information concerning our country in this field will be provided to the international community.

821. In order to ensure coordination in practice and increase efficiency, institutions operating in the field of development cooperation will be ensured to work in compliance with our national policies.

821.1. Accreditation criteria for the activities of Turkish NGOs in the field of development cooperation will be determined and NGOs that meet these criteria will be accredited by a commission which comprised of relevant public institutions.

821.2. A cooperation mechanism will be established in order to ensure the compliance of activities, conducted in Turkey, of all development cooperation actors such as international organizations, foreign aid organizations, foreign diplomatic missions

and international NGOs with the national policies.

822. The competencies of the personnel working in the foreign missions and the foreign relations departments of our public institutions will be improved, and the administrative and technical capacity of these departments will be strengthened.

822.1. The personnel needed in the foreign missions of our country will be determined in terms of quantity, quality and minimum qualification; within the framework of the needs, structure of the legislation will be established to facilitate the assignment of civil servants and non-public human resources in international missions and to make these assignments more attractive.

822.2. The competencies, such as foreign language, country expertise, diplomacy and negotiation skills of the personnel working in foreign relations departments of public institutions will be improved, and administrative and technical capacity of these departments will be strengthened.

823. Turkey's development experience acquired in various areas will be shared effectively with other countries.

823.1. Institutionalization will be ensured in order to implement systematic and regular training programs in the field of development for the public personnel in the beneficiary countries.

823.2. Development cooperation programs will be carried out to support the development efforts of the countries in which we closely cooperate, especially in the countries in the region.

823.3. Triangular programs and projects will be developed in order to transfer Turkey's development experience to other countries.

823.4. Legislation regulating financial and technical issues will be prepared concerning exchange of experts with other countries and appointment of long-term consultants from public or non-public.

823.5. Awareness raising activities such as content production and event organization will be carried out in order to ensure transfer of Turkey's development experience to other countries.

824. Academic activities will be supported in order to increase the knowledge and competence for international development cooperation in our country and to contribute more to the development processes of other countries, especially LDCs.

824.1. Master's programs in the field of international development cooperation will be developed, academic studies in this field will be diversified and activities of think tanks will be supported.

2.5.2.6.2. Regional Cooperation

a. Objective

825. The main objective is to enhance relations with Islamic countries, EU, other regional countries and regional initiatives in political, economic, social, cultural and scientific fields and to make more effective use of multilateral and regional cooperation.

b. Policies and Measures

826. The features of the Standing Committee of the Economic and Commercial Organization of the Islamic Cooperation Organization (COMCEC), in which our country carries out the permanent secretariat services, as addressing the development problems of Islamic countries and the solution offers for these problems, and being a knowledge-based policy dialogue platform will be reinforced and in this respect, the coordination among the national institutions will be strengthened.

826.1. The institutional capacity of the COMCEC secretariat will be strengthened.

826.2. Within the context of developing economic relations with Islamic countries, active coordination of the relevant public institutions at the national level will be ensured through the National Coordination Committee of COMCEC.

826.3. By ensuring to work in line with the COMCEC agenda within a specific program, the effectiveness of the cooperation efforts of the COMCEC Forums, which our institutions provide secretarial services, will be enhanced.

826.4. Technical and financial support to the capacity building projects of the member countries within the scope of working group activities, COMCEC project funding and other mechanisms as parts of the COMCEC Strategy will be continued.

826.5. The issues such as industry, R&D, innovation, renewable energy and digitalization will be brought to the agenda of the COMCEC.

827. The relations initiated or accelerated in various areas with Islamic countries during our OIC Summit Term Presidency will be deepened and continued after our Term Presidency.

827.1. The establishment of the OIC Arbitration Center and the OIC Police Cooperation and Coordination Center, which were decided to be established in our country, will be completed.

827.2. Within the scope of developing economic relations with Islamic countries, the projects of COMCEC Gold Exchange and COMCEC Real Estate Exchange pioneered by our country will be realized.

827.3. Encouraging the efforts for the comprehensive reform of the OIC will be continued.

828. Efforts to facilitate and liberalize trade in the Islamic world and in our close vicinity will be increased.

828.1. Efforts to establish free trade agreements with regional countries and regional blocs such as the Gulf Cooperation Council, including provisions on trade in services and investments will be maintained.

828.2. Initiatives will continue for the implementation of the Developing-8 Countries (D-8) Preferential Trade Agreement by all Contracting Parties. Necessary initiatives will be taken before the member countries in order to activate regional trade agreements such as Trade Preferential System among the Member States of the OIC (TPS-OIC) and Economic Cooperation Organization (ECO) Trade Agreement and the

ground for the implementation of these agreements will be established in our country.

828.3. Activities will be carried out to position our country in a more attractive manner in bilateral and multilateral trans-boundary transportation corridors.

828.4. Diplomatic efforts towards the export of goods and services that are important for our country will be increased.

829. Regional cooperation initiatives such as ECO, Black Sea Economic Cooperation (BSEC), D-8, which are hosted by our country or of which Turkey is a founding member, will be benefited more effectively.

829.1. By completing the membership process of ECO Science Institute and ECO Culture Institute, the activities of the institutions will be supported.

829.2. Efforts to increase the number of members of the ECO Trade and Development Bank hosted by our country will be continued, and the human and institutional capacity of the Bank will be strengthened.

829.3. Efforts towards institutionalization of the ECO Educational Institute in Ankara will be increased.

829.4. Strategies will be developed in order to get the maximum benefit from the activities carried out within the scope of BSEC and D-8.

830. Bilateral and multilateral relations, which our country is conducting more and more intensively with Islamic countries, will be ensured to reach to a stronger scientific base.

830.1. Research centers for the Islamic world will be established within the universities.

830.2. Academic studies that will contribute to the relations of our country with Islamic countries in the fields of politics, economy, trade and culture will be encouraged.

831. Political, economic, cultural, social and scientific cooperation with the Turkic world will be developed.

831.1. The contribution made to the cooperation efforts of the intergovernmental organizations such as the Turkic Council and Türksoy will be increased and sustained.

832. Our country's political, economic, social, cultural and scientific cooperation activities with Asia-Pacific, Africa, South Asia, Latin America and Caribbean countries will be deepened.

832.1. The Third Summit of Turkey-Africa Partnership will be held and efforts to follow the decisions taken will be increased.

832.2. Regional mechanisms, in particular the UN Economic Commission for Latin America and the Caribbean, will be used to enhance cooperation.

832.3. Our efforts to be effective in the UN Asia Pacific Economic and Social Commission, in particular in its decision-making mechanisms, will be increased.

833. Efforts to expedite the accession negotiations for EU membership, as Turkey's strategic goal, and develop a common policy and activities with the EU will be ma-

intained resolutely and taking a position in line with the interests of our country during the Brexit process will be ensured.

833.1. Considering the harmonization process with the EU acquis, the National Action Plan for the EU Accession will be updated.

833.2. In accordance with the agreement reached in Turkey-EU Summits, activities will be carried out in key areas such as strengthening cooperation on critical thematic issues, in particular the High Level Political Dialogue, expediting the process of Visa Liberalization Dialogue, burden sharing in migration management, updating the Customs Union.

833.3. Considering our national priorities, administrative and financial measures will be taken by all relevant institutions to ensure the efficient and effective use of the financial assistance provided to our country within the framework of the EU accession process.

833.4. Common policies and cooperation activities between Turkey and the EU on strategic issues, particularly in defense, security, counterterrorism and irregular migration will be developed in bilateral level or multilateral platforms.

833.5. By closely following Brexit process carried out by the EU and United Kingdom, legal, political and diplomatic initiatives will be made before the parties in order to protect Turkey's rights, including the Customs Union, arising from the Partnership with the EU.

834. Constructive cooperation with the UN, the Council of Europe, the human ri-

ghts mechanisms at the Organization for Security and Co-operation in Europe and the European Court of Human Rights will be maintained and an active role will be assumed in decisions taken.

834.1. Activities will be observed by following up the issues on the agenda of international mechanisms related to human rights and our contribution will be provided to these activities within the framework of our national policy, and rights and interests of our country.

2.5.2.6.3. Increasing Contribution and Visibility of Turkey in Global Development Agenda

a. Objective

835. The main objective is to make our country play an active role in solving global problems, mainly in bringing the problems of developing countries to the global agenda and resolving these problems.

b. Policies and Measures

836. To enable that international platforms such as UN, G20 and OECD to produce effective solutions concerning problems in global agenda, initiatives will be taken in these platforms. Our country will be provided to host to regional offices of international organizations and in this regard bilateral and multilateral cooperation mechanisms will be utilized more actively.

836.1. Efforts will be intensified in bringing developing countries' development problems into the agenda of international platforms especially UN, G20 and OECD.

836.2. International initiatives will be intensified and processes for establishing legal infrastructure will be facilitated for the purpose of hosting UN agencies especially operating in the field of development.

836.3. Efforts will be carried on for improving global economic governance and close cooperation and coordination with countries in these platforms will be ensured.

836.4. Efforts to keep the problems faced by countries graduated from LDC status on the agenda will be supported within the context of İstanbul Plan of Action.

836.5. Common concerns of Islamic world as Quds Al-Sharif will be pursued in the presence of UN and other international institutions.

837. Strategies and programs will be developed to improve relations with emerging economies, which transforms global economic system significantly.

837.1. Country strategies will be prepared for emerging countries which may become economically and commercially priority in the coming term.

838. Medium and long-term strategies will be prepared to make Turkish higher education center of attraction for countries where our international cooperation is well-built.

838.1. Placing students in the undergraduate and graduate programs in Turkey will be performed by identifying the needs of the countries prioritized in the field of development cooperation.

838.2. A special program will be developed under Turkey Scholarships, qualified workforce will be identified and obtaining work permit in Turkey will be facilitated for selected students.

839. To increase international visibility and strengthen the image of Turkey, public and culture diplomacy activities will be intensified, thesis put forward by our Nation and national policy choices will be conveyed to the national and international arena effectively via strategic communication.

839.1. Strategy of National Public Diplomacy will be prepared and within this context public diplomacy activities will be conducted with a holistic view in coordination with public institutions and organizations.

839.2. Public policy activities carried out by traditional and new media tools; will be continued by events like seminar, conference and forum which can influence public opinion, international organizations which contribute promotion of Turkey will be attended, and effectiveness of these activities will be increased by enlarging digital diplomacy channels.

839.3. International cooperation will be developed with institutions and organizations, universities, NGOs and people that are influent on international public opinion and within this framework researches and projects will be carried out devoted to promotion of Turkey.

839.4. All positive and negative propaganda activities concerning Turkey will be closely monitored, evaluated and in this

context instant information flow will be provided to decision makers.

839.5. Within the scope of fighting against black propaganda, efforts will be made to inform public correctly and qualified publications for international society will be encouraged in this respect.

839.6. Within the scope of promotion of Turkish culture, launching Turkish language and literature undergraduate programs in selected countries will be supported.

840. The capacity to deal with urgencies of the countries experiencing crisis or transformation will be increased.

840.1. Emergency and Humanitarian Aid will be continued to the countries experiencing crisis or transformation and capacity development programs will be implemented on these matters with these countries.

841. International efforts aimed at financing development and increasing the role of private sector in development will be actively supported.

841.1. Institutional and legal infrastructure to attract more impact investment, Islamic finance and socially responsible finance resources into Turkey will be established, efforts in international platforms in this respect will be actively supported.

841.2. Increase of public-private partnerships will be supported for necessary legal and financial ground to support entrepreneurs which produce innovative and tech-based solutions to development problems.

2.5.2.7. Sustainable Development Goals

a. Objective

842. The main objective is to reflect the Sustainable Development Goals (SDGs) in line with our priorities and to establish an effective follow-up and review mechanism.

b. Policies and Measures

843. SDGs will be reflected in sectoral and thematic policy documents in line with national priorities and conditions.

843.1. Alignment with the SDGs will be considered in the preparation of institutional strategic plans and sectoral and thematic policy documents.

844. A well-functioning and participatory institutional coordination mechanism will

be established for the follow-up and review of SDGs.

844.1. In order to ensure the follow-up and review and the coordination of SDG implementation at national level, the National Sustainable Development Coordination Board will be established under the Presidency of Strategy and Budget in a flexible structure for the participation of representatives of local administrations, academia, private sector and NGOs in addition to related public institutions.

845. In line with the developments of global SDG indicator set, the scope of the national indicator set will be expanded in line with the priorities.

845.1. National sustainable development goals monitoring and evaluation system will be established.



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