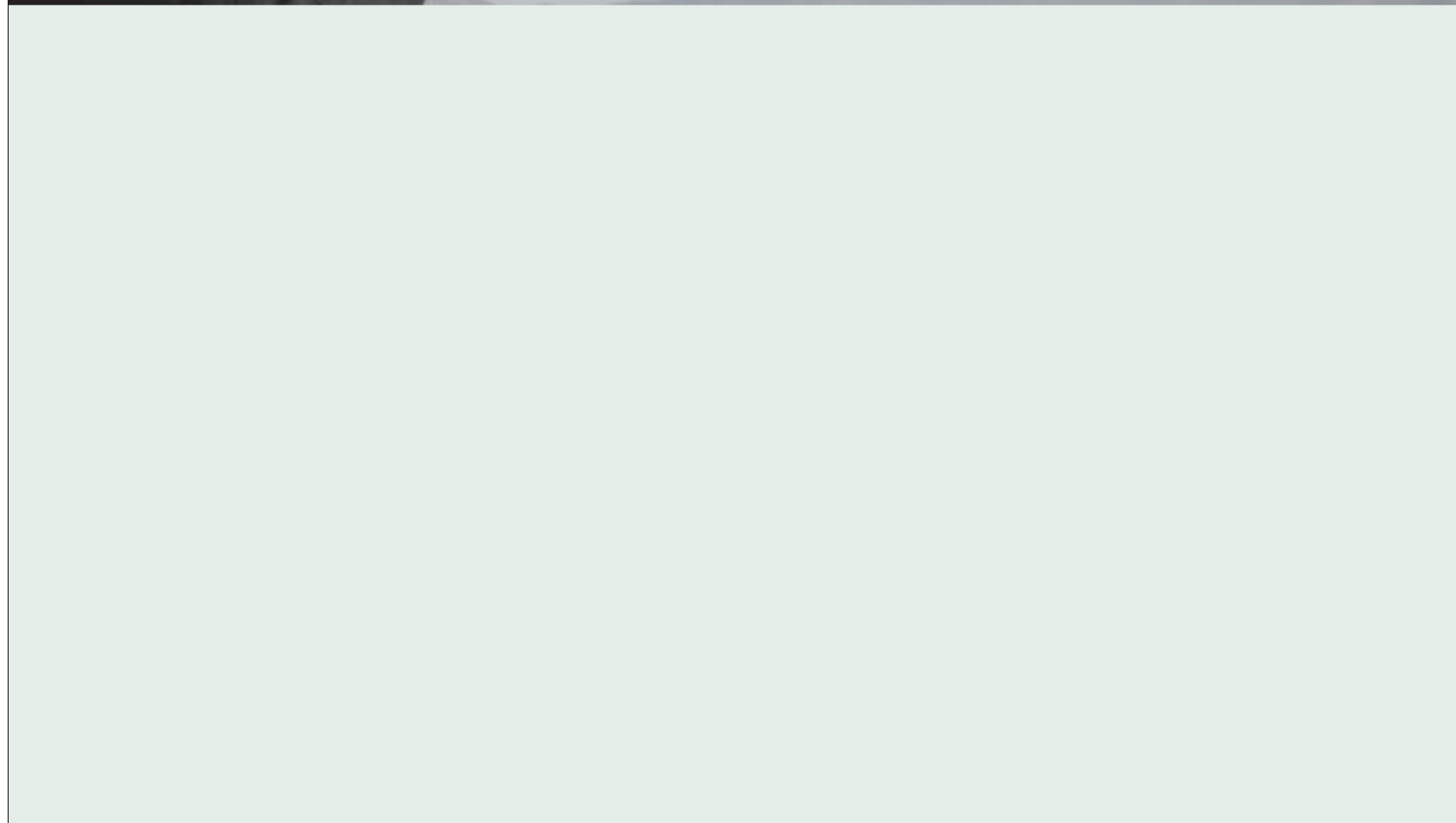
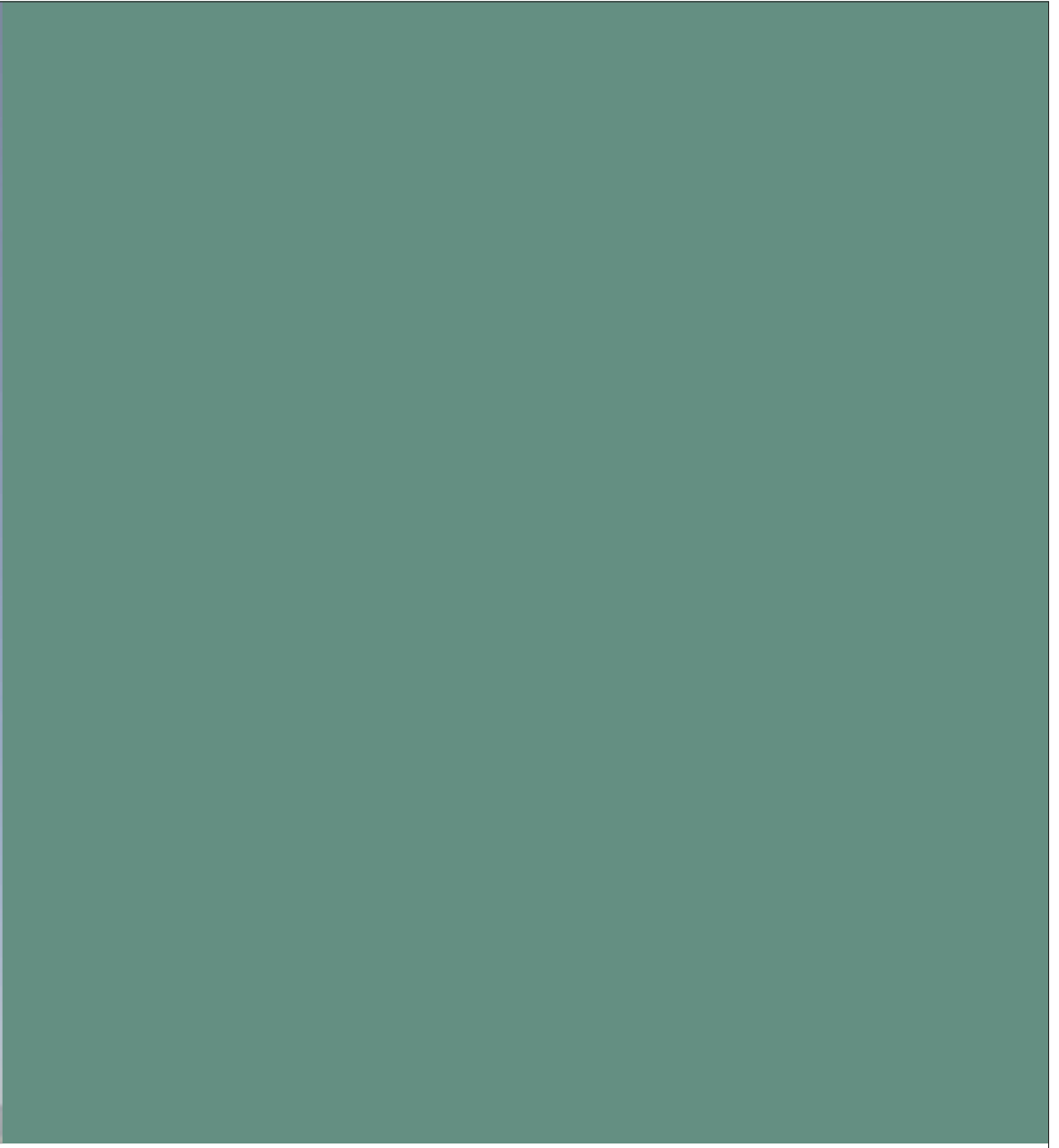




Developing and growing, innovative İZMİR

İZMİR REGIONAL PLAN 2010-2013





İZMİR REGIONAL PLAN 2010-2013



İzmir Regional Plan 2010 - 2013

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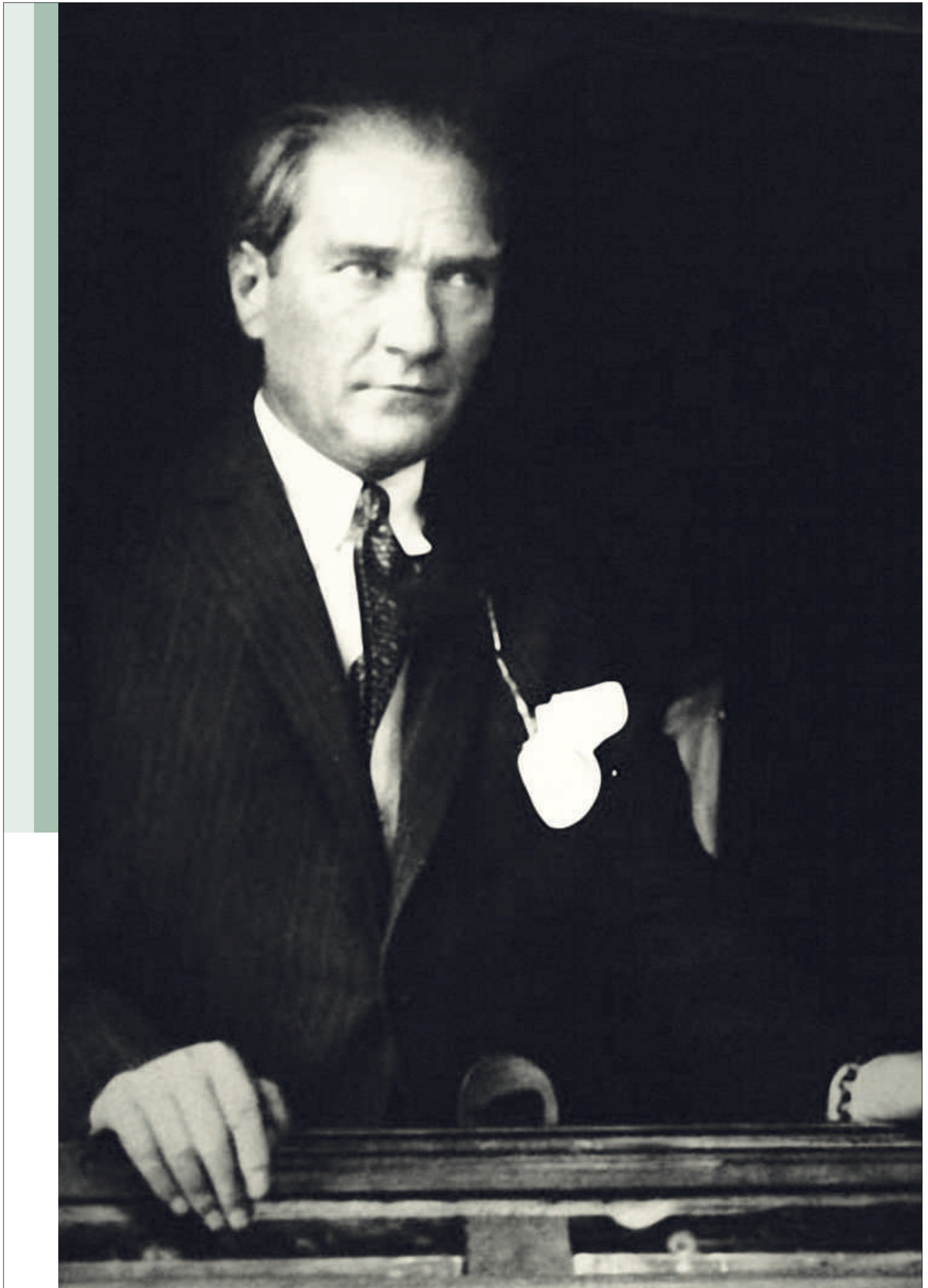
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İZMİR REGIONAL PLAN 2010-2013

Approved by the State Planning Organization
on June 16th, 2010.





from www.isteaturk.com archives

Departing from İzmir,
Basmane Train Station,
July 9th, 1926

"Our great ideal is,
to raise our stand as the most civilised
and prosperous nation."

K. Atatürk



2010-2013 İzmir Regional Plan (İZBP) is the essential policy documentation that presents the progress axes, aims and priorities of the development strategy to be realized by İzmir with an integral approach in Economic, social and cultural fields.

In this context; İZBP has been prepared, towards realizing the vision of **“Developing and Growing, Innovative İzmir”** that was determined with the attendance and shared opinions of all institutions and organizations, non-governmental organizations, universities and private sector, within the framework of the Ninth Development Plan (2009-2013).

In İZBP, a participative strategic approach has been followed that unfolds İzmir's potential resources, opportunities and strengths, prioritizes the problems and covers the aims towards those priorities.

İZBP aims to create a background for the effective and efficient use of the potential of İzmir by providing the strategic planning works and institutional and sectoral strategy documents with different purposes realized by all relevant institutions and organizations in İzmir and Aegean Region to steer towards the same priorities and aims.

İZBP shall serve to increase the communication, coordination, collaboration and cooperation between the public sector, private sector and the civil society; providing a general viewpoint and common purpose formed by the opinion of all segments. Realization of these aims and priorities together shall increase the contribution of İzmir towards national economy and competitiveness.

We expect all members of the public sector, private sector and civil society segments to participate in the recognition, adoption and implementation processes of the 2010-2013 İzmir Regional Plan that has been prepared under the coordination of İzmir Development Agency.



introduction

The İZBP, within which the participative planning techniques have been implemented sensitively, has been prepared with an essence to set the local dynamics into motion and in compliance to the locality, decentralism and bottom-up planning principles, with the responsibility to constitute the most suitable local development model for Turkey.

We present our gratitude to all who have contributed in this work.

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Chairman of İZKA
Executive Board

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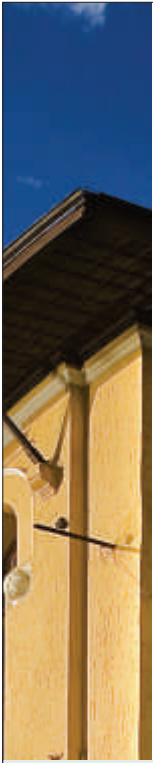


abbreviations

ABPRS	Address Based Population Registration System
DPT	Undersecretariat of State Planning Organization
DTM	Undersecretariat of Foreign Trade
EBİLTEM	Ege University Science and Technology Application and Research Centre
EBSO	Aegean Region Chamber of Industry
EDAM	Centre for Economics and Foreign Policy Studies
EGEV	Aegean Foundation for Economic Development
EGİAD	Aegean Young Businessmen Association
EİB	Aegean Exporters' Association
ESBAŞ	Aegean Free Zone Development & Operating Co.
EU	European Union
EUROSTAT	The Statistical Office of the European Union
GDP	Gross Domestic Product
GNP	Gross National Product
HACCP	Hazard Analysis and Critical Control Points
İBB	İzmir Metropolitan Municipality
İDESBAŞ	İzmir Menemen Free Zone Founder and Operating Co.
İESOB	İzmir Union of Tradesmen and Craftsmen Chambers
IRC-Ege	Aegean Innovation Relay Centre
İZBP	2010-2013 İzmir Regional Plan
İZKA	İzmir Development Agency
İZTO	İzmir Chamber of Commerce
KOSGEB	Small and Medium Sized Enterprises Development and Support Organization
NGO	Non-Governmental Organization
OECD	Organization for Economic Co-operation and Development
OIZ	Organized Industrial Zone
PD	Product Development
R&D	Research and Development
SIA	Small Industrial Area
SME	Small and Medium Sized Enterprises
SP	Strategic Priority
SPA	Specially Protected Area
SWOT	Strengths, Weaknesses, Opportunities and Threats Analysis
TCDD	State Railways of the Republic of Turkey
TÜBİTAK	The Scientific and Technological Research Council of Turkey
TÜİK	Turkish Statistical Institute
TSE	Turkish Standards Institute
UN	United Nations
UNDP	United Nations Development Programme
URAK	International Competitiveness Research Institute
USA	United States of America
WTP	Wastewater Treatment Plant

PLANNING APPROACH and METHOD

part



Regional plans are deemed the fundamental document to be basis for maintaining the regional development and implementing the planning activities within the region. In our country, the Zoning Law No. 3194 establishes the basis for the regional plans. In the Zoning Law, three main plan stages namely; regional plans, landscape plans and zoning plans are stipulated and the regional plans are shown at the first step of these stages. The regional plan prepared by taking the strategic planning approach as the basis is the coordination, direction and strategy document for realizing the region's development with the following means;

- **determining the relationship between the policies, plans and strategies generated at national level and the activities to be carried out at local level,**
- **strengthening the cooperation and coordination between the institutions and organizations existing at local level,**
- **fastening regional development, ensuring its sustainability,**
- **triggering local potential by realizing the efficient and effective use of resources, and forming a basis for the regional programmes and projects.**



PLANNING METHOD APPROACH and

2010-2013 İzmir Regional Plan Process

Within the framework of the 2010-2013 İzmir Regional Plan (İZBP) preparation works, initially the process design work has been realized. In this stage, the things to be done in the planning period have been set forth and the process has been designed by determining the steps to be followed.

The plan has been produced with strategic planning approach, in the light of the aspects below:

- Realizing consensus and participation at every stage of planning,
- Utilizing quantitative analysis methods,
- Designing as a plan that is to be completed with actions.

The main purpose behind the preparation of İZBP is to evaluate and activate the interior dynamics and development potential of İzmir. Within the framework of this main purpose of the plan, national-scale plans and sectoral strategies have been examined, foreign countries' regional development plans and preparation stages have been studied.

In result of all these studies, a plan preparation process that is participation-based and that encompasses all actors focusing on socioeconomic development within the region has been designed (Figure 1).

Process stages are as given below.

I. Stakeholder Analysis studies

II. Situational Analysis studies

- a. "A Socioeconomic Outlook for İzmir Region (TR31)" Report
- b. "İzmir Emerging and Strategic Sectors" Report
- c. Conclusion Report on Studies Towards Developing İzmir Clustering Strategy
- d. İzmir Situational Analysis (June 2009)

III. Vision and Main Purposes studies,

IV. Participative meetings and workshops,

V. Compiling results, determining performance criteria and writing the plan.

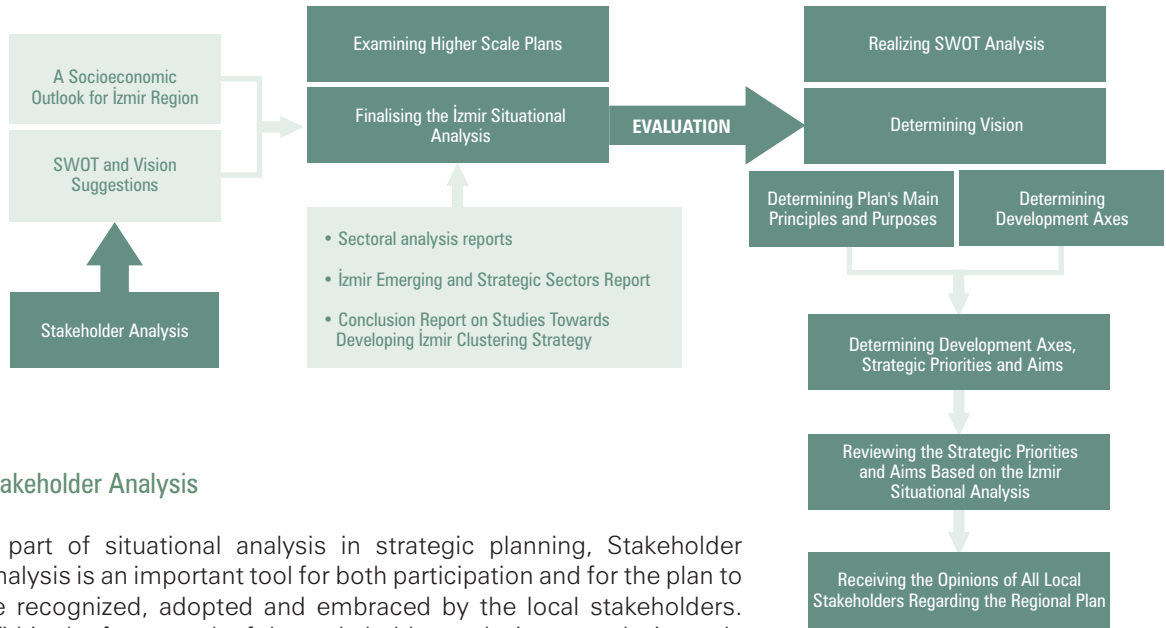


Figure 1

Stakeholder Analysis

A part of situational analysis in strategic planning, Stakeholder Analysis is an important tool for both participation and for the plan to be recognized, adopted and embraced by the local stakeholders. Within the framework of the stakeholder analysis, an analysis study encompassing approximately 500 institutions and organizations including İZKA Development Council members has been realized. In the light of this analysis, the works based on the plan's participation main principle have been carried out.

Situational Analysis

The purpose of the Situational Analysis studies is to determine the correct development axes, strategies and aims for the region. For that purpose, the first step within İZBP's preparations has been to set forth reports and analyses based on quantitative and qualitative data that display an overview of the Region. In result of the study, problems and potentials of the region have been revealed. Within the context of the Situational Analysis works, the below given studies have been done:

- I. Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis
- II. İzmir Situational Analysis (June 2009)
- III. Sectoral analysis reports, İzmir Emerging and Strategic Sectors Report and Conclusion Report on Studies Towards Developing İzmir Clustering Strategy

Within the frame of İzmir Situational Analysis, the report that set forth the emerging and strategic sectors of İzmir, studies towards developing İzmir's clustering strategy, conclusion report studies and the analysis studies realized on some certain sectors have contributed inputs to İZBP.

The reports published by the Agency during the Situational Analysis step such as "İzmir Region (TR31) Situational Report" and "İzmir Situational Analysis (June 2009)" as well as the findings of SWOT analyses¹ have all revealed problems, potentials and draft strategic development axes. These development axes have defined the focus of all participatory workshops held during preparation of the plan.

Vision and Main Purposes

In parallel to the Situational Analysis studies, works towards determining the vision, main purpose and principles of the plan have been continued. Surveys have been conducted for determining the vision. Alternative comments regarding the vision have been received from workshop participants again with surveys. Lastly, the opinions of the Development Board have

¹The participants of SWOT meetings and working groups that were formed in the preparation process of the Plan are listed in Annex-2.

been asked via surveys on which among the three alternatives revealed in result of the survey, meeting and workshop studies should be chosen as the development vision of İzmir. Survey results have been presented to the Executive Board and thus the vision of İzmir within 2010-2013 İzmir Regional Plan context has been defined.

Participative Meetings and Workshops

In light of the initial findings revealed from Situational Analysis studies, after the vision alternatives and İZBP's main principles and purposes were defined, the stage of realizing participative meetings for finalizing plan's development axes and determining strategic priorities and aims has been initiated. Within the framework of the development axes, both thematic and sectoral workshops have been realized, and in result of these studies, the plan's main strategic document has begun to be formed together with the opinions of the local stakeholders. The meetings held within this context may be evaluated under the three stages below:

- I. Contact Meeting
- II. Development Axes Workshops
- III. Sectoral Workshops

The first among the meetings held for the purpose of informing the local stakeholders in İzmir regarding the İZBP process and the studies conducted was the İZBP Contact Meeting. In the meeting, the stakeholders have been informed about why the Regional Plan is developed and on the results of the preparations and studies conducted. In this meeting, awareness at local level regarding İZBP has been created and preliminary information has been given regarding the workshop studies to be held at later stages. Following the contact meeting, workshop studies on strategic priorities and aims have been conducted. From various institutions and organizations, a total of 127 representatives who are specialists at their field have joined these studies.

The last set of meetings has been realized within the framework of the sectors revealed to be prioritized and approved within the context of İZBP. Participative studies for the key sectors within İZBP have been realized in cooperation with various institutions in İzmir.

Compiling the Analyses and the Results, Writing İZBP

Along with the inputs obtained through the review of the analysis studies, reports and national strategy documents; the axes, priorities and aims of İZBP have been reviewed and four development axes and five key sectors have been determined.

After another opinion exchange at local stakeholders scale, İZBP has been approved by the İZKA Executive Board and then sent to the attention of the Undersecretariat of State Planning Organization (Devlet Planlama Teşkilatı Müsteşarlığı - DPT). İZBP, which is a first in our country among regional plans that are of the most important tools of regional development, has then been presented to the opinions and comments of 35 institutions and organizations at national scale, via DPT. İZBP which has been finalized after the evaluation of these opinions and suggestions, has been approved by DPT on June 16th, 2010, thus coming into force as the first regional development plan prepared by regional development agencies in Turkey and approved by DPT.

İZBP's Vision, Fundamental Principles and Purposes

The vision of 2010-2013 İzmir Regional Plan (İZBP) has been determined as "Developing and Growing, Innovative İzmir". While reaching this vision, the principles that shall be followed as basis are given below:

- Equality and Social Inclusion
- Sustainable Development
- Participation

Equality and Social Integration

The principle of equality encompasses, beyond a figural equality, the obligation of acting equally to those under same situations, in regards to rights and duties, benefits and commitments, authorities and responsibilities, and opportunities and services.

The principle of Equality and Social Inclusion defines the condition of accessibility for the individuals towards fields of social sphere such as education, health, culture, employment, and their effective functioning in such fields within the concept of equal opportunities. Implementations towards social inclusion encompass policies that shall eliminate discrimination and social exclusion triggered by various social disadvantages (handicapped people, poverty, etc.). İZBP adopts equality and social inclusion as a general principle in all processes within the context of its priorities and aims.

Sustainable Development

Sustainable Development is an integrated approach that aims for the realization of a programming in harmony from today towards the future with all relevant economic, environmental and social viewpoints by setting up a balance between the needs of human life and sustainability of natural resources. İZBP has handled sustainable development with an integrated approach.

Participation

In İZBP, it is essential to strengthen social dialog and participation, thus to provide public contribution and embracement, as was defined within the Ninth Development Plan.

İZBP has been prepared, under the coordination of İzmir Development Agency, with the contributions of public institutions and organizations, private sector and non-governmental organizations in İzmir. Within this context, with the conducted face to face interviews, surveys, workshops, round-table meetings, study visits, search conferences and sector meetings, the views and evaluations of approximately two thousand people have been gathered. As it has been stated in the Ninth Development Plan, providing societal contribution and ownage by strengthening societal dialogue and participation, is also fundamental in İZBP within the context of its priorities and aims.

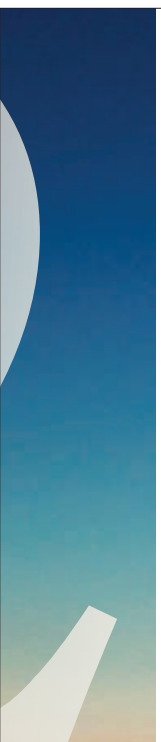
İZBP has been grounded the following three fundamental purposes for the realization of the vision adopted:

- **Providing Competitiveness with Innovation, Productivity and Capacity Increase**
- **Increasing the Quality of Life**
- **Protection and Effective Use of Natural and Cultural Resources**



GENERAL OVERVIEW OF İZMİR REGION (TR31)

part



DPT's study published in 2003 using data of the year 2000, namely the Provinces' Socioeconomic Development Listing, is the first and most up-to-date study that handles the provinces' position within national and regional scale regarding their socioeconomic development level. According to the mentioned study, Aegean Region stands as the second region among all regions regarding development level, while İzmir is found to rank as the **third** most socioeconomically developed province among 81 provinces. In our country there is need for further studies that compare provinces and regions regarding some social development criteria and fundamental development and quality of life parameters, beyond the basic economic data.

In studies of institutions like URAK and EDAM which measure the provinces' competitive power within the framework of sub-indexes formed of various economic, social and infrastructural data, İzmir was yet again found to be the **third** most competitive province throughout the country within the general index listing.

In the sub-indexes of these studies, İzmir similarly has a prominent place. According to this, İzmir is the **second** most competitive province throughout the country regarding the physical infrastructure, commerce capability, production potential and accessibility sub-indexes within two separate studies set out to measure the competitiveness of provinces. İzmir is the **fourth** province regarding human capital and life quality, while ranking only at the **ninth** place regarding branding capability and innovation sub-indexes, falling behind Manisa and Denizli.



GENERAL OVERVIEW OF İZMİR REGION (TR31)

Demographic Structure

İzmir is above the overall median age values of Turkey (28.5) and Aegean Region (32.2) with its value of 32.4. While the elderly population ratio is 6.84% in Turkey and 8.70% in Aegean Region, it is at 8.05% in İzmir. While these data show that İzmir is one of the cities with the most elderly population, social services and care institutions towards this elderly population are not at adequate levels. The number of education institutions for the handicapped people is also insufficient.

Regarding population density, İzmir is quite above the values of both the Aegean Region (105 person/km²) and Turkey average (93 person/km²) with its density value of 316 person/km² and is the third province with the densest population throughout the country. While the birth rate is much lower in İzmir (1.75) compared to both the Aegean Region (2.04) and Turkey average (2.53), the population increase rate is strikingly high. This situation may be explained substantially with immigration phenomenon. Aegean Region and İzmir are at the top of regions and provinces receiving immigrants, and İzmir is an immigrant attraction centre at both regional and national scale.

In Turkey, urban population ratio is 75% while the same ratio is 90.89% in İzmir. İzmir, with its population density increasing and urbanizing faster than country overall level, needs strong and effective policies especially in subjects such as planned urbanization, contingency and disaster administration, transportation and environment.

Economic Structure

According to the current prices generated by the Turkish Statistical Institute (TÜİK) based on the most up-to-date 2001 data; regarding gross domestic product (GDP) per capita values, İzmir is above the Turkey average of 2,146 \$ with its value of 3,215 \$. İzmir ranks at the sixth place in this regard among all 81 provinces. Income distribution inequality in İzmir parallels the inequality throughout the country.

According to TÜİK data, İzmir ranks at the first place among the provinces in the region regarding the GDP generated within Aegean Region. Thus, İzmir generates approximately half (46.9% - 13,383 million TL) of the GDP generated within the Aegean Region by itself, followed by Manisa (13.7%), Muğla (10.2%), Aydın (8.2%), Denizli (7.6%), Kütahya (5%), Afyon (4.3%) and Uşak (1.9%).



İzmir is an immigrant attraction centre both at regional and national scales.

In Turkey, urban population ratio is 75% while the same ratio is 90.89% in İzmir.

The elderly population ratio in İzmir is higher than that in Turkey.

İzmir constitutes approximately 7% of Turkey GDP, thus being the third province in regards to contributing to Turkey's GDP, rising just below İstanbul and Ankara. According to EUROSTAT data, it resides at the 185th place among a total of 295 regions compared to regions throughout Europe regarding GDP size.

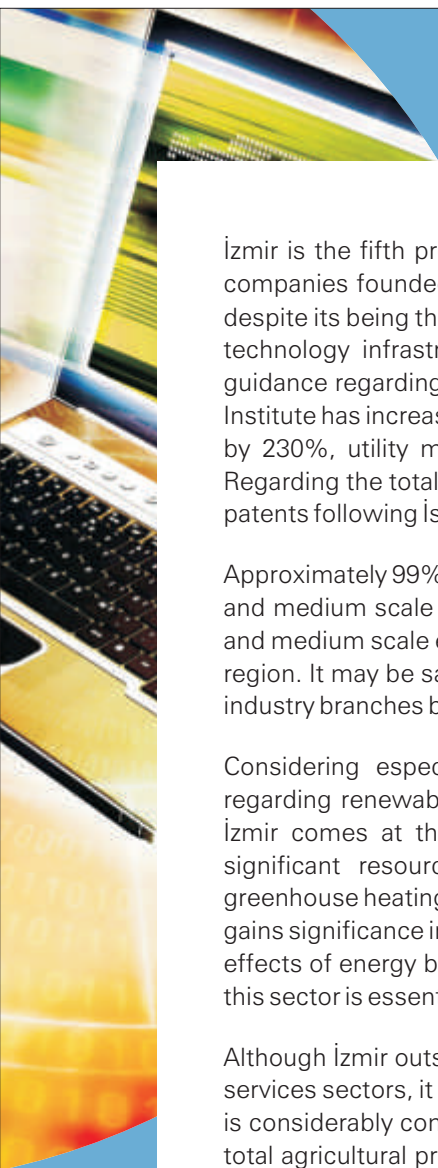
A significant foreign trade centre of the country since very old eras, İzmir still maintains its characteristic of being the secondary most important foreign trade centre of the country for the surrounding provinces and regions. In province based export/import coverage ratio, the province is at second place. However, İzmir's share within Turkey export total is decremental. While this share was 7.70% in 2002, in year 2008 it declined down to 5.96%. While İzmir had been in a position giving foreign trade surplus in year 2003 and before, it has begun giving foreign trade deficit since the last five years. Policies aimed towards increasing the competitive capacity of İzmir based enterprises at international markets should be developed in order to increase the export values of the products produced. The axis of such policies should be competition policy based on technology and quality in production.

Examining the enterprise numbers in the manufacturing industry of the province, textile and textile product manufacturing outstands as the sector with the highest number of enterprises. This sector is followed respectively by unclassified machinery and equipment production, furniture production, food products, beverage production and base metal product sectors.

İzmir is the province with the highest number of OIZs within Turkey, with its two free zones and a total of 17 organized industrial zones (OIZ). Mainstream problems of these free zones and OIZs are infrastructural deficiencies and legislation shortcomings.



According to the current prices generated by the Turkish Statistics Institution (TÜİK) based on the most up-to-date 2001 data; regarding gross domestic product (GDP) per capita values, İzmir is above the Turkey average of 2,146 \$ with its value of 3,215 \$.



İzmir is the fifth province in our country in terms of highest number of international capital companies founded. The fact that the companies' R&D grant benefitting ratio is low in İzmir despite its being the 2nd province with densest industry in Turkey and employing a science and technology infrastructure points out that the companies are in need of information and guidance regarding the grants. Trademark applications done from İzmir to the Turkish Patent Institute has increased between years 2002 - 2008 by 86%, while patent applications increased by 230%, utility model applications by 128% and industrial design applications by 35%. Regarding the total patent numbers between years 1995 - 2008, İzmir is at third place with 90 patents following İstanbul (741 patents) and Ankara (165 patents).

Approximately 99% of the industrial sector companies in İzmir are micro-enterprises and small and medium scale enterprises (SME). Institutionalizing of these micro-enterprises and small and medium scale enterprises and increasing of their marketing capacity are important for the region. It may be said that within the city's manufacturing industry, agro-industries and some industry branches based on high technology (high tech industries) are on the rise.

Considering especially İzmir's wind and geothermal resources, its potential especially regarding renewable energy sector is striking. Regarding wind power generation potential, İzmir comes at the third place throughout the whole country. Likewise, the region has significant resources regarding geothermal energy, electricity, residence heating and greenhouse heating. Developing production and consumption within renewable energy sector gains significance in our current day where the titles of energy supply safety and environmental effects of energy becoming more and more critical. Increasing investments especially within this sector is essential for regional development.

Although İzmir outstands at national and regional scale as a focus centre for the industry and services sectors, it is observed that there are several districts in İzmir where agriculture sector is considerably concentrated. According to the data of year 2007, approximately 4.6% of the total agricultural production of Turkey was done within İzmir and out of overall employment, 7.5% of the population was employed within the agriculture sector in the province. While the ratio of labour force employed within agriculture sector is 23.7% for Turkey nationwide. Between years 1995 - 2007, the contribution of İzmir's agricultural production value to Turkey total has occurred at an annual average of 4.3%.

In İzmir, agricultural production is realized in more variety fields and with higher technology compared to nationwide agriculture sector. İzmir has a significant place in the country especially regarding cultivation of ornamental plants, aquaculture and organic agriculture. The province ranks at third place within the total ornamental plant cultivation area category with a value of 12.5% share ratio and at second place within the total greenhouse ornamental plant cultivation area category with a value of 29.6% ratio.

An increase tendency is observed in the cultural fishing enterprise numbers within İzmir province in the last twenty years. The ratio of organic agriculture areas to total agricultural lands in İzmir is above both Turkey and Aegean Region average values. This ratio is 0.54% throughout Turkey and 1.63% in Aegean Region while for İzmir it is 7.65%.

İzmir has agricultural products that are important in respect to production value, efficiency and branding potential. However, agricultural lands are small sized and fragmental; average agricultural enterprise size is below country average value. In addition to these, chronic problems peculiar to the agricultural structure -such as the culture of organized action being not adequately developed, sufficient capital and knowledge being absent-reduce enterprises' efficiency levels and weakens the producers' hands regarding marketing. The fact that industry sectors based on agriculture, such as clothing, food and drinks manufacturing



are focused in İzmir highlights the necessity to develop the integration between agriculture and industry.

With its geographic location, infrastructure, natural, cultural and archaeological assets, İzmir bears considerable potential for various tourism types with marine, health, convention, fair, urban, cultural and ecological tourism coming at the lead. Despite this fact, average length of stay of tourists, occupancy rate of accommodation facilities and labour force efficiency in hotel and restaurant services are not at desired levels. Contribution of hotel and restaurant services to İzmir GDP is around 2.5% while employment ratio in this sector is 7.9%.

As of year 2008, İzmir is the third province countrywide regarding the number of blue flag beaches with its 21 beaches awarded with the blue flag status. The fact that İzmir's most significant focus of attraction is the seasons and tourism causes the demand to focus on the traditional tourism months within mass tourism context and thus a tourism season of four months is experienced. A serious inadequacy exists regarding the promotion of İzmir's tourism potentialities. It may be said that İzmir is not involved with tourism adequately also regarding investment and planning aspects.

Grants and incentives given in tourism policies centre around Antalya and Southern Aegean areas. Public investments made to Antalya regarding tourism field is approximately 25 times the amount made to İzmir. Generally the share İzmir gets from Turkey tourism is around 4% according to number of tourists and accommodation data.

In İzmir where agriculture is modernized and industry gets diversified and developed, tourism sector also outstands. Furthermore, the natural resources İzmir enjoys, and its scientific infrastructure point out to the existence of potential of new and advanced sectors. This multi-sector structure of the city causes the economic power to get scattered and lack of specialization.

There are 294 international transportation companies, 44 international warehouses and agencies, 869 cargo transportation companies, 549 passenger transportation companies, 218 mail and courier companies and 281 transportation-support companies within the logistics sector registered under the İzmir Chamber of Commerce (İZTO). The activities realized in İzmir within the field of logistics are observed to be dominantly; transportation, storeroom activities and warehouse keeping activities. The logistics capacity of the region cannot be utilized to its full extent and the investments made do not meet the expectations sufficiently. However,

The multi-sector structure of the city causes the economic power to get scattered and lack of specialization.





A serious inadequacy exists regarding the promotion of İzmir's tourism potentialities. It may be said that İzmir is not involved with tourism adequately also regarding investment and planning aspects.

storing, handling and distribution activities that are effective factors in logistics sector are continuously becoming widespread.

As of year 2008, İzmir is at third place in the country in respect to both its share of 6.2% within total bank deposit, and its share of 6.4% within total bank loans. Also, according to the Provinces' and Regions' Socioeconomic Development Listing Study conducted by DPT in year 2003, regarding income tax and corporate tax per capita values total, the province resides above the country average value of 165 million TL, at the fourth place countrywide with its value of 191 million TL. On the other hand, considering the last 10 years, a decrease is observed in the share received by İzmir from the public investments in Turkey. While İzmir's share was 4.82% as of 1999, in the year 2000 this value was halved to be 2.44% and it declined down to 1.99% in 2007.

Employment

In sectoral sense, the highest contribution to İzmir province's GDP is provided respectively by, services (54.4%), industry (37.5%) and agriculture (8.1%). According to the data in year 2008, the employment distribution among sectors has been realized as 7.5% in agriculture, 31.5% in industry and 61% in services sector. Total labour force on the other hand has risen up to 1.17 million in İzmir as of year 2008. Compared to country-wide values it can be observed that the employment ratios in non-agriculture sectors are continuously higher in İzmir than that of country overall level. 47.1% of total Aegean Region population working in services and industry sectors are employed in İzmir, and this ratio is 13.7% for those employed in agriculture sector. İzmir is the industry and services centre of Aegean Region, compared to the TR32 and TR33 Level 2 regions situated in Aegean Region.

The unemployment ratio that happened to be 11.8% in 2008 occurs above the country average and increases with the immigrations. And the qualified labour force immigrates to other cities. Insufficient livelihoods and high unemployment rates are observed at rural areas. Based on labour force efficiency; the national labour efficiency rate is around 25% in İzmir while the same value is approximately at 50% levels in İstanbul. In İzmir, the share of wage earner women labour force within total employment (21.4%) is above the Turkey average (14%).

Education

Preschool, elementary and secondary education schooling ratios are higher than the Turkey average. Although the number of students per teacher in preschool, elementary and secondary education is lower than the Turkey and Aegean Region averages, in especially some districts the number of students per classroom is considerably higher. There are seven universities in the city. With the steps taken in recent years, studies have begun for the purpose of developing the university-industry cooperation. In regards to the ratio of population with higher education and above graduation to the total population over age 15; İzmir comes second among Turkey's 81 provinces with 10.77% after Ankara (15.45%).

The servicing capacity in the province towards formal education and professional education is developing in terms of both quality and quantity. Still, especially the professional education programs should be improved with respect to compliance to regional labour force demand and quality.

Healthcare

Number of people per specialist doctor in İzmir is 59% of the same rate in Aegean Region and 8% of Turkey. And the number of people per nurse in İzmir is 48.5% of the same rate in Aegean Region and 6.8% of Turkey. Although İzmir is above country average in terms of essential health indicators, services provided in subjects such as planned urbanization and public health remain insufficient against the demands, due to the urban population density being higher than Turkey average.



Culture

Although many cultural and artistic activities open to international, national and local participation are held in İzmir, these are not realized in coordination. Moreover, the infrastructure necessary for the mentioned sociocultural activities is currently inadequate. The increase between years 2000 - 2007, in the number of both movie theatres and cinemagoers in İzmir is slightly higher than the increase observed in the same period throughout Turkey and Aegean Region. While in terms of new theatre hall establishment in İzmir is below even the inadequate increase throughout the country, the demand for theatre is on the rise in the city. There are 16 museums within the province. However, in respect to both the thematic variety and the geographic and demographic accessibility, the museums within the province need improvement.

Environment

Because İzmir, employing a considerable importance considering its energy resources, biological diversity, soil fertility, water basins and mineral resources, houses significantly varied urban, agricultural and industrial activities within; environmental sustainability gains importance. The most important environmental issue in the city is basin pollution caused by domestic wastes, agricultural and industrial activities. Marine pollution also persists as a problem for İzmir. Although the existence of the treatment facility activated in year 2000 to prevent the pollution in İzmir Bay employs a positive effect, the pollution entries carried by the basins' water beds still persist in adversely affecting the improvement process in İzmir Bay.

Gediz Basin is environmentally threatened by the pollution coming from Kütahya, Uşak and Manisa along with the industrial pollution coming from İzmir's Kemalpaşa district, settlements without wastewater treatment facilities with Menemen at the top of the list and also by the insensible agricultural applications again in Menemen. Küçük Menderes Basin is also polluted in result of domestic wastewaters. In Bakırçay Basin pollution problem is experienced again caused by domestic wastewaters and agricultural activities. Wastewater treatment facilities and investments for garbage landfill areas should be realized in basin terrains.

With an annual usable water potential per person at an average of 614 m³, İzmir is deemed "water-poor". On the other hand, water consumption in İzmir is caused by a ratio of 70% from irrigation purposes. In regards to the air pollution experienced in İzmir; some positive developments have been experienced with the quality of the fuels used for domestic heating and industry being limited, the inspection of used fuels, and with the transition to natural gas for industry and domestic heating purposes. However it is seen that the air quality may improve further if the clean energy utilization potential of the province can be evaluated.

One of the environment-related problems is that the rate of the utilization of environmental management systems is low in İzmir. While in a fine condition regarding urban solid waste collecting works, İzmir has capacity inadequacies regarding disposal tasks. 88% of the total hazardous waste amount produced in Aegean Region results from industrial activities in İzmir. It constitutes a problem that the waste amount is high while the industrial waste storehouses and appropriate hazardous waste disposal facilities are few, resulting in illegal dumping

Although forested area ratio is high, İzmir is significantly below Turkey average regarding productive forest area. Moreover, İzmir houses sensitive ecosystems of international importance.

Transportation Infrastructure

Due to being the third largest city within Turkey and the largest city within Aegean Region, İzmir has a dense passenger and cargo (load) traffic. It is a passage point connecting the settlement regions at the north and the agriculture, industry and tourism areas at the south.

İzmir Harbour is the largest port of Aegean Region with its annual ship acceptance capacity of 2,757. The exporting port at the first place in Turkey among government-managed ports dealing with container handling is in İzmir. İzmir Harbour is not only an importing portal to Central Anatolia Region and Aegean Region but also an important trade and commerce port between European, Middle Eastern and Asian countries due to its railway and highway connections.

Although having an important potential among the world's port cities, İzmir currently does not utilize this potential adequately considering its development and infrastructural works. In order to strengthen the aspect of İzmir being a trade centre, port capacity should be expanded and approach roads should be developed. With its strategic location on the Mediterranean-Black Sea line and its potential expansion area, North Aegean (Kuzey Ege - Çandarlı) Port will be one of the important main transshipment ports of East Mediterranean, in case it is activated.

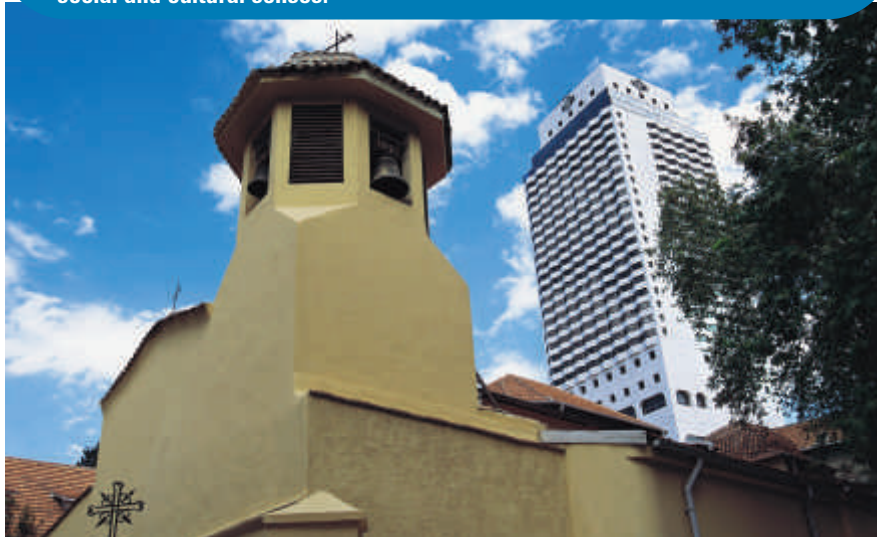
The airport capacity being increased, international ferry routes, ports servicing tourism and trade, and transportation variety are positive features for İzmir regarding transportation. On the other hand, the inadequacy of railways investments, rarity of direct flights from and to İzmir, maritime lines not being used sufficiently for passenger transportation, the dependency of both intracity and intercity transportation of loads and passengers on highways, İzmir Port not being sufficient in both capacity and infrastructure to meet the increasing demand, road traffic and parking problem are the weak points of transportation in İzmir.

Considering its position throughout the country, İzmir is one of the most developed provinces with its rich natural resources, high capital accumulation, grown human labour force, developed institutional structure, science and technology infrastructure and strong transportation networks. However, despite this picture, it cannot be ignored that İzmir has significant strong and weak aspects in economical and social sense, and important opportunities and threats in development sense.

In addition, İzmir is a centre within Aegean Region in economical, social and cultural senses. In this regard, the relationship of İzmir with the neighbouring provinces (Manisa, Aydın, Balıkesir, Uşak, Afyon, Kütahya, Denizli, Muğla, Çanakkale) has a multifaceted character going back into historical roots. In most respects, İzmir is face to face with district strengths and weaknesses, opportunities and threats brought by its central position as an economical, social and regional attraction centre.

Considering its position throughout the country, İzmir is one of the most developed provinces with its rich natural resources, high capital accumulation, grown human workforce, developed institutional structure, science and technology infrastructure and strong transportation networks.

In addition, İzmir is a centre within Aegean Region in economical, social and cultural senses.



DEVELOPMENT AXES and KEY SECTORS

part

3.1 Determining the Development Axes

By adopting plan principles, region-related experiences and views of all relevant institutions and organizations in İzmir has been taken into consideration as these principles necessitated. An in-depth overall review of İzmir has been formed with the research and analysis studies based on the data obtained in the essential topics that are related to the region and covering the region's social, economical and environmental issues.

In result of these studies conducted, to reach the fundamental aims and the vision emphasized in the framework of 2010-2013 İzmir Regional Plan (İZBP), there are four themes appearing for the socioeconomic development of İzmir and for providing its sustainability. The titles for the defined development axes are listed below.

- **Competitiveness for Enterprises**

- **Employment and Social Integration**

- **Sustainable Environment**

- **Strengthened Infrastructure and Superstructure**



COMPETITIVENESS for ENTERPRISES

Purpose: Increasing national and international market shares with efficiency, innovation and quality especially in key sectors for increasing the competitive power of enterprises

Strategic Priority	Aim
1. Developing Regional R&D and Innovation Capacity	1. Regional Innovation Strategy shall be developed. 2. The cooperation between universities and research institutions, and between public institutions and businesses shall be strengthened. 3. R&D infrastructure shall be strengthened with key sectors at top priority. 4. Innovation, R&D and technology awareness shall be raised. 5. Innovation centred enterprises shall be developed. 6. Technology capacities of businesses shall be increased and advanced technology use in businesses shall be universalized. 7. More effective functioning of İzmir Technology Development Zone, and increase of number of companies within the Zone shall be realized.
2. Increasing Institutionalization, Production and Marketing Capacity in Enterprises	1. Branding shall be supported and the number of geographical indication employing products and brand registrations in Turkey total share shall be increased. 2. Effectiveness of enterprises within national and international markets, and their export ratio within Turkey shall be increased. 3. Institutionalization of family companies shall be realized. 4. Production and quality processes of SMEs shall be improved. 5. Finance capabilities of SMEs and their capacity to benefit from current financial grants shall be increased. 6. More effective functioning of agricultural cooperatives and unions shall be realized especially in institutionalization, management and marketing aspects.

Strategic Priority

Aim

3

Establishing Clusters and Realizing Planned Industrialization

1. A Clustering Strategy shall be formed until year 2012, cooperation networks supporting clustering shall be developed and clustering awareness shall be raised.
2. Two clustering establishments shall be supported in key sectors, particularly in the ones with clustering potential, that will serve as models.
3. Establishing clusters in food and beverage industry's potential cluster sub-sectors shall be supported, providing the integration of the sector with the agriculture sector.
4. Establishing clusters in clothing materials industry's potential cluster sub-sectors shall be supported, having İzmir to be a fashion design centre.
5. Establishing clusters in logistics sector shall be supported.
6. Establishing potential clusters in the sub-sectors of industrial machine production sector shall be supported.
7. Specialized organized industry zones shall be founded and more effective utilization of existing zones shall be realized.

4

Strengthening the Production and Service Infrastructure

1. The infrastructures of OIZs, SIAs, free zones and technology development centres shall be strengthened.
2. Infrastructure necessary for drying-cooling, storage and food safety towards food products shall be created.
3. Tourism infrastructure shall be developed, particularly for alternative tourism types.
4. Infrastructure of agricultural production shall be strengthened.

5

Increasing Clean Production Applications in SMEs

1. Awareness in the region towards clean production shall be raised.
2. Conformity of enterprises to the environment legislation and environment management systems shall be supported.



Strategic Priority	Aim
6. Providing Productivity and Economic Diversity on Sectoral Basis	1. Organic agriculture and good agricultural practices shall be universalized within agriculture sector. 2. Processing and marketing of organic and high added value food products shall be supported in food and beverage industry. 3. Organic and environment-friendly textile production shall be supported in clothing materials industry. 4. Prioritized investment fields regarding renewable energy resources shall be determined and utilized. 5. Investments towards diversifying the tourism sector shall be supported.
7. Promoting the Region	1. City Marketing Strategy shall be created and implemented. 2. Investment promotion works shall be carried out in key sectors. 3. Culture and tourism opportunities shall be promoted, increasing the income obtained through tourism.

Strategic Priority	Aim
1. Increasing Employment and Labour Force Productivity	1. Regional Labour Force Strategy shall be created and implemented. 2. Vocational education shall be developed in consideration of intermediate labour force demands in labour market regarding especially the key sectors. 3. Skilled labour force shall be developed especially in key sectors. 4. Participation of disadvantaged groups in labour force shall be increased.
2. Improving Education and Healthcare Services	1. Preschool education and informal education shall be supported. 2. The effectiveness of education services shall be increased by encouraging accessibility and quality. 3. Primary healthcare services shall be strengthened with the preventive health and mother and child health services coming foremost.
3. Strengthening Social Inclusion and Fight Against Poverty	1. Social services shall be improved. 2. Integration of immigrants to urban life shall be realized. 3. Living conditions and employment opportunities at rural areas shall be developed.

Purpose: Strengthening social integration by developing employment opportunities and conditions, and services towards social inclusion, with education and healthcare coming foremost

EMPLOYMENT and SOCIAL INTEGRATION





SUSTAINABLE ENVIRONMENT

Purpose: Preserving the environment and improving environmental quality while continuing economical activities

Strategic Priority	Aim
1. Realizing Sustainable Water and Wastewater Management at Basin Areas, Regions with Touristic Significance and Rural Areas	1. The pollution shall be reduced and water quality shall be improved to the next higher quality (2nd and 3rd water quality) by providing pollution control and basin management at water basins. 2. Sustainable management of drinking water and utility water shall be provided. 3. Management of industrial and domestic wastewater shall be provided. 4. The soil and water pollution caused by agricultural activities shall be prevented.

Strategic Priority	Aim
2. Providing Sustainable Solid and Hazardous Waste Management	1. Recovery, recycling and reuse of urban and industrial solid and hazardous wastes shall be realized. 2. Solid waste and hazardous waste storage and disposal capacities shall be increased. 3. Awareness of industrialist and urban consumer actors shall be raised.
3. Realizing and Improvement of Air Quality Control	1. Renewable and clean energy utilization in industry and domestic consumption shall be encouraged. 2. Air pollution control shall be realized at industry-intensive areas.
4. Providing the Continuity of Sensitive Ecosystems and Biodiversity	1. Region ecosystems bearing national and international significance shall be revived by considering the preservation-utilization balance. 2. Biodiversity shall be protected.
5. Providing Energy Efficiency	1. Energy efficiency shall be encouraged and technology utilization towards this goal shall be supported.

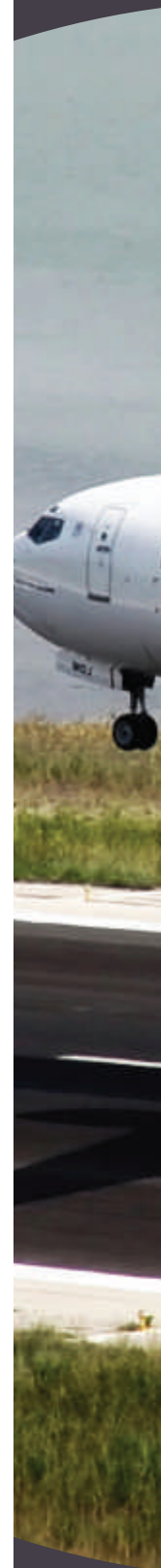


STRENGTHENED INFRASTRUCTURE and SUPERSTRUCTURE

Purpose: Accelerating the economical and social development of İzmir by developing the transportation, urban, environmental, social, cultural and informational infrastructure

Strategic Priority	Aim
1 Strengthening Transportation Grids	1. Roads, maritime lines, airline network and railways in İzmir shall be strengthened, supporting the key sectors. 2. Transportation connections and infrastructure of İzmir Harbour shall be strengthened, the quantity of containers handled at the harbour shall thus be increased. 3. Domestic (intracity) transportation opportunities shall be strengthened with maritime transportation and railway systems coming foremost. 4. Transportation connections between Centrum and districts, and the rural transportation infrastructure shall be strengthened.

Strategic Priority	Aim
2. Improving the Infrastructure Related to the Utilization of Natural and Historical Assets, and City Aesthetics	1. Infrastructure facilitating the utilization of existing natural, historical and cultural assets shall be developed. 2. Areas significant regarding tourism shall be improved in respect to visual perception and landscaping.
3. Improving the Quality of Life via Social, Cultural and Urban Transformation	1. Actions towards urban transformation shall be activated. 2. Quality and capacity of social reinforcement areas shall be increased.
4. Improving the Urban and Rural Infrastructure	1. Environmental infrastructure shall be developed. 2. Energy infrastructure shall be developed. 3. Infrastructure and disaster management capacity in areas subject to disaster risk shall be strengthened. 4. Informatics and communication infrastructure shall be strengthened.



3.2 Determining the Key Sectors

Within the framework of the 2010-2013 İzmir Regional Plan (İZBP); both quantitative and qualitative analyses have been realized for the purpose of determining the development axes and key sectors in İzmir. In the İzmir Emerging and Strategic Sectors Report and in the Conclusion Report on Studies Towards Developing İzmir Clustering Strategy, analyses in which sectors-related concentration coefficient and 3 stars analysis methods were utilized have been conducted. Along with these, sectoral analysis reports and status quo analysis have provided input to plan studies as reports containing quantitative and qualitative analyses.

Within the framework of sectors' concentrations in İzmir; added value changes, export and import rates, technology levels, and innovation capacities have been assessed and analyzed. In result of the meetings, workshops and discussions, sectors appeared after the quantitative analyses have been confirmed and the sectors seen as development sectors by the stakeholders have been exhibited.

The key sectors that have been manifested by the rising sectors survey, current situation analysis and search / decision conferences, considered to be supportive of İzmir's economic development and to create competition for the region, waiting to grow within the region are determined and listed as below:

- High Tech Industries
- Renewable Energy
- Tourism
- Logistics
- Agriculture and Agro Industries (Agriculture, Food and Beverage Industry, Clothing Materials Industry)

Coming foremost among the five key sectors is the High Tech Industries sector, that will clear the way for high added value sectors. As a region situating seven universities and as the industry's second most concentrated province with the adequate science and technology infrastructure and human capital, İzmir has the institutional, physical and natural infrastructure for these sectors to develop.

Renewable Energy sector, of which importance has grown more and more with the climate change and recent developments at

world scale, manifests as another key sector that bears development potential in İzmir. Considering especially the geothermal and wind resources, it is seen that İzmir bears considerable potential in renewable energy sector. In this context, it is necessary to increase the investments aimed towards the utilization of existing resources in İzmir.

Tourism sector is another key sector defined within İZBP where the production and service capacities are stipulated to be increased. In İzmir, many districts have various tourism potentials. In order to increase the income obtained in this sector, tourism variety should be increased and integration of different tourism varieties should be realized while also increasing the service quality in tourism. Especially the touristic assets and tourism potentials İzmir employs should be promoted effectively

Logistics is a key sector demanding development for the purpose of strengthening İzmir's feature of being the production and trade centre. In this context, especially expanding port capacity and developing approach roads bear significance.

Agriculture and Agro Industries (Agriculture, Food and Beverage Industry and Clothing Materials Industry) are the fifth of the key sectors in İzmir with a significant development potential. Along with the products of high added value, the integration of agriculture and industry bears importance for the competitiveness of sectors in İzmir and for the region's development.

3.2.1 High Tech Industries

In our day, countries capable of producing science and technology can achieve international competitive superiority and development acceleration. Therefore science and technology policies come up as a foremost aspect regarding economic growth. Determining science and technology policies in line with the development dynamics of regions shall increase these policies' efficiency and applicability.

Actions where science and technology are used for producing new products and services are defined as research and development activities (R&D). In the Ninth Development Plan, aims such as "designing R&D activities towards producing innovation in order to increase efficiency and competitiveness, increasing the ratio of R&D expenditures within GDP, developing the university-industry cooperation, completing the infrastructures of Technology Development Zones, developing the infrastructure of informatics and communication technologies" have been put forward regarding this issue.

Technologies that can produce higher quality products or services in unit time, display a high growth characteristic regarding their world demand, provide a rate of return higher than average in commercial sense are defined as "advanced technologies". According to the Organization for Economic Cooperation and Development's (OECD) definition based on R&D density; sectors which employ an R&D expenditure share higher than 5% of the total gross production value are classified within advanced technology group. Sectors that strike attention with the high technology level used, research and development actions and the high added value created, and thus defined as advanced technologies within plan framework are as below:



- Informatics and Communication Technologies
- Biotechnology and Gene Technologies
- Material Technologies
- Nanotechnology
- Design Technologies
- Mechatronics
- Energy and Environment Technologies

The high tech industries highlighted for their significance for the region in the İzmir Emerging and Strategic Sectors Report and in the Conclusion Report on Studies Towards Developing İzmir Clustering Strategy are as follows.

- Industrial Machines Production Industry,
- Chemical Substances and Products Production,
- Medical, Sensitive and Optical Equipments,
- Information Technologies.

İzmir has the necessary infrastructure and human resource for science and technology production. The existence of seven universities of which one is especially focused on advanced technology, public research institutions, Technology Development Zone, Technology Development Centres at Ege and Dokuz Eylül universities, institutions such as EBİLTEM and IRC-Ege facilitate the realization of university-industry cooperation, supporting of private sector R&D activities and the participation of researchers within universities in these activities.

Realizing development in the defined advanced technologies and universalizing the utilization of such technologies within the abovementioned high tech industries shall accelerate the region's economic development. Therefore it is important **to develop the potential İzmir employs regarding advanced technologies and thus enable advancement in high added value sectors.**

In the chart below, aims directly related to advanced technologies under development axes, and the priorities covering these aims are shown.



HIGH TECH INDUSTRIES

Competitiveness for Enterprises

- Developing Regional R&D and Innovation Capacity
- Promoting the Region

Employment and Social Integration

- Increasing Employment and Labour Force Productivity

3.2.2 Renewable Energy

Energy is one of the significant inputs of development. Meeting the energy demand increasing in parallel to the developments in technology, the requirement of providing environmental, social and economic sustainability, the obligation of reducing CO₂ and other greenhouse gas emissions due to Kyoto Protocol increases Turkey's need towards renewable energy resources.

Renewable energy policies has gained much importance in our day on international platform. The European Union has set the goals of meeting 20% of the energy demand from renewable energy resources and increasing energy efficiency by also 20% until 2020, and utilizing renewable energy in all buildings until 2018. Due to EU policies being effective also on our country during harmonization process and more importantly for the global purpose of increasing energy demand security, the goal of "maximally increasing the share of local and renewable energy resources within the production system" has been set under the title of "energy infrastructure" within the context of Ninth Development Plan. In the context of this goal, utilization of the renewable energy potential in İzmir carries importance also at national-scale.

In terms of variety of energy resources, İzmir employs many opportunities regarding a diversity of natural resources waiting to be utilized. İzmir region has a renewable, environment-friendly energy resource potential such as solar energy and bio-energy, and especially wind energy and geothermal energy.

Considering wind energy potential, İzmir comes at the third place nationwide. 36% of the installed power throughout Turkey including those activated at year 2008 resides at İzmir. However this power has been obtained by utilizing only 1% of the theoretical potential. İzmir province is considerably rich in wind energy with the theoretical capacity of 11,815 MW. The total amount of energy that can be generated via utilizing this potential is higher than the total electricity generation of Aegean Region. The infrastructure investment areas related to wind energy within the region are determined as Bergama, Dikili, Aliağa, Çeşme, Karaburun and Urla districts.

İzmir has a rich potential also in terms of geothermal energy. The variety in the temperatures of geothermal resources found at the region enables a wide range of utilization areas. The potentials in Seferihisar (35 MWe), Dikili (30MWe), and Balçova (5MWe), has such temperatures that enable electricity generation. Also, while regarding domestic heating there is a potential residence equivalent of 212,000, only 11% of this potential is being utilized. Districts and investment areas that enjoys resources for residence heating are Balçova (Narlidere district is able to utilize the resource at Balçova too), Seferihisar, Aliağa, Bergama, Çeşme and Dikili districts. On the other hand, only 3% of the 19,000 decare greenhouse heating potential is used. Districts where greenhouse heating potential should be utilized are Seferihisar, Dikili and Bayındır districts.

Furthermore, although the potential for health tourism exists in 8 districts that are geothermal fields, current utilization is mostly limited to Balçova, Çeşme and Dikili districts. In districts where resources exist at such temperatures that allow more than one utilization areas, especially in Seferihisar and Dikili districts, developing projects towards the integrated use of the resource bears significance.

In this region of considerable advantages regarding biomass energies, solar energy also outstands as other advantageous energy sources to be used, along with wind energy and geothermal energy.

It is observed that the energy consumption in İzmir is approximately 54% above Turkey average value. It is also seen that the consumption has increased by 15% in the last two years. Renewable energy sector is important for the region for the purposes of contributing to the increase in the country energy supply security, and also of utilizing local potentials to aid the development of İzmir and Turkey in the direction of sustainable development principles. Moreover, considering İzmir's position throughout the country and among surrounding provinces, it is seen that the province's potential towards becoming a renewable energies centre should be utilized.

Some national initiatives are also required to reach these aims at regional-scale. Completion of the legal regulations, which will pave the way for renewable energy investments and renewable energy utilization, is of vital importance for the realization of national and regional scale sustainable development. The legal legislation to determine the authorization, license and supervisions of the companies functioning in renewable energy field should be strengthened; standards to be used in this subject should be created; accreditation and control mechanisms should be established. Along with the legal regulations that has been issued regarding geothermal energy, legislation regulations supporting wind and solar energy investments should also be completed.

On the other hand, the energy production and consumption planning to be prepared in

national-scale should be realized by being based on regional potentials and by setting long-term goals in harmony with international policies and actions. In this context, **making İzmir a renewable energy region by increasing the renewable energy investments in the area, universalizing the production and consumption of renewable energy technologies while developing the labour force and universalizing renewable energy utilization**, bears much significance for the region's development.

In the chart below, aims directly related to renewable energy sector under development axes, and the priorities covering these aims are shown.



3.2.3 Tourism

As of 2008, worldwide total international tourist entries have reached approximately twice its value of 1995, and it is estimated that this value will reach thrice the 1995 value in year 2020. Turkey is a mentionable country regarding tourism sector. The long term goal of our country is to become one of the top five countries attracting the most tourists and obtaining the highest tourism income.

İzmir, with its geographic location, variety of historical and cultural assets, and its infrastructure aimed at mass tourism based on sun, sea and sand tourism, has a wide tourism spectrum. Despite this, tourism potential of İzmir could not be utilized adequately until this day. Compared to the prominent tourism centres of Turkey, İzmir is behind, regarding both supply and demand aspects of tourism. The share İzmir takes from the country's overall tourism is around 4%.

İzmir houses natural, historical and cultural resources that can be utilized in different types of tourism. The purpose for İzmir that employs all these resources related to tourism sector is **to become a tourism destination employing high competitiveness in national and international field with diversified tourism**.

Tourism depends on natural, cultural and historical resources and may in time cause these to become commoditised or exhausted. In this sense, the most important point to consider for the effective utilization of resources is restraining the mass tourism approach that is suitable for short term profiting but may in long term rapidly exhaust the resources. Instead of this, sustainable tourism approach, which will benefit in long term and from which not only the capital but also local public shall benefit, should be implemented.

The tourism types in which İzmir province bears special potential are convention, health, sea, urban, cultural and rural tourism. Therefore, these tourism types are handled primarily within İZBP. In sector planning; initially handling the infrastructure, followed by creating an awareness and demand in the market by conducting advertisements, and finally making the investments should be appropriate.

In the chart below, aims directly related to tourism sector under development axes, and the priorities covering these aims are shown.

TOURISM

Competitiveness for Enterprises

- Strengthening the Production and Service Infrastructure
- Providing Productivity and Economic Diversity on Sectoral Basis
- Promoting the Region

Employment and Social Integration

- Increasing Employment and Labour Force Productivity

Sustainable Environment

- Realizing Sustainable Water and Wastewater Management at Basin Areas, Regions with Touristic Significance and Rural Areas

Strengthened Infrastructure and Superstructure

- Improving the Infrastructure Related to the Utilization of Natural and Historical Assets, and City Aesthetics
- Improving the Quality of Life via Social, Cultural and Urban Transformation



3.2.4 Logistics

In our day, as result of several factors such as total globalization of trade, handling production and distribution strategies at world scale, developments in international marketing methods and information technologies, companies are competing not only against the companies nearby them or in their country but also with companies all around the world. In result of this; the role of optimal management of supply processes and logistics services is of vital importance for the companies to survive by increasing their efficiencies and providing competitive advantage. Studies conducted point out to the fact that logistics sector is on the rise throughout the world and with the constantly acceleration globalisation process logistics will be one of the star sectors.

The potential of logistics sector is estimated to be 6 trillion dollars worldwide. The share claimed by the sector from gross domestic product (GDP) is between 8% and 10% in developed countries. While the growth of the sector is at an average value of 10%. In our country, the sector size reached 60 billion dollars and its share within GDP is around 12-13%. According to the report prepared by the International Bank for Development and Reconstruction, Turkey is at third place among East European countries regarding logistics performance index. As a result of the report in question; the necessity of an extensive planning of the logistics investments in Aegean Region, especially in İzmir has surfaced, which has to be conducted in competition with especially Greece, a neighbouring country of high logistics performance index.

The logistics sector has been discussed within the Ninth Development Plan covering years

2007-2013 and under the aims of the priority named “Developing Energy and Transportation Infrastructure” within the development axis titled “Increasing Competitive Power” it has been stated that, “policies providing important ports to be developed into logistics centres shall be implemented, in this regard the road and railway connections of all ports shall be completed, port capacities shall be increased, especially at İzmir region, thus supporting the Mediterranean Region to be an important logistics centre for East Mediterranean area”.

It appears that İzmir, despite it resides on the passage between Mediterranean Sea and Black Sea in regards to its geopolitical position, it has the opportunity to open to Balkans, Europe and –over Anatolia– to Middle East and is in close proximity to domestic markets, employs functioning OIZs and free zones, houses international companies numbering over one thousand, and 2,255 logistics companies functioning registered under İZTO, enjoys the benefit of a qualified labour force and has been a port and trade city for over 8,500 years; cannot reach its true potential due to the transportation infrastructure being inadequate towards supporting logistics activities, problems arising from İzmir Port’s physical and legal situation, not having a logistics centre, logistics fields being scattered, and legislative problems being experienced in grants and supervision.

The completion of the İzmir Port privatization and strengthening of the port in terms of technical equipment and operation, improvement of transportation infrastructure as to support the logistics sector, establishing a logistical park for developing İzmir into an important logistical base, activating the project Kuzey Ege (Çandarlı) Port which is expected to be one of the main transshipment ports of East Mediterranean, and training qualified human resource for the sector are all aspects of vital importance for İzmir to reach its true potential in logistics sector. In spatial context, the sector concentrates at Aliağa, Konak, Bornova, Kemalpaşa and Torbalı districts. Considering the sector with all of its relevant sub-sectors, it is seen that there are around a total of 7 thousand companies employing approximately 50,000 employees. It is also seen that there are considerable employment (12% increase) and number of companies (15% increase) changes during the period between years 2004-2008 within the sector.

With all these reasons present, **developing İzmir into a logistical base by improving logistics infrastructure and human resource specialized in the sector** shall be a significant dynamics that will contribute to the region's economic development.

In the chart below, aims directly related to logistics sector under development axes, and the priorities covering these aims are shown.



LOGISTICS

Competitiveness for Enterprises

- Developing Regional R&D and Innovation Capacity
- Establishing Clusters and Realizing Planned Industrialization

Employment and Social Integration

- Increasing Employment and Labour Force Productivity

Strengthened Infrastructure and Superstructure

- Strengthening Transportation Grids

3.2.5 Agriculture and Agro Industries

Agriculture: Agricultural Products with High Added Value

Due to the fact that agriculture is economically the primary sector throughout the rural lands which constitute the better part of country lands together with providing input to food and industry sectors, exchange yields, its role regarding contribution to employment and food safety, there is the obligation of plans, programs and interventions regarding the agriculture sector. Because we have been one of the seven self-sufficient countries in agriculture throughout the world for long years-affected also by general economic conditions, the sector not facing its competitors outside the country enough brought along the fact that the countries we preferred not to compete with in the past confront us today with their more modern and large scale enterprises. Furthermore, the agricultural droughts experienced during the recent times due to climate changes also propose threat against production.

İzmir region has a soil and climate structure both very suitable regarding agriculture. However, it is not possible to say that this potential is used effectively with the current state. İzmir providing maximal benefit from its potential will contribute to both the region's development level and the reduction of intraregional development differences.

At this point, what is expected from the sector is not increasing its share within the province's economy, in other words competing with industry or services sector but to abide by the sustainability principle and produce the maximal added value from its own natural and human resource potential. The agriculture, industry and services sectors cannot be competing with or replacing each other, but they feed one another and contribute to economy growth with their outcomes.

The agriculture in İzmir is handled, different from country general, by the different associations, chambers, markets and universities, and general or product-specific workshops, symposiums, summits and similar works are conducted regarding the subject. These facts show us that in İzmir agriculture is not handled solely as an issue between producers and agriculture-related state institutions, mostly limited to agricultural backup prices, but instead bear the result that the segments processing and trading the agricultural products also put a significant contribution on the subject. These studies present important knowledge accumulation not only to the public and senior bureaucracy but also to the producers who are the primary actors in the sector.

In the Ninth Development Plan, one of the priorities that are thought to contribute in the increase of country competitiveness is defined as "Activating the Agricultural Structure". The fundamental purpose of this mentioned priority has been determined to state "an organized agricultural structure of high competitiveness shall be formed while taking the features of providing food safety and dependability and natural resource sustainability into consideration".

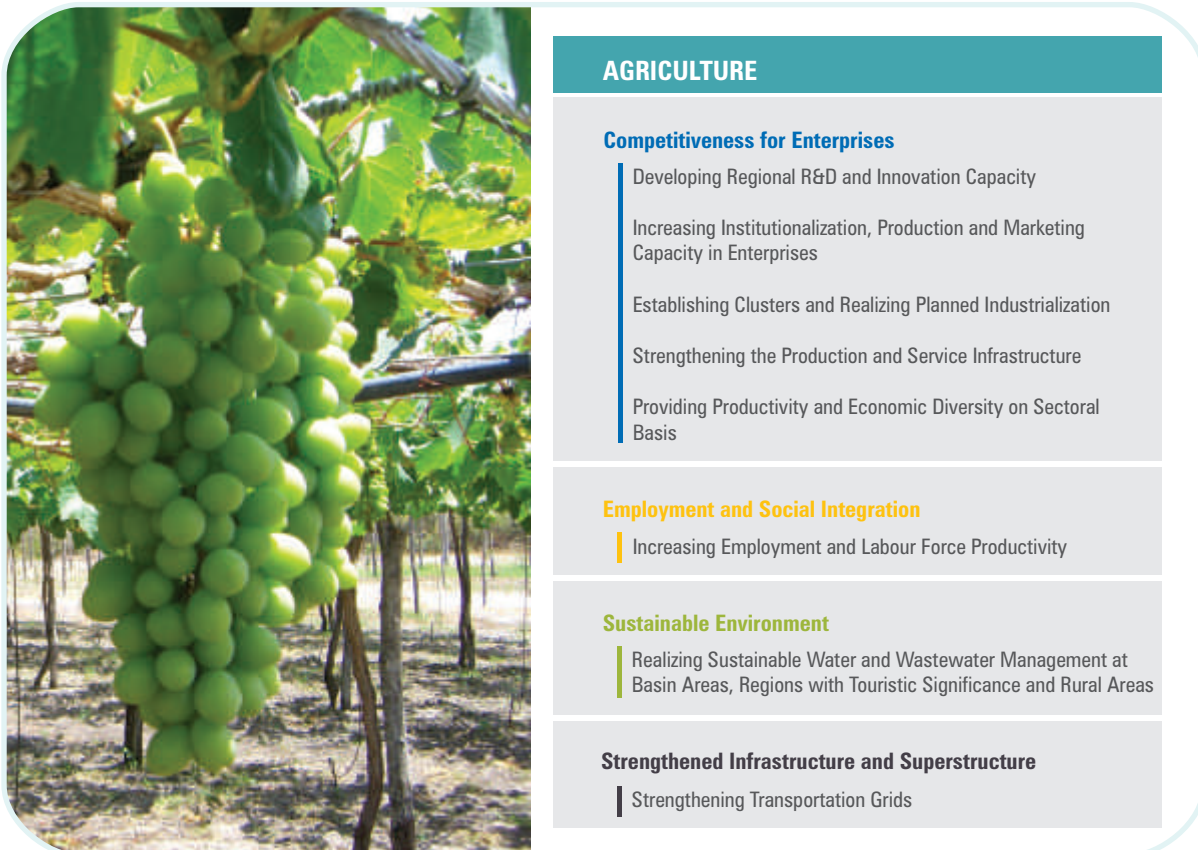
Also, in the framework of the 2006-2010 Agriculture Strategy Document the fundamental purpose of "the foundation of an organized and sustainable agriculture sector of high competitiveness that handles the economic, social, environmental and international developments as an integrated whole in the framework of the principle of using resources efficiently" has been taken as basis. Again within the context of Aegean Agriculture Master Plan, "food safety, organization, agricultural marketing and agriculture-industry integration" have been aimed.

In addition to all these strategies, within the priorities of agricultural policies defined in context of the Agriculture Law, the aims of "Increasing efficiency, product diversity, quality and competitiveness in agricultural production, developing the infrastructures of agricultural enterprises, universalizing the utilization of informatics and relevant technologies in agricultural activities, directing agricultural production towards realizing the agriculture-

industry integration, development and rational utilization of soil and water resources” have been stipulated.

Considering the current situation of the region along with the national strategies, it is of vital importance **to increase the competitiveness of the sector in districts with potential by realizing the agriculture-industry integration and production of products with high added value.**

In the chart below, aims directly related to agriculture sector under development axes, and the priorities covering these aims are shown.



Food and Beverage Industry: High Quality and Diversified Products with High Added Value

One of the prominent industries based on agriculture in İzmir is food and beverage industry. Increasing the capacity of İzmir food and beverage industry regarding production, technology, research and development, quality, branding and marketing issues is among the purposes stated in the framework of 2010-2013 Regional Plan. Employing around 2,200 enterprises and approximately 29,000 personnel, the sector is among the key and rising sectors of İzmir. The sector is mostly situated at the central or surrounding districts, namely Konak, Karşıyaka, Bornova, Menemen, Kemalpaşa, Torbalı and Ödemiş in İzmir.

The employment within the sector in the region has an important share (8.91%) within Turkey overall sectoral employment, just as the export share in the region within Turkey's overall sector export (11.31%).

Within the food and beverage industry sectors; fruit and vegetable processing, dried fruits and vegetables, milk and dairy products, and—potentially—aquaculture products appear as the prominent sub-sectors in İzmir. In this regard, especially fruit and vegetable processing, meat and dairy integrated industry and aquaculture products are the most prioritized sectors to be encouraged within plan context.

Agriculture and, food and beverage industry sectors are also mentioned within the purposes and aims of the Ninth Development Plan. Providing from-farm-to-table food safety and dependability has been aimed under the priority titled “Activating Agricultural Structure” in the Ninth Development Plan. Likewise, it has been aimed that in traditional sectors, products or activities with high added value shall be given importance and the transformation towards a structure complying with international competition shall be supported, under the priority titled “Realizing the Transition to High Added Value Production Structure in Industry and Services”. Modernization of food enterprises in the context of Medium Term Plan is also among priorities dealt

In the sector some problems are experienced due to the enterprises being generally SMEs; and these problems comprise of raw material processing, production, capacity, technology, research and development, cost, capital and financial opportunities, marketing and sales organization problems, etc.

For the resolution of these problems it is important to determine the strategic priorities and aims that increase the integration in agriculture and food sectors, provide food safety and dependability, and activate food control applications, increase quality raw material implementations, strengthening technologic innovation, quality systems, product development and marketing techniques. **Realizing agriculture-industry integration in food and beverage manufacturing to produce quality, diverse products with high added value** is among the fundamental aspects that will accelerate the region's economic development.

In the chart below, aims directly related to food and drinks sector under development axes, and the priorities covering these aims are shown.

FOOD AND BEVERAGE INDUSTRY

Competitiveness for Enterprises

- Developing Regional R&D and Innovation Capacity
- Increasing Institutionalization, Production and Marketing Capacity in Enterprises
- Establishing Clusters and Realizing Planned Industrialization
- Strengthening the Production and Service Infrastructure
- Increasing Clean Production Applications in SMEs
- Providing Productivity and Economic Diversity on Sectoral Basis
- Promoting the Region

Employment and Social Integration

- Increasing Employment and Labour Force Productivity

Strengthened Infrastructure and Superstructure

- Strengthening Transportation Grids



Clothing Materials Industry: Fashionable and Knowledge-Intensive Products

Clothing materials industry which is one of the locomotive sectors of Turkey is concentrated also in İzmir. 22% of the manufacturing industry enterprises and 28% of the employees reside within clothing, leather clothing and leather products manufacturing. Especially outerwear, underwear, and leather shoe and clothing manufacturing are prominent textile sub-sectors within the region.

Although the highest number of units and employment in this sector are located at Konak, Çiğli, Bayraklı, Gaziemir and Buca districts. The sector build-up in Buca has increased especially after the establishment of Buca Clothing and Organized Industrial Zone founded at year 2002.

The Aegean Free Zone in Gaziemir is effective on the sector concentration in this district. Likewise, the OIZ at Bergama district triggers this district's sectoral concentration, while the İDESBAŞ Menemen Free Zone at Menemen district is among areas where especially leather clothing and shoes industries are concentrated. The region has a serious share (10%) of Turkey overall sectoral employment. In the sector, there are over 3 thousand companies, employing approximately 41 thousand employees.

The effects of recently experienced crisis, destructive competition with China and Far East, removal of quotas from world textile confection trade, increase of import products in domestic market, sanctions in EU legislation, and EU-based problems caused by Customs Union make the situation for the clothing industry sector more and more difficult with each passing day. For the competitiveness in this sector to be maintained and developed; fashion, branding, social and environmental standards, innovative products and transition to knowledge-intensive textile products should be given priority in company strategies.

These points have also been emphasized in the Ninth Development Plan, under the priority of "Realizing the Transition to High Added Value Production Structure in Industry and Services". In this regard, within the Ninth Development Plan the defined aims state that "by concentrating on products and activities with high added value in traditional labour-intensive sectors such as "textile, garments, leather", the transition to the new structure approximating international competition shall be supported, multifunctional products with advanced technologies shall be developed in "textile, garments, leather" sectors, and R&D actions shall be encouraged. In these sectors, competitiveness shall be continued with the methods of closely tracking the rapidly changing fashion, fashion influencing and product customization depending on fashion design". Furthermore, encouraging genuine design activities, enabling the training of quality designers, supporting the formation of national and international trademarks are among the aims for the sector.

In our day, the fundamental condition of competitiveness is not merely producing but producing the most quality product with the most appropriate costs in shortest possible time. Here, the essential factor answering the questions of what will be produced how it will be produced is the preference of consumers. Correctly understanding the preferences affecting textile and garments consumption, and producing the goods and services in compliance to this understanding are the fundamental conditions for competitiveness in this sector.



CLOTHING MATERIALS INDUSTRY

Competitiveness for Enterprises

- Developing Regional R&D and Innovation Capacity
- Increasing Institutionalization, Production and Marketing Capacity in Enterprises
- Establishing Clusters and Realizing Planned Industrialization
- Providing Productivity and Economic Diversity on Sectoral Basis
- Promoting the Region

Employment and Social Integration

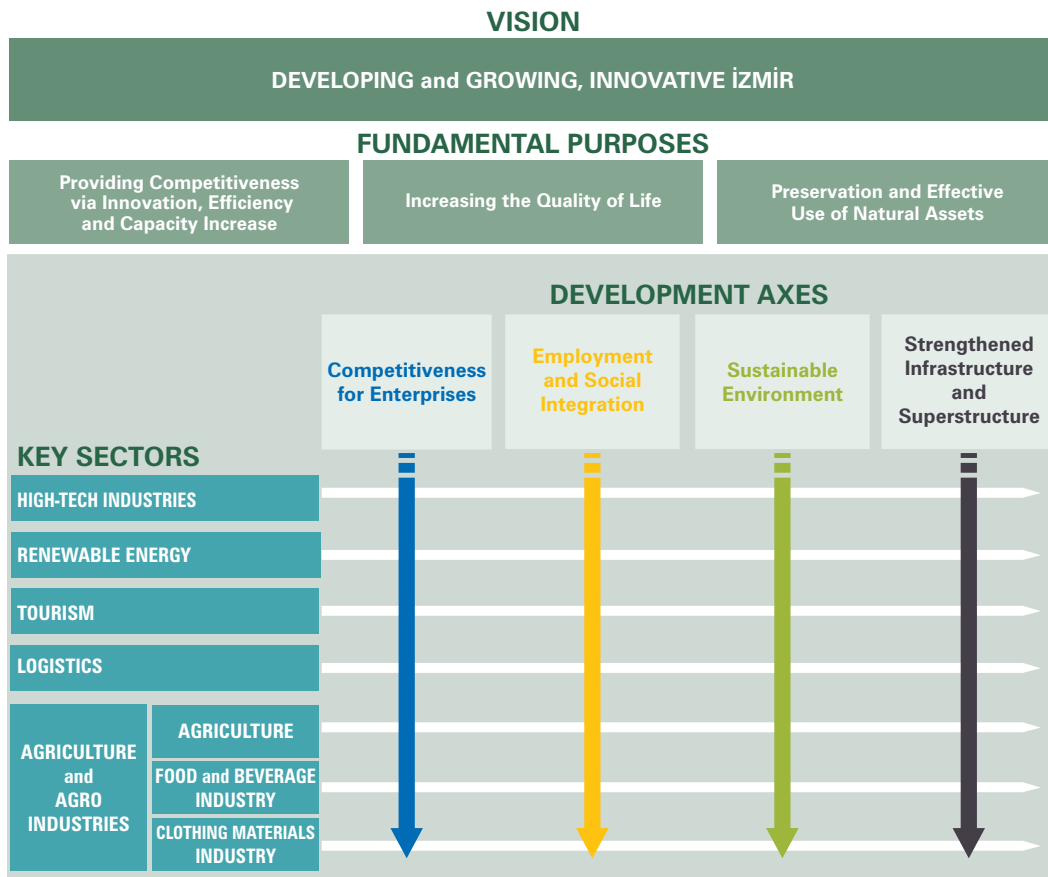
- Increasing Employment and Labour Force Productivity

One of the fundamental factors affecting consumer preferences is fashion and design. In this regard, defining and supporting design and fashion initiators is of vital importance. The main sectoral demand arising in the region is; **thrusting the province forward at national and international scale as a centre for fashion and design, especially by realizing the transition to knowledge-intensive textile products regarding clothing, leather clothing and shoe manufacturing.**

In the chart below, aims directly related to textile and clothing sector under the development axes and the priorities covering these aims are shown.

For the region to reach the vision of “Developing and Growing, Innovative İzmir”; it is of great importance to set forth the fundamental purposes, priorities and aims with an integrated approach instead of handling the problems and potentials one by one. For that reason, the manifested development axes have been related with key sectors.

İzmir, in the light of the priorities and aims set forth by İZBP that was prepared with this principle and fundamental philosophy, shall accelerate its own socioeconomic development and with the steps taken towards the aim of sustainable development it shall serve as a model for other regions.



DEVELOPMENT AXES

part

The development axes determined in line with the region's socioeconomic needs and in accordance with national development strategies, cover the strategic priorities that İzmir is going to focus on, for the 2010-2013 period, in order to meet these needs. The aims under every development axis include the intervention areas regarding these priorities. All these development axes, strategic priorities and aims constitute the strategic content of İZBP. The development axes of İZBP are as follow.

- **Competitiveness for Enterprises**

- **Employment and Social Integration**

- **Sustainable Environment**

- **Strengthened Infrastructure and Superstructure**

4.1 Competitiveness for Enterprises

In respect to the development of regions and countries, SMEs have always maintained their economic, social and political importance and occupied a significant position for strategy determination. New SMEs have undertaken important missions in development by accelerating the development of region's industry, producing some products that demand flexible production and special skills, creating employment within their region, and by supporting the larger industrial enterprises with intermediate products. Of the businesses in İzmir, 99% are SMEs, and 85% of total employed population works in these enterprises. Therefore it is critical for İzmir to increase the competitiveness of SMEs by solving the problems they experience.

With various policies and strategies covered at national level within the Ninth National Development Plan, Medium Term Plan, and SME Strategy and Action Plan documents, measures towards the resolution of SMEs' problems have been stipulated. Similar problems are being experienced in the SMEs of İzmir as the SMEs within Turkey. For that reason, the priorities and aims within the axis titled Competitiveness for Enterprises have been defined in compliance to the policies within these national plans and strategy documents.

In result of the analysis studies conducted towards SMEs in İzmir, fundamental problem fields of SMEs have been found out as:

- **The widespread practice of family enterprises, lack of professional management and corporate governance**
- **Inadequacies in financing resources and the necessity for new regulations in state supports and policies**
- **Problems experienced in marketing and branding**
- **Deficiencies regarding technology and innovation**

In result of the İzmir Emerging and Strategic Sectors Study, Studies Towards Developing İzmir Clustering Strategy, Situational Analysis and SWOT studies, workshops and meetings conducted within the process of planning, the strategic sectors employing the potential of revealing İzmir's competitiveness, and the needs of these sectors have been determined. Encouraging works in favour of developing R&D and innovation capacity, institutionalization in production and services, quality increase, increase of marketing and export capacities in these sectors shall accelerate the development of the region.

Each step taken towards the resolution of SMEs' problems and the

increase of their competitiveness is important for the development of İzmir, as SMEs are the most important boost of flexible production. In this context, providing the national and international competitiveness of the enterprises is defined as one of the fundamental development axes of the 2010-2013 İzmir Regional Plan. The fundamental purpose of this development axis has been determined as **“increasing the competitiveness of enterprises, especially SMEs, by efficiency in production, innovation and quality production resulting in the increase of national and international market shares”**. For the realization of this fundamental purpose, seven strategic priorities have been defined within the development axis of Competitiveness for Enterprises.

SP1: Developing Regional R&D and Innovation Capacity

In our age where information is considered among the production factors, the importance attached to the actions towards the production of information and its transformation into an asset, and the institutionalization of this course is one of the most important tools that render the development of a region sustainable. In this regard, for İzmir to exist in a position more advanced than today, improvement of regional R&D and innovation capacity appears as a fundamental priority. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Developing R&D and Innovation • Universalizing Informatics and Communication Technologies • Realization of Crossing into High Added Value Production Structure in Industry and Services • Activating Agricultural Structure
	Realizing Regional Development	• Realization of Development Based on Local Dynamics and Inner Potential
Information Society Strategy (2006-2010)	Developing R&D and Innovation	• Developing Research Capacity • Developing R&D and Innovation Awareness and University-Industry Cooperation for Increasing the Competitiveness of Real Sector • Increasing Total R&D Spending and the Share of Private Sector within These Spending
	Influence of Informatics and Communication Technologies into Business World	• Universalizing the Informatics and Communication Technology Utilization of Enterprises in All Sectors • Increasing the Competitiveness of Enterprises via Special Information Technology Applications that Provide Efficiency Increase of Product and Service Processes in Prioritized Sectors
SMEs Strategy and Action Plan (2007-2009)	Enterprise Development	• Raising Awareness Level on Innovation and New Technology Production • Universalizing the Utilization of New Technologies, Information Technologies, Flexible Production and Supply Planning Systems in Production
	Developing Technology and Innovation Capacity	• Improving the Mechanisms that Will Draw Researchers into Industrial Applications for the Purpose of Increasing SMEs' Effectiveness During the Stage the Scientific Information Generated in Our Universities and Research Centres Being Converted into Marketable Commercial Products • Increasing the Effectiveness of Technology Development Zones • Encouraging Product-Based Fundamental Research Studies
Turkish Industry Policy	Developing Technologic Capacity and R&D	• For the Purpose of Developing Industry's Technology Capacity, Development of University-Industry Cooperation and Establishment of Technology Support and Development Centres, New Technoparks and Technology Institutes Shall Be Encouraged. Also, the Existing R&D Supports Shall Be Increased

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		• Technology Development Zones Shall Be Founded for the Purpose of Integrating and Developing the Scientific and Technological Infrastructure of Universities, Public and Private Sector, Harmonizing the SMEs dor New and Advanced Technologies, and Developing New Product and Production Processes • The R&D Activities in Advanced Technology Fields Such As Biotechnology and Genetic Engineering, Software, Informatics and Communication Technologies, Innovative Materials, Aeronautics and Space Technologies, Nuclear Technology, Marine Sciences, Underwater Resource Utilization Technologies and Clean Energy Technologies Shall Be Supported • Joint R&D Activities to Be Carried Out With the Cooperation of Universities and Public-Private Sector Shall Be Encouraged • Industrial Property Rights System in Turkey Shall Be Developed, and Education and Support Programs Shall Be Arranged for that Purpose • Innovation Capabilities of Enterprises Shall Be Developed via Education and International Cooperation
National Innovation Strategy (2008-2010)	Enterprise, Efficiency and Innovation	• Raising Awareness Regarding Innovation and Creating a Work Environment Suitable to Develop Innovation • Encouraging Companies' Innovation By Supporting the Cooperation in Research Field and the Commercialization of Research • Supporting the Development of New Technologies in Industry Branches that Are to Be Effective in Future
	Competitiveness	• Managing Intellectual Property Rights to Encourage Innovation and Competition • Creating an Infrastructure that Shall Encourage the Access and Utilization of Information Technologies by Companies and Persons and Shall Develop Electronic Trade
	Infrastructure and Environments	• Developing Technoparks and Making Them Accessible

There are seven aims stipulated under this strategic priority.

Aim 1 (SP1A1): Regional Innovation Strategy shall be developed

Another way for reducing regional development differences and providing development is developing innovation systems formed according to the regions' characteristics and needs.

Within the plan period, research studies towards creating İzmir's innovation strategy shall be conducted. Within this context, regional innovation strategy examples in our country and in EU states, their preparation stages, applied methods and concluded results shall be studied and successful examples shall be examined. Creating and developing innovation awareness in the region shall be supported in cooperation with national institutions and organizations, enterprises and local stakeholders. Sectoral innovation capacities shall be revealed and innovation-based strategies shall be developed.

Aim 2 (SP1A2): The cooperation between universities and research institutes, and between public institutions and businesses shall be strengthened

The connection between the institutions that realize R&D activities, the ones that support these activities and the ones that benefit from the information and technology created by these activities being weak results in either problems regarding the implementation of R&D activities, or causes the conducted studies to be irrelevant to the demands of industry.



For that reason, the cooperation of the universities and research centres with the other public institutions, non-governmental organizations and industrial enterprises in İzmir has to be increased and the institutional capacity towards R&D studies has to be developed in order to strengthen the link between information and production, and to reflect the R&D activities to implementation.

İzmir, which is the second region with the most concentrated industry in Turkey, has great potential for providing university-industry cooperation with its seven universities, Technology Development Zone and other research centres.

Within this context, the works conducted in the recent years towards developing the cooperation between university-industry-public in İzmir shall be continued and increased. Mechanisms that will draw researchers into industrial applications especially in key sectors that are namely high tech industries, renewable energy, logistics, food and drinks industry and clothing industry, and sectoral and thematic studies shall be conducted aiming towards accelerating regional economic development and increasing competitiveness.

In the process where the scientific information generated at our universities and research centres are converted into marketable commercial products, national and regional network structures, fair, project bazaar, etc. activities shall be held for the purpose of getting researchers and enterprises together.

In this framework, higher education institutions and research centres realizing joint projects with the companies within the high tech industries sector, thesis subjects at universities being directed to fields the industry has demand for, lecturers sharing their academic studies with the industry shall strengthen the sector-university cooperation.

İzmir is significantly advantageous regarding logistics education. In Turkey, academic education of logistics subject at undergraduate level has been first started in İzmir in year 2004. And in recent years, academic programs at undergraduate, graduate and postgraduate levels aimed towards educating qualified personnel and managers for logistics sector are rapidly increasing at the universities in İzmir. Concerning increasing the sector-university cooperation and putting forward solutions towards sector problems, joint projects shall be realized with the cooperation of the current higher education institutions and companies functioning within the sector.

Key Sectors Related to the Aim

High Tech Industries

Renewable Energy

Logistics

Food and Beverage Industry

Clothing Materials Industry

Regarding renewable energy sector; in order to increase the effects of works in the region within the context of wind, geothermal, sun, biomass energies and to increase the local and national competitiveness level by revealing the competitive power of the region, technical and/or institutional means for facilitating the cooperative works of regional institutions and organizations relevant to the sector shall be constituted. Private sector, universities, relevant public institutions and non-governmental organizations shall be coordinated to act with a shared mind and thus to increase the regional development acceleration to be provided by the renewable energy sector. Foundation of engineering, R&D, project development joint venture companies shall be supported; and by creating shared platforms meeting industrialists, investors, academicians and financial institutions, investment and cooperation networks shall be formed between relevant institutions.

Cooperation especially between universities and companies functioning in renewable energies field shall be developed regarding the issue of implementing R&D activities and training qualified labour force for the sector. Wind and geothermal energy are the renewable energy types with the most demand for qualified human resources in the region.

Realization of new techniques and studies towards the production of functional foods in food and drinks sector, universalization of food safety issue among enterprises and university-industry cooperation towards measurement, test, calibration, etc. subjects necessary for the companies dealing in export shall be supported.

Regarding clothing industry sector; the institutional structure necessary for İzmir to become a fashion and design centre is currently existing at the region. Cooperation between relevant vocational high schools and real sector representatives shall be realized. Also, sectoral university-industry cooperation required for the development of technologies towards the production of knowledge-intensive textile and clothing and the implementation of such technologies shall be developed.

Aim 3 (SP1A3): R&D infrastructure shall be strengthened with key sectors at top priority

The R&D infrastructure resides mostly within the bodies of universities, public research centres and private sector companies, and the research activities are generally realized by these institutions.

İzmir, with seven universities, research institutions and private sector companies it employs, has

Key Sectors Related to the Aim
High Tech Industries
Renewable Energy
Food and Beverage Industry
Clothing Materials Industry

the infrastructure and human resource required for the development of science and technology and the transformation of technology into high added value products. In the context of this aim, mechanisms aiming towards the effective use of this mentioned potential shall be developed.

For the development of advanced technologies, R&D activities and the physical spaces these activities are conducted in are of critical importance. In this sense, the R&D infrastructure shall be strengthened by initially taking infrastructure inventory on sectoral base and by having research laboratories and test centres with international accreditation established.

For the purpose of developing the textile products, founding Textile Research Centres at the region and R&D, PD and innovation units at enterprises shall be realized and supported. In İzmir there are suitable universities that can work towards the aim of textile product development. Dokuz Eylül and Ege Universities' Textile Engineering departments point out to the existence of an infrastructure for regional studies in textile/clothing sectors and especially for conducting research on multifunctional and practical knowledge-intensive textile products. Studies to be conducted on knowledge-intensive textile products of which market has not yet extended to full potential shall increase the competitive power of İzmir in this constantly rising sector. Therefore, the R&D opportunities in the area especially regarding multifunctional and practical textile products and technical textile shall be increased within the Plan context. Establishment and development of centres, which will enable conducting research on multifunctional and practical knowledge-intensive textile products and shall aid in these research universalize throughout whole textile/clothing sector, shall be supported. Other than these centres, necessary actions shall be taken towards giving attention to R&D studies in universities of İzmir regarding technical textiles and multifunctional garment products, and developing university-industry cooperation in this regard. Incentives shall be developed for setting up such R&D, PD and innovation units also within industrial enterprises.

Another sector prioritized regarding R&D infrastructure is renewable energy sector. While there is an existing infrastructure related to all renewable energy types within the bodies of universities and research centres with solar, geothermal and wind energies coming foremost, a new Renewable Energies Perfection Centre shall be established which will realize the studies to be converted into applications.

In food and drinks industry, the laboratory infrastructure required for the standardization processes towards domestic and abroad sales, and for producing products with high added value and thus increasing the domestic and abroad competitiveness of the sector shall be created.

Aim 4 (SP1A4): Innovation, R&D and technology awareness shall be raised

As included in the Ninth Development Plan; innovation is one of the most important aspects of the competitive economic structure that changes rapidly in our current day, and most of the innovations stem from the R&D activities producing information and technology. Turkey, despite being the 17th largest economy throughout the world, resides at the 51st place at the innovation index. Regarding the fact that adequate advance cannot be made in our country towards innovation, lack of adequate awareness on the importance of the subject is one of the significant reasons.

Although İzmir is a province that has science and technology infrastructure, its performance regarding benefitting from financial supports related to R&D is not high enough. Regarding the rate of benefitting from R&D grant supports given to companies by TÜBİTAK and DTM between years 1995-2008, İzmir is at the 5th place (with a benefitting ratio of 4.5%) throughout Turkey preceded by not only İstanbul and Ankara but also Kocaeli and Bursa provinces. The rate of benefitting from R&D supports being low among the companies in İzmir which is the second province with the most concentrated industry points out to the fact that the companies are in need of being informed and guided regarding supports. Therefore, works shall be conducted for raising and universalizing the awareness of innovation, R&D and technology consciousness for all segments of society, private sector coming at the lead.

Aim 5 (SP1A5): Innovation centred enterprises shall be developed

Defined as “finding new ways of producing assets”, it is obvious that innovation shall be the driving force behind industry in the 21st century. In the process of transforming innovation into economic assets, registration and protection of intellectual rights constitutes a grave importance. Considering the total patent numbers between the years 1995-2008, it can be seen that İzmir follows İstanbul (741) and Ankara (165), residing at the 3rd place nationwide with its total of 90 patents (5.7%). For that ratio to be increased, access of innovation centred enterprises to the financial support they need shall be facilitated. In order to increase efficiency and competitiveness, enterprises that attach importance to the designing of R&D activities as to produce innovation and towards the market shall be supported financially and technically.

Aim 6 (SP1A6): Technology capacities of businesses shall be increased and advanced technology use in businesses shall be universalized

In our day where global competition is on the rise, regions producing high added value products with extensive technology utilization outdistance others by one step. Therefore, on one hand efforts should be made to provide increases of efficiency, competitive superiority and added value in the sectors currently in favour, while on the other hand steps should be taken in order to develop products of much higher added values for which newer technologies are utilized. For that purpose, the technology utilized by the enterprises within the production processes shall be developed.

Regarding clothing industry which is among the key sectors, production of multifunctional, smart and technical textile products shall be supported within this aim's context. Utilization areas of

technical textiles are spread over a wide range from agriculture to construction, from all kinds of vehicles and transportation devices to defense industry, or to health sector. It may be said that approximately 20% of the textile market comprise of technical textiles. The market share and utilization area of technical textiles are expected to increase in the coming 15-20 years. While the smart textile products, that can be defined as technical textile products with higher added value, are such textiles that fulfil at least one additional function from any field with health (i.e. clothes that measure body temperature or blood pressure and can intervene if necessary or can communicate the situation to another unit), security (i.e. military clothes that change colour according to surrounding environment or can inform the user by sensing the chemical changes in the vicinity), and informatics (i.e. clothes with integrated mobile phones) coming foremost.

Defined as “finding new ways of producing assets”, it is obvious that innovation shall be the driving force behind industry in the 21st century.

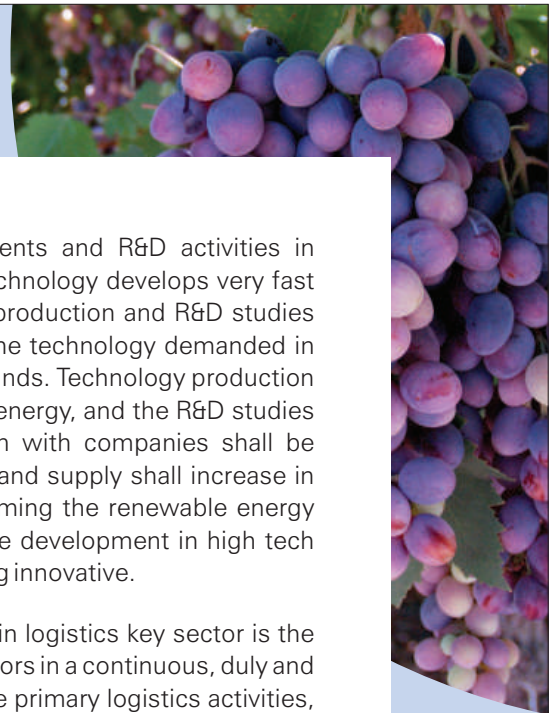
It is considered that, as of 2003, the market for smart textiles product group is 300 million dollars and its market share will increase rapidly. Development of such products, of which importance will increase in long term, necessitates research work of long periods, and innovative R&D actions are required. Production of knowledge-intensive textile and clothing products being universalized in İzmir, and thus making İzmir a pioneer regarding this subject in its region and country is among aims of the Plan. In conclusion, production of multifunctional, smart and technical textile products in the sector shall be supported for the purpose of realizing the transition to products with high added value and of increasing the sector's share within international markets.

Increasing the use of R&D outputs and informatics and communication technologies in agriculture sector is among the sectoral priorities towards this aim. For that purpose, the effectiveness of the public sector, chambers of agriculture and producer associations shall be increased. In order to obtain activity and finance effectiveness, the cooperation between these institutions shall be developed. With the detection systems developed towards increasing the amount and quality of agricultural production coming foremost, use of informatics and communication technology applications shall be increased.

Regarding food and drinks industry sector; the fact that most food industry enterprises in İzmir comprise of small and medium scale enterprises just as the norm throughout Turkey affects the modernization of technological structure. For the sector to develop further, R&D, innovation activities and advanced technology utilization should be supported in food industry, and the production technologies at the establishments should be modernized. With advanced technology implementations and nanotechnology applications the safety and nutrient value of food products shall be increased. Also, necessary works shall be carried out towards implementing the traceability of products beginning from the field. Food packaging is another field where advanced technologies are utilized. Development of smart packaging systems and their universalization throughout the sector in İzmir shall be encouraged in the Plan context. R&D, innovation activities and advanced technology utilization within the sector shall be increased.

Key Sectors Related to the Aim

Agriculture
Renewable Energy
Food and Beverage Industry
Clothing Materials Industry
Logistics
Industrial Machinery Production, Informatics and Medical, Sensitive and Optical Tools Manufacturing



Another sectoral priority is to support technological investments and R&D activities in renewable energy industry and subsidiary industries. Foreign technology develops very fast regarding renewable energy technologies, and the technology production and R&D studies conducted both at regional and at national scale cannot meet the technology demanded in time—in other words, they fall behind in meeting the market demands. Technology production conducted especially in wind energy, solar energy and biomass energy, and the R&D studies conducted for that purpose by companies and in cooperation with companies shall be increased. This way, actions centred on technology production and supply shall increase in İzmir and advances shall be made regarding the claim of becoming the renewable energy centre of the Region. The plan shall constitute parallelism to the development in high tech industries sector and this shall contribute to region's vision of being innovative.

Another one of the most important aspects of competitiveness in logistics key sector is the realization of service, goods and information flow between the actors in a continuous, duly and correct way. In this regard, for an effective management in whole primary logistics activities, information technologies and communication infrastructure are of vital importance. Therefore, in order to provide effectiveness in logistics sector, time and resources shall be utilized efficiently, information technology and communication infrastructures shall be improved in order to facilitate bureaucratic processes, and solutions that can improve the operational processes of companies and increase their traceability shall be developed in regards to sector demands.

Within the Plan context, the aim is to universalize advanced technology utilization within all sectors in addition to the sectors mentioned above, with industrial machinery production, informatics and medical, sensitive and optical tools manufacturing sectors coming foremost among them.

Aim 7 (SP1A7): More effective functioning of İzmir Technology Development Zone, and increase of number of companies within the Zone shall be realized

Infrastructural deficiencies of the İzmir Technology Development Zone, which has been established for the purposes of supporting the constitution and growth of companies that make high added value production and utilize or produce advanced technologies, encouraging the development, transferring and commercializing of the technology, supplying the companies infrastructure and technical support for conducting their R&D tasks, contributing to the high degree realization of university-industry cooperation, shall be eliminated and its better introduction to universities and industrialists shall be realized.

Performance Indicators for the “Developing Regional R&D and Innovation Capacity” Priority

Benefit from R&D supports ratio shall be increased from 4.5% to 6%.

The ratio of patent registration certificate quantity within Turkey overall patents shall be increased from 7.4% to 10%.

The ratio of industrial design registrations quantity within Turkey overall registrations shall be increased from 5.7% to 9%.

The ratio of R&D investment discounts within Turkey overall discounts shall be increased from 9.9% to 12% in food and drinks industry.

The ratio of R&D investment discounts within Turkey overall discounts shall be increased to 2% in clothing production industry.

The number of companies residing in the İzmir Technology Development Zone shall be increased from 65 to 80.

SP2: Increasing Institutionalization, Production and Marketing Capacity in Enterprises

In our day, not only possessing the physical resources but also using these resources more efficiently than competitors is an important factor affecting competitive power. Among the list of factors paving the way to competitiveness for SMEs, institutionalization and increase in production and marketing capacities come at the lead. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Activating Agricultural Structure • Realization of Transition Into High Added Value Production Structure in Industry and Services • Realization of Development Based on Local Dynamics and Inner Potential • Improvement of Work Environment
Turkish Industry Policy	Increasing Export	• Promoting Industrial Products in Foreign Markets and Forming Turkish Brands Shall Be Supported for the Purpose of Providing Sustainable Growth in Export • The Consultancy and Support Services Necessary For SMEs in Marketing and Export Activities Shall Be Provided
SMEs Strategy & Action Plan (2007-2009)	SMEs' Integration to International Market	• Supporting Direct Marketing, Market Deepening and Branding Activities
Information Society Strategy (2006-2010)	Influence of Informatics and Communication Technologies Into Business World	• Providing Convenience Regarding Works With Public Sector • Providing Knowledge Acquisition Environment • Developing the Informatics and Communication Technology Capability of Enterprises and Employees • Developing E-Trade
The Ministry of Environment and Forestry Turkey EU Integrated Environmental Approximation Strategy (UÇES)(2007-2023)	Industrial Pollution Control Sector	• Execution of Works that Will Realize the Implementation of the Best Existing Techniques At Industrial Plants and Large Incineration Plants Shall Be Carried Out Cooperatively by All Relevant Sides
National Rural Development Strategy (2007-2013)	Development of Economy and Increase of Employment Opportunities	• Bringing Agriculture and Food Sectors Into A Competitive Structure

Under this priority, six aims towards the goal of increasing the competitiveness of the enterprises and the development of SMEs in these fields have been defined, with the enterprises within key sectors possessing priority.

Aim 1 (SP2A1): Branding shall be supported and the number of geographical indication employing products and brand registrations in Turkey total share shall be increased

Enterprises' branding with their products bears significance not only regarding their national recognition and marketing capacity increase but also for them to obtain competitiveness in international markets. In İzmir, branding (trademark) applications have increased by 86% compared to year 2002. In year 2008, the ratio of brand registrations at İzmir within Turkey overall registrations has been 5.6%.

Within the framework of İZBP, increasing the branding capacity of the enterprises in İzmir is among prioritized aims. Works aimed towards creating İzmir trademarks recognized at national and international scale especially in sectors mentioned below shall be supported under this aim. Supporting of the innovation capacities of companies and designs along with branding is another connected aim to be carried out in parallel

Key Sectors Related to the Aim

Agriculture

Food and Beverage Industry

Clothing Materials Industry

Branding of food products genuine to İzmir, their marketing in domestic and foreign markets is important. In this context, public availability and training activities on industrial property rights aimed towards the universalization of branding awareness shall be held. Processing and branding of fruits and vegetables such as olive, grapes, cherry, artichoke of which production is concentrated in Aegean Region and İzmir, and

their promotion in domestic and foreign markets is among important means for sector competitiveness. The food industry in İzmir is at the lead among sectors with high exportation potential. For the development of this potential, it is aimed to increase the quality and reach a much more competitive level at international scale. For that purpose, universalization of new marketing and promotion techniques shall be encouraged and genuine products shall be advertised.

In the region, production of olive is developed in Bayındır, Kemalpaşa and Torbalı districts; cherry and grapes in Kemalpaşa, Buca, Foça, Menemen; tangerine in Seferihisar, Menderes, Selçuk; fig in Ödemiş, Tire, Kiraz, Beydağ; tomato in Bayındır, Torbalı, Tire, Selçuk, Ödemiş, Urla, Beydağ, Kiraz; artichoke in Karaburun; chestnut in Beydağ; industrial plants in Bergama,

Menemen, Torbalı, Tire; ornamental plants in Bayındır; bovine stockbreeding in Ödemiş, Tire, Kiraz, Bayındır and Bergama; ovine stockbreeding in Bergama, Dikili, Ödemiş, Menemen and Kiraz; poultry raising in Kemalpaşa, Bergama, Foça, Torbalı, Urla and Aliğa; and marine products (aquaculture) are developed in coastal districts. Marketing actions to be conducted regarding these products that shall contribute to the region's competitiveness are of vital importance. The producers shall be supported to sell the agricultural products they gather, with the abovementioned products coming foremost, as to obtain high revenues and at regional, national and international markets as brands (trademarks).

Enterprises' branding with their products bears significance not only regarding their national recognition and marketing capacity increase but also for them to obtain competitiveness in international markets.

Geographic indication applications shall be increased at the region which currently has eight geographic indications. Along with increasing the number of products registered by receiving geographical indication, registration of products that appear at a rather local scale and thus increase of added value obtained from these products shall be realized. Along with primary agriculture products and food and drinks products, the branding of products in clothing sector shall also be encouraged in order to increase exporting capacity within the region. In İzmir, the export share of wedding dress and nightdress sector that is concentrated in the region is 31% of its export throughout Turkey. The support that is to be given to branding shall increase not only domestic sales but also abroad sales and export capacity by over 31%.

Aim 2 (SP2A2): Effectiveness of enterprises within national and international markets, and their export ratio within Turkey shall be increased

Although still continuing its feature of being an important foreign trade centre of Turkey, İzmir's

export share has the tendency to decrease in recent years. While İzmir's share has been 7.70% as of 2002, this ratio has fallen to approximately 6% in the year 2008. Moreover, while İzmir has been presenting foreign trade surplus in year 2003 and before, in the last 5 years it presented a foreign trade deficit. Detecting the problems experienced in this field and this way, increasing the marketing and exporting capacities of SMEs shall have a considerable effect on increasing İzmir's exporting share and closing its foreign trade deficit.

With globalization in effect, it is getting harder and harder each passing day for the SMEs to get share in both international and national markets. For that reason, it is very important that SMEs can hold on in new markets of international level and grow in existing areas by increasing their market shares. In the field survey realized by KOSGEB, the most important problems of İzmir SMEs regarding expansion to foreign markets and exporting are listed as; resource shortfall, capital, technology and material inadequacy, lack of knowledge about the foreign market, satisfaction within domestic market, inability finding intermediary enterprises, inability to present appropriate prices, inability to present quality goods and lack of foreign language skills. Within the Plan period, activities aimed towards the elimination of these problems shall be undertaken in order to increase the marketing and exporting capacities.

Aim 3 (SP2A3): Institutionalization of family companies shall be realized

As it is in the SMEs throughout Turkey, the SMEs in İzmir also mostly comprise of short lived, newly founded family companies without professional managers. These properties appear both advantageous and disadvantageous in different ways. While decisions can be given more rapidly, and by protection of the information accumulation the competitive power increases, integration with other enterprises and institutionalization are blocked. Not paying attention to institutionalization creates ungainliness. A vision holder management cannot be developed and professional staff cannot reside at decision-making positions of the companies.

Institutionalization should be universalized in SMEs and enterprises should be assigned an extraverted, dynamic and competitive structure in the light of institutional administration principles. Implementing institutional administration principles, universalizing professional management shall be realized and SMEs with family enterprise approach shall be supported on the issue of effective family business management.

Aim 4 (SP2A4): Production and quality processes of SMEs shall be improved

In our day, consumer demand is turning towards more quality and superiorly designed, custom products. For increasing their capacity to compete with large companies and to realize exporting, modern production, consumption and service techniques applications towards quality and efficiency should be universalized in SMEs.

In order to provide Small and Medium Scale Industrial Enterprises produce products at international quality and standards, the support required for quality awareness development, supplying effectiveness to quality safety concept, and the material, design, production methods, maintenance-repair and marketing activities necessary for these actions shall be granted. 6% of the companies that are granted TSE quality certificates throughout entire country reside within İzmir. For that reason, the supports and means shall be developed that are necessary towards the aims of developing the quality management systems of SMEs –especially those within key sectors–and obtaining the quality standard documents and certifications required for increasing the companies' exporting capacity.

Aim 5 (SP2A5): Finance capabilities of SMEs and their capacity to benefit from current financial grants shall be increased

SMEs cannot benefit from banking and loan system adequately due to their capital and endorsement quantities being not large enough and not having enough capacity. Within the

context of this aim, public availability programs shall be prepared in cooperation with finance organizations and professional chambers, informing the SMEs regarding finance services and providing easier access of SMEs to finance opportunities via joint protocols.

In almost every country, various support mechanisms have been developed for the purpose of providing the SMEs the opportunity to develop and survive in global competitiveness. Likewise in our country, state supports towards various purposes are implemented for SMEs by institutions and organizations such as KOSGEB, Undersecretariat of Treasury, Undersecretariat of Foreign Trade (DTM), Ministry of Industry and Commerce, Ministry of Finance and the Scientific and Technological Research Council of Turkey (TÜBİTAK).

The enterprises benefitting from the financial supports to be granted by İzmir Development Agency and public institutions/organizations and increasing their capacities towards benefitting are important for the success of these supports aiming for the region's development. For that reason, trainings, availability meetings and conferences shall be developed for the enterprises to benefit more fully from the existing financial supports.

Aim 6 (SP2A6): More effective functioning of agricultural cooperatives and unions shall be realized especially in institutionalization, management and marketing aspects

The fact that most agricultural enterprises within the region are small-scale and that the employers (entrepreneurs) lack some necessary professional information causes them to experience problems in production and marketing stages. Hence, an obligation towards organising as cooperatives and associations arises against the difficulties experienced by small-scale enterprises trying to survive. Strengthening the cooperatives, of which numbers can be considered adequate in İzmir, and the associations which have been founded a considerably short while ago, are important tasks for the small-scale agricultural enterprises to increase their revenues and survive within the market.

In order to have small-scale enterprises to supply their input materials from low prices, meet their production-based mechanization demands effectively, and increase their profitability, new mechanisms shall be developed, enabling producer organizations to work effectively. For the agricultural organizations to deal more effectively, these organizations shall be encouraged to work jointly with each other, while also supporting applications such as establishing shared machinery park, product storage and processing plants or increasing the capacity of existing ones.

Performance Indications for “Increasing Institutionalization, Production and Marketing Capacity at Enterprises” Priority

Number of products bearing geographic indication shall be increased from 8 to 10.

The ratio of brand registrations within Turkey overall registrations shall be increased from 5.6% to 9%.

The ratio of brand registrations within Turkey overall registrations shall be increased from 5% to 7% in food and drinks industry.

The ratio of brand registrations within Turkey overall registrations shall be increased from 3% to 5% in clothing industry.

Export ratio of enterprises within Turkey overall export shall be increased from 6% to 8%.

Export ratio of food and drinks industry within Turkey overall sectoral export shall be increased from 11.3% to 14% until year 2013.

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Export ratio of clothing industry within Turkey overall sectoral export shall be increased from 6.1% to 8%.

The ratio of the number of companies awarded quality certificate by TSE within the awarded companies throughout Turkey shall be increased from 6% to 8%.

Number of members and shareholders within agricultural cooperatives and associations/unions shall be increased by 27%.

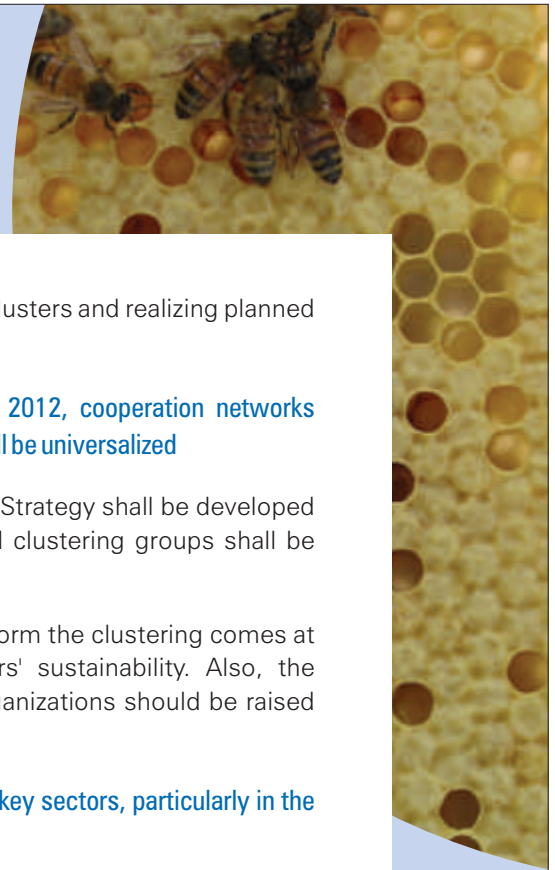
SP3: Establishing Clusters and Realizing Planned Industrialization

Another means of development towards increasing SMEs' competitiveness is clustering. Clusters feed the innovation necessary for advancing efficiency and provide new products to be created, and increases the competitive power of enterprises residing in the same area. Access to obtaining various production inputs, information, technology, leader enterprises' contributing and an experienced labour force pool are all easier for companies in the cluster. With the advantage brought by being within a network of dense information flow, companies easily access the market, technology and competition information. Moreover, development of cooperation between suppliers providing goods and services and the relevant institutions is more convenient within clusters. One of the most important advantages is the reduction of process costs by using local suppliers. In order to make it possible for the enterprises in İzmir to benefit from these advantages and for their competitiveness to increase even more, establishing clusters shall be supported.

Currently in İzmir, there are various clustering initiatives set off by local institutions and organizations and carried out by national supports. İzmir Organic Food Cluster as a branch of Development of a Clustering Policy for Turkey, and İzmir Aeronautics Cluster as a locally implemented project are two important clustering initiatives currently in progress. İZKA also continues its works towards forming a regional clustering strategy within "Development of İzmir Clustering Strategy" project context in 2009.

Developing clustering works in key sectors handled within the Plan context and in their sub-sectors, along with the clusters currently in progress, and accelerating the establishment of clusters in the plan period are among İZBP's priorities. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Realization of Transition into High Added Value Production Structure in Industry and Services
SMEs Strategy & Action Plan (2007-2009)	Improvement of Work Environment	• Clustering Formations Shall Be Supported
Turkish Industry Policy	Encouraging Investments	• Investments to Be Made on Industrial Areas and Technoparks Shall Be Encouraged
	Organized Industrial Zones, Industrial Sites and Industrial Areas	• New Policies and Strategies Shall Be Developed for Encouraging the Enterprises to Cluster Within Organized Industrial Zones, Industrial Sites and Industrial Areas
	Sectoral Policies	• Design, Collection Type Production, Promotion and Marketing Activities Shall Be Highlighted for the Purpose of Maintaining Competitiveness in Textile and Clothing Sector, Utilizing the Existing Stagnant Capacity and Receiving Further Share From World Markets via Market Diversification Method



Seven aims have been defined under the priority of establishing clusters and realizing planned industrialization.

Aim 1 (SP3A1): A Clustering Strategy shall be formed until year 2012, cooperation networks supporting clustering shall be developed and clustering awareness shall be universalized

In order to obtain successful clustering models, İzmir Clustering Strategy shall be developed with a common mind, and road maps for the chosen potential clustering groups shall be formed.

Developing strong cooperation between the actors which shall form the clustering comes at the foremost among the most important factors for clusters' sustainability. Also, the awareness of producers, suppliers, relevant institutions and organizations should be raised towards clustering benefits for the cluster works to be successful.

Aim 2 (SP3A2): Two clustering establishments shall be supported in key sectors, particularly in the ones with clustering potential, that will serve as models

In the Research Studies on Determining İzmir Clustering Strategy, it has been concluded that the below main sectors bear clustering potential.

- Food Products and Beverage Industry
- Clothing and Fur Production
- Chemical Substances and Products Production
- Base Metal Industry
- Fabrication Metal Products Production
- General Machinery and Equipment Production
- Motor Land Vehicles Production
- Furniture and Other Products Production
- Highway Transportation
- Supporting Transportation Services
- Activities Related to Entertainment, Recreation, Culture and Sports

Activities shall be accelerated aimed towards cluster formations in the cluster sub-sectors (Industrial Ventilation, Air Conditioning and Cooling Devices and Canned Foods) that reveal high clustering potential and the key sectors defined within the Plan context among these sectors.

Also, the cluster formation works carried out on the key sectors in the Plan and the sub-sectors (organic food, biomedical, metal industry) of the 11 sectors listed above shall be continued.

Development of cooperation networks for the small and medium scale enterprises in these sectors shall be supported as to increase their competitiveness. Effective utilization of such cooperation networks, for production, exporting and in search of solutions to shared problems, shall be supported.

Utilization of advanced technologies and R&D activities are among fundamental priorities in the Plan context. Within the context of clustering works, development and shared utilization of technologies which cannot be developed or integrated by a small scale enterprise itself shall be supported and encouraged. Thus, actions towards enabling producers to use shared technology shall be encouraged.

Aim 3 (SP3A3): Establishing clusters in food and beverage industry's potential cluster sub-sectors shall be supported, providing the integration of the sector with the agriculture sector

Within the context of research studies on clustering, it is revealed that food and beverage industry shows a concentration in İzmir. Also, the Canned Foods sector, which has been determined as a potential cluster sub-sector within the said sector, displays concentration especially in Torbalı and Kemalpaşa districts. The sub-sector holds an approximate export ratio of 52% and employment ratio of 20% within İzmir food products and drinks sector. In addition, 21% of all companies dealing in this sector throughout Turkey reside within İzmir. Canned food sector clustering road map shall be prepared and establishing sectoral clusters shall be supported in the light of the clustering level analysis and cluster dynamics analysis along with sectoral statistical analyses conducted.

Another issue to be addressed regarding the clustering in this sector is the necessity to provide integration between agriculture sector and food and drinks production sector in the region. There is no problem regarding raw material existence or variety for food industry in İzmir just like there is none throughout Turkey. However, accessing appropriate quality raw material all throughout the year is a considerable problem for food and drinks industry. Both the inadequacy of dehydration and cooling storages and the problems in reaching quality raw material, and agricultural residues left on raw material are all experienced problems. For the industry not to get affected from these problems and for providing agricultural products at desired quality, all relevant works towards realizing agriculture-industry integration shall be conducted and sector development shall be accelerated.

Developing strong cooperation between the actors which shall form the clustering comes at the foremost among the most important factors for clusters' sustainability. Also, the awareness of producers, suppliers, relevant institutions and organizations should be raised towards clustering benefits for the cluster works to be successful.

Aim 4 (SP3A4): Establishing clusters in clothing materials industry's potential cluster sub-sectors shall be supported, having İzmir to be a fashion design centre

Clustering shall be encouraged in niche sectors such as nightdress, wedding dress production that will carry İzmir to higher places in the key sector of clothing production industry. In central districts where the sector concentrates spatially (Çiğli, Bornova, Konak, Gazimir, Buca), clustering shall be developed. Sectoral concentrations exist in Ege Buca Clothing OIZ that is the first specialized organized industrial zone in the central district of Buca and around Mimar Kemalettin Avenue in Konak. These are important factors that shall accelerate the sector towards the desired objective.

Actors in the sector are in consensus regarding İzmir becoming a fashion design centre in the future. Although there is concentration and high amounts of production in the sector, some actions need to be taken for İzmir to be a fashion centre. For the marketing and exporting capacity and international competitiveness to increase; especially marketing techniques should be developed in fashion, design and knowledge-intensive textile products. In this context, all kinds of means, works and activities aiding İzmir in becoming a fashion and design centre shall be supported.

Aim 5 (SP3A5): Establishing clusters in logistics sector shall be supported

In order to provide a cost advantage for increasing the sector's competitive power and to establish inter-institutional cooperation, a cluster regarding logistics sector shall be established in İzmir. The sector concentrates spatially in Aliağa, Konak, Bornova, Kemalpaşa and Torbalı districts. The infrastructure required by the sector to provide cluster formation shall be strengthened. Holding areas shall be formed by establishing container terminals and truck parking lots at city entrance axes. Also, sectoral clustering shall be supported by including activities such as loading, unloading, storage, packaging, contract manufacturing, customs clearance, etc. thus providing convenience to industrial zones and large-scale logistics companies.

Aim 6 (SP3A6): Establishing potential clusters in the sub-sectors of industrial machine production sector shall be supported

In result of studies on clustering it has been found out that industrial machinery production sector is concentrated in İzmir. The ratio of the employment in İzmir to the sector's Turkey overall employment is 11.18%. In the industrial ventilation, air-conditioning and cooling sector –found out to be a potential cluster sub-sector of the said sector–concentration is seen in Çiğli, Bornova and Konak districts. The ratio of number of companies within the sector in İzmir has been found out as 17% of the overall sector companies throughout Turkey.

In conclusion of the clustering study, it has been seen that there is a significantly dense, multifaceted relationship that is both horizontal and vertical between the companies of İzmir in the sector. The sector's competitive, open to world and highly innovative characteristic plays an important role for the relations being that much dense and communication channels being open. Also, creating several environments where direct contact between companies' owners, managers and employees can be made (association, chamber of industry, professional meetings, social meetings), communication being not controlled from one site but having more than one communication point and key people giving direction to communication having high education levels are also important factors. The relations and communication grid in the sector are not limited to regional institutions but also extend at high levels to national and international institutions and organizations. In the light of these results of statistical analyses and field studies, road maps to industrial ventilation, air-conditioning and cooling sector shall be realized and establishing clusters shall be supported.

Aim 7 (SP3A7): Specialized organized industry zones shall be founded and more effective utilization of existing zones shall be realized

According to the field survey conducted by KOSGEB, it is seen that only 44% of the enterprises in İzmir have chosen their sites within an organized industry zone. In İzmir there are 17 OIZs, two Free Zones and there is one Technology Development Zone. Infrastructural and other deficiencies of these zones should be urgently completed and the enterprises which have chosen sites outside of industrial zones should be encouraged to move to the zones. The forthwith completion of the partially functional OIZs and bringing them into full service is important for the orderly industrialization to be made possible in İzmir. Also, the need towards the establishment of Organized Agriculture Specialization Zones has been determined in the region. For cheap procurement of production factors, universalization of clean production, and more convenient and advantageous marketing of production outputs, Organized Agriculture Specialization Zones shall be established. Establishment of Organized Stockbreeding Specialization Zones in Ödemiş and Tire, and Organized Floriculture Zone in Bayındır district shall be supported.

Performance Indicators for “Establishing Clusters and Realizing Planned Industrialization” Priority
Number of companies within OIZs shall be increased by 9%.
The ratio of number of companies in İzmir's canned foods sector within Turkey overall number of same sector companies shall be increased from 21% to 23%.
Number of warehouses functioning under the supervision of İzmir Customs and Enforcement Head Directorate shall be increased from 116 to 125.
The number of companies in İzmir's logistics sector shall be increased from 2,255 to 2,400.
The ratio of number of companies in İzmir's wedding and night dress sector within Turkey overall number of same sector companies shall be increased from 21% to 23%.
The ratio of number of companies in İzmir's Industrial Ventilation, Air-Conditioning and Cooling Devices sector within Turkey overall number of same sector companies shall be increased from 17% to 19%.
2 Organized Stockbreeding Specialization Zones, 1 Organized Floriculture Zone shall be established.

SP4: Strengthening the Production and Service Infrastructure

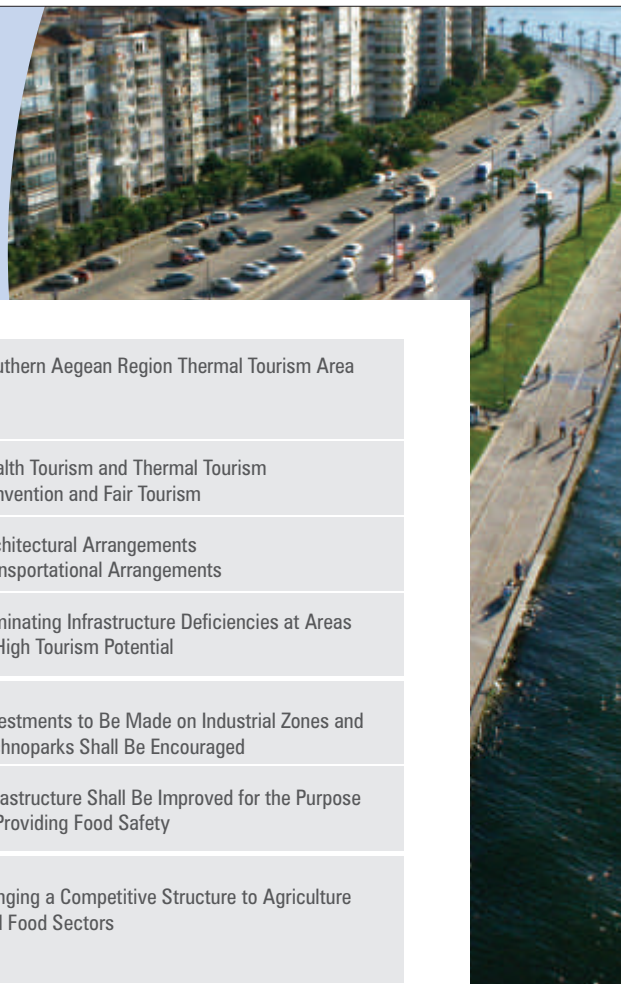
Projects and also public investments towards İzmir, which suffers from the lack of infrastructure investments especially in fields industry has need of, such as transportation, energy, port and communication, fail to be adequate. Within the Plan period, new energy, transportation, communication, port, highway investments, urban infrastructure investments shall be completed with haste.

Faster elimination of the deficiencies especially in energy, communication and transportation fields, thus supporting the production and service infrastructure will affect the businesses' competitiveness and investment attraction in a positive way. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Four fundamental aims have been defined for the purpose of strengthening production and service infrastructure and increasing competitiveness in certain sectors within this Plan period.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Making the Macroeconomic Stability Permanent • Activating Agricultural Structure • Realization of Transition Into High Added Value Production Structure in Industry and Services
Ministry of Culture and Tourism, Thermal Tourism Master Plan Action Plan (2007-2023)	Thermal Tourism Cities, Regions and Centres	• Bringing Qualified Infrastructure to Thermal Tourism Centres
	Developing Technical Infrastructure Capacities	• Opening Thermal Bed Capacity to Business and Making İzmir the World's Most Important Health and Thermal Destination

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	Prioritized Thermal Culture Preservation and Development Areas and Tourism Centres	• Southern Aegean Region Thermal Tourism Area
	Tourism Diversification	• Health Tourism and Thermal Tourism • Convention and Fair Tourism
	Branding at Urban Scale	• Architectural Arrangements • Transportational Arrangements
	Strengthening Transportation and Infrastructure	• Eliminating Infrastructure Deficiencies at Areas of High Tourism Potential
Turkish Industry Policy	Encouraging Investments	• Investments to Be Made on Industrial Zones and Technoparks Shall Be Encouraged
	Sectoral Policies	• Infrastructure Shall Be Improved for the Purpose of Providing Food Safety
National Rural Development Strategy (2007-2013)	Developing Economy and Increasing Employment Opportunities	• Bringing a Competitive Structure to Agriculture and Food Sectors

Aim 1 (SP4A1): The infrastructures of OIZs, SIAs, free zones and technology development centres shall be strengthened

Evaluating the results of the survey conducted by İzmir Development Agency (İZKA) in February 2009, it is observed that the most fundamental problems of OIZs and free zones centre on infrastructural deficiencies. It has been determined that especially in OIZs there are serious deficiencies regarding waste management. It is seen that only 30% of the enterprises have sewer connection, 2% have preliminary treatment facilities and 35% of them are connected to main wastewater treatment facilities (WTF). In free zones, although all of the enterprises have sewer connections, it is observed that only 4% have preliminary treatment facilities and around 12% of them are connected to WTF. Besides these, it is indicated that both in OIZs and in free zones there are infrastructural deficiencies in energy, transportation and communication fields. It is highlighted regarding transportation that there is need especially for the strengthening of railways transportation and road connections.

Within the plan period, works aimed towards strengthening infrastructure and eliminating inadequacies within industrial zones shall be supported.

Aim 2 (SP4A2): Infrastructure necessary for drying-cooling, storage and food safety towards food products shall be created

In İzmir, especially the equipments in cold storages are needed to be developed. In this context, cold storage systems and continuous cold storage chain should be developed and universalized in the sector. Especially the food sector establishments dealing with meat, dairy and fishery products, and fresh fruits and vegetables shall be modernized in compliance to EU hygiene criteria. By eliminating the equipment inadequacy of long term cold storage facilities; product quality, hygiene and food safety applications shall be increased. Also, at the processing stage and at storing and distribution stages of agricultural products, necessary actions towards hygiene rules, addition of labels and barcodes, keeping necessary records shall be realized, personnel awareness in this issue shall be raised. Conducting temperature tracking in storage of important food products such as meat and dairy shall be supported.

Due to food safety not being realized, both export losses and health issues arise. As is throughout Turkey, most of the existing facilities in İzmir do not comply with the EU standards. When problems related to food safety are examined, it is seen that a major portion of these problems are production-originated and that most of these problems are preventable by taking the necessary precautions. In order to provide processed food safety, HACCP system should be effectively implemented in food processing. Within the Plan context, formation of food safety management systems in food industry shall be encouraged.

"Traceability from field to fork" that is a part of good agricultural practices is necessary for realizing food safety. In this regard, actions shall be initialized for the development of traceability system and establishment of its infrastructure. Moreover, increasing the number of EU accredited laboratories conducting residue analysis and the development of such laboratories are among the aims within Plan context regarding food safety.

Aim 3 (SP4A3): Tourism infrastructure shall be developed, particularly for alternative tourism types

Diversifying tourism in İzmir has been defined as one of the sectoral purposes. In this context, the infrastructure towards realizing tourism diversity shall be strengthened. Especially convention tourism, thermal tourism and cruise and yacht tourism need infrastructure development.

İzmir is one of the seven provinces in Turkey with the suitable infrastructure for convention tourism. With the relatively developed infrastructure and promotion of the city centre and central districts, convention tourism is among the foremost tourism types for İzmir to focus on. Although the bed capacity in the Bornova, Balçova and Konak districts of İzmir, which have potential for convention tourism, is relatively high, it is not adequate. In these districts, convention centre numbers and capacities shall be increased and bed capacity shall be expanded. In Gazimem, fair and convention infrastructure shall be improved.

Within the framework of the Thermal Tourism Master Plan of the Ministry of Culture and Tourism, The aim is for Turkey to increase its total number of beds and become the most important health and thermal destination until 2023. Within the context of the mentioned Plan, İzmir is one of the 17 provinces where the strategies aimed towards developing thermal tourism infrastructure and superstructure shall be realized. In İzmir, the district displaying the most development regarding thermal tourism is Balçova. In Dikili, the infrastructure for thermal energy utilization has been completed. Besides Çeşme-Ilıca; Urla-Gölbahçe, Bergama and Seferihisar thermal resources shall also be handled regarding thermal tourism.

The following geothermal fields in İzmir are planned to be developed as thermal culture and tourism preservation and development zones and thermal tourism centres.

- 1- Dikili Thermal Culture and Tourism Preservation and Development Zone**
- 2- Bergama Allianoi Manisa Soma Menteşe Culture and Tourism Preservation and Development Zone**
- 3- İnciraltı Tourism Centre Balçova Thermal Springs Section**
- 4- Seferihisar Doğanbey Geothermal Field**

Being a rich province regarding sea tourism with its coastline length of 629 km, İzmir has an important potential regarding yacht tourism. Especially the southern side of Çeşme Peninsula constitutes one of the principal yacht routes of our country. The marina infrastructure in İzmir shall be developed, and thus İzmir shall obtain a higher share in yacht tourism.

Cruise tourism is a rapidly developing tourism type bringing considerably rich income that

attracts the middle and upper class income groups. İzmir has made significant progress regarding cruise tourism in the last 5 years. İzmir Alsancak Port is the third largest port of Turkey, and has become one of the recognized ports of the Mediterranean Sea. However, it is seen that the existing passenger port cannot answer the demand in the long term despite İzmir's high potential. In this regard, in order to meet the constantly increasing demand in cruise tourism for İzmir, the cruise port infrastructure shall be developed.

Aim 4 (SP4A4): Infrastructure of agricultural production shall be strengthened

Developing the irrigation infrastructure, universalizing the use of alternative energy types and modernizing existing greenhouses for the purpose of making agricultural production more efficient are among the infrastructural priorities to be handled within this aim's context.

Agricultural irrigation infrastructure shall be developed and the use of crop field modern irrigation systems shall be universalized. Within the province, approximately 75% of the economically irrigable lands are irrigated. Besides increasing that value, modernization of the current infrastructure shall also be realized. Furthermore in the irrigated lands, transition from flooding method—which causes waste of water and harms the soil structure—to pressure irrigation method shall be realized.

The modernization of existing greenhouses in the region shall be encouraged and the awareness of producers shall be raised. The geothermal energy existent in İzmir shall be utilized in modern and large scale greenhouses that create considerable employment, high revenues and have no marketing problems. Geothermal heating greenhouse investments shall be universalized, especially in Dikili, Seferihisar and Bayındır districts.

Along with the utilization of geothermal resources, the existing renewable energy potential in İzmir such as the solar, wind and biomass energy shall be evaluated, renewable energy use in agricultural production shall be encouraged and investments shall be increased. Especially in districts dominated by agricultural economy (Bayındır, Bergama, Dikili, Kınık, Kiraz, Beydağ, Menderes, Menemen, Ödemiş, Seferihisar, Tire, Torbalı) biomass energy generation and utilization shall be universalized. Also, in districts with the adequate wind speed (Bergama, Dikili and Seferihisar among the abovementioned districts) and districts with the adequate solar energy potential (especially Tire, Ödemiş, Kiraz, Beydağ among the abovementioned districts) according to the Turkey Wind and Solar Energy Potential Chart; utilization of wind and solar energy in agricultural production processes shall be encouraged.

Performance Indicators for “Strengthening Production and Service Infrastructure” Priority

1 accreditation laboratory shall go into operation towards the aim of increasing food products export.

The ratio of number of food processing sub-sector (meat processing, animal subsidiary products, aquaculture products processing, milk processing) establishments in compliance to EU hygiene rules within total number of establishments shall be increased from 14% to 50%.

Number of blue flagged marinas shall be increased from 0 to 2.

Number of blue flagged beaches shall be increased from 21 to 29.

Number of sprinkle irrigation systems shall be increased by 26%.

Number of drip irrigation systems shall be increased by 95%.

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The annual greenhouse vegetable-fruit production quantity shall be increased by 21%.

Utilization ratio of geothermal resource potential used in greenhouse heating shall be increased from 3% to 5%.

Irrigation ratio of lands open to economical irrigation shall be increased from 75% to 85%.

SP5: Increasing Clean Production Applications in SMEs

The pollution caused by dense industrial activities and production processes is one of the important environmental threats in İzmir. The water amount recycled and utilized back in industry has been 19% of the total water consumption amount in İzmir in 2004, while this ratio was 33% for Turkey average. Water recycling rate is considerably low in İzmir. According to 2006 data, industrial electric consumption per capita in İzmir is 133% above Turkey value. Utilization of techniques and technologies that will provide with reduction of energy usage in industry and energy saving policies will contribute to energy saving in İzmir. Moreover, while the ratio of hazardous industrial waste to total industrial waste is 6.8% throughout Turkey, this ratio is 10.2% in İzmir. Lack of knowledge in companies within İzmir plays an important role regarding these high amounts of hazardous waste.

Utilization ratio of environmental management systems that reside within clean production approach and aim to minimize industrial development's adverse effects on environment is significantly low in the region. The ratio of companies having environmental management system certificates to total number of companies is only 7%.

Actualizing clean production applications in establishments will be beneficial both environmentally and economically by increasing the efficiency in production process. Considering also the effects of environmental management on product design, selection of products providing input for processes, wide frame, integrating management processes that encompass the utilization of techniques and technologies in production processes, and global trends; it will contribute to increasing the competitiveness of establishments. On the other hand, there are various directives in this subject regarding preventing industrial pollution and chemical substance usage in EU legislation. Although there are directives already adjusted and adopted, within the harmonization process there will be various other regulations that shall necessitate the industrial establishments to make some preparations.

It is important that enterprises take steps in the direction of clean production applications in this preparation period.

It is essential that clean production and eco-efficiency applications towards industrial and agricultural activities, particularly in textile, leather, food processing and chemistry sectors, are embraced in İzmir. This strategic priority has importance on providing sustainable development and realizing the region vision within the Plan context, and creates coherence with High Tech Industries among key sectors and Sustainable Environment among development axes. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure Continue →



Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure
The Ministry of Environment and Forestry Turkey EU Integrated Environmental Approximation Strategy (UÇES)(2007-2023)	Industrial Pollution Control Sector	• Execution of Works that Will Realize the Implementation of the Best Existing Techniques at Industrial Plants and Large Incineration Plants Shall Be Carried Out Cooperatively by All Relevant Sides
Turkish Industry Policy	Realizing Sustainable Development	• Environment-Friendly Technologies Shall Be Given Priority in Determining Industrial Policies and New Industry Investments, Local Manufacturers Shall Be Informed and Encouraged Regarding these Technologies

Two aims have been determined within the context of this priority.

Aim 1 (SP5A1): Awareness in the region towards clean production shall be raised

Cooperation shall be developed between industrial enterprises especially in textile, leather, food processing and chemistry sectors, NGOs, public organizations, and universities in order to raise awareness in the region on the environmental and economical benefits of clean production. The current level of knowledge regarding clean production methods and environment-sensitive technologies shall be increased. Furthermore, the perception that sees clean production applications as environmental regulation obligations and high-cost investments towards environment protection shall be prevented; the awareness on the fact that they are implementations creating advantages in issues such as decreasing raw material and energy consumptions, decreasing waste amounts and minimizing waste disposal costs shall be raised.

Aim 2 (SP5A2): Conformity of enterprises to the environment legislation and environment management systems shall be supported

Clean production strategies for enterprises and relevant institutions shall be constituted and implemented, thus increase in production efficiency and decrease in raw material consumption shall be realized. Therefore, same quality products shall be produced while reducing product costs and contributing to enterprise profitability. In order to enable clean production, establishments' compliance to environment legislation and their eco-efficiency shall be provided by realizing technology modifications in enterprises, making improvements in production processes, increasing process efficiency, replacing the utilized raw materials with environment-friendly equivalents, controlling raw material/product inventory to decrease losses and reutilization of side products within the production process.

Also, utilization of wastes and stubbles shall be realized in order to increase production efficiency in agricultural enterprises. Especially the recovery applications realizing generation of biomass energy shall be increased.

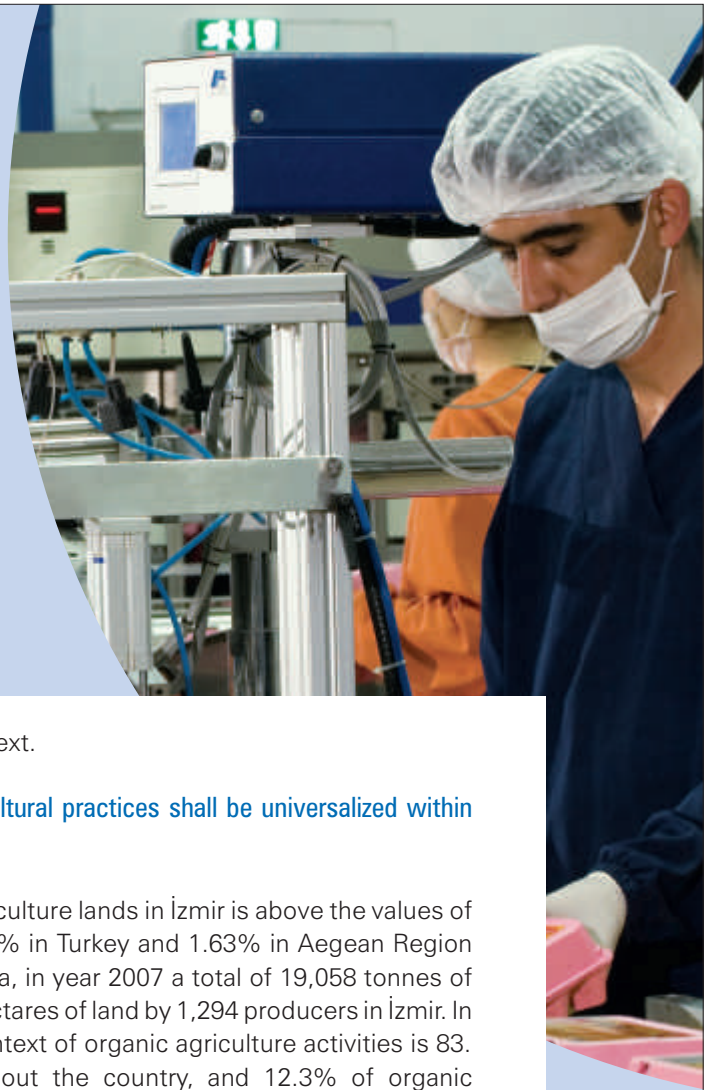
Performance Indicator for "Increasing Clean Production Applications in SMEs" Priority

The ratio of manufacturing industry companies possessing environment management system certificate in overall number of companies shall be increased from 7% to 15%.

SP6: Providing Productivity and Economic Diversity on Sectoral Basis

The region displays a wide sectoral distribution range regarding economic diversity. Geographic advantages, the qualified labour force created through housing many universities, and the potential created through the existence of natural and cultural assets are aspects providing diversity to economic activities. It is important to provide development in an economic, social and environmental integrity in a region enjoying all these features. Sectors prominent within this priority's context are agro-industries, renewable energy and tourism. Production and service alternatives that create higher added value shall be chosen in these sectors. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Realization of Transition into High Added Value Production Structure in Industry and Services • Developing Energy and Transportation Infrastructure • Activating Agricultural Structure
	Realizing Regional Development	• Providing Development to Rural Areas
	Strengthening Human Development and Social Solidarity	• Preservation and Development of Culture, and Strengthening Societal Dialog
	Increasing Competitiveness	• Realization of Transition into High Added Value Production Structure in Industry and Services
Ministry of Energy and Natural Resources, Strategic Plan (2010-2014)	Energy Supply Safety	• Fully Activating Free Market Conditions and Providing Improvement to Investment Environment
Ministry of Culture and Tourism, Turkish Tourism Strategy 2023 Action Plan (2007-2013)	Strengthening Transportation and Infrastructure	• Our Country Taking Its Deserved Share From Sea Tourism
Turkish Industry Policy	Encouraging Investments	• Utilization of More Effective Support Tools, Reducing Bureaucracy, Providing Transparency, Generality and Impartiality Shall Be Given Importance for the Purpose of Supporting Investments
	Developing SMEs and Entrepreneurship	• Increasing SMEs' Efficiencies, Their Share Within Added Value and Their International Competitiveness
	Sectoral Policies	• Design, Collection Type Production, Promotion and Marketing Activities Shall Be Highlighted for the Purpose of Maintaining Competitiveness in Textile and Clothing Sector, Utilizing the Existing Stagnant Capacity and Receiving Further Share from World Markets
National Rural Development Strategy (2007-2013)	Developing Economy and Increasing Employment Opportunities	• Providing a Competitive Structure to Agriculture and Food Sectors
	Preserving and Developing Rural Environment	• Developing Environment-Friendly Agriculture Applications • Management and Development of Protected Sites



Five aims have been defined under this priority context.

Aim 1 (SP6A1): Organic agriculture and good agricultural practices shall be universalized within agriculture sector

The ratio of organic agriculture lands to overall agriculture lands in İzmir is above the values of both Aegean Region and Turkey. This ratio is 0.54% in Turkey and 1.63% in Aegean Region while it is at 7.65% in İzmir. According to TÜİK data, in year 2007 a total of 19,058 tonnes of organic products have been produced in 26,330 hectares of land by 1,294 producers in İzmir. In 2007, the number of products produced in the context of organic agriculture activities is 83. 19.5% of total organic agriculture area throughout the country, and 12.3% of organic production farmers is in İzmir.

For the purpose of addressing food safety demand, the production conducted in the framework of organic agriculture and good agricultural practices that has higher market value shall be developed. Because organic agriculture and good agricultural practices are of a relatively complex structure compared to traditional production, young entrepreneurs and producer associations that are more open towards innovation shall be focused on. For that purpose, a structure where relevant public institutions/organizations and producer organizations can work in cooperation shall be formed.

Aim 2 (SP6A2): Processing and marketing of organic and high added value food products shall be supported in food and beverage industry

Today, demand increases for organic food processing and marketing that are also due to the effects of the changing consumer preferences cause industry to tend towards organic product contracts with producers. For that reason, the importance of the knowledge, implementation and cooperation regarding organic product regulations increases. In this context, organic food products processing and marketing shall be supported. Among these products, the nutraceuticals/ functional foods which are foods or food components that are beneficial to health due to their disease preventive or therapeutical features shall be especially encouraged.

Aim 3 (SP6A3): Organic and environment-friendly textile production shall be supported in clothing materials industry

In our day, with the importance of environmental awareness and healthy living increasing constantly, another product group of which importance is on the rise especially within garments sector is the ecologic and organic textile products. Ecologic textile or eco-textile is defined as; the product that has been produced by preserving the environment at every

production and processing stage from fibre to finished product, does not harm the user during usage, and is recyclable after being cast off. Especially ecologic textile products harmless to human health are preferred more by consumers in recent years. Furthermore, applications towards decreasing water consumption in textile sector, which normally uses high amounts of water, are also important. Considering the organic agriculture potential, ecologic and environment-friendly textile production shall be developed in the region.

Aim 4 (SP6A4): Priority investment fields regarding renewable energy resources shall be determined and utilized

The region displays a wide sectoral distribution range regarding economic diversity. Geographic advantages, the qualified workforce created through housing many universities, and the potential created through the existence of natural and cultural assets are aspects providing diversity to economic activities.

It is predicted that the investments to be done throughout the world between 2007 and 2030 shall reach a total of 5.5 trillion USD. Renewable energy technologies in Europe and our country shall employ a very important share at future energy market. Increase of investment opportunities in renewable energy, considered along with the renewable energy potential of the region, creates a considerable competitive power. The wind, geothermal, sun and biomass energy investments have increased in İzmir during the last ten years. Investment areas in the sector regarding investor and supplier firms shall be determined and implementation stages shall be reached in these determined areas.

İzmir has the feature of being a renewable energy centre with its high potential regarding wind, geothermal, biomass and solar energies and the advantages created by its geographic position. Due to space problems recently being experienced in Europe regarding wind energy, the attention has begun to slide to our country. As the central province on the north-south Çanakkale, Balıkesir, İzmir, Bodrum line stretching from Selanik to Bodrum, the province is a centre for supplier companies. Companies working on renewable energy field shall be supported and foreign investors shall be encouraged to cooperate with local companies. Also, for the purpose of realizing the projections necessary for the continuity of existing partnerships and for producing projects intended to application, a renewable energy resources inventory and data centre shall be established.

Aim 5 (SP6A5): Investments towards diversifying the tourism sector shall be supported

İzmir has a significant potential regarding diversified tourism. In this context, especially universalizing boutique hotels, supporting investments enabling convention and fair tourism, and developing thermal tourism, culture tourism, ecotourism, urban tourism and sea tourism types other than mass tourism (sea sports, yacht tourism, blue cruise, cruise tourism, etc.) are important for the region.

Boutique hotels and house pensions shall be universalized in İzmir. While a concentration of facilities towards meeting the demands of middle-class local tourists can be seen in İzmir, the facilities towards upper-class, especially foreign tourists and those who would bring more income are not adequate. İzmir shall integrate its existing tourism resources with the option of boutique hotels that present customized services and compete against large enterprises by attracting an elite tourist group although they are small enterprises themselves, and thus increase its tourism income. Especially in the Peninsula area, boutique hotels and house pensions harmless to natural structure shall be developed. Also, camping sites and trailer camps in compliance with the local structure shall be utilized for İzmir, especially in Bergama, Seferihisar and Selçuk districts that bear potential for such applications.

Thermal areas shall be made into centres and tourism shall be stretched over 12 months, and utilization of these areas in health tourism shall be universalized. Regarding its geothermal potential, Turkey is ranks 7th in the world and 1st in Europe. In our country, the region richest in thermal resources is the Aegean Region, and İzmir is also significantly rich in terms of these resources. Thermal waters in the province spring along the fault lines connected to the Büyük Menderes rift valley that has formed due to late tectonic activities. From Balçova, Seferihisar, Çeşme-Şifne, Aliağa, Bayındır-Ergenli, Urla-Gölbahçe, Bergama-Mahmudiye-Paşaköy-Güzellik, Dikili-Madra-Nebiler, Dikili-Karadere-Çoban-Kaynarca-Bademli-Kocaoba geothermal fields, thermal resources with widely varying temperatures can be obtained. As was mentioned before, the district in İzmir with the most developed thermal tourism is Balçova. Along with Çeşme-İlica, the thermal resources in Seferihisar and Urla-Gölbahçe shall also be utilized for thermal tourism. The infrastructure towards the use of thermal energy has been completed in Dikili and thus treatment opportunity exists for 12 months of a year. With facilities at international standards and effective promotion, Dikili shall be an important destination in health tourism.

Also, convention tourism shall be developed in districts of high potential in this field, namely Konak, Balçova, Bornova, Çeşme and Gazimir. With its transportation convenience, natural beauty, climate suitability and historical and cultural assets İzmir has the potential necessary for the development of convention tourism. The province of İzmir is in close proximity to Europe which is the leader in world convention tourism market with a share of 57%, and it shall use this advantage.

The region's cultural resources and assets shall be utilized in cultural tourism, and cultural tourism shall be developed. One of the most important sources for tourism in İzmir is its historical and cultural resources and assets. With its rich history dating back 8,500 years, İzmir carries traces of Hellenistic, Roman, Byzantine, Principalities and Ottoman Eras. Furthermore, İzmir is a province where different ethnic groups such as Levantines, Greeks, Armenians and Jews have been coexisting in peace for many years. For that reason it housed many cultural and historical assets such as temples, castles, churches, mosques, synagogues, inns, Turkish baths, agoras, historical sites and bazaars.

Most of İzmir districts have prominent historical assets. These shall be utilized in cultural tourism. Also, İzmir cuisine, emphasizing wine and olive oil that have maintained their significance in İzmir for many years, and also famous people who have lived in İzmir such as Homer and Dario Moreno shall be highlighted as cultural assets.

İzmir shall utilize its rich resources regarding sea tourism in alternative sea tourism types such as sea sports, yacht tourism, blue cruise and cruise tourism rather than mass tourism. In other words, new tourism types shall be added to existing ones to increase market share. Especially in Çeşme, Foça, Dikili, Karaburun and Seferihisar districts, sea sports tourism and yacht tourism that attracts tourists of high income level shall be developed.

In İzmir, agriculture is common at districts outside the central and coastline districts, especially eastern districts, and this situation creates a source for ecotourism. The district of Ödemiş, in addition to its natural resources such as Gölcük and Bozdağ, has cultural assets suitable for tourism such as Birgi houses and the bazaar famed with its handicraft. These resources shall be evaluated under an integrated tourism theme and thus a model supported by ecotourism approach shall be constructed for Ödemiş and its surrounding area. In the Peninsula region, especially in Urla district, agro-tourism, which involves tourists making both holiday and participating in agricultural production, shall be developed. Also ecotourism shall be developed in Bergama, Selçuk, Torbalı and Kemalpaşa; incomes shall be increased by supporting activities and products such as handicrafts, regional kitchen products and local guidance..

Urban tourism in the region shall be developed. Urban tourism provides both economic and social advantages. Urban spaces such as museums, restaurants, cafeterias, and architectural features, monuments, parks shall be developed.

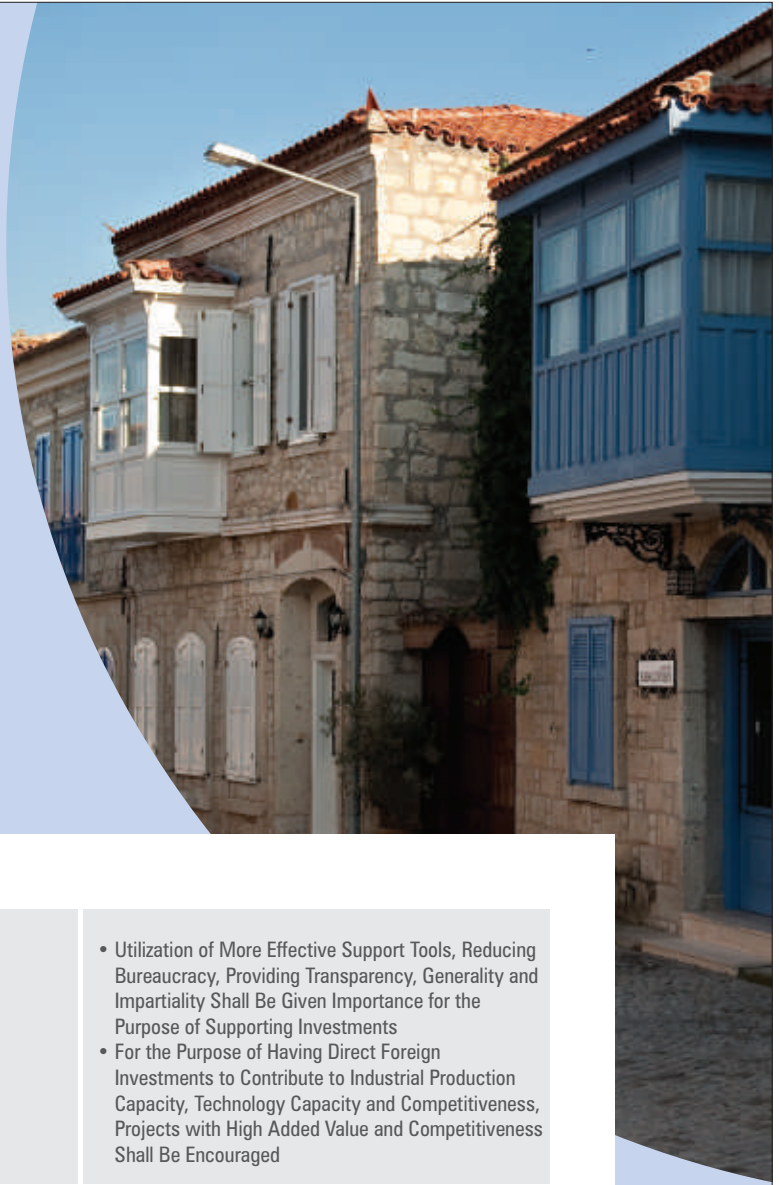
Performance Indicators for “Providing Productivity and Economic Diversity on Sectoral Basis” Priority
Number of producers dealing in organic production shall be increased by 24%.
Agriculture area size where organic production is done shall be increased from 26,330 hectares to 30,000 hectares.
Number of producers working within the context of Good Agricultural Applications shall be increased by 30%.
Agriculture area size where Good Agricultural Applications are implemented shall be increased from 258 hectares to 340 hectares.
The ratio of wind energy installed power to theoretical capacity shall be increased from 1% to 4%.
The ratio of foreign visitors to İzmir within visitors to Turkey shall be increased from 3.93% to 4.93%.
Number of arrivals to boutique hotels shall be increased from 15,040 to 16,100.
Average length of stay at boutique hotels shall be increased from 1.3 days to 1.9 days.
Number of passengers visiting via cruise tourism shall be increased from 321,279 to 500,000.
Number of commercial and private yachts visiting the ports shall be increased from 1,923 to 2,200.
Number of people visiting museums and historical sites shall be increased from 2,799,236 to 3,000,000.

SP7: Promoting the Region

In order to increase the global competitive power of İzmir and to highlight the distinction between the province and other cities, İzmir's tourism and investment opportunities should be promoted at national and international platforms. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	Realization of Transition into High Added Value Production Structure in Industry and Services
Ministry of Culture and Tourism, Thermal Tourism Master Plan Action Plan (2007-2023)	Target Markets	- Conducting Availability, Promotion, Workshop etc. Works for the Purpose of Directing Domestic and Foreign Tourism Investors to Invest in Thermal Tourism Field - Conducting Thermal-Based Domestic and Abroad Promotion, Fair, Workshop, etc. Activities in Countries Defined As Destination Promotion Areas
	Research and Development	Branding

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Turkish Industry Policy	Encouraging Investments	• Utilization of More Effective Support Tools, Reducing Bureaucracy, Providing Transparency, Generality and Impartiality Shall Be Given Importance for the Purpose of Supporting Investments • For the Purpose of Having Direct Foreign Investments to Contribute to Industrial Production Capacity, Technology Capacity and Competitiveness, Projects with High Added Value and Competitiveness Shall Be Encouraged
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Three aims have been defined under this priority.

Aim 1 (SP7A1): City Marketing Strategy shall be created and implemented

As all cities throughout the world race against each other in our day towards being more preferred by groups such as tourists, investors, consumers and global media, city marketing has become a specialization branch. Within this context, a city marketing strategy shall be created and implemented for making İzmir a prominent destination in local, national and international competition.

As the first stage in strategy preparation, extended studies shall be conducted towards determining how İzmir is recognized by İzmirians, citizens from other provinces in the country and those who live in foreign countries and revealing the awareness of the province outside of İzmir.

With the project, the natural, cultural, economic, historical and social features of İzmir shall be handled as a whole, product-service issues, advantages and investment opportunities that render İzmir different from other cities shall be revealed via a creative and innovative approach.

With this, the promotion works to be conducted regarding İzmir shall be implemented in an integrated, consistent and stable manner. The adoption of the constituted city marketing strategy by all actors relevant to tourism in İzmir is of vital importance for the strategy to spring to life and be implemented in a healthy way. The strategy shall be implemented with the cooperation and coordination of İzmir citizens, representatives of private sector, public sector and non-governmental organizations.

Aim 2 (SP7A2): Investment promotion works shall be carried out in key sectors

An İzmir Investment Strategy shall be prepared in the framework of City Marketing Strategy, investment promotion shall be conducted towards target markets primarily in key sectors. National and international target markets shall be researched especially in the key sectors of renewable energy, high tech industries, tourism, food and drinks production and clothing industry, and investment promotion actions shall be undertaken towards these markets. In this context, activities such as roadshows, company visits, participation in international fairs and sectoral events, preparation of investment promotion materials shall be executed, and contacts shall be made with investor networks.

Aim 3 (SP7A3): Culture and tourism opportunities shall be promoted, increasing the income obtained through tourism

The reason why today's world-leader tourism destinations can compete better than İzmir is not that they have more numerous or valuable assets but that they promote these assets more effectively. Although the Ministry of Culture and Tourism has made an important promotion advance in the recent years, in these introductory campaigns İzmir has taken place only with Ephesus and Bergama. In this direction, İzmir shall get involved in country promotion campaigns more deeply in parallel to the "city marketing" strategy.

Conducting promotion works on tourism types for which the province of İzmir especially carries potential, namely, convention, fair, health, sea, urban, cultural tourism and ecotourism is of vital importance for attracting more tourists. Especially in districts of rich resources for cultural tourism, promotion works shall be done towards this aspect. Promotion of prominent districts regarding sea tourism, namely, Çeşme, Dikili, Foça, Karaburun, Menderes, Seferihisar and Urla shall also be given due importance. While regarding ecotourism, especially Bergama, Ödemiş, Selçuk, Torbalı, Urla and Kemalpaşa districts shall be promoted. Bornova and Balçova shall be promoted as health and convention tourism centres and Konak as an urban and convention tourism centre.

The tourism potential of the Peninsula region shall be promoted to both tourists, the local society and investors at local, national and international level simultaneously. Promotion and investment works should be given importance in Karaburun, Seferihisar, Urla, Ödemiş, Dikili and Foça districts which carry significant tourism potential with their resources, in order to increase the tourism market share received by these districts. Another district that has international fame and significance with the rich historical assets employed, Bergama should be defined as a tourism county and awareness should be raised in this regard. Menderes and Selçuk, which are being preferred especially by foreign tourists, shall be publicized also to countries other than the ones from which tourists are already being attracted, thus attracting demand from new markets.

In markets from where a tourist flow already exists, effectiveness of promotions shall be increased; and in countries such as Japan, the USA, Italy and England which have high tourist expenditures, campaigns towards the promotion of İzmir shall be worked on.

National and international promotion of the International İzmir Festival, İzmir European Jazz Festival, İzmir International Fair, İzmir Short Film Festival and other activities organised throughout the year shall be realized. Because İzmir is an important university city and houses various industry and commerce branches, a promotion field is open also regarding convention and enterprise tourism.

Performance Indicators for “Providing Regional Promotion” Priority

Average facility occupancy rate shall be increased from 45.65% to 47.65%.

Average length of stay in facilities shall be increased from 2.3 days to 2.8 days.

Number of fairs held shall be increased from 31 to 37.



Competitiveness for Enterprises Development Axis

SWOT Analysis

STRENGTHS

- Being the third province in Turkey regarding socioeconomic development and competitiveness
- Constituting almost half of the Aegean Region GDP, being the at sixth place countrywide regarding GDP per capita
- Being at second place among regions where industry is most concentrated in Turkey
- Existence of qualified labour force
- Existence of rich natural, historical and cultural resources
- OIZs and SIAs being abundant regarding both numbers and areas
- Existence of ESBAŞ and İDESBAŞ
- Existence of clustering works in progress in sectors such as aeronautics, informatics and organic agriculture
- Having the scientific and technological infrastructure and human capital, existence of İzmir Institute of Technology (İYTE) and İzmir Technology Development Zone
- The high tech sectors (especially informatics, medicinal tools and industrial machinery) being concentrated and star sectors
- The agricultural production being made with higher variety and higher technology compared to countrywide average
- The sectors based on agriculture such as food and drink production, clothing and leather products manufacturing being concentrated and star sectors
- Being responsible for the larger portion of countrywide ornamental plant cultivation
- The existence of diversity in meat, dairy and aquaculture products
- Having high capacity, experience and product variety in organic agriculture
- Green housing, greenhouse and ornamental plant cultivation having been developed
- The existence of Turkey's first and most advanced agricultural products exchange market
- Institutional capacity employed for fields of education and research towards agriculture
- Employing a large portion of country potential regarding wind energy, and the investment potential resulted by this
- Employing a large share within our country's total potential which is at the fifth place throughout the world regarding geothermal energy
- The high development rate of hotel and restaurant services sector
- Variety of transportation possibilities
- The existence of railways transportation opportunity to industrial zones
- The development potential of the logistics sector
- Storing, handling and distribution activities becoming increasingly widespread
- Having ports that serve tourism and trade
- İzmir Port being one of the most important export ports of Turkey
- The existence of ferry cruises between Çeşme-Greece (Chios Island) and Çeşme-Italy (Bari and Brindisi), strengthening tourism potential and cross-border trade

OPPORTUNITIES

- Geographic proximity to European market
- The increased interest towards organic products throughout Turkey and the world, this interest being reflected to the supports given to organic production and the relevant legal texts
- Renewable energy sector gaining priority within national and international fields
- Touristic-purpose arrangements having been made at thermal tourism regions and centres
- Being a transit point connecting agricultural, industrial and touristic regions
- Cruise tourism being continuously increased
- Existence of a project in Çandarlı to create a new container port that will be the largest port in the Mediterranean Sea

WEAKNESSES

- Export share showing a tendency towards falling, having a foreign trade deficit in the last five years
- Employing a multi-sector structure which results in scattering of the economic power and lack of specialization
- The decrease observed during the last 10 years in the public investments made for İzmir
- Many of the OIZs being not yet utilized fully; existence of infrastructural deficiencies in energy, transportation and communication fields at OIZs and free zones
- Inadequate benefitting from R&D grant supports
- Insufficient institutionalization in SMEs
- Agricultural lands being small sized and fragmented, average agricultural enterprise size being below the country average, the culture of organized action not adequately developed in agriculture structure, lack of sufficient capital and knowledge
- Insufficient utilization of modern irrigation, disinfection, fertilization, etc. techniques
- Inadequacy of cold storage and transportation within the fresh fruit and vegetable chain
- Quality, measurement, hygiene and food safety applications being inadequate for the processing of agricultural products
- Excessive fishing in aquaculture products, inadequacy in organization and supervision
- Livelihood resources being insufficient and unemployment ratio being high at rural region (countryside)
- The lands that should be evaluated as forest and grazing grounds being utilized for economic activities such as agriculture, tourism, mining and quarry
- Insufficient agriculture-industry integration
- Agricultural lands in some districts being under the threat of destruction due to industrial activities
- The demand for tourism not being able to spread to 12 months due to mass tourism based on sea-sand-sun
- The average length of stay of tourists and the occupancy ratio of accommodation facilities being low
- İzmir not being promoted adequately regarding tourism and investment
- The infrastructure for convention and exhibition tourism being inadequate
- The foreign dependency for energy
- Decrease being experienced in the concentration of industry and agriculture employment
- İzmir Port not having the infrastructure and capacity to meet the increasing demand, and in result the increase in the ships' waiting periods
- Companies of İzmir origin being small-scale in the logistics sector

THREATS

- The global financial crisis affecting Turkey and İzmir adversely
- The legislation about OIZs and free zones changing too frequently, resulting in feeling of insecurity for investors
- Global energy shortage beginning to be experienced and energy prices thus having the tendency to increase
- Existence of a foresight that speculates; in case Turkey joins the EU, all of the subsistence enterprises and a considerable portion of semi-subsistence enterprises within the agricultural sector shall be drawn out of production
- İzmir being excluded from the context of Instrument for Pre-Accession Assistance for Rural Development (IPARD) that is financed by the EU
- Pollution of the seas proposing a risk against aquaculture products
- Tourism grants and incentives being concentrated in Antalya and Southern Aegean Region
- Foreign dependency on the technology necessary for renewable energy field, the investment costs being high
- Inadequate benefitting from the nationwide-presented incentives and grants

4.2 Employment and Social Integration

Expanding employment opportunities and improving employment conditions regulate income distribution and decrease poverty. This also strengthens social inclusion and supports social integration and development. Moreover it supports economic development by increasing regional competitiveness, efficiency and capacity in production, and innovation. The Ninth Development Plan has defined increasing the employment rate as one of the five national-scale economic and social development axes.

Various social segments such as youth, women and handicapped people are disadvantageous within the labour force market regarding employment opportunities and conditions. In the Ninth Development Plan, this has been defined as a national-scale aim that states “equal opportunities shall be provided for the people meeting difficulties in labour force market, namely women, youth, long term unemployed, handicapped and former convicts”, and specific priorities and aims have been defined towards improving the employment opportunities and conditions of these social segments.

The aspects of education and health sit at the very centre of today's development policies regarding the strengthening of employment and social integration. The Millennium Development Goals that have been accepted by 191 countries including Turkey at the UN Millennium Summit in September 2000 included 8 fundamental aims that are considered to be reached in 2015. Of these 8 aims; one is directly related to education (providing elementary education for all people universally), three are directly related to health (reducing childhood deaths; improving mother health; fighting against contagious diseases such as HIV, malaria), while the remaining aims are also indirectly related to education and health.

The Ninth Development Plan that has been prepared in compliance with international aims has defined the nationwide priorities of “development of education system” and “activating healthcare system” under the social development axis of “Strengthening of Human Capital and Social Solidarity” and put aims towards the improvement of education and healthcare services in terms of both accessibility and quality.

For social integration to be realized there is need to improve also the social service policies in terms of accessibility and quality towards all society with disadvantaged groups coming foremost, strengthening social inclusion further than just the employment opportunities and conditions. Under the title of “Strengthening of



Human Capital and Social Solidarity” which is one of the five economic and social development axes of the Ninth Development Plan, nationwide priorities and aims have been defined towards strengthening social integration and social inclusion.

In our day, with innovative and alternative methods in services towards social inclusion, the social segments such as women, unemployed youth, immigrants, handicapped people, elderly and poor people who experience different or similar disadvantages in accessing the economic, social and cultural opportunities are aimed to leave their positions of merely passive service recipients. This way, it is aimed for the individuals constituting these segments to become active members of society by utilizing their productive potentials in their own living spaces.

The fundamental purpose of the axis of Employment and Social Integration is; **strengthening social integration by developing employment opportunities and the services towards social inclusion, notably education and healthcare.** Within this context, three priorities have been defined under the strategic development axis.

SP8: Increasing Employment and Labour Force Productivity

Increasing employment and labour force efficiency is important in terms of social development for strengthening social integration via improving income distribution and reducing poverty; and in terms of economic development for realizing regional competitiveness and efficiency increase in production. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Employment	- Increasing Education's Sensitivity to Labour Force Demand - Developing Labour Force Market - Developing Active Workforce Policies
	Increasing Competitiveness	Realization of Transition into High Added Value Production Structure in Industry and Services
Ministry of Culture and Tourism, Turkey Tourism Strategy 2023 Action Plan (2007-2013)	Education	- Developing Academic Education and Vocational Education in Conjunction to Raise Qualified Personnel for Tourism Sector - Determining Alternative Strategies in Promotion and Marketing Activities - Private Sector Participation to Raising Labour Force at the Qualification Demanded by Tourism - Updating Curriculum in Formal and Informal Education
	Diversifying Tourism	Sea Tourism
Turkish Industry Policy	Developing Labour Force	- Labour Force Quality Shall Be Increased and Education Activities Shall Be Developed Towards Technological Developments for Increasing International Competitiveness - Importance Shall Be Given to Developing the Collaboration Between the Economy's Labour Force Demand and the Vocational, Technical and Formal, Informal Education
Transportation Master Plan Strategy	Logistics	Increasing the Knowledge, Skills and Capabilities of Human Resources within Sector

Continue →

National Rural Development Strategy (2007-2013)	Development of Human Resources, Organisation Level and Local Development Capacity	• Fight Against Poverty and Increasing the Employability of Disadvantaged Groups
SMEs Strategy and Action Plan (2007-2009)	Developing Entrepreneurship	• Universalizing Business Establishing Training and Consultancy Services Aimed Towards Entrepreneurship Candidates and Developing Business Establishing Training and Consultancy Programs for Special Target Groups and Disadvantaged Groups • Increasing the Knowledge and Skills of Entrepreneurs with Newly Established Businesses Regarding Business Development

In that direction, four aims have been defined under the priority of increasing employment and labour force efficiency within the Plan context.

Aim 1 (SP8A1): Regional Labour Force Strategy shall be created and implemented

Labour force strategy encompasses various subtitles such as, increasing employability by developing the skills and qualification of the labour force; professional education; providing professional guidance and counselling services; integration of especially the disadvantaged groups with notably the youth, women, handicapped people. Contribution of the works to be conducted on all these subtitles to regional development may only be possible through regional orientation and region-wide coordination, and harmonizing the works of institutions especially public institutions serving towards employment within a regional strategy.

In this context, a Regional Labour Force Strategy shall be constituted. This strategy shall employ a structure that includes initially the Regional Labour Force Demand Analysis that will harmonize the vocational education with the labour force demand required by the regional economy, along with the titles of vocational education, guidance and consultancy, disadvantaged groups' integration to labour force market, employment potential of emerging and existing sectors; directing the works of all institutions dealing in these subjects, providing regional coordination and determining regional strategy.

Aim 2 (SP8A2): Vocational education shall be developed in consideration of intermediate labour force demands in labour market regarding especially the key sectors

One of the most important aspects allowing the enterprises to compete is raising intermediate staff answering the regional labour force demand. Because of that, it is important to develop the cooperation and coordination between institutions/organizations giving vocational and technical education and industry, and to encourage the private sector regarding in-house ability/skill development activities. In this context, existing intermediate staff developing their professional knowledge and skill levels with in-house trainings shall be supported. Prioritized sectors to be handled within the framework of this aim are tourism, agriculture, clothing and logistics.

Key Sectors Related to the Aim

Tourism

Agriculture

Clothing Materials Industry

Logistics

Professional certification system in tourism education shall be initiated and trainings aimed at specialization on diversified tourism sub-branches shall be given. Employment of qualified intermediate personnel shall be realized in museums and historical sites along with accommodation facilities.

In agriculture sector; labour force knowledge and skill levels regarding the production processes shall be increased. In that context, employers' and agricultural labour force's cultivation knowledge and skills on titles such as nurturing, pruning, spraying (disinfestations/disinfection), fighting diseases and pests shall be increased. Cooperation of public institutions and producer organizations shall be provided in that regard.

Just like throughout the country, there are many vocational high schools, vocational graduate schools and textile engineering departments that present production and design education in textile and garment subjects in İzmir. The vocational high schools in İzmir give education in 84 different fields of clothing and textile production. In addition to vocational high schools, education is given in 15 different fields in professional training centres. However, due to the cooperation between education institutions and industries being not developed enough, many such programs are found inadequate by industrialists. In this context, training intermediate staff such as fashion designers, modists, stylists, pattern-makers etc. who are talented regarding fashion design and capable of contributing to the region's vision of becoming a fashion and design centre with innovative designs, shall be supported.

For logistics sector, it is necessary to found a Logistics Vocational High School in cooperation with the sector for the purpose of meeting the sector's intermediate personnel demand. Furthermore, institutional companies within the sector to provide practical training and employment opportunities to students and trainees educated in logistics is of vital importance. And for meeting qualified labour force demand in short term, logistics classes capable of giving certificates shall be opened, and the current personnel shall be provided with detailed, in-service trainings.

Aim 3 (SP8A3): Skilled labour force shall be developed especially in key sectors

Qualified human resource is the key factor in creating competitive advantage via effective management, productivity and efficiency increase in enterprises. Training of new talents especially in practical sciences which have intensive knowledge and technology use is prioritized both for Turkey and for İzmir. In this regard, reverse brain drain from foreign countries to İzmir shall be supported, joint projects shall be developed together with the Turkish brain power residing abroad. Prioritized sectors to be handled within this aim's context are high tech industries, renewable energy and clothing production sectors.

Key Sectors Related to the Aim

High Tech Industries

Renewable Energy

Clothing Materials Industry

In order to meet the qualified personnel demand of the high tech industries sector, relevant departments at universities shall become more effective. For meeting the qualified personnel demand of the sector, universities' departments aimed towards advanced technology shall be strengthened in terms of R&D infrastructure and human resources. Especially in the sub-sectors of informatics, industrial machinery production, medical, sensitive and optical tools manufacturing under this sector, required qualified staff shall be trained and a qualified labour force shall be developed in advanced technology fields (informatics and communication technologies, biotechnology and gene technologies, material technologies, nanotechnology, design technologies, mechatronics, energy and environment technologies) necessitated by other sectors in İzmir.

Qualified labour force demand is rising also in the developing renewable energy sector. Electrical and electronic engineering and mechanical engineering departments exist in four

out of seven universities within the province, while Dokuz Eylül University, Ege University and İYTE house research centres and institute units related to renewable energy. On the other hand, creating the labour force qualified for meeting the sector's demand in the departments and units in question, and reshaping of the education programs in this subject actively according to the region demand are important tasks. In this regard, education programs aimed towards training of specialized human resource demanded by the sector shall be prepared to be implemented. Within the framework of undergraduate, graduate and postgraduate programs, renewable energy R&D studies and programs related to these (such as energy systems engineering) shall be increased in universities. Qualified labour force specialized in renewable energy engineering applications, projects, technical service and training subjects shall be increased.

In clothing production sector, new marketing techniques and strategies gain importance with each passing day due to the increase in product diversity and therefore customer needs and expectations. In order to obtain competitive power in this sector, in which competing is constantly getting more and more difficult, development of correct marketing strategies and altering and renewing marketing strategies in parallel to developments in fashion, technology and customer preferences. In this context, employees shall be trained to know the world market very well, track world fashion and markets closely and aid the companies in the sector to correctly understand consumer needs and demands, act accordingly and gain competitive power.

Aim 3 (SP8A3): Participation of disadvantaged groups in labour force shall be increased

Youth unemployment has some genuine aspects different from general unemployment. In most cases, young people who will enter the labour force market for the first time have a better and actual education but less work experience. For that reason young unemployment has a greater amount of risk to turn into long term unemployment. In a study of International Labour Organization (ILO) conducted in 2005 for analyzing global employment trends, unemployed youth has been defined as one of the six fundamental problem fields expected to be experienced in the upcoming period in global scale; governments, international organizations and non-governmental organizations have been summoned to work on the issue.

Youth unemployment is a gradually deepening problem in our country, too. In regions with dense urban populations such as İzmir, the risk of youth unemployment damaging social integration increases even further. Combined with the fact that approximately 46% of İzmir population is below 30 years of age according to ABPRS 2008 data, youth unemployment problem in İzmir gains even further importance. For that reason, vocational education programs shall be supported that will increase employability and reduce youth unemployment by increasing the professional knowledge and skill levels of unemployed youth in İzmir. Again for decreasing youth unemployment, education and consultancy services towards young entrepreneurs shall be supported.

Considering the position of women in the employment market, it is seen that major nationwide improvements are necessary. The situation in İzmir is similar to that of the country in this regard. Although the ratio of wage earner women to total employment is higher in İzmir compared to Turkey average (according to 2008 data, respectively; 21.4% and 14%), of the total employment in the three main sectors of the province, 73.19% comprises of men and only 26.81% is composed of women.

The reasons to that situation can be listed as; the accessibility of women to education and professional education being generally lower, opportunities towards women in the employment market being not developed enough, sociocultural obstacles faced by women in rural areas and in the segment who emigrated from rural areas to the city regarding participation in labour force, etc. In this context, vocational education programs aiming towards increasing the professional knowledge and skills of women shall be encouraged.



Also, education and consultancy services towards woman entrepreneurs shall be supported.

The position of handicapped people is also significantly disadvantageous regarding employment. Accessibility to education and professional education being considerably limited nationwide, over half of the handicapped people do not attend education levels more advanced than elementary education, and their labour force participation rate is also low. However, handicapped people have, just as other disadvantaged groups, a considerable potential regarding labour force and efficiency. Moreover, exclusion of handicapped people and other disadvantaged groups damage social integration. In this context, knowledge and skill levels of handicapped people shall be developed and their qualifications in the labour force market shall be increased. Also, education and consultancy services towards handicapped entrepreneurs shall be supported.

Groups such as unemployed youth, women, handicapped people, former convicts who are disadvantageous in labour force market shall be supported, and employment opportunities for these groups shall be increased. In this regard, profession types suitable for the mentioned society segments shall be revealed. Job searching and finding services towards all these segments shall be developed and the knowledge and awareness level on the newly formed legal benefits for the disadvantaged groups shall be increased. Likewise, the project development and management capacity towards funds that will create employment in the region shall be increased.

Performance Indicators for “Increasing Employment and Labour Force Productivity” Priority

Number of students per classroom in vocational and technical secondary education shall be reduced from 35 to 30.

Number of trainees attending the vocational, technical trainings given by Provincial Directorate of National Education within informal education context shall be increased from 65,770 to 75,000.

Number of handicapped trainees attending the trainings given by Provincial Directorate of National Education towards handicapped people within informal education context shall be increased from 1,685 to 5,000.

Unemployment rate shall be reduced from 11.8% to 11%.

Non-agricultural unemployment rate shall be decreased from 12.4% to 12%.

Labour force participation rate of women population shall be increased from 24.5% to 28%.

The ratio of paid women employees within total employment shall be increased from 21.4% to 25%.

SP9: Improving Education and Healthcare Services

Improving the education and healthcare services in order to strengthen social integration in İzmir's dynamic social structure has been defined as a priority within the Plan context. The table on the following page displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Strengthening Human Development and Social Solidarity	• Development of Education System • Activating the Healthcare System
The Status of Elderly People in Turkey and Aging National Action Plan	Work and Aging Labour Force	• Employment Opportunities for All Elderly People Who Want to Work
	Development and Immigration at Rural Areas and Urbanization	• Improving Living Conditions and Infrastructure in Rural Areas • Prevention of Social Exclusion of Elderly People in Rural Areas
	Accessibility to Information, Education	• Life-Long Equal Opportunity with Education, Education Renewal Opportunities, Vocational Guidance and Settlement Services
National Rural Development Strategy (2007-2013)	Developing Human Resources, Organisation Level and Local Development Capacity	• Strengthening Education and Healthcare Services
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Improve Maternal Health	• Reducing Mother Deaths Incurred by Pregnancy, Birth and After-Birth by Three Quarters between 1990 and 2015
	Promote Gender Equality and Empower Women	• Eliminate Gender Disparity in Primary and Secondary Education, Preferably by 2005, and at All Levels of Education No Later Than 2015
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Reduce Child Mortality	• Reduce by Two Thirds, between 1990 and 2015, the Mortality Rate of Children under 5 Years of Age
	Achieve Universal Primary Education	• Ensure That, by 2015, Children Everywhere, Boys and Girls Alike, Will Be Able to Complete a Full Course of Primary Schooling

Three aims have been defined under the priority in question.

Aim 1 (SP9A1): Preschool education and informal education shall be supported

Preschool education enables children to develop the cognitive, affective and psychomotor skills they should have when they start elementary education as much as possible independent from their families and socioeconomic conditions. For that reason, the importance of preschool education gets more and more emphasized in our day. The existing condition of İzmir regarding preschool education is near the countrywide average level in terms of both the number of students per teacher and per classroom, and the schooling ratio.

However, when the issue is approached at international scale, the serious necessity for improvement regarding the issue in both our country and in İzmir can be seen clearly. Turkey falls far behind countries such as Peru, Bulgaria, Albania, Romania, and ranks last in the ranking of European countries regarding the schooling rate in preschool education.

In that framework, the service capacity shall be increased and the awareness on preschool education among the society shall be raised within the Plan context in order to support the universalization of preschool education in İzmir.

In İzmir, the variety and the content regarding technical courses and trainee numbers of

professional technical trainings presented among the informal education services are constantly increasing. The same increase is observed in the social and cultural trainings organized. The informal education services are significantly beneficial especially for supporting the social integration of disadvantaged segments such as unemployed youth, women, handicapped people, poor people, arrestees and former convicts and elderly population.

The service capacity of informal education in İzmir should be supported in quality and quantity. In that direction, cooperation opportunities with new actors like NGOs and public and private organizations that will contribute in institutional social responsibility context shall be developed, and by activating these institutions' capacity, accessibility to informal education opportunities shall be strengthened.

In this context, works aimed towards increasing the professional and technical knowledge and skills especially of segments outside formal, vocational education and higher education shall be supported. Likewise, informal education works that support the social integration of segments such as children, young people, women, handicapped people, elderly people, immigrants, former convicts and arrestees shall be supported.

Aim 2 (SP9A2): The effectiveness of education services shall be increased by encouraging accessibility and quality

İzmir is at fifth place regarding the development level of its education sector among 81 provinces, preceded by Ankara, İstanbul, Eskişehir and Yalova respectively. And according to Level 2 regions, İzmir region ranks at third place after Ankara and İstanbul regions. However, despite its relatively advanced position countrywide, İzmir needs significant improvements regarding education in terms of both accessibility and quality.

First of all, due to being a local, regional and national immigration attraction centre and the population's increasing trend being decreased but still persistent, the demand towards education services is constantly increasing in İzmir, and the existing capacity of the institutions producing the services in question falls short of this demand. This situation causes problems regarding accessibility to education especially in metropolitan districts receiving high numbers of immigrants. In districts such as Buca, Karabağlar, Bayraklı, Balçova, Konak, Gazimemur which may be listed among these districts in question, the student number per classroom in elementary and/or secondary education is higher than the country average and the top limit defined as 30 students per classroom. In this context, accessibility to education shall be supported especially in districts where the number of students per classroom is high in mobile or combined classroom implementations.

A nationwide necessity for improvement exists also for the quality of education. Within İZBP context, improvement of not only accessibility but also the quality of education shall be supported in İzmir. In that direction, innovative methods, technologies and equipments for education shall be universalized, effective use of information-technology classes and science-linguistics-computer laboratories shall be realized. For increasing the effectiveness of education services by supporting accessibility and quality, cooperative working of not only public institutions but also local administrations, NGOs, universities and actors who will contribute in institutional social responsibility context shall be supported.

Aim 3 (SP9A3): Primary healthcare services shall be strengthened with the preventive health and mother and child health services coming foremost

The fact that primary healthcare services are not strengthened enough nationwide in terms of

A nationwide necessity for improvement exists also for the quality of education. Within İZBP context, improvement of not only accessibility but also the quality of education shall be supported in İzmir.

quality and quantity causes the patients to tend towards the more costly secondary and tertiary healthcare services, thus significantly increasing the costs of healthcare system. At the same time, this situation limits the existing service capacity considerably.

In contemporary development policies; preventive healthcare services, in broad sense, strengthens society health, and by minimizing the risks constituted by preventable and contagious diseases increases effectiveness of the healthcare system.

In terms of fundamental healthcare indicators, İzmir is above country average in general. The qualitative and quantitative improvements experienced in fields such as inoculation and preventive healthcare services, 112 emergency health services in the recent years increases the fundamental healthcare indicators of İzmir. Despite this, the healthcare services in İzmir do not only serve those within province borders but also serve in considerable amounts to those from surrounding provinces and regions. This situation presses the existing provincial capacity especially regarding primary healthcare services.

Also, similar to the country's general situation, the primary healthcare services, especially preventive health services in the province are in need of significant improvements in terms of quality, and preventive actions such as raising public awareness in this issue. Within İZBP context, the primary healthcare services, notably preventive healthcare and mother-and-child health services, shall be strengthened and universalized. In that direction, cooperation of public institutions and private sector organizations who will contribute in institutional social responsibility context shall be realized for the purpose of increasing the capacity of institutions providing abovementioned services. And yet again, the knowledge and awareness of the society on preventive healthcare services and public health shall be raised.

Performance Indicators for “Improving Education and Healthcare Services” Priority

Net preschool schooling ratio (4-5 years age) shall be increased from 33.24% to 50%.

Number of students per classroom in elementary education shall be reduced from 33 to 30 in all districts.

Net secondary education schooling ratio shall be increased from 68.16% to 75%.

Number of students per classroom in secondary education shall be reduced from 31 to 30.

Number of students per classroom in vocational and technical secondary education shall be reduced from 35 to 30.

Number of trainees attending the vocational, technical trainings given by Provincial Directorate of National Education within informal education context shall be increased from 65,770 to 75,000.

Number of handicapped trainees attending the trainings given by Provincial Directorate of National Education towards handicapped people within informal education context shall be increased from 1,685 to 5,000.

Population per bed at hospitals shall be reduced from 331 to 300.

Infant death ratio shall be reduced from 9.1 per mille to 7 per mille.

Mother death ratio shall be reduced from 12.9 per hundred thousand to 8 per hundred thousand.

SP10: Strengthening Social Inclusion and Fight Against Poverty

In the approach that constitutes the basis for the Human Development Reports that has been issued by UNDP each year since 1990, it is aimed that “individuals should be enabled to live their lives in the way they value, by the opportunities in front of them being enriched and their capacities increased”.

As factors such as İzmir's gradually increasing and urbanizing population, increasing age average, changing family structure and decrease in the household size average value combine with the province's characteristic of being a regional and national attraction point, a significantly dynamic population structure forms within the region. Factors such as the increase trend of unemployment and especially youth unemployment, and financial crises experienced deepen the poverty within the region.

Within this dynamic structure the disadvantages experienced towards accessibility to economic, social and cultural opportunities especially by social segments like women, unemployed youth, handicapped people, immigrants, elderly and poor people increase, and the effectiveness of social services on these people decrease. Strengthening of these mentioned services both in context and accessibility, and in quality shall in turn strengthen the social integration and social inclusion within this dynamic population structure of İzmir. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Strengthening Human Development and Social Solidarity	• Improving Income Distribution, Social Inclusion and Fight Against Poverty • Preserving and Developing Culture, Strengthening Social Dialogue
	Realizing Regional Development	• Providing Development to Rural Areas
	Increasing Employment	• Developing Labour Force Market
The Status of Elderly People in Turkey and Aging National Action Plan	Active Participation to Society and Development Process	• Realizing the Social, Cultural, Economic and Political Participation of Elderly People • Realizing the Participation of Elderly People in All Stages of Decision Making Process
	Work and Aging Labour Force	• Employment Opportunities for All Elderly People Who Want to Work
	Development and Immigration at Rural Areas and Urbanization	• Improving Living Conditions and Infrastructure at Rural Areas • Prevention of Social Exclusion of Elderly People at Rural Areas
National Rural Development Strategy (2007-2013)	Developing Economy and Increasing Employment Opportunities	• Diversifying Rural Economy

Three aims have been defined under the priority in question.

Aim 1 (SP10A1): Social services shall be improved

Due to the social service institutions for elderly people are concentrated mostly at city centre of İzmir, the accessibility of elderly people to social services gets limited especially in districts where the average household size is lower than country and region averages and the age average value is higher. The services in question have to be improved also in terms of variety and quality within the province. Therefore, the social services for elderly people shall be universalized especially at districts where the elderly population living alone gradually increases, and the variety and quality of these services shall be improved within İZBP context in İzmir.

Within the region, a considerable amount of young population live as is within the country general. Approximately 46% of the population is under 30 years age. As was stated within the 2008 Turkey Human Development Reports issued by UNDP under the title of "Youth in Turkey", Turkey needs a more explicit youth policy and institutions to support the youth. Within İZBP context, young people's participation to social life shall be supported under the fundamental titles of sports, culture, civil society and especially education, and the social services aimed towards this population segment shall be improved.

In the region, the social services aimed towards certain segments such as women, children, handicapped people and immigrants should also be strengthened in terms of both accessibility and quality. Therefore, within İZBP context the social inclusion works aimed towards the whole society and notably the disadvantaged segments such as women, children, handicapped people and immigrants shall be universalized. Social services aimed towards the mentioned segments shall be improved in terms of variety and quality, and innovative methods shall be supported.

Aim 2 (SP10A2): Integration of immigrants to urban life shall be realized

İzmir is one of the provinces where the immigration phenomena is experienced most dynamically throughout Turkey. Within the 2007-2008 period, 5.1% of all immigrants within Turkey have immigrated to İzmir, making İzmir the fourth province throughout country regarding the immigration population taken in. Considering the flow direction of this extensive immigration, it is observed that İzmir is an attraction centre in local, regional and national scales. İzmir is taking in immigrants both from some of its own districts which are dominated by rural socioeconomic structure and neighbouring provinces and other regions of Turkey.

Strengthening social services both in context and accessibility, and in quality shall in turn strengthen the social integration and social inclusion within the dynamic population structure of İzmir.

Analyzing the reasons of this extensive immigration, we get the results showing that 'immigration due to another household person' is at first place with 26.13% and 'employment expectation' is at second place with 23.02%. Just like it is countrywide, mostly 20-24 age group young population emigrates into İzmir. This situation clearly displays the strong link between the immigration aimed towards İzmir and the expectation to find employment and income.

Works to be conducted for providing the immigrants' integration into urban life under various titles such as informal and vocational education, employment, fight against poverty should be carried out at regional scale with the participation and coordination of public sector, local administrations, academic institutions, NGOs and organizations that will contribute in institutional social responsibility context. Many institutions and organizations independently supporting the new immigrants' integration to urban life causes a waste of both resource and capacity, and a decrease in the effectiveness of existing applications. In this context, works aimed towards creating an Internal Immigration Strategy, which will determine the direction and ensure the coordination of abovementioned works, shall be supported.

Reasons such as the immigrant young people and women being generally devoid of adequate education and professional information & skills deepen the disadvantages they face in İzmir regarding accessibility to labour force market. This situation causes the social segments in question enter into the trap of chronic poverty, aggravating the existing situation by bringing social integration problems along with it.

On the other hand, measures aimed towards reducing sociocultural harmonization problems should be developed for supporting the harmonization of immigrants to urban life. Social segments who do not develop their sense of identity belonging to the regions they emigrated to cannot get used to the urban life and cannot integrate with the whole of society but stay confined within their own closed social fields. For that reason, works aimed towards developing the consciousness and identity of belonging to İzmir and the urban life as a common ground meeting everybody shall be supported as well as works to be executed by NGOs' and local administrations developing social solidarity, cooperation and cohabitation culture.

Context and variety of the services brought to immigrant population under titles such as informal education, culture, civil society in order to decrease this social segment's sociocultural harmonization problems and support their social integrations shall be increased and their quality shall be improved within İZBP context. Social support centres presenting services such as informal and vocational education, and rehabilitation at quarter, neighbourhood and district scale, on-site in a participative manner, and ensuring the effective and on-site utilization of social aids shall be established especially at urban areas receiving high immigration.

Aim 3 (SP10A3): Living conditions and employment opportunities at rural areas shall be developed

Reasons such as the fragmented property structure, widespread practice of nonpaid family labour and low efficiency seen in agriculture, decrease of employment in agriculture sector, limited alternative work opportunities in rural economy, difficulties experienced in accessibility to services such as education and health trigger the immigration from rural areas to urban areas. As a result, the dynamic immigration phenomena İzmir faces does not only occur from surrounding provinces and regions but also from its own districts of dominant rural socioeconomic structure into city centre.

Despite being a province receiving persistent immigrations, especially in some of İzmir's districts with dominant rural socioeconomic structure the population is decreasing rapidly, their young populations are emigrating to the Centrum or other metropolitan cities in search of education and employment opportunities; and in result of this, the age average value is fast increasing in these districts. This situation bore in some districts such a condition that the average age is higher than İzmir and country average values while the average household size is lower than İzmir and country average levels. In these districts where the population is constantly decreasing, aging, and living alone; economy stagnates, the service deficit towards social integration and social inclusion increases and poverty deepens.

Therefore, diversification of the rural economy for the purpose of strengthening rural economy labour force demand and the potential of producing added value shall be supported and works aimed towards creating new employment opportunities and improving the quality of regional young labour force shall be activated within İZBP context in İzmir with the districts in question coming foremost. Again in rural areas, living conditions shall be improved and the content and quality of the fundamental services such as education and healthcare shall be increased.

Performance Indicators for “Strengthening Social Inclusion and Fight Against Poverty” Priority

Number of students per classroom in vocational and technical secondary education shall be reduced from 35 to 30

Number of trainees attending the vocational, technical trainings given by Provincial Directorate of National Education within informal education context shall be increased from 65,770 to 75,000.

Number of handicapped trainees attending the trainings given by Provincial Directorate of National Education towards handicapped people within informal education context shall be increased from 1,685 to 5,000.





Employment and Social Integration Development Axis SWOT Analysis

STRENGTHS

- Being the third province throughout Turkey regarding socioeconomic development and competitiveness
- Being the centre of Aegean Region regarding socioeconomic and sociocultural aspects
- Being at the fifth place regarding education sector within the development listing in Turkey
- Being the fourth most competitive province countrywide regarding human capital and life quality
- Schooling ratios being higher than Turkey average at every level (preschool, elementary and secondary) of formal education
- Student per teacher numbers being lower than Turkey and Aegean Region averages at every level (preschool, elementary and secondary) of formal education
- Existence of seven universities
- The universities having knowledge and experience on institutional cooperation, research and development and programming activities
- Observation of increases in both branch varieties and course and trainee numbers regarding the social and cultural trainings organized within informal education concept
- Realization of numerous cultural and artistic activities
- Existence of many local media organizations
- Being higher than country average regarding essential health indicators
- Being one of the most developed provinces regarding institutional structure (public institutions, professional chambers and non-governmental organizations being stronger than those at other provinces)
- The rates of employment in sectors outside of agriculture being higher than the Turkey average
- The ratio of wage earners to total employment being considerably high compared to Turkey average
- The ratio of wage earner women to total employment being 2 times the Turkey average
- The diversity seen in social and cultural structure

OPPORTUNITIES

- The increase in the interest towards cultural-artistic activities, the demand for new theatre halls being higher than Turkey average
- Unregistered employment ratio being below the countrywide average value



WEAKNESSES

- Median age value being higher than Turkey and Aegean Region average values and elderly population ratio being high
- Social service and care institutions for the elderly population being insufficient, and the existing ones focusing within Metropolitan municipality borders
- Number of students per classroom in elementary and secondary education being higher than the Turkey average
- Especially in some districts the number of students per classroom in elementary and secondary education being considerably high
- The education, social service and skill improvement institutions necessary for the social integration of handicapped people being insufficient
- The existence of a continuous increase in the illiterate population due to immigrations
- The healthcare organizations focusing around the Centrum and therefore problems arising regarding accessibility to healthcare services in other districts; capacity overloads due to healthcare organizations servicing people also from surrounding provinces
- Unemployment rate being above countrywide average value and its increase due to immigrations
- Women in rural regions being often worked at family enterprises as unpaid family workers, and in urban areas at low-wage labour-intensive jobs
- Reshaping of professional education being inadequate to the demands of local economy
- The infrastructure for cultural activities being inadequate in both quality and quantity
- Museums in İzmir being inadequate in both quality and quantity
- Emigration of the qualified labour force to other cities
- Cultural and artistic activities being not carried out in coordination
- The connection between the university and the business world being weak
- Low average household size causing problems regarding the care of especially handicapped people and old people those who are in poverty or in need of nursing
- Data production and studies at local, regional and international levels regarding İzmir being insufficient

THREATS

- Services regarding subjects such as planned urbanization, public health and transportation being inadequate due to the urban population density being high compared to Turkey average
- The population increasing due to immigration triggering unplanned/illegal housing, the stress over the supply of services such as education and health persisting
- The province's health institutions being inadequate due to intensive service to the populations of surrounding provinces
- Aging of districts' populations due to immigration from districts to city Centrum caused by unemployment, and thus the increase in unemployment

4.3 Sustainable Environment

İzmir ranks at high levels regarding its population increase rate. On the other hand, a wide range of varieties in economic activities within the region clearly strikes the eye. As a result of all these, rapid exhaustion of natural resources and the pollution created by the wastes caused by production and consumption bring important environmental problems and thus render environmental sustainability critical.

In the environment axis of the National Sustainable Development Report presented at the United Nations World Summit on Sustainable Development, the subjects of “elimination of deficits on infrastructure and waste disposal facilities; development of clean production technologies, environment-friendly production and consumption forms which do not harm resources, environment management and quality safety systems; and realizing national energy saving and demand stability” have been emphasized. Within the period passed, the importance of environment is highlighted with the principle stated as “It is essential to preserve natural and cultural assets and environment with an approach taking later generations into consideration” within the Ninth Development Plan, and this statement emphasizes a growth based on sustainable development principles within the era of Ninth Development Plan. Furthermore, the reduction of emissions of CO₂ and other greenhouse gases has become an obligation according to Kyoto Protocol, and within the Ninth Development Plan certain aims have been defined stating necessary actions shall be taken regarding reducing greenhouse gas emissions. It is essential to take precautions within the region in order to realize the year 2014 limit values defined within the framework of the Regulation of Air Quality Assessment and Management, as per the framework of EU Integrated Environment Approximation Strategy and Kyoto Protocol.

A consensus exists besides the context of environmental investments in the framework of abiding the sustainable development strategy, older technologies should be replaced with newer ones and investments on environmental technologies should be increased in order to increase competitiveness, and it is emphasized that as result the pressure on natural resources will decrease and growth will get accelerated. The expressions of “climate change and clean energy”, “sustainable transportation”, “sustainable production and consumption”, “better management of natural resources” which reside within the framework of Integrated Environment Approximation Strategy and in EU's

development strategy are reflected on national policies, and in the Ninth Development Plan they are situated within the development axis of increasing competitiveness as a priority, namely “preservation of environment and development of urban infrastructure”.

In parallel to the national approach, the issues of management of natural resources such as water basins and sensitive ecosystems; climate change and energy; relationship between production-consumption and environment; and sustainable waste management are highlighted for the region. The fundamental purpose of Sustainable Environment development axis is; **preservation of environment and improvement of environmental quality while continuing economic activities**. Five strategic priorities have been defined under this development axis.

SP11: Realizing Sustainable Water and Wastewater Management at Basin Areas, Regions with Touristic Significance and Rural Areas

İzmir is within the water poverty limits regarding its annual usable water potential per capita, according to the world water sufficiency index. At this point, the water accessibility opportunities shall be increased especially at rural areas, and by taking the actions necessary towards the solution of qualitative problems regarding water, drinking water shall be made

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Realizing Environmental Sustainability	• Halving the Population Having No Sustainable Access to Safe and Clear Drinking and Utility Water Until Year 2015
Ministry of Environment and Forestry Wastewater Treatment Action Plan (2008-2012)	Provincial Action Plans Gediz Basin Action Plan	• Realization of Wastewater Treatment
Ministry of Environment and Forestry EU Integrated Environmental Approximation Strategy (UÇES) (2007 - 2023)	Water Sector Development Axis	• Pollution of Underground, Surface and Coast Waters Shall Be Tracked, Minimized and they Shall Be Protected Against Pollution • Sewer Systems and Treatment Plants Shall Be Established in Compliance to Urban Wastewater Treatment Regulation • Sustainable Realization of Natural Water Resources and Water Ecosystems Shall Be Realized • Drinking Water Shall Be Reached to More Consumers in a Sanitary Way • Pollution Emerging From Hazardous Substances' Discharge into Water Shall Be Detected, Prevented and Reduced in Stages
	Industrial Pollution Control Sector	• Execution of Works that Will Realize the Implementation of the Best Existing Techniques at Industrial Plants and Large Incineration Plants Shall Be Carried Out Cooperatively by All Relevant Sides
National Environment Action Plan	Water Resources Management	• Preservation of Water Resources

accessible to more users in a sanitary way. On the other hand, the fact that three important water basins are located in the region and are supporting economical activities renders good management of water basins even more crucial. High-efficiency utilization of existing water resources while preserving the said water resources is one of the environmental priorities of the region. Also, taking precautions towards the protection of İzmir Bay against pollution and the improvement of water quality is also handled within this priority. At this point, it is essential to prevent water pollution and keeping it in check in order to prevent and control the environmental damage caused by different economic activities. Within plan context, the pollution of underground, surface and coastal waters shall be monitored, minimized and prevented from being polluted.

At this point, it should also be seen that the priority in question is directly related to key sectors. Due to the water in İzmir is consumed approximately 70% at agriculture and 15% at industry (notably in food and textile), and the necessity to utilize environment technologies for the measures related to this issue, the strategic priority in question has direct relation to the development of high tech industries and recycling sector. Therefore the priority in question shall be handled along with all these relevant fields within Plan context. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Four aims have been defined under this strategic priority.

Aim 1 (SP11A1): The pollution shall be reduced and water quality shall be improved to the next higher quality (2nd and 3rd water quality) by providing pollution control and basin management at water basins

Gediz, Küçük Menderes and Bakırçay basins reside within İzmir provincial borders. The most serious problem regarding the basins is that a pollution control in coordination with other provinces within basin borders cannot be realized. Caused especially by industrial and agricultural activities, another reason of the dense pollution is domestic wastewaters. At this point, works conducted in coordination with the surrounding provinces will be important for the basins. Actions have to be coordinated with Kütahya, Manisa and Uşak provinces for Gediz basin; and with Manisa province for Bakırçay basin. It is declared that Gediz river has III and IV class water quality all along the basin. Küçük Menderes and Bakırçay basins face pollution threat with their IV class water quality.

Administrative and technical arrangements shall be made and the continuity of an effective supervision and control system shall be realized in order to provide quality sustainability of water resources throughout the whole region.

Bakırçay river is also getting polluted due to the partial wastewater problems at Bergama and Kınık. At these areas, treatment facility investments shall be supported. Furthermore, the process waters of the industrial enterprises and thermal power plant at Soma district in Manisa pollutes Bakırçay. The untreated wastewater and solid waste problems in Bayındır, Beydağ, Kiraz, Ödemiş, Selçuk, Tire and Torbalı districts cause the Küçük Menderes basin to be polluted. Gediz basin gets most of its pollution from Manisa, while also suffering from dense pollution in result of the urban wastes at Foça, and urban wastes along with agricultural and industrial activities at Kemalpaşa and Menemen. Especially the industrial activities at Kemalpaşa and insensible agricultural activities at Menemen are the most significant pollution sources for Gediz. Technical and financial support shall be provided for the treatment of domestic wastewaters at Küçük Menderes and Gediz, along with the implementation of environment management systems towards industrial and agricultural activities. The farmers around these basins shall be educated regarding sensible and modern agricultural applications, and with pilot schemes the area of effect shall be increased.

Aim 2 (SP11A2): Sustainable management of drinking water and utility water shall be provided

In İzmir, 40% of the drinking water demand is met through dam reservoirs, and 60% through

underground waters. While it may be evaluated as a result of this, another point to highlight is; the ratio of population serviced with treatment facility within total municipality population occurred to be 29% as of year 2006, which is below the Turkey average of 49%.. The ratio of population given service with drinking and utility water within total municipality population is 97%, and thus lower than the Turkey average value of 98%. With the treatment facilities established in the region, the adverse quality aspects found in the underground water has begun to be prevented. On the other hand, at surrounding districts there are qualitative problems rather than quantitative problems regarding water. At the villages residing within these regions and neighbouring districts, chlorination and storing services are required. Investments shall be realized at Menderes (Özdere, Tekeli), Ödemiş (Bademli, Gölcük), Bayındır (Zeytinova), Bergama, Beydağ, Çeşme, Dikili, Foça (Gerenköy) which are among districts that outstand when the data on municipality population given service with drinking and utility water are considered.

Moreover, administrative and technical arrangements shall be made and the continuity of an effective supervision and control system shall be realized in order to provide quality sustainability of water resources throughout the whole region. Regarding water usage other than drinking water supply; water saving shall be realized in industrial and domestic water uses and especially in agricultural uses, while having the techniques and technologies regarding water recycling shall be put to use and developed. Especially for the agricultural and industrial activities, in which more than 50% of the underground waters are consumed, excess water drains shall be prevented.

Aim 3 (SP11A3): Sustainable management of industrial and domestic wastewater shall be provided

Considering both its important basin areas and its coasts facing Aegean Sea, realization of wastewater management in İzmir is very important. The ratio of population given service with WTF to the total municipality population is 76%, and this value is significantly lower than the value in developed countries where this value varies between 85% and 100% in especially in regions of touristic value. While the works aimed towards wastewater treatment are in progress in the districts of Aliğa, Bayındır, Foça, Kemalpaşa, Menderes, Menemen, Seferihisar, Torbalı, Urla; the districts of Beydağ, Tire, Kınık, Ödemiş are among districts in need of investment regarding wastewater treatment. On the other hand, investments towards sewer system are aimed yet again in the districts of Aliğa, Bayındır, Bergama, Beydağ, Çeşme, Dikili, Kiraz, Menemen, Ödemiş, Selçuk and Torbalı. In Karaburun, the population ratio given sewer (sanitation) grid service is 40%, and considering the district's blue flag beach potential, this issue is definitely among the most important titles in need of investment within the district. In that context, the waters used for swimming and recreational purposes in İzmir shall be prevented from pollution by any pollutant (microbiologic pollutants coming foremost), water quality shall be monitored and supervised.

It is observed that there are serious deficits in OIZs regarding waste management. Only 30% of the enterprises have sewer grid connection, 2% have preliminary treatment facilities and 35% are connected to main WTF. In free zones, although all of the enterprises have sewer connections, it is observed that only 4% have preliminary treatment facility and around 12% of them are connected to WTF. Therefore, infrastructure works towards wastewater treatment shall be supported at industrial zones. Also, the treatment of water shall be realized with the most suitable technologies at single enterprises, implementations towards recycling shall be supported and constitution of environment management systems shall be provided in this regard.

Aim 4 (SP11A4): The soil and water pollution caused by agricultural activities shall be prevented

Considering that the share of agriculture in total employment is 18% and the ratio of

agricultural areas within total acreage is 30% in İzmir, it is seen that agriculture is among the most important economic sectors in İzmir. At this point, the significance of agricultural activities' environmental effect is also obvious. The pollution resulting from the drainage waters caused by irrigation in the region shall be prevented. With Menemen coming foremost, at all basins the water and soil pollution caused by agriculture-based nitrate shall be monitored, minimized and prevented.

Performance Indicators for “Realizing Sustainable Water and Wastewater Management at Basin Areas, Regions with Touristic Significance and Rural Areas” Priority

Annual usable water potential quantity per capita shall be increased from 614 m³/person to 1,000 m³/person.

The ratio of population given drinking water service with treatment plant within total municipality population shall be increased from 29% to 35%.

The Water Quality Classes of Gediz, Bakırçay, Küçük Menderes Rivers shall be improved respectively from III/IV/IV quality classes to II/II/III quality classes.

The ratio of population given drinking water service with treatment plant within total municipality population in Gediz Basin shall be increased from 15% to 85% until year 2012.

The ratio of population given drinking water and utility water service within total municipality population shall be increased from 97% to 99%.

The ratio of population given service with Water Treatment Facility (WTF) within total municipality population shall be increased from 76% to 82%.

The ratio of population connected to Sewer Grid within total municipality population shall be increased from 96% to 98%.

Establishments' connection to WTF ratios in OIZs shall be increased from 37% to 50%.

Water reuse ratio in industry shall be increased from 10% to 25%.

SP12: Providing Sustainable Solid and Hazardous Waste Management

Regarding the field of solid wastes and hazardous wastes, a total of 9,560 million Euros investment demand is foreseen until year 2023 according to the national environmental approximation strategy. Although not a regional action, solid and hazardous waste management is indispensable for the region in respect to the importance of environmental sustainability considering the wide variety of key sectors in İzmir. With a daily domestic waste amount of 4,320 tonnes, the fullness rates of the disposal facilities in İzmir show that the produced waste amount is increasing with an annual acceleration rate between 10% and 16%. Therefore, the necessary actions regarding both infrastructure and waste reduction should be taken. On the other hand, the hazardous waste amount produced in İzmir is equal to 88% of total amount in Aegean Region. The waste amount being vast and appropriate hazardous waste disposal facilities being scarce cause problems and illegal dumping. This situation shows the necessity of producing solution to this matter. In order to manage İzmir's solid and hazardous wastes in a sustainable way, utilization of new and innovative environmental technologies is necessary. The fact that high tech industries which is one of the key sectors of İzmir shall be supported in that direction completes this integrated strategy. The table on the following page displays the upper scale plans, documents and strategies relevant to this priority.



Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure
Ministry of Environment and Forestry-EU Integrated Environmental Approximation Strategy (UÇES) (2007 - 2023)	Waste Sector Development Axis	• Solid Waste Production Shall Be Decreased • Measures Shall Be Taken that Will Realize the Recovery and Regular Storage of Solid Wastes via Suitable Methods • Measures Shall Be Taken While Taking into Consideration the Competition Conditions and Domestic Market Requirements Regarding Packaging and Packaging Waste Management • Management of Hazardous Wastes Shall Be Realized • Management of Medical and Special Wastes Shall Be Realized
	Industrial Pollution Control Sector	• Execution of Works that Will Realize the Implementation of the Best Existing Techniques at Industrial Plants and Large Incineration Plants Shall Be Carried Out Cooperatively by All Relevant Sides
Turkish Industry Policy	Organized Industrial Zones, Industrial Sites and Industry Areas	• Foundation of Waste Recycling Facilities in Organized Industrial Zones Shall Be Supported
National Environmental Action Plan	Management of Hazardous Wastes	• Reduction of Hazardous Wastes

Within the context of this priority, three aims have been defined.

Aim 1 (SP12A1): Recovery, recycling and reuse of urban and industrial solid and hazardous wastes shall be realized

In the region, Çiğli wastewater treatment facility is producing 600 tonnes of sludge per day. Projects are being produced in universities regarding the disposal or recycling of this sludge. Implementation projects shall be formed regarding this issue and reutilization or appropriate disposal of the sludge shall be realized with suitable techniques and technologies. On the other hand, approximately 25% of the urban solid waste comprise of recyclable plastic, paper, glass, carton and metal wastes. In result of the recycling actions getting accelerated at the region, the recovered solid waste amount will increase. Major amount of the industrial waste within Aegean Region exists within İzmir. Within the framework of sustainable development principles, the recycling, recovery and reutilization amounts of domestic solid waste from İzmir and industrial solid and hazardous waste especially from Kemalpaşa, Menemen, Gaziemir and Aliağa shall be increased.

Aim 2 (SP12A2): Solid waste and hazardous waste storage and disposal capacities shall be increased

The urban and industrial waste storage capacities of the region shall be increased. Construction of the new sanitary storage facility that shall be established at Torbalı in order to meet the demand stemming from the inadequacy of existing urban solid waste storage capacity shall be accelerated. Number of solid waste transfer stations shall be increased, the transfer stations considered to be built in Urla, Helvacı, Kemalpaşa and Selçuk shall be

completed and unsanitary storage areas shall be closed. Projects shall be produced to meet İzmir's demand for hazardous waste disposal, and construction of sanitary storage facilities shall be realized for hazardous waste. Also, reduction of waste types most problematic regarding disposal such as urban wastewater sludge, treatment sludge that stems from leather industry and slag waste that stems from iron-steel industry and is within nonhazardous waste characteristic shall be realized, and suitable disposal methods shall be developed for these wastes.

Aim 3 (SP12A3): Awareness of industrialist and urban consumer actors shall be raised

The studies conducted in the region display that the manufacturer companies are not knowledgeable of the necessities brought by national environment legislation that is being renewed. The awareness of industrialists shall be raised regarding disposal methods, which of the wastes are hazardous, with which most suitable techniques shall the implementations regarding pollution prevention and clean production may be increased in relevant sectors, and waste exchange market shall be encouraged

Performance Indicators for “Providing Sustainable Solid and Hazardous Waste Management” Priority
Solid waste transfer station capacity shall be increased from 1,304 tonnes/day to 1,800 tonnes/day.
Solid waste disposal capacity shall be increased from 2,300 tonnes/day to 4,500 tonnes/day.
Hazardous industrial waste ratio shall be reduced from 10.2% to 8.5%.
Ratio of recovery and reuse of solid waste shall be increased from 4% to 15%.
Urban waste recovery ratio shall be increased from 1% to 5%.

SP13: Realizing and Improvement of Air Quality Control

In result of the air pollution based on domestic heating, transportation and dominantly industry, sustainable control of air quality and improvement within İzmir gains importance. It is observed that the region stands at a strong position regarding its renewable energy resources potential. Therefore this priority shall be handled along with industry based on advanced technologies and renewable energy sectors that cover environment technologies in a sectoral way. The table on the following page displays the upper scale plans, documents and strategies relevant to this priority.

Three aims have been defined within the context of this strategic priority.

Aim 1 (SP13A1): Renewable and clean energy utilization in industry and domestic consumption shall be encouraged

Approximately 60% of the total energy consumed in İzmir is utilized for industrial purposes. This value is significantly above the Turkey average which is approximately at 45%. Therefore, an important source of air pollution in İzmir is industry. Especially the electric arc furnace iron and steel plants (plant producing steel from scraps), ship dismantling facilities, refinery, petrochemistry, gas filling facilities, rolling plants and other facilities, which are functioning in Aliağa and are all classified as “facilities with high pollution characteristic” within regulations, are the most important air pollutants in İzmir. Clean energy utilization shall be increased in

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure • Developing Energy and Transportation Infrastructure
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Realizing Environmental Sustainability	• Realizing the Integration of Country Policies and Programs, and Reversing the Loss of Environmental Resources with Sustainable Development Principles
Ministry of Environment and Forestry EU Integrated Environmental Approximation Strategy (UÇES) (2007-2023)	Air Sector Development Axis	• Air Quality Aims Shall Be Defined and Formed • Air Quality Shall Be Determined Based on Defined Methods and Criteria • Implementing Action Plans Towards Improving Air Quality, and Utilization of Environment-Friendly Clean Technologies Shall Be Realized
	Industrial Pollution and Control Sector	• Relevant Directives Shall Be Integrated into Domestic Legislation and Implemented Effectively While Also Considering the Investment Needs of Facilities and Realization Time of these Investments
National Environmental Action Plan	Air Pollution Arising From Energy Sector	• Supporting Renewable Energy Resources Utilization
National Climate Change Strategy Document (2010-2020)	Climate Change National Aims	• Developing the R&D and Innovation Capacity Towards Clean Production While Considering Our Existing Technology and Development Level, Creating the National and International Financial Resources and Incentive Mechanisms that Will Provide the Increase of Competition and Production in This Field

Aliağa, along with the industrial processing plants and cement factories in Kemalpaşa and Torbalı, and the current emissions shall be decreased by utilizing new technologies.

In the region, a dense air pollution is experienced during winter months. While domestic heating could have been realized especially via geothermal energy, only 11% of the exiting domestic heating potential is currently utilized in the region. Therefore, geothermal domestic heating investments in Dikili, Bergama, Aliağa, Seferihisar, Çeşme, Bayındır, Balçova and Narlıdere districts shall be accelerated. On the other hand, in regions where geothermal energy domestic heating is not applicable, natural gas utilization shall be universalized.

Aim 2 (SP13A2): Solid waste and hazardous waste storage and disposal capacities shall be increased

There are six air quality measurement stations within İzmir, namely in Alsancak, Bornova, Karşıyaka, Güzelyalı, Çiğli and Buca. Also, the Ministry of Environment and Forestry collects measurement values from Gaziemit Measurement Station. However, in industrial zones such as Aliağa, Torbalı, and Kemalpaşa, there are no air quality measurement stations. For that reason, regular monitoring and thus control of air pollution shall be carried out in industry-intensive zones such as this and the likes that are outside city centre.

Performance Indicators of “Realizing and Improvement of Air Quality Control” Priority

PM₁₀ concentration shall be reduced from 52 µg/m³ to 35 µg/m³.

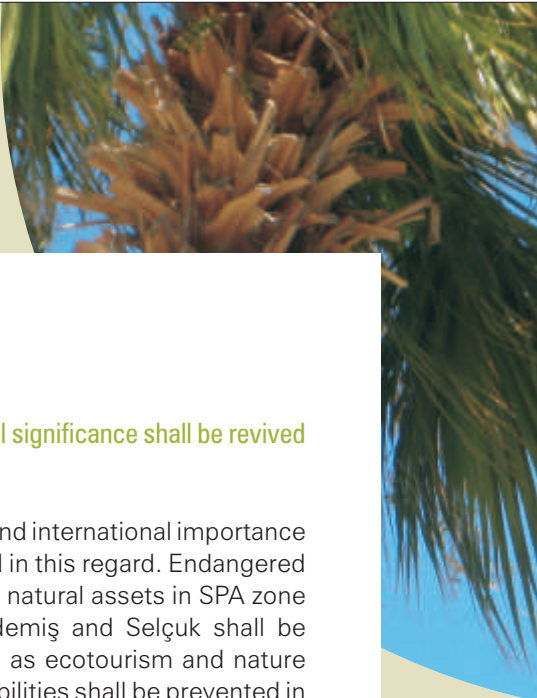
For SO₂ concentration the 18 µg/m³ value shall be maintained.

Geothermal resource potential used in residential heating to theoretical geothermal resource potential ratio shall be increased 11% to 15%.

SP14: Providing the Continuity of Sensitive Ecosystems and Biodiversity

İzmir houses some very important sensitive ecosystems. Foça is one of the 14 areas accepted as Specially Protected Areas (SPA) in Turkey and houses Mediterranean Monk Seals. 217 out of 426 bird species existing in Turkey are observed within Gediz Delta. Among these 217 bird species, there are 28 bird species that are globally endangered. Also, there are 700 plant species at the delta and 11 out of these are endemic species. On the other hand, there are some special species also at Kemalpaşa (Nif Mountain), Çeşme (Alaçatı, Zeytineli), Karaburun, Ödemiş (Bozdağ) and Selçuk. Although the forested area ratio is high at the region, the ratio of productive forest areas is low. In the framework of International Biodiversity Convention, and the following National Biodiversity Strategy and Action Plan, the subjects of preservation of biodiversity and sustainable utilization of biological resources have gained importance. In this region of significant biodiversity, these aims include aims that support the key sector of tourism. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure • Activating Agricultural Structure
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Realizing Environmental Sustainability	• Realizing the Integration of Country Policies and Programs, and Reversing the Loss of Environmental Resources with Sustainable Development Principles
Ministry of Environment and Forestry-EU Integrated Environmental Approximation Strategy (UÇES) (2007-2023)	Environmental Preservation Sector	• Determining the Factors Causing the Loss of Biological Diversity and Taking the Measures Towards Alleviating These Factors
Ministry of Environment and Forestry-Foça Specially Protected Area Action Plan (2008-2013)	Research, Tracking and Preservation of Biodiversity	• Monitoring Water Quality, Preserving Biodiversity
National Environmental Action Plan	Preservation of Natural, Historical and Cultural Assets	• Increasing the Monetary Resources to Be Used for Protection



Two aims have been defined under this strategic priority.

Aim 1 (SP14A1): Region ecosystems bearing national and international significance shall be revived by considering the preservation-utilization balance

Preservation and publicity of the region ecosystems with national and international importance shall be realized and awareness raising actions shall be conducted in this regard. Endangered endemic species shall be preserved. Especially the reservation of natural assets in SPA zone Foça, Ramsar zone Gediz Delta, and in Çeşme, Karaburun, Ödemiş and Selçuk shall be protected; these areas shall be prepared for tourism types such as ecotourism and nature tourism. Actions that disregard national and international responsibilities shall be prevented in such tourism types, and projects that will ensure minding the protection-utilization balance shall be developed. Protected areas towards preservation of wetlands shall be displayed at all physical plans, and road maps towards the protection and management of wetlands shall be created. Projects shall be developed at wetlands such as Gediz Delta, Alaçatı coastal ecosystems, Gölcük Lake, Küçük Menderes Delta, and already prepared management plans shall be implemented.

Aim 2 (SP14A2): Biodiversity shall be protected

At the region actions have been started on determining and preserving the biodiversity. Especially at industrial zones, projects shall be realized for the purposes of designation, preservation and awareness of biodiversity. Biodiversity shall be monitored and protected at the seas and at wetlands. Oran and Siren reefs that are of vital importance to the Mediterranean Monk Seal as breeding and birthing places in Foça shall be protected against settlement based sea pollution, management plan works regarding the area shall be completed. Status check, rehabilitation of unsanitary storage areas and wastewater treatment facility efficiency realization at these regions are also important. Furthermore, development and implementation of monitoring programmes shall be initiated for the purpose of better utilizing forest biodiversity, appropriate mechanisms shall be constituted for the more effective preservation and sustainable utilization of forest diversity.

Performance Indicators for “Providing the Continuity of Sensitive Ecosystems and Biodiversity” Priority

Unproductive forest area ratio shall be reduced from 83% to 70%.

SP15: Providing Energy Efficiency

Energy consumption is constantly and rapidly increasing based on industrialization and economic growth. The subject of international-scale energy efficiency has come up in the beginning of 2000s, and some implementations have begun at both legal regulations and at action plans levels. In our country too, the Energy Efficiency Law has been issued and thus the realization of energy efficiency has been prescribed in many fields, especially at residences and industry. As of year 2007, the electric consumption per capita is 4,139 kWh in İzmir, this average value is 2,879 kWh for Aegean Region and 2,198 kWh throughout Turkey. This situation shows that the energy consumption is at significantly high levels within İzmir region. It is important to realize energy efficiency at residences, workplaces and notably the industrial facilities which realize the major part of electricity consumption. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Developing Energy and Transportation Infrastructure
UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)	Realizing Environmental Sustainability	• Realizing the Integration of Country Policies and Programs, and Reversing the Loss of Environmental Resources with Sustainable Development Principles
Ministry of Energy and Natural Resources Strategic Plan (2010-2014)	Energy Supply Safety	• Increasing Energy Efficiency
Turkey Energy Efficiency Strategy	Developing Energy Efficiency Strategy in energy consumption sectors (industry, building, transportation) and Providing Technical/Financial Support for its Implementation	• Facilitating the Development of Turkish Energy Efficiency Policy • Facilitating the Creation of Institutional Arrangements for the Activation of the Strategy • Energy Efficiency in Buildings • Energy Efficiency in Industry • Energy Efficiency in Municipalities • Energy Efficiency in Transportation
National Environmental Action Plan	Preservation of Natural, Historical and Cultural Assets	• Increasing the Monetary Resources to Be Used for Protection

One aim has been determined for this priority. It is important to support especially innovative and advanced technologies in the region in order to achieve the aim in question.

Aim 1 (SP15A1): Energy efficiency shall be encouraged and technology utilization towards this goal shall be supported

It is foreseen that as of year 2020, energy consumption shall display an increase more than twice its value in 2007, in parallel to the industrialization and technological developments. Energy efficiency reduces foreign dependency while increasing the competitiveness of manufacturer industrial enterprises at domestic and foreign markets, providing energy saving from heating and lighting expenses within family or establishment budget. This way, a positive contribution to environment and human health is obtained. In this regard, projects enabling more production with the same energy especially in industry-intensive industrial facilities shall be developed. Moreover, electricity saving at public and private sector buildings, and the awareness of public on energy culture and efficiency shall be developed.

Green buildings provide significantly more energy saving (around 30%) compared to not green ones. All buildings to be built on countries which constituted green building legislation should be in compliance to this legislation. Awareness of local administrations in İzmir of 'green buildings' shall be raised, and the potential of green buildings sector shall be revealed.

'Smart grid' implementations that enable residences and workplaces to reside within the grid not only as energy consumers but also as energy producers shall be developed.

Performance Indicators for "Providing Energy Efficiency" Priority

Electricity consumption used in residences per capita shall be reduced from 790 kWh to 700 kWh.



Sustainable Environment Development Axis SWOT Analysis

STRENGTHS

- Limiting the quality of fuels utilized in domestic heating and industry and supervision of the fuel used
- Transition to natural gas in industry and domestic heating
- The existence of the Treatment Facility, activated in year 2000 within the context of the Great Channel Project (Büyük Kanal Projesi), in order to eliminate pollution in İzmir Bay
- Coasts of İzmir constituting living, feeding and breeding grounds for the Mediterranean Monk Seal
- Housing many bird species
- Employing wild life preservation areas
- Employing the technical capacity regarding recycling and waste management
- Existence of universities and research centres working on the environment
- The public and local administration organizations and universities within the province enjoying the benefit of past project experiences
- Forest assets being abundant compared to Turkey average



OPPORTUNITIES

- Investments towards infrastructure and treatment facilities being increased at surrounding provinces and districts
- The fact that soil pollution will decrease as organic agriculture is developed
- Domestic, cheap and clean energy being supported by European Union and national renewable energy policies



WEAKNESSES

- The existence of serious deficits in OIZs regarding waste management
- Water resources being inadequate
- The ratio of population serviced with treatment facility being low, and the chlorination/storage services being deficient in some districts
- Serious deficits in the sewage system
- The problem of marine pollution
- Capacity and waste storage infrastructure being insufficient regarding solid waste disposal
- Inadequate waste sludge elimination
- Industrial plants adversely affecting urban air quality, also being problematic concerning waste materials
- Gediz Basin being polluted mostly from industrial; Bakırçay Basin from agricultural and Küçük Menderes Basin from domestic and agricultural activities
- Water reutilization ratio being low within industry
- Environmental management systems' utilization ratios being low
- Lack of knowledge regarding hazardous waste within companies; and in companies with the knowledge, storage problem; the licensed recycling plants used for hazardous waste recycling being unable to meet the sufficient capacity
- Insufficient pollution control at all basins
- Insensible and non-controlled use of fertilizers and agricultural disinfectants
- Water level of Küçük Menderes continuously falling due to the excessive digging of underground water wells
- Being below Turkey average in terms of productive forest areas
- Forest of İzmir province being comprised of 1st degree fire-sensitive forests
- Air pollution measurement stations being inadequate
- Lack of sufficient number of wastewater treatment facilities
- Quality areas housing endemic species being under no kind of protection status

THREATS

- Global warming and climate changes being experienced
- Continuation of some pollution inputs adversely affecting the improvement process of İzmir Bay
- Entry of domestic wastes and industrial wastes to Gediz basin from other surrounding provinces
- Industrial plants' close proximity to settlement centres constituting environmental threats



DEVELOPMENT AXES

4.4 Strengthened Infrastructure and Superstructure

One of the most important steps in the economic and social development of a region is the development of infrastructure and superstructure as to support economic and social life. The development of infrastructure and superstructure with the key sectors coming foremost is one of the fundamental development axes of 2010-2013 İzmir Regional Plan.

In the Ninth Development Plan, it is aimed to develop infrastructure and superstructure through various policies and strategies. Also, developing the energy and transportation infrastructure and thus "supplying the energy necessitated by economic development and social advance in a continuous, secure way with minimized cost" is among national-scale aims defined in this plan. Likewise, environment protection and urban infrastructure development is stipulated in the Ninth Development Plan. Preserving and developing the genuine historical and natural heritages to turn into economic assets has been defined as one of the strategic priorities and aims within the plan.

A strong infrastructure and superstructure is among the fundamental aspects for increasing the quality of life supporting production and increasing regional economy competitiveness. In this context, the purpose of this development axis is **accelerating İzmir's economic and social development by developing the transportation, urban, environmental, social, cultural and informative infrastructures**. Four strategic priorities have been defined under this development axis context.

SP16: Strengthening Transportation Grids

Transportation grids carry great importance regarding providing physical, sociocultural and economic connections between a region and other regions. Developing the transportation grids that

connect İzmir to neighbouring provinces, other regions of the country and foreign regions appears as a fundamental priority in regards to vitalizing regional economy. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Developing Energy and Transportation Infrastructure
Transportation Master Plan Strategy	Railroads	• Prioritizing Combined Transportation
	Maritime Lines	• Completing the Infrastructure Investments for Our Existing Ports to Give Services at International Minimum Standards towards Ships, Loads, Passengers and Environment in Their Maritime Transportation Activities, and Realizing the Compliance of Our Ports to Technology, International Rules and Standards • Developing Combined Transportation with Railroads Highways Connection • Effective Realization of the Privatization Works Initiated at Public Ports • Determining and Developing the Ports that Will Be Transshipment Centre in Aegean and Mediterranean Seas
Transportation Master Plan Strategy	Urban Transportation	• Prioritizing Public Transportation • Utilization of Infrastructure and Investments • Rail Systems • Car Park Policy • Pedestrianization
	Combined Transportation	• Elaboration on the Universalization of Combined Transportation • Concluding the Support Works on Combined Transportation • Realizing Necessary Investments
	Logistics	• Realizing Countrywide Logistic Integrations, Executing or Completing Infrastructure Investments that Will Increase Sectoral Efficiency and Effectiveness • Special Priority on Urban Logistics

Four aims have been defined under this strategic priority.

Aim 1 (SP16A1): Roads, maritime lines, airline network and railways in İzmir shall be strengthened, supporting the key sectors

İzmir, the centre of Aegean Region, bears the characteristic of a transition point connecting settlement areas and agricultural, industrial and touristic zones due to its location. Along with this, it has international connections due to its seaports and Adnan Menderes Airport.

Regarding vitalizing the economy and increase the national and international scale competitiveness of İzmir, initially the transportation connections shall be strengthened for the development and acceleration of key sectors, Agriculture and Agro-Industries, High tech Industry, Tourism, Renewable Energy and Logistics sectors.

In that direction, improving the connections of İzmir with neighbouring provinces, İstanbul and Ankara, activating the İzmir-İstanbul Highway Project and İzmir-Ankara High Speed Train Project,

diversifying and increasing the direct flights from İzmir to foreign countries, strengthening the main arterial connections of existing ports, notably İzmir Port, and the Çandarlı Port to be built, towards intermodal transportation, integrating especially the ports and railroads to that purpose, establishing the logistical centre that will enable İzmir to become a logistics base, and the construction of a new cruise port are of importance.

Aim 2 (SP16A2): Transportation connections and infrastructure of İzmir Port shall be strengthened, the quantity of containers handled at the Port shall thus be increased

İzmir Port, which is the most prominent export port of Turkey among container handling ports operated by public sector, has occupied an important position not only for İzmir but also for Turkey. For the port that became situated within city centre as the city developed, activities such as expansion works, channel combing, and technical equipment purchase are being planned. The current physical structure of the port prevents large ships from docking the port due to the channel depth and therefore causes them to prefer other ports. For uplifting İzmir Port to major port status, the privatization process should be completed and the port should be strengthened regarding operation capacity.

İzmir Port coming to be within the city centre increases the traffic density due to entries/exits to and from the port. Right along with this situation; the inadequacy of connection lines despite the existence of railway lines within the port, and lack of rails suitable for load transportation at the points where connections exist constitute obstacle against increasing the combined transportation to be had. In order to eliminate these problems and realizing capacity increase, road and railway connections of the İzmir Port shall be improved, beginning with approach connections to the by-pass freeway.

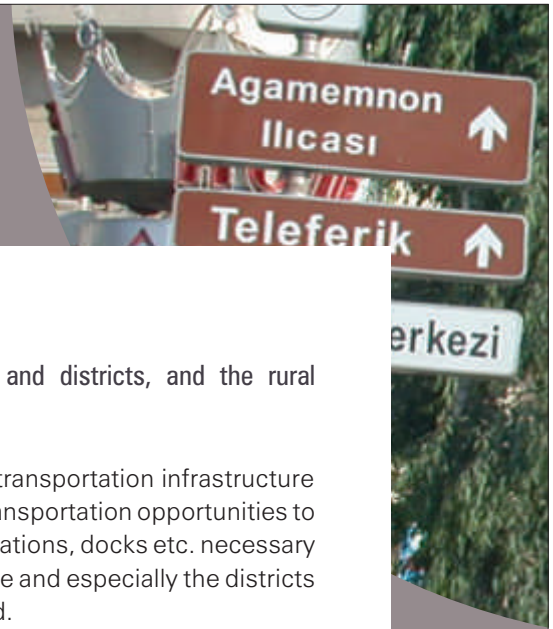
In İzmir Port to where large ships cannot dock or can only dock with 25-30% less capacity, approach channel combing works should be done in order to increase depth. In order to eliminate the jam caused by the technical equipments that are used at the port load-unload processes being inadequate, and functioning inefficiently due to operator scarcity, and thus the problem of ships waiting for long periods; the port shall be strengthened regarding technical equipments and the operator scarcity shall be resolved.

Aim 3 (SP16A3): Domestic (intracity) transportation opportunities shall be strengthened with maritime transportation and railway systems coming foremost

Having a wide variety of domestic transportation options due to its location, the works which had been accelerated in the recent years towards reducing the share of freeway transportation that had the greatest portion until this day, to strengthen maritime transportation and railway systems should be continued, and the domestic transportation systems should be integrated within the Transportation Master Plan. In this regard, it is important that the railway system works in progress or plan stages are continued and dock and cruise numbers of maritime transportation are increased and service quality is improved.

Actions shall be conducted towards the solution of the parking problem that concentrates the most around the city's commerce and entertainment centres along with the traffic and environment problems caused by the number of motor vehicles in İzmir almost doubling in the last 10 years.

Complementary to intracity transportation system, pedestrian and bicycle transportation types shall be given importance, and pedestrian walks and bicycle paths shall be universalized for the encouragement of such types. Handicapped people shall be taken into consideration regarding intracity transportation planning.



Aim 4 (SP16A4): Transportation connections between Centrum and districts, and the rural transportation infrastructure shall be strengthened

With the improvements to be made at the roads that form rural transportation infrastructure and connect districts to villages, increasing and diversifying the transportation opportunities to districts, and the construction of physical infrastructure like bus stations, docks etc. necessary for these, the transportation connections between İzmir city centre and especially the districts where touristic activity is concentrated upon shall be strengthened.

Also, development of agricultural products' sales and marketing opportunities and strengthening of accessibility opportunities of the agriculture input raw materials to the agriculture fields are of importance for İzmir. In order to meet the regional demand regarding this subject, production roads at agricultural areas shall be strengthened and the infrastructure regarding this purpose shall be developed.

Performance Indicators for “Strengthening Transportation Grids” Priority
Number of foreign cities to where direct flights are made shall be increased from 103 to 120.
Number of car parks operated by İzmir Metropolitan Municipality shall be increased from 54 to 60.
Total length of pedestrian walks at city center along the coast shall be increased from 37.4 km to 45 km.
Total length of bicycle paths at city center along the coast shall be increased from 25.8 km 30 km.
The ratio of asphalt village roads to overall village roads shall be increased from 74% to 85%.
Quantity of containers handled at İzmir Port shall be increased from 884,966TEU to 1,200,000 TEU.

SP17: Improving the Infrastructure Related to the Utilization of Natural and Historical Assets, and City Aesthetics

İzmir possesses many natural and historical assets both within and outside city centre. These assets carry potential especially regarding the tourism sector, and improvements have to be made to the existing infrastructure for this potential to be realized. In addition to this, all aspects such as structures and structure groups, greenery areas, gardens, yards, roads and squares should be organized to form an integrated whole within urban environments.

City attractiveness should be improved by having aspects such as city furniture, lighting components, bus stops, direction signs, panels, phone cabins, paving stones to constitute an integrity regarding urban aesthetics. The environment, which is constituted in the region with the combination of structures and these components, should be improved to bear not only functional but also urban aesthetical features. The table on the following page displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure
Ministry of Culture and Tourism, Turkish Tourism Strategy 2023 Action Plan (2007-2013)	Branding at Urban Scale	• Architectural Arrangements • Social and Cultural Arrangements
National Rural Development Strategy	Developing Rural Infrastructure	• Developing Rural Area Physical Infrastructure Services and Increasing the Quality of Life
	Developing Rural Area Physical Infrastructure Services and Increasing the Quality of Life	• Development and Preservation of Rural Settlements

Two aims have been defined under this strategic priority.

Aim 1 (SP17A1): Infrastructure facilitating the utilization of existing natural, historical and cultural assets shall be developed

For the existing rich resources of İzmir to better contribute in tourism, restoration, renewal and improvement works shall be conducted on components like museums, cultural centres, historical structures and monuments. Presentation and service quality of existing museums shall be increased, and construction of new museums shall be initiated. Museums shall function at areas planned as museum zones where their specific demands are met. Also, the transportation infrastructure to tourism areas (touristic zones, historical structures, rural tourism areas, wharfs/ docks/ ports, museums, airport etc.) and between tourism areas shall be strengthened.

Aim 2 (SP17A2): Areas significant regarding tourism shall be improved in respect to visual perception and landscaping

Visual perception and landscaping works are important regarding making areas of touristic significance more effective, beautiful and comfortable, and attracting more people to these places due to the visitors being pleased with their experiences.

In this regard; components such as billboards and signs that point visitors to relevant directions in areas like historical sites, structures and ruins shall be arranged as to not disrupt the area's genuine quality, yet adequate for the visitors to know and understand the place. Areas of touristic significance shall be rendered suitable for activity at every hour of the day with applications such as night-time illumination. City entrances which are of vital importance regarding the visitors' first and last impressions shall be visually improved. At these areas of touristic significance, physical opportunities facilitating the visits shall be created and developed especially for disadvantaged groups.

SP18: Improving the Quality of Life via Social, Cultural and Urban Transformation

Having a population increase above Turkey average and an urban population ratio again above the region and country average values, İzmir is continuously taking in immigrants from neighbouring provinces and regions, and from rural areas to urban areas within itself. This

trend brings along unplanned settlement at city centre and other urban areas, and increases the demand for the development of the region's social and cultural infrastructure.

Improving the social reinforcement areas within the city for increasing the quality of life and realizing urban transformations of urban areas in need of renewal without disregarding the social and environmental conditions are among the prioritized demands of İzmir. Moreover, increasing the city's attractiveness with the urban transformation to be realized at certain areas of the city will be effective also regarding economic field in attracting the tourists and investors to the city. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure
Ministry of Culture and Tourism, Turkish Tourism Strategy 2023 Action Plan (2007-2013)	Branding at Urban Scale	• Architectural Arrangements • Social and Cultural Arrangements
National Rural Development Strategy	Developing Rural Infrastructure Services and Increasing the Quality of Life	• Development of Rural Infrastructure • Development and Preservation of Rural Settlements

Two aims have been defined under this priority.

Aim 1 (SP18A1): Actions towards urban transformation shall be activated

The immigration and unplanned urbanization problems extensively experienced by large cities throughout Turkey since 1950s has been experienced also by İzmir. In result of the rapid population increase based on immigration being combined with lack of supervision and planning between 1950-2000, approximately half of the inhabitable areas of the city have been used for illegal housing. In result of this process it is seen that settlement areas that are under disaster risk and devoid of all kinds of security, social, cultural and urban technical infrastructure have covered a major portion of the city. In addition, urban spaces that are transforming in an unhealthy way in economic and social sense, notably İzmir Centrum, are among the areas in need of renewal, rehabilitation and transformation in İzmir.

In this scope, actions realized towards shanty housings, existing structure stocks and historical and cultural spaces within the city, which are handled within the context of the urban transformation, rehabilitation and renewal projects, shall be supported. In this context, creation of an Urban Transformation Guide that stipulates the criteria of policy maker and implementer institutions who carry out works towards urban transformation, and the social, economic, cultural and spatial fundamental references and principles for the social segments and areas effected by the process shall be supported. Commercial attraction centres shall be developed in the city centre and more effective use of these shall be provided. The transformations and renewals of commerce areas and trade centres of, notably Kemeraltı, the historical trade centre of the city, followed by Alsancak, Liman Arkası Salhane, Bayraklı regions shall be realized.

Aim 2 (SP18A2): Quality and capacity of social reinforcement areas shall be increased

Social reinforcement and recreation areas support individuals towards living healthy lives, realize their healthy integration among their own age group and overall society, and improve urban texture. Due to İzmir being a regional centre that develops fast and attracts immigrants, the existing capacity of province's social and cultural infrastructure components gets rendered inadequate. This situation prevents healthy urbanization, and weakens social inclusion and integration. The infrastructure in question covers museums, libraries, theatre halls, movie theatres, art centres, and cultural centres.

A significant children, young, elderly and handicapped population resides in İzmir, which reflects a rapidly urbanizing population structure. Quality and capacity of social reinforcement and recreation areas that are sometimes specific to different societal groups and sometimes common should be increased. In order to increase the quality of life and realize healthy urbanization, social reinforcement and recreation areas such as parks, cultural facilities, sports areas -towards the general public and notably elderly people, children, youth and handicapped people- should be universalized, and existing ones should be improved. In that context, the quality and capacity of social reinforcement areas in İzmir shall be increased in parallel to the national scale aims in scope of İZBP.

The cultural infrastructure should be likewise improved in İzmir in terms of both accessibility and quality. Despite the archaeological, historical, cultural and social potential of the region, the museums within the province concentrate mostly around city centre. Similarly, despite the archaeological and historical potential all throughout the region, no effective museum application could be developed at the historical sites except the world-famous Ephesus and Bergama. In our current day, it is a well known fact that especially the thematic cultural museums create a cultural and artistic potential and thus aid the region be a sociocultural attraction centre. However it is seen that an effective museum infrastructure could not be developed also in this area within İzmir borders. It is observed that the demand for movie theatres and theatre halls increase within the province faster and stronger than country average. Likewise, the necessity towards cultural infrastructure such as youth and social centres is also on rise. Therefore within the Plan context, actions towards increasing the quality and capacity of cultural infrastructure components shall be supported.

Performance Indicators for “Improving the Quality of Life via Social, Cultural and Urban Transformation” Priority

Number of museums shall be increased from 16 to 20.

Number of public libraries shall be increased from 43 to 50.

Number of theatre halls shall be increased from 26 to 30.

SP19: Improving the Urban and Rural Infrastructure

The condition of infrastructure facilities at urban and rural living areas is the most definitive factor of development and an important indicator of a country's development level. Completing the urban and rural infrastructure regarding transportation, environment, energy and informatics infrastructures is important. It is necessary for regional development in İzmir to complete these infrastructures at urban and rural areas and to plan, improve and reconstruct the structures, commerce and living spaces especially considering high disaster risk. The table below displays the upper scale plans, documents and strategies relevant to this priority.

Relevant Upper Scale Plans / Documents / Strategies	Development Axis / Strategic Purpose	Priority
Ninth Development Plan (2007-2013)	Increasing Competitiveness	• Preservation of Environment and Development of Urban Infrastructure • Developing Energy and Transportation Infrastructure
	Increasing Quality and Effectiveness in Public Services	• Rationalization of Inter-Institutional Authorizations and Responsibilities
	Realizing Regional Development	• Providing Development to Rural Areas
Information Society Strategy (2006-2010)	Competitive, Universal and Cheap Infrastructure and Services	• Universalization and Development of Communication Infrastructures
Ministry of Environment and Forestry-EU Integrated Environmental Approximation Strategy(UÇES) (2007-2023)	Water Sector Development Axis	• Sewer Systems and Treatment Plants Shall Be Established in Compliance to Urban Wastewater Treatment Regulation • Drinking Water Shall Be Reached to More Consumers in a Sanitary Way
	Waste Sector Development Axis	• Measures Shall Be Taken that Will Realize the Recovery and Regular Storage of Solid Wastes via Suitable Methods.
Ministry of Environment and Forestry Wastewater Treatment Action Plan (2008-2012)	Provincial Action Plans Gediz Basin Action Plan	• Realization of Wastewater Treatment
Ministry of Energy and Natural Resources Strategic Plan (2010-2014)	Energy Supply Safety	• Realizing Resource Diversification while Prioritizing Domestic Resources • Increasing the Share of Renewable Energy Resources within Overall Energy Supply • Increasing Energy Efficiency
National Innovation Strategy (2008-2010)	Competitiveness	• Creating an Infrastructure that Shall Encourage The Access and Utilization of Information Technologies by Companies and Persons and Shall Develop Electronic Trade

Four aims have been defined under this strategic priority.

Aim 1 (SP19A1): Environmental infrastructure shall be developed

“As was handled within the development axis titled “Sustainable Environment”, the rapidly increasing population brings environmental infrastructure demands along with it. Within the region, infrastructure deficiencies toward pollution control at water basins, basin management; sustainable drinking and utility water management; urban utilization sustainable wastewater management; urban solid and hazardous wastes recycling, recovery, reutilization; increasing solid waste and hazardous waste storage and disposal capacities shall be eliminated.

Especially the infrastructure works related to the wastewater treatment in the districts affecting basins, namely Bergama, Kınık, Beydağ, Kiraz, Ödemiş, Selçuk, Tire and Torbalı districts shall be accelerated. With the same approach, the wastewater treatment infrastructures in Foça, Kemalpaşa and Menemen districts shall be strengthened. Related to the subject, also the sewer infrastructures in Aliğa, Bayındır, Bergama, Beydağ, Çeşme, Dikili,

Kiraz, Menemen, Ödemiş, Selçuk, Torbalı and Karaburun districts shall be developed.

Improvement of the infrastructure related to solid waste and sludge storage and disposal capacity shall be realized at the region. Construction of the new sanitary storage facility that shall be established in order to meet the demand stemming from the inadequacy of existing urban solid waste storage capacity shall be accelerated. Number of solid waste transfer stations shall be increased and unsanitary storage areas shall be closed.

Regarding drinking water infrastructure; investments shall be realized also at the regions of Menderes (Özdere, Tekeli), Ödemiş (Bademli, Gölcük), Bayındır (Zeytinova), Bergama, Beydağ, Çeşme, Dikili, Foça (Gerenköy) which are among districts that outstand when the data of municipality population given service with drinking and utility water are considered. On the other hand, in the surrounding districts there are qualitative problems rather than quantitative problems regarding water. At the villages residing within these regions and neighbouring districts, chlorination and storing services shall be developed.

Aim 2 (SP19A2): Energy infrastructure shall be developed

Within the region, the infrastructure demand especially towards the renewable energy sector shall be met. The infrastructure shall be strengthened especially with transition lines, enabling renewable energy investment and utilization. Considering the existing and potential renewable energy plants, deficiencies at existing transmission lines shall be eliminated and, if necessary, new transmission lines shall be constructed.

Efficient methods for electricity grid connection shall be examined, and recommendations shall be provided to institutions and organizations employing national authority for the implementation of such methods. Especially the structures of the transmission lines of EU countries that utilize renewable energy plants extensively shall be examined and appropriate improvements shall be conducted at the region in result of such examinations. On the other hand, realization of renewable energy investments shall be supported to be in coordination with energy storage investments. This way, regional backups of reserve energy resources (natural gas, active energy storage etc.) shall be constituted to be utilized to meet the energy demand during times when no production via renewable energy is made and/or production capacity decreases.

For the purpose of full capacity utilization of the geothermal resource potential in İzmir, reservoir and drilling works on eight fields defined as geothermal fields shall be accelerated. Efficient utilization of geothermal resources shall be realized at suitable fields by selecting appropriate utilization areas shown on the map.

Also, infrastructure for the clean energy resource natural gas shall be developed in such a way that shall support use of renewable energy in domestic heating field.

Aim 3 (SP19A3): Infrastructure and disaster management capacity in areas subject to disaster risk shall be strengthened

İzmir is subject to serious disaster risks both at urban and at rural areas. Furthermore, these risks vary widely from earthquake to flood, drought to forest fires. The entire region is within first degree earthquake zone and the rapid, unplanned and shanty urbanization constitutes a grave risk especially at city and district centres. Similarly, global climate change and the resultant irregularity of precipitation rhythm bring along with them the risks of flood and flash flood, drought and forest fire.

In addition to the unplanned and disorganized urbanization, due to the infrastructure that will present healthcare and emergency services such as hospitals, fire department and security

department critical in time of a possible contingency being concentrated mostly at provincial centre, and this infrastructure being connected within itself and to other regions only through the critical transportation grids deepen the existing disaster risks. In addition to all of these, education, institutional capacity and awareness capacity that form the superstructure of disaster management is inadequate in İzmir just like nationwide.

The capacity of institutions, which will have the public be aware of the risks towards possible disaster and contingency, have these risks to be minimized, and manage the contingency in coordination during or following the disaster, should be increased. In this regard, an integrated disaster management system should be developed within the province. Within the Plan context, actions aimed towards strengthening the infrastructure and increasing disaster management capacity in areas subject to disaster risk shall be supported in İzmir.

Aim 4 (SP19A4): Informatics and communication infrastructure shall be strengthened

Strengthening the informatics and communication networks is important towards making the transition to information society in economic and social life, and the information flow between individuals and institutions being realized in a continuous and correct way in due time.

Therefore, informatics and communication infrastructures shall be improved for the purposes of providing competitiveness in economic activities, efficient utilization of time and resources, and increasing life quality. Infrastructure investments that shall enable convenient access to information, and faster and secure communication opportunities -such as fibre optic cabling, 3G technology applications and integration of public services- gain importance in this regard .

Performance Indicators for “Improving the Urban and Rural Infrastructure” Priority

The ratio of population given drinking water service with treatment plant within total municipality population shall be increased from 29% to 35%.

The ratio of population given drinking water and utility water service within total municipality population shall be increased from 97% to 99%.

The ratio of population given service with Water Treatment Facility (WTF) within total municipality population shall be increased from 76% to 82%.

The ratio of population connected to Sewer Grid within total municipality population shall be increased from 96% to 98%.

A wind energy power plant energy transmission line of 800 kV and 74 km length shall be established.



Strengthened Infrastructure and Superstructure Development Axis SWOT Analysis

STRENGTHS

- The increased capacity of Adnan Menderes Airport
- Increased transportation variety due to the city being centred around a bay
- Emphasized importance on pedestrian and bicycle transportation, arrangement of certain sites appropriate for these purposes
- Railway and road connections with the hinterland, especially with Alsancak Port
- İzmir Port being in close proximity to tourism areas and Adnan Menderes
- Employing important possibilities regarding maritime transportation due to the coastline
- Existence of metro and light rail system lines under construction
- Communication network of İzmir being developed

OPPORTUNITIES

- The fact that Ankara-İzmir line will be shortened with the Ankara-İzmir High-Speed Train Project
- Privatization of İzmir Port
- The fact that candidacy to Healthy Cities Association will provoke acceleration in infrastructure projects

WEAKNESSES

- Railway and rail system investments being inadequate
- Direct flights from İzmir being scarce
- Maritime lines not being used sufficiently for passenger transportation
- Intracity and intercity loads and passenger transportation being dependent on roads, investments dominated by roads having been employed for intracity transportation until 1990s
- Traffic problem and inadequate parking lots
- Transition and distribution infrastructure towards the use of renewable energies being inadequate
- Excessive construction stemming from unplanned housing and green areas thus having been lost

THREATS

- The increase in motor vehicles causing traffic, environment and parking problems
- Being under high risk of earthquake, erosion and flood
- Increase in the infrastructure demand caused by the population rapidly increasing due to immigration

ASSOCIATING THE DEVELOPMENT AXES

part

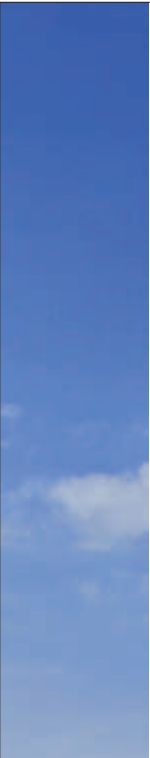
The development axes defined within plan context are in relation with each other. Sustainability of socioeconomic development depends on the integrated structure of the plan within itself. Therefore, it is seen that the priorities of Competitiveness in Enterprises, Employment and Social Integration, Sustainable Environment, and Strengthened Infrastructure and Superstructure development axes complement each other. At the table below, development axes are related to each other, and which axis' which priority is the other's complementary is shown.

DEVELOPMENT AXES		Competitiveness for Enterprises							Employment and Social Integration			Sustainable Environment					Strengthened Infrastructure and Superstructure			
		SP1	SP2	SP3	SP4	SP5	SP6	SP7	SP1	SP2	SP3	SP1	SP2	SP3	SP4	SP5	SP1	SP2	SP3	SP4
Competitiveness for Enterprises	SP1		X	X		X	X					X	X	X		X				X
	SP2	X		X	X	X	X		X							X	X			X
	SP3	X	X		X			X									X			
	SP4		X	X		X	X										X			X
	SP5	X	X		X						X	X	X	X		X				X
	SP6	X	X		X			X		X								X		
	SP7			X			X		X		X						X	X	X	X
Employment and Social Integration	SP1		X					X		X	X									
	SP2						X		X		X	X					X		X	X
	SP3					X		X	X	X			X					X		
Sustainable Environment	SP1	X				X			X						X					X
	SP2	X				X				X				X						X
	SP3	X				X							X			X				X
	SP4											X					X			
	SP5	X	X			X								X						X
Strengthened Infrastructure and Superstructure	SP1		X	X	X			X		X										X
	SP2						X	X							X			X	X	X
	SP3							X		X	X							X		X
	SP4	X	X		X	X		X		X		X	X	X		X	X	X	X	

SPATIAL CHARTS

part

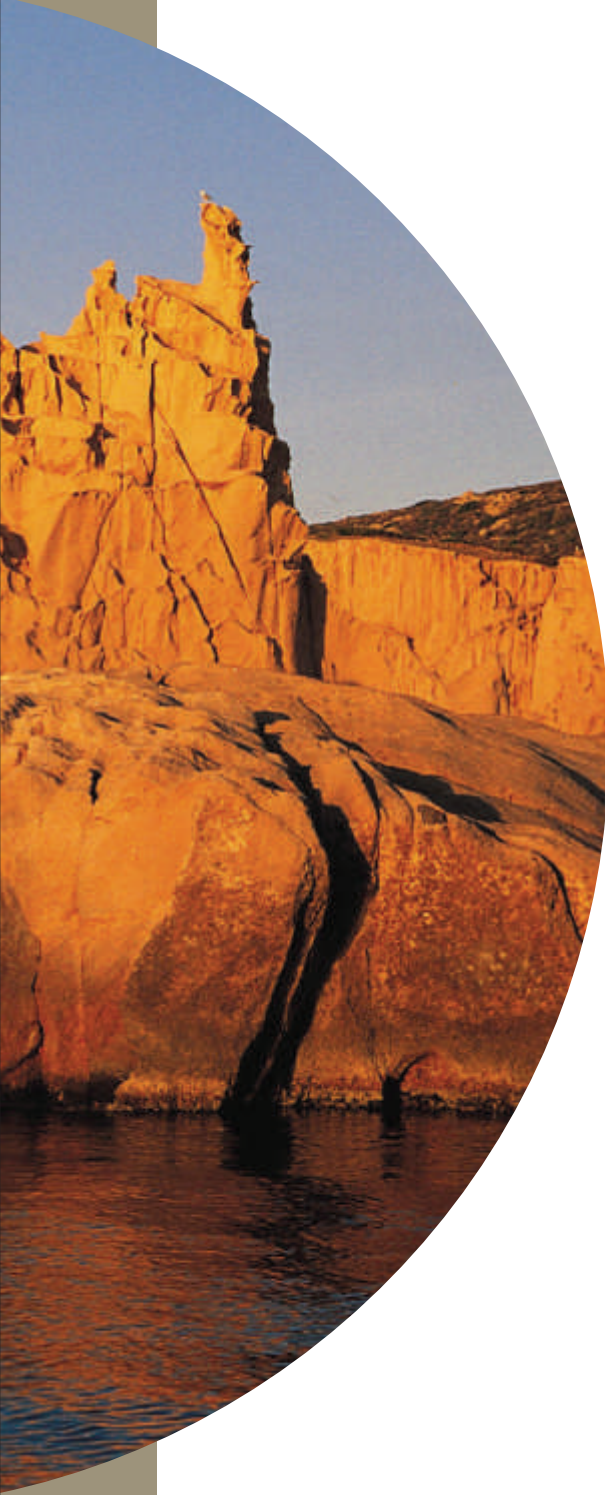




In this section, spatial featured recommendations and spatial mutual interactions of the strategic priorities and aims defined within the framework of 2010-2013 İzmir Regional Plan are explained. In that context, five separate charts at region scale have been prepared for each development axis; each of them including district and sub-regional details, and two of them within the context of Competitiveness in Enterprises Axis.



In the preparation of spatial charts, the recommendations of one or more aims are summarized for which certain districts or sub regions are prioritized. However, for the interpretation of the charts, it should not be thought that these aims shall only be directed at the districts in question. While many of the defined aims interest the entire region regarding many different aspects, solid recommendations have been brought up by making prioritizations for some districts regarding the aims based on the problem definitions at the Situational Analysis and other relevant documents. On the other hand, aims that are defined in the Plan but do not have a spatial perspective or that cover the entire region spatially have not been included within the charts.



6.1 Competitiveness for Enterprises

For the spatial recommendations and perspectives of the strategic priorities and aims defined within the framework of Competitiveness for Enterprises Development Axis, two separate schematic presentations were created, namely “Economic Diversity and Efficiency” and “Production Infrastructure”. Spatial priorities stipulated as per the axis were summarized separately for each district at the three charts given below.

The Production Infrastructure Chart created through the spatial recommendations for the improvement demand in the infrastructure related to production points out the infrastructural aims related to tourism infrastructure, organized industrial zones, free zones, technology development centres and the newly advised specialized organized industrial zones. In this context, improvements shall be realized related to the shared use of establishments within OIZs, especially the waste management. In free zones, the infrastructure yet again related to wastewater management shall be improved. Also, the infrastructural deficiencies regarding the subjects of energy and communication at OIZs and free zones shall be eliminated, and strengthening demand for especially the railroad transportation and highways connections to region shall be met. On the other hand, the existing infrastructure of the İzmir Technology Development Zone residing at Urla shall be improved to work more efficiently for increasing its contribution to region's innovation capacity. For the purposes of utilizing the economic potential at the districts and revealing the competition power to be created by clustering, Organized Stockbreeding Specialization Zones shall be founded in Ödemiş and Tire, and an Organized Floriculture Zone shall be founded in Bayındır.

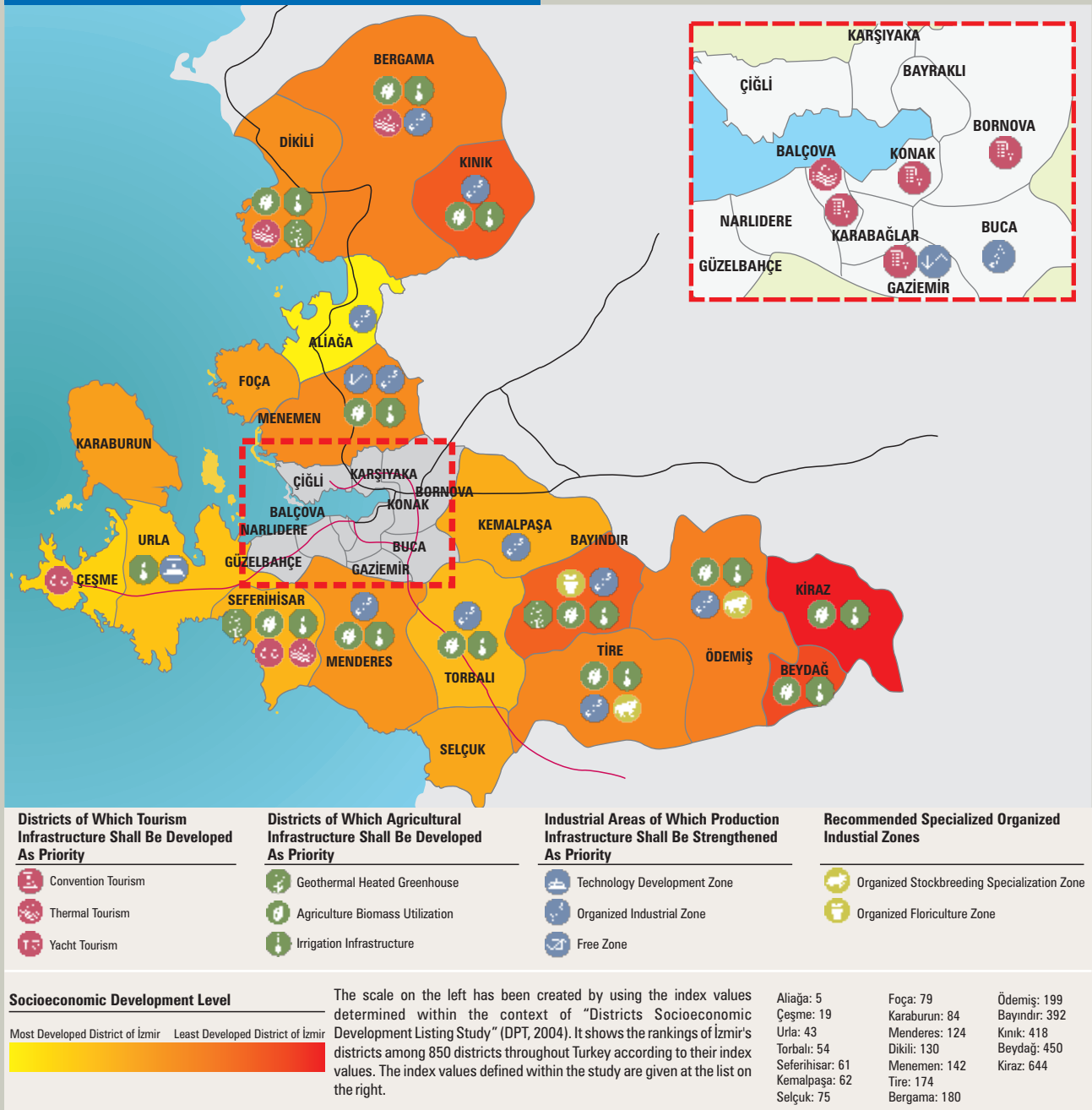
Infrastructure demand related to tourism have been handled at district scale especially regarding convention tourism, thermal tourism and yacht tourism types. Bed capacity shall be increased in Bornova, Balçova and Konak districts, which bear potential for convention tourism, and convention centre capacity in Gazıemir shall be increased. Regarding thermal tourism, infrastructure works shall be conducted at Seferihisar, Dikili, Bergama and Balçova districts, and considering the fact that the south of Çeşme Peninsula constitutes one of the main yacht routes of our country, yacht port infrastructure of İzmir shall be developed, especially at Çeşme and Seferihisar districts.

Regarding agricultural structure, geothermal heated greenhouse investments shall be universalized especially at Dikili, Seferihisar and Bayındır districts. In districts where economy is agriculture based, universalizing drip irrigation and biomass utilization is stipulated.

In the Economic Diversity and Efficiency Chart, districts prioritized within the framework of organic production, alternative energy generation and consumption, and the districts where diversified tourism shall be developed are defined. In the aims defined with the Realizing Efficiency and Economic Diversity at Sectoral Basis strategic priority, the sectors of organic agriculture, organic food and organic clothing sectors are emphasized. In that context, initially it is envisaged to create a structure where public institutions/organizations and producer associations will work together in order to universalize organic agriculture and good agricultural applications. Moreover, as well as İzmir Centrum, Menemen, Kemalpaşa, Torbalı and Ödemiş districts have been featured as districts where works towards processing and marketing organic food products shall be universalized. Finally regarding organic production, it is aimed to universalize ecological and organic production in textile sector, notably garments sub-sector, of which production outstands especially at central districts.

Renewable energy sector is also among sectors that outstand regarding the development of economic diversity and efficiency in İzmir. In this context, technology production on solar

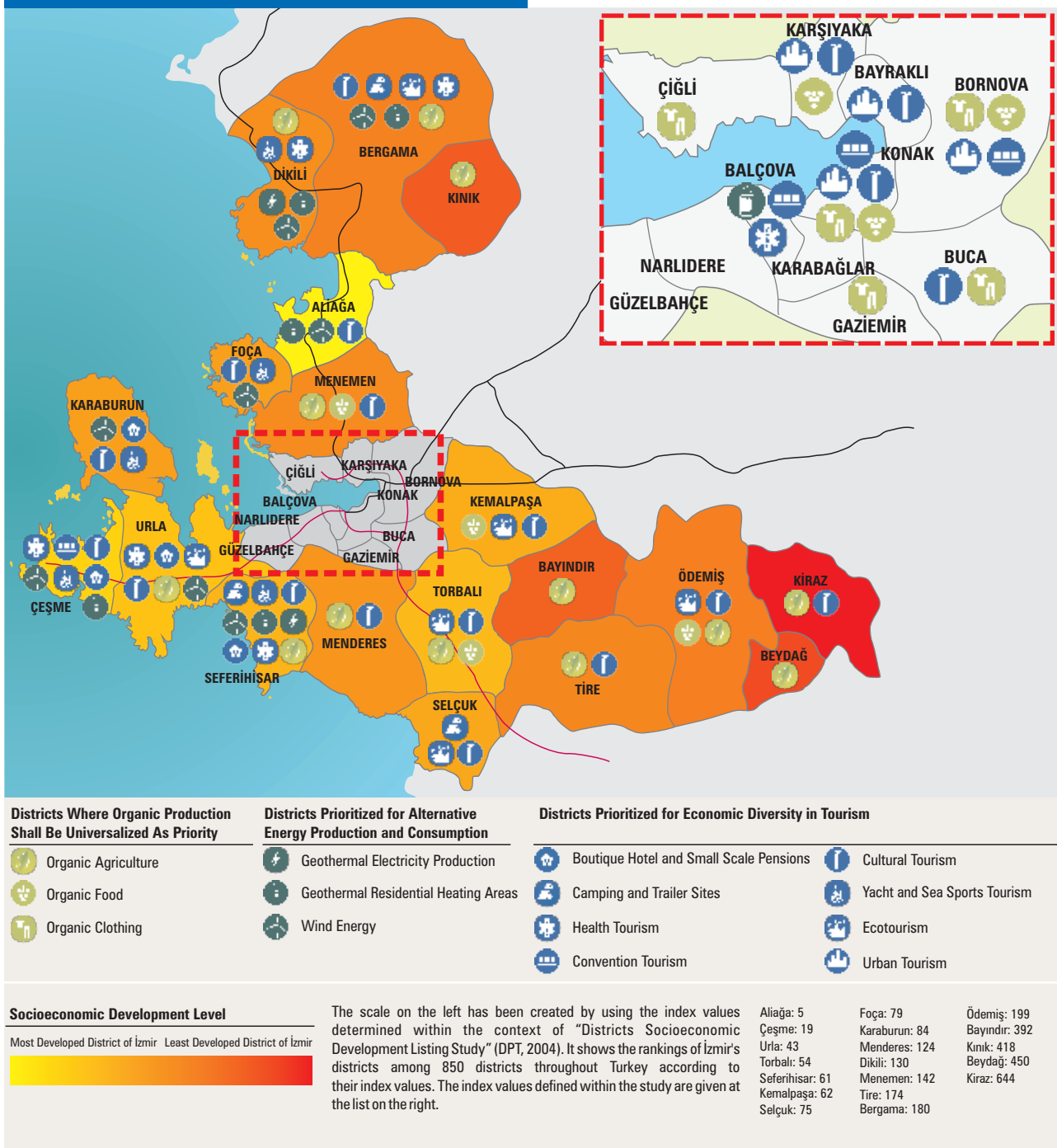
PRODUCTION INFRASTRUCTURE



energy is supported and wind and geothermal energy types outstand regarding electricity production. In this framework, geothermal electricity production in Dikili and Seferihisar, and residential heating purposed geothermal resource utilization in Balçova, Seferihisar, Aliağa, Dikili, Bergama and Çeşme are recommended. Furthermore, investments shall be realized at Bergama, Dikili, Aliağa, Foça, Karaburun, Çeşme and Seferihisar districts regarding wind power electricity production.

İzmir has a considerable potential also regarding diversified tourism. In that context, it is important for the region to universalize boutique hotels, supporting investments that enable convention and exhibition tourism, and to develop thermal tourism, cultural tourism, ecotourism, urban tourism and sea tourism types outside mass tourism (sea sports, yacht tourism, blue cruise, cruise tourism etc.).

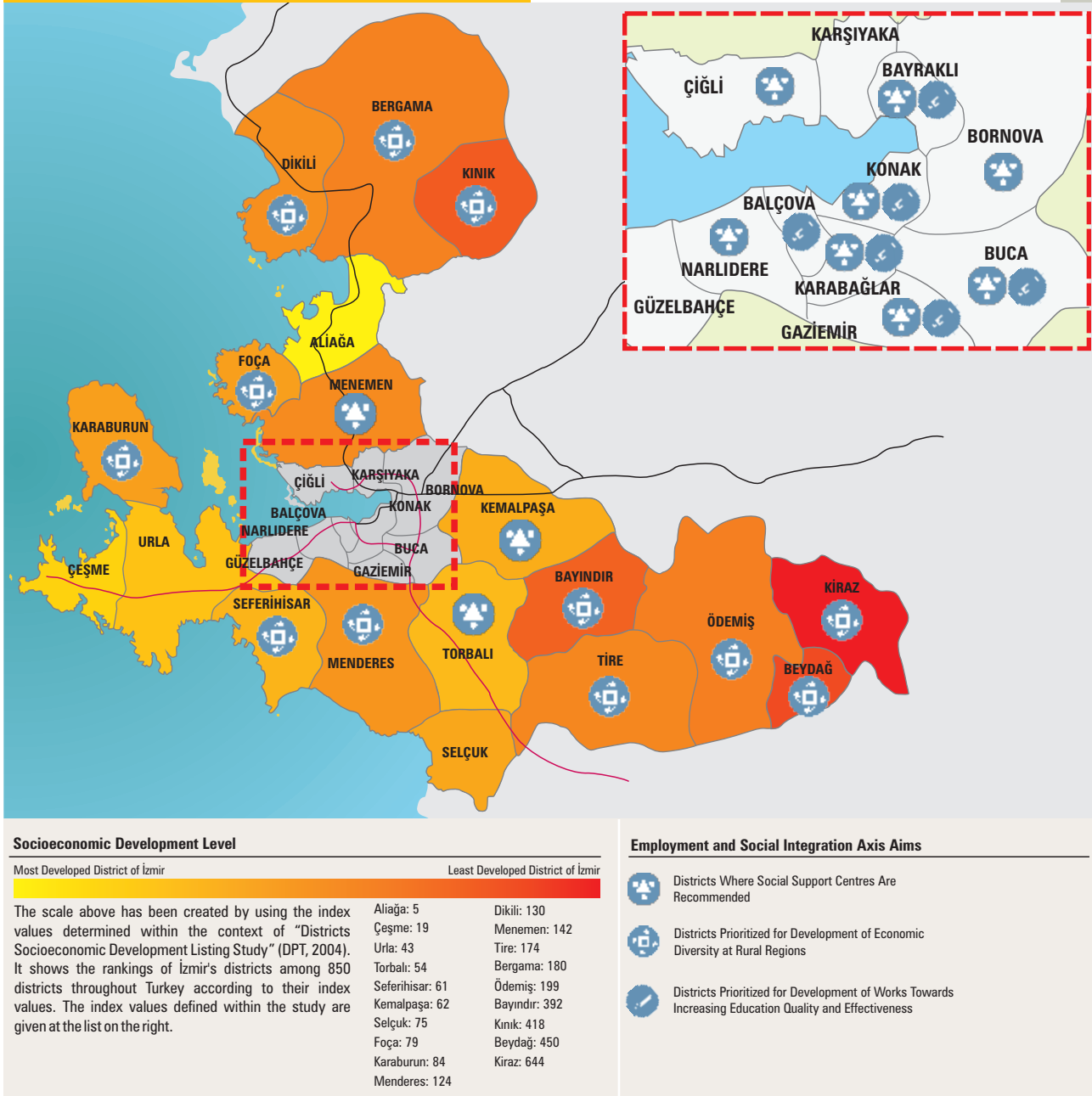
ECONOMIC DIVERSITY and EFFICIENCY



6.2 Employment and Social Integration

In the chart prepared for the spatial recommendations and perspectives of priorities and aims determined within the framework of Employment and Social Integration Development Axis, strategic priorities with spatial feature are summarized for each district separately. In this framework, three different recommendations are brought up regarding employment and social integration within the chart.

EMPLOYMENT and SOCIAL INTEGRATION



With the chart, first the prioritized districts recommended for the establishment of social support centres are given, which will serve the purposes of increasing the disadvantaged groups' participation to labour force and realizing the integration of immigrants to urban life. Secondly, prioritized districts recommended for developing economic diversity outside agriculture and increasing employment opportunities are given, for the purposes of improving living conditions and work opportunities at rural regions, and yet again increasing the

disadvantaged groups' participation to labour force. In the Employment and Social Integration Development Axis chart, the districts considered as priority towards increasing education quality and effectiveness are defined thirdly.

6.3 Sustainable Environment

In the chart prepared for the spatial recommendations and perspectives of priorities and aims determined within the framework of Sustainable Environment Development Axis, strategic priorities with spatial feature are summarized at district scale. In this context, the chart displays districts prioritized regarding wastewater, solid waste and marine and coastal areas management, districts prioritized regarding air pollution and industrial pollution control, and districts with biodiversity and sensitive ecosystems concentration.



6.4 Strengthened Infrastructure and Superstructure

In the chart prepared for the spatial recommendations and perspectives of strategic priorities and aims determined within the framework of Strengthened Infrastructure and Superstructure Development Axis, aims envisaged and recommended in the intracity, Centrum-districts and intercity transportation infrastructure are defined along with the recommendations and priorities relevant to ports planned to built, ports planned to be infrastructurally strengthened and yacht ports to be completed.

TRANSPORTATION INFRASTRUCTURE



Socioeconomic Development Level

Most Developed District of Izmir Least Developed District of Izmir

The scale above has been created by using the index values determined within the context of "Districts Socioeconomic Development Listing Study" (DPT, 2004). It shows the rankings of Izmir's districts among 850 districts throughout Turkey according to their index values. The index values defined within the study are given at the list below.

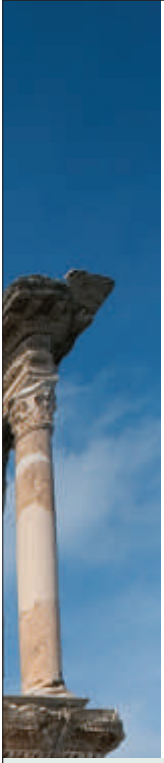
Aliağa: 5	Foça: 79	Ödemiş: 199
Çeşme: 19	Karaburun: 84	Bayındır: 392
Urla: 43	Menderes: 124	Kınık: 418
Torbalı: 54	Dikili: 130	Beydağ: 450
Seferihisar: 61	Menemen: 142	Kiraz: 644
Kemalpaşa: 62	Tire: 174	
Selçuk: 75	Bergama: 180	

Aims Regarding Izmir Centrum and Intercity Transportation Connections

	Planned Ports		Improvement of Maritime Transportation
	Yacht Ports to Be Completed		Existing Subway Lines
	Ports to Be Infrastructurally Strengthened		Subway Lines Under Construction
	Nemrut Docks Railroad Line		Planned Subway Lines
	Izmir - Istanbul Highway Project		Suburban Line to Be Strengthened
	Izmir - Ankara High Speed Train Project		Planned Tramway Lines
	Centrum-Peripheral Transportation Connections and Rural Transportation Infrastructure to Be Strengthened		

INTERACTION OF NİZMİR with NEIGHBOURING PROVINCES

part

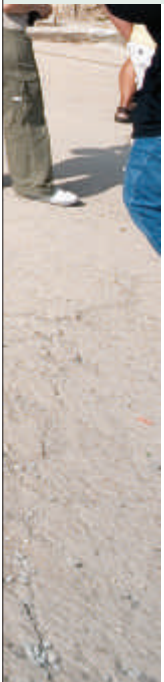


Due to İzmir is at a central position within Aegean Region regarding economic, social, cultural and institutional aspects, its relationship with the neighbouring provinces (Manisa, Aydın, Balıkesir, Uşak, Afyon, Kütahya, Denizli, Muğla, Çanakkale) gains a multifaceted extent that dates back to historical roots. On the other hand, the neighbouring provinces compete with İzmir to reach existing economic, social and institutional resources regarding both economic sectors and other fields, and try to attract the potential opportunities related to these to themselves. In result of this competition, the relationship of İzmir with neighbouring provinces gains an even more dynamic characteristic.

In addition to these, because many problems related to regional development cover more than one province regarding economic, social, institutional and geographical aspects, the solutions to these problems should also be developed not only at one province scale but on coordination and cooperation ground shared with neighbouring provinces and relevant institutions. For that reason, it is important to determine the development scenarios related to the relationship of İzmir with neighbouring provinces during Plan period.

Furthermore, more studies should be conducted towards analyzing the current status of the economic, social, cultural and institutional relationship of İzmir with the neighbouring provinces. In this framework, the relationship of İzmir with the neighbouring provinces have been handled in the context of development axes, strategic priorities and aims defined within the Plan.

Based on the development axes, strategic priorities and aims defined within the Regional Plan, communicating and sharing successful applications and experiences between institutions at İzmir and at neighbouring provinces, and creating shared working grounds towards coordination shall be prioritized.





7.1 Competitiveness for Enterprises

Regional R&D and Innovation Capacity

The multi-sectoral regional economy of İzmir develops on the axis of dense economic relations not only within province borders but also at neighbouring provinces. It is important to develop R&D and innovation capacity between İzmir and the neighbour provinces at sectors where the production-supply chain coincides with the provinces in question. In this context, joint works may be carried out between the universities, public institutions and sector representative institutions at said provinces and the universities, public institutions and sector representative institutions in İzmir towards developing the regional R&D and innovation capacity.

Clustering Formations and Planned Industrialization

Within the context of creating clusters and realizing planned industrialization priority, clustering formations may be developed with the coordination and joint works of relevant institutions at İzmir and neighbouring provinces in sectors of which production-supply chain covers more than ne province. In this regard, especially the cluster formations on processed fruit and vegetable sector in İzmir should be developed with the coordination and joint works of relevant institutions in the provinces where the production-supply chain coincides, notably Manisa and Aydın provinces.

Products with Geographic Indications and Regional Brand Registrations

Considering İzmir displays significant similarity with the neighbouring provinces regarding climate, soil structure and product diversity, a geographical indication may frequently cover more than one province especially at agricultural production (i.e. Aegean Sultani grape, Aegean cotton, Aegean fig). In that context, branding is encouraged at regional scale for the purpose of increasing regional economy's competitiveness by increasing enterprises' competitiveness. In situations where geographic indication covers more than one province, the relevant institutions in İzmir and in neighbouring provinces may carry out coordination and joint works for supporting the number of products with geographic indication and brand registrations.

Food Safety: Drying-Cooling-Storage Infrastructure

İzmir is a portal to outer markets for the food products produced in Aegean Region and in neighbouring provinces due to its geographical position and port infrastructure. Therefore it is important to ensure food safety of products that are marketed over İzmir to foreign markets in order to increase regional economy competitiveness, with the necessary drying-cooling-storing infrastructure. In this context, coordinated joint works may be carried out between the institutions at İzmir and neighbouring provinces for the purposes of reducing costs in the drying-cooling-storing infrastructure for the food products that are produced in production basins covering also the neighbouring provinces and

marketed to foreign markets over İzmir, increasing regional economy's competitiveness and providing effective utilization of resources.

Regional Promotion: Alternative Tourism

For the diversification of tourism, developing service infrastructure and effective regional promotion are both important. In that regard, coordinated joint works may be carried out between the relevant institutions for the purpose of publicizing the cultural and touristic opportunities in order to bring in the alternative potential to regional economy at routes covering more than one province at both geographical sense (such as Nif Mountain, Spil Mountain covering Manisa and İzmir) and historical sense (The Great Alexander Expedition Path that begins from Çanakkale Truva and continues onwards to İzmir Efes, or the Persian King Road that begins from İzmir Efes and passes through Manisa and Uşak).

Basin Management: Clean Production, Organic Production

Gediz river, which constitutes one of the most important water basins of İzmir, passes through Kütahya, Uşak and Manisa to pour into Aegean Sea from İzmir. Again one of the most important surface water resources of the region, Bakırçay springs within Manisa province borders and reaches Aegean Sea from İzmir. Both basins are significant agricultural production basins, and also important industrial areas.

Therefore, raising the awareness on clean production at the establishments functioning with industrial production within Gediz and Bakırçay basins is vital for protecting these regions which also house important natural protection areas. In this context, joint projects towards increasing the awareness of clean production in the establishments may be carried out in the provinces in question by relevant institutions. Coordinated joint works may be conducted between the relevant institutions in the said provinces for determining and utilizing prioritized investment fields towards renewable energy resources in the mentioned basins.

In these regions that are also important agricultural production basins, joint works may be realized for the purposes of universalizing organic agriculture and good agricultural applications in agricultural production, and processing and marketing organic food products with high added value at food and drinks industry.

The multi-sectoral regional economy of İzmir develops on the axis of dense economic relations not only within province borders but also at neighbouring provinces.

7.2 Employment and Social Integration

Accessibility to Healthcare Services

Regarding the healthcare services it presents, İzmir is a centre of importance not only at province scale but at regional scale covering neighbouring provinces. This situation strains the existing service capacity of İzmir and limits the accessibility to healthcare services. In that regard, joint works may be realized in coordination with relevant institutions for the purposes of reducing the service demand coming from neighbouring provinces to the healthcare institutions in İzmir and strengthening the accessibility to healthcare services at these provinces by improving the primary healthcare services, notably preventive health and mother-and-child health services of the neighbouring provinces.

Rural Economic Diversity, Life Quality

A significant portion of the immigration towards İzmir arises from neighbouring provinces. In order to reduce the problems caused by this immigration that mostly emerge due to

employment and living conditions improvement expectations, joint works may be realized in coordination with relevant institutions for increasing the work and employment opportunities especially for the unemployed youth and women, and improving life quality at the rural areas of neighbouring provinces.

7.3 Sustainable Environment

Basin Management: Water and Wastewater

It is important to reduce pollution and improve water quality to the next class by realizing pollution control and basin management in Gediz and Bakırçay basins that are important agricultural production basins and house a considerable population and wide natural protection sites. Likewise, it is necessary to provide sustainable drinking water and utility water management at the basins in question.

On the other hand, it is also important to realize industrial and urban sustainable wastewater management and prevent the soil and water pollution emerging from agricultural activities in the mentioned basins that are important industrial production sites. Joint works may be carried out for the purpose of creating and activating institutions/organizations that may provide coordination in realizing a water and wastewater management at basin scale regarding all these issues, such as a Gediz Basin Provinces Environmental Protection Union.

Basin Management: Solid Waste and Hazardous Waste

It is of importance to take measures at basin scale regarding the solid waste and hazardous waste arising from both domestic and dense industrial use in Gediz and Bakırçay basins. Joint works may be developed between relevant institutions for raising the awareness of industrialist and urban consumer actors, realizing the recycling, recovery and reuse of urban and industrial solid and hazardous wastes, and establishing solid waste and hazardous waste storage and disposal facilities serving more than one province at mentioned areas while considering cost effectiveness.

At the region there is a great potential towards alternative tourism with routes covering more than one province at both geographical sense (such as Nif Mountain, Spil Mountain covering Manisa and İzmir) and historical sense (The Great Alexander Expedition Path that begins from Çanakkale Truva and continues onwards to İzmir Efes, or the Persian King Road that begins from İzmir Efes and passes through Manisa and Uşak).

Basin Management: Air Quality

One of the most important reasons of the air pollution in Gediz and Bakırçay basins is the renewable and clean energy consumption at industrial and domestic utilization not being supported. In fact, the regions in question house significant renewable energy resources such as geothermal and wind energies. In this direction, joint works may be carried out, considering cost effectiveness, in coordination towards activating the clean energy potential mentioned at more than one province and towards realizing air pollution control at industry-intensive areas.

Basin Management: Ecosystem and Biodiversity

There are many ecosystems of national and international significance at Gediz and Bakırçay basins. Joint works may be executed in coordination between relevant institutions for the purposes of vitalizing these areas considering protection-utilization balance, and preservation of biodiversity in the basins in question.

7.4 Strengthened Infrastructure and Superstructure

Transportation Grids

Considering İzmir is an important portal for the goods produced at neighbouring provinces to



open out to foreign markets and also a regional-scale economic, social, cultural centre, strengthening the transportation connections with neighbouring provinces is of great significance. In this context, joint works may be carried out in coordination for the purposes of supporting the highways, maritime lines and railroads especially directed from the production areas at neighbouring provinces to the logistics and port centres in İzmir, and strengthening the transportation connections from neighbouring districts of the surrounding provinces.

Alternative Tourism Infrastructure

At the region there is a great potential towards alternative tourism with routes covering more than one province at both geographical sense (such as Nif Mountain, Spil Mountain covering Manisa and İzmir) and historical sense (The Great Alexander Expedition Path that begins from Çanakkale Truva and continues onwards to İzmir Efes, or the Persian King Road that begins from İzmir Efes and passes through Manisa and Uşak). With their shared historical, cultural and geographical features, İzmir and surrounding provinces are face to face against a common potential and common infrastructure problems regarding diversification of tourism and development of alternative tourism.

In this direction, it is important to improve the existing service infrastructure and support new investments towards activating the mentioned alternative tourism potential of the region. Again in these mentioned areas, joint works may be carried out in coordination with relevant institutions for the purposes of developing infrastructure for enabling the natural, historical and cultural assets existing in the region to be utilized, and improving the significant touristic areas regarding visual perception and landscape aspects.

Disaster Management

With their shared geographical features, İzmir and neighbouring provinces face similar disaster risks. These risks range from earthquake to forest fire, from drought to flash flood. And thus, all short-term, medium-term and long-term measures to be taken against such disaster risks are also similar in that respect. In this context, joint works may be carried out in coordination with relevant institutions, while considering cost effectiveness, for the purposes of creating joint disaster management processes between İzmir and neighbouring provinces and developing the joint infrastructures related to these.

PERFORMANCE INDICATORS

part

COMPETITIVENESS for ENTERPRISES

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Gross Value Added Per Capita (GVA) (\$)	8,398 (2006)	TÜİK GVA Calculation Estimate Studies, 2010	9,000
GVA ratio within Turkey (%)	6.6 (2006)	TÜİK GVA Calculation Estimate Studies, 2010	8
Export ratio within Turkey (%)	5.9 (2008)	TÜİK, 2008a	8
Number of companies within OIZs	735 (2008)	İZKA OIZ Survey, 2008	800
Brand registrations ratio within Turkey (%)	5.6 (2008)	Turkish Patent Institute (TPE), Brands Data, 2009	9
Industrial design registrations ratio within Turkey (%)	5.7 (2008)	TPE, Industrial Design Data, 2009	9
Awarded Patent Registration Certificates ratio within Turkey (%)	7.4 (2008)	TPE, Patent Data, 2009	10
İzmir R&D supports benefitting ratio within Turkey (%)	4.5 (2009)	TÜBİTAK, 2009	6
Number of companies in İzmir holding TSE quality certificate ratio within Turkey (%)	6 (2009)	TSE, 2009	8
Number of products with geographic indication	8 (2009)	TPE, 2009	10
Number of companies within Technology Development Zone	65 (2009)	Calculated based on data of İZTEKGEB web site, 2009	80
Ratio of installed wind power to theoretical capacity (%)	1 (2007)	Boztepe, 2008 (EMO, 2008)	4
Ratio of geothermal resource potential utilized in residence heating within theoretical geothermal resource potential (%)	11 (2007)	Calculated based on information and data derived from Turkey Geothermal Association, 2007; DPT, 2006c; Aksoy, 2009: p.143	15
Electricity amount generated from geothermal resource (MWe)	0 (2007)	Turkey Geothermal Association, 2007	3
Ratio of foreign visitors to İzmir within total number of visitors to Turkey (%)	3.93 (2007)	Calculated based on Ministry of Culture and Tourism, 2009 data	4.93
Average occupancy rate of facilities (%)	45.65 (2007)	Ministry of Culture and Tourism, 2009	47.65
Average length of stay (days)	2.3 (2008)	Ministry of Culture and Tourism, 2009	2.8
Average length of stay at boutique hotels (days)	1.3 (2008)	Ministry of Culture and Tourism, 2009	1.9
Number of arrivals to boutique hotels	15,040 (2008)	Ministry of Culture and Tourism, 2009	16,100
Number of people visiting museums and historical sites	2,799,236 (2009)	Provincial Directorate of Culture and Tourism, 2010	3,000,000

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Number of (commercial and private) yachts visiting the ports	1,923 (2008)	Ministry of Culture and Tourism, 2009	2,200
Number of exhibitions held	31 (2008)	TOBB, 2009	37
Number of passengers visiting via cruise lines	321,279 (2008)	İZTO, 2009	500,000
Number of blue flagged marinas	0 (2008)	TÜRÇEV, 2008	2
Number of blue flagged beaches	21 (2008)	TÜRÇEV, 2008	29
Quantity of containers handled at İzmir Port (TEU)	884,966 (2008)	TCDD, 2009	1,200,000
Number of companies functioning in logistics sector	2,255 (2009)	Calculated based on İZTO web site, 2009	2,400
Number of warehouses functioning under the supervision of İzmir Customs and Enforcement Head Directorate	116 (2009)	İEÜ, 2009	125
Irrigation ratio within overall economically irrigable lands (%)	75 (2005)	TKB, 2006	85
Number of Organized Agriculture Specialization Zones	0 (2009)	Provincial Directorate of Industry and Commerce, 2009	3
Utilization ratio of geothermal resource potential used in greenhouse heating (%)	3 (2006)	Turkey Geothermal Association, 2007	5
Number of producers dealing in organic production	1,294 (2007)	TÜİK, 2008	1,600
Agriculture area size where organic production is done (ha)	26,330 (2007)	TÜİK, 2008	30,000
Number of producers working within the context of Good Agricultural Applications	131 (2007)	Provincial Directorate of Agriculture, 2009	170
Agriculture area size where Good Agricultural Applications are implemented (ha)	258 (2007)	Provincial Directorate of Agriculture, 2009	340
Number of drip irrigation systems	10,476 (2009)	Provincial Directorate of Agriculture, 2009	20,000
Number of sprinkle irrigation systems	1,432 (2009)	Provincial Directorate of Agriculture, 2009	1,800
Greenhouse vegetable-fruit production quantity (tonnes/year)	165,485 (2008)	TÜİK, 2008	200,000
Number of Agricultural Producer Unions members	2,457 (2008)	Provincial Directorate of Agriculture, 2009	8,000
Number of Reclamation Unions members	863 (2008)	Provincial Directorate of Agriculture, 2009	1,200
Number of shareholders in agricultural cooperatives	39,465 (2009)	Provincial Directorate of Agriculture, 2009	45,000
Number of members and shareholders within agricultural cooperatives and associations	42,785 (2008)	Provincial Directorate of Agriculture, 2009	54,200

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Export ratio of food and drinks industry within Turkey overall sectoral export (%)	11.3 (2008)	İZKA Data of Clustering Conclusion Report, Ministry of Finance, 2010	14.00
Ratio of brand registrations within Turkey overall registrations in food and drinks industry (%)	5 (2008)	TPE, Brands Data, 2009	7
Ratio of R&D investment discounts within Turkey overall discounts in food and drinks industry (%)	9.9 (2008)	İZKA Data of Clustering Conclusion Report, Ministry of Finance, 2010	12
The ratio of number of food processing sub-sector (meat processing, animal subsidiary products, aquaculture products processing, milk processing) establishments in compliance to EU hygiene rules within total number of establishments in these sub-sectors (%)	14 (2008)	General Secretariat of European Union, 2009	50
Export ratio of clothing industry within Turkey overall sectoral export (%)	6.1 (2008)	İZKA Data of Clustering Conclusion Report, Ministry of Finance, 2010	8
Ratio of brand registrations within Turkey overall registrations in clothing industry (%)	3 (2008)	TPE, Brands Data, 2009	5
Ratio of R&D investment discounts within Turkey overall discounts in clothing industry (%)	0 (2008)	İZKA Data of Clustering Conclusion Report, Ministry of Finance, 2010	2

EMPLOYMENT and SOCIAL INTEGRATION

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Net preschool schooling ratio (4-5 years age)	33.24 (2008-2009 period)	Provincial Directorate of National Education 2008-2009 Formal Education Data	50 (2013-2014 period)
Number of students per classroom in elementary education (all districts)	33 (2008-2009 period)	Provincial Directorate of National Education 2008-2009 Formal Education Data	30 (2013-2014 period)
Net secondary education schooling ratio (%)	68.16 (2008-2009 period)	Provincial Directorate of National Education 2008-2009 Formal Education Data	75 (2013-2014 period)
Number of students per classroom in secondary education	31 (2008-2009 period)	Provincial Directorate of National Education 2008-2009 Formal Education Data	30 (2013-2014 period)
Number of students per classroom in vocational and technical secondary education	35 (2008-2009 period)	TÜİK 2008 Comparative Regional Data, 2009	30 (2013-2014 period)
Number of trainees attending the vocational, technical trainings given by Provincial Directorate of National Education within informal education context	65,770 (2007-2008 period)	Provincial Directorate of National Education 2008-2009 Informal Education Data	75,000 (2013-2014 period)

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Number of handicapped trainees attending the trainings given by Provincial Directorate of National Education towards handicapped people within informal education context	1,685 (2008-2009 period)	Provincial Directorate of National Education 2008-2009 Informal Education Data	5,000 (2013-2014 period)
Unemployment rate (%)	11.8 (2008)	TÜİK 2008 Household Labour Force Data, 2009	11
Unemployment rate outside agriculture sector (%)	12.4 (2008)	TÜİK 2008 Household Labour Force Data, 2009	12
Labour force participation rate of women population (%)	24.5 (2008)	TÜİK 2008 Household Labour Force Data, 2009	28
The ratio of paid women employees within total employment (%)	21.4 (2008)	TÜİK 2008 Household Labour Force Data, 2009	25
Population per bed at hospitals	331 (2007)	Provincial Directorate of Health Data, 2008	300
Infant death ratio (per mille)	9.1 (2008)	Provincial Directorate of Health Data, 2008	7
Mother death ratio (per mille)	12.9 (2008)	Provincial Directorate of Health Data, 2008	8

SUSTAINABLE ENVIRONMENT			
INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Annual usable water potential quantity per capita (m ³ /person)	614 (2007)	DSİ, 2008	1,000
The ratio of population given drinking water service with treatment plant within total municipality population (%)	29 (2006)	TÜİK, 2008	35
The ratio of population given service with Water Treatment Facility (WTF) within total municipality population (%)	76 (2006)	TÜİK, 2008	82
Respective water quality classes of Gediz, Bakırçay, Küçük Menderes Rivers	III/IV/IV (2008)	Provincial Directorate of Environment and Forestry, 2009	II/III/III
The ratio of population given drinking water service with treatment plant within total municipality population in Gediz Basin	15 (2007)	Ministry of Environment and Forestry Wastewater Treatment Action Plan, 2008	85
The ratio of population given drinking water and utility water service within total municipality population (%)	97 (2006)	TÜİK, 2008	99
The ratio of population connected to Sewer Grid within total municipality population (%)	96 (2006)	TÜİK, 2008	98
Solid waste transfer station capacity (tonnes/days)	1,304 (2007)	İBB, 2008	1,800
Solid waste disposal capacity (tonnes/days)	2,300 (2007)	İBB, 2008	4,500

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Ratio of establishments in OIZs connected to WTF (%)	37 (2009)	Calculated based on compiling Provincial Directorate of Industry and Commerce, 2008; Provincial Directorate of Environment and Forestry, 2008 Data and results of survey applied to OIZ administrations in 2009 by İZKA, 2009	50
the ratio of hazardous industrial waste (%)	10.2 (2006)	TÜİK, 2008	8.5
Water reuse ratio in industry (%)	10 (2004)	TÜİK, 2008	25
Ratio of recovery and reuse of solid waste in industry (%)	4 (2004)	TÜİK, 2008	15
Urban waste recovery ratio (%)	1 (2007)	İBB, 2008	5
PM ₁₀ Concentration (µg/m ³)	52 (2008)	Bayram, 2008 (İBB,2008)	35
SO ₂ Concentration (µg/m ³)	18 (2008)	Bayram, 2008 (İBB,2008)	18
The ratio of manufacturing industry companies possessing environment management system certificate within overall number of companies (%)	7 (2004)	Calculated by using TÜİK 2004 Manufacturing Industry Environment Indicators	15
Unproductive forest area ratio (%)	83 (2005)	Ministry of Environment and Forestry, 2006a	70
Electricity consumption used in residences per capita (kWh)	790 (2007)	Calculated by using TÜİK, 2008 data.	700

STRENGTHENED INFRASTRUCTURE and SUPERSTRUCTURE

INDICATOR	CURRENT STATUS	SOURCE	AIM (2013)
Umber of direct flight foreign cities	103 (2009)	Calculated based on DHMİ data, 2009	120
Number of car parks operated by İBB	54 (2007)	İBB, 2008	60
Total length of pedestrian walks at city centre along the coast (km)	37.4 (2007)	İBB, 2008	45
Total length of bicycle paths at city centre along the coast (km)	25.8 (2007)	İBB, 2008	30
The ratio of asphalt village roads to overall village roads (%)	74 (2009)	İzmir Governorship, 2009	85
Number of museums	16 (2008)	TÜİK 2009 ABPRS Data, 2010	20
Number of public libraries	43 (2008)	TÜİK 2009 ABPRS Data, 2010	50
Number of theatre halls	26 (2008)	TÜİK 2009 ABPRS Data, 2010	30



annexes

ANNEX-1: Higher Scale Strategic Documents the Regional Development Plan is Based on

- Ninth National Development Plan (2007-2013)
- EU Integrated Environmental Approximation Strategy (2007-2023)
- Wastewater Treatment Action Plan (2008-2012)
- Information Society Strategy (2006-2010)
- UN and DPT Millennium Development Goals Report Turkey 2005 (2005-2015)
- Aegean Agriculture Master Plan (2006)
- Ministry of Energy and Natural Resources Strategic Plan (2010-2014)
- Foça Specially Protected Area Action Plan (2008-2013)
- SME Strategy and Action Plan (2007-2009)
- Agriculture Strategy Document (2006-2010)
- Thermal Tourism Master Plan Action Plan (2007-2023)
- Turkey Energy Efficiency Strategy
- Turkey Tourism Strategy 2023 Action Plan (2007-2013)
- Turkish Industry Policy
- The Status of Elderly People in Turkey and Aging National Action Plan
- National Environmental Action Plan
- National Climate Change Strategy (2010-2020)
- National Rural Development Strategy (2007-2013)
- National Innovation Strategy (2008-2010)
- Transportation Master Plan Strategy



ANNEX-2: Workgroups in Plan Preparation Period

2010-2013 İzmir Regional Plan İZKA Workgroup

- Begüm TATARİ
- Didem KÖSEOĞLU
- Emin Çetin HAŞAR
- Filiz MOROVA İNELER
- Güvenç KÜÇÜKTOK
- Murat YILMAZÇOBAN
- Nilüfer KAYA
- Sena GÜRİSOY
- Sibel ERSİN
- Suna YAŞAR ÖZDEMİR

1. SWOT Survey and District SWOT Analysis Meeting Participants

- A.Turna Food Tourism
- ABİGEM İzmir
- Aegean Free Zone Customs Office
- Akg Group
- Akzo Nobel Industry
- Aliağa Chamber of Tradesmen and Craftsmen
- Aliağa Municipality
- Armutlu Municipality
- Association in Support of Contemporary Life
- Ayaskent Municipality
- Balçova District Governorship
- BASİFED
- Bayındır Chamber of Commerce
- Bayındır Chamber of Tradesmen and Craftsmen
- Bayındır District Governorship
- Bayındır Municipality
- Bergama Chamber of Commerce
- Bergama District Governorship
- Bergama Municipality
- Birgi Municipality
- BMC Industry and Commerce Inc.
- Bornova District Governorship
- Bozdağ Municipality
- Buca Municipality
- Çandarlı Municipality
- Cevher Döküm Industry Inc.
- Çiğli Chamber of Tradesmen and Craftsmen
- Çiğli Civil Defence Directorate
- Çiğli District Directorate of National Education
- Çiğli District Directorate of Security
- Çiğli District Directorate of Security
- Çiğli District Governorship
- Çiğli District Mufti
- Çiğli District Special Administration Directorate
- Çiğli Fiscal Directorate
- Çiğli Healthcare Group Presidency
- Çiğli Municipality
- Çiğli State Hospital

- Değirmendere Municipality
- DEÜ Arts and Sciences Faculty
- DEÜ ATMER
- DEÜ Buca Education Faculty Fine Arts Teaching Department
- DEÜ Directorate of the Healthcare Sciences Institute
- DEÜ Environmental Engineering Department
- DEÜ Faculty of Architecture Urban and Regional Planning Department
- DEÜ Faculty of Business Tourism Management Department
- DEÜ Faculty of Law Justice Vocational Graduate School
- DEÜ Fine Arts Institute
- DEÜ İzmir Vocational Graduate School
- DEÜ Marine Operation and Administration Graduate School
- DEÜ Nursery Graduate School
- DEÜ Physical Treatment and Rehabilitation Graduate School
- DEÜ Torbalı Vocational Graduate School
- Dikili District Directorate of Agriculture
- Dikili District Governorship
- Dikili Forestry Operation Office
- Dikili Healthcare Group Presidency
- Dikili Municipality
- DTM Aegean Free Zone Directorate
- EBSO
- Ege Cooling Inc.
- Ege Export Associations
- Ege Seramik Industry and Commerce Inc.
- Ege University Agricultural Application and Research Centre
- Ege University Faculty of Communication
- Egeplast
- Ekiz Oil and Soap Industry
- Foça Tourism Information Bureau
- Gaziemir District Governorship
- Gerenköy Municipality
- Göçbeyli Municipality
- Gölçük Municipality
- Gümüldür Municipality
- Güzelbahçe District Governorship
- İBB Eşrefpaşa Hospital
- İBB İzbeton
- İGEME Export Promotion Centre Aegean Regional Directorate
- İGİD İzmir Young Businessmen Association
- İzmir Chamber of Commerce
- İzmir Chamber of Pharmacists 3rd Region
- İzmir Institute of Technology
- İzmir Market of Commerce
- İzmir Metropolitan Municipality
- İzmir University of Economics
- İzmir Yerel Gündem 21
- İZSU General Directorate
- Karaburun District Governorship
- Karaburun Municipality
- Karşıyaka District Governorship
- Kaynaklar Municipality
- Kazete
- Kemalpaşa District Governorship
- Kemalpaşa Municipality
- Kemalpaşa Organized Industrial Zone
- Kiraz District Governorship
- Kiraz Municipality

- Klimasan
- Konak Municipality
- Menderes District Governorship
- Menderes Municipality
- Menemen Chamber of Commerce
- Menemen District Governorship
- Menemen Municipality
- Mordoğan Municipality
- Norm Civata
- Ödemiş District Special Administration Directorate
- Ören Municipality
- Petkim Petrochemical Holding
- Provincial Associations Directorate
- Provincial Customs Directorate
- Provincial Directorate of Youth and Sports
- Provincial Healthcare Directorate
- Provincial Industry and Commerce Directorate
- Provincial National Education Directorate
- Provincial Social Assistance and Solidarity Foundation
- Provincial Social Services Directorate
- Provincial Special Administration
- Sarnıç Municipality
- Seferihisar District Governorship
- Selçuk Chamber of Commerce
- Selçuk Chamber of Tradesmen and Craftsmen
- Selçuk District Governorship
- Socotab Yaprak Tütün Inc.
- TARIŞ General Directorate Cotton Association
- Tarış Olive and Olive Oil Agricultural Sales Cooperatives Association
- TescoKipa
- The Ministry of Labour and Social Security İzmir Regional Directorate
- Tire District Governorship
- Torbalı District Governorship
- TÜİK İzmir Regional Directorate
- Türk-İş 3rd Region Agency
- Underwater Research Association – Mediterranean Monk Seal Study Group
- Urla Municipality
- Yaşar University
- Yaşar University European Union Centre
- Yazıbaşı Municipality
- Yeni Gazetem Ege - İzmirport Magazine
- Zeytindağ Municipality

2. Aliağa District SWOT Analysis Meeting Participants

- 4 Yıldız Iron and Steel
- Aliağa Chamber of Commerce
- Aliağa Chamber of Tradesmen and Craftsmen
- Aliağa District Directorate of Agriculture
- Aliağa District Directorate of National Education
- Aliağa District Governorship
- Aliağa Ekspres Journal
- Aliağa Kocaer Iron and Steel
- Aliağa Municipality
- Aliağa Municipality Directorate of Environment Protection and Control
- Aliağa Small Scale Industrial Site Building Cooperative
- ÇEBİTAŞ Iron and Steel Industry
- Ege Steel Industry and Commerce

- PETKİM Petrochemical Holding
- Turkish Petroleum Refineries

3. Balçova District SWOT Analysis Meeting Participants

- Bahçelerarası Neighbourhood Alderman
- Balçova District Directorate of National Education
- Balçova District Directorate of Special Administration
- Balçova District Governorship
- Balçova District Healthcare Group Presidency
- Balçova Municipality
- Çetin Emeç Neighbourhood Alderman
- Fevzi Çakmak Neighbourhood Alderman
- Korutürk Neighbourhood Alderman
- Onur Neighbourhood Alderman
- S.S. Balçova Tradesmen and Craftsmen Credit and Guarantee Cooperative
- Teleferik Neighbourhood Alderman
- Türkiye Association for Retired Non-Commissioned Officers

4. Bayındır District SWOT Analysis Meeting Participants

- Bayındır Chamber of Agriculture
- Bayındır Chamber of Commerce
- Bayındır Chamber of Tradesmen and Craftsmen
- Bayındır District Directorate of Agriculture
- Bayındır District Directorate of National Education
- Bayındır District Directorate of Security
- Bayındır District Governorship
- Bayındır Healthcare Group Presidency
- Bayındır Industrialists Association
- Bayındır Kazım Dirik Elementary School
- Bayındır Municipality
- Bayındır Social Assistance and Solidarity Foundation
- S.S. Bayındır Small Scale Industrial Site Building Cooperative
- Ziraat Bankası Bayındır Office

5. Bergama District SWOT Analysis Meeting Participants

- Bergama Association of Culture and Tourism
- Bergama Chamber of Commerce
- Bergama Chamber of Grocery Merchants
- Bergama District Directorate of Agriculture
- Bergama District Governorship
- Bergama Foundation of Culture and Arts
- Bergama Municipality
- District Agency of Chamber of Certified Public Accountants and Sworn-In Certified Public Accountants

6. Beydağ District SWOT Analysis Meeting Participants

- Beydağ Agriculture Credit Cooperative
- Beydağ Chamber of Tradesmen and Craftsmen
- Beydağ Değirmenci Dairy Products
- Beydağ District Directorate of Agriculture
- Beydağ District Directorate of National Education
- Beydağ District Governorship
- Beydağ Municipality

- Beydağ Municipality Yağcılar Neighbourhood Alderman
- Çakır Olive Oil Factory
- Ege Chain Agricultural Products Machinery Food Livestock Spare Parts Industry and Commerce
- Ege Saraciye Industry
- Küçük Menderes Journal
- Zinsan Chain
- Ziraat Bankası Beydağ Office

7. Bornova District SWOT Analysis Meeting Participants

- Altındağ Chamber of Tradesmen and Craftsmen
- Bornova Chamber of Drivers and Automobile Owners
- Bornova Chamber of Tradesmen and Craftsmen
- Bornova District Directorate of National Education
- Bornova District Directorate of Security
- Bornova District Governorship
- Bornova Fiscal Directorate
- Bornova Healthcare Group Presidency
- Bornova Social Assistance and Solidarity Foundation
- Çamdibi Chamber of Tradesmen and Craftsmen
- İzmir Provincial Directorate of Healthcare Bornova Oral and Dental Health Centre
- SHÇEK General Directorate Bornova Nevvar Salih İşgören Nursing Home Directorate

8. Buca District SWOT Analysis Meeting Participants

- Buca 1st Region Deeds Registry Office
- Buca District Directorate of Cadastre
- Buca District Directorate of Civil Defence
- Buca District Directorate of National Education
- Buca District Directorate of Population and Citizenship Affairs
- Buca District Governorship
- Buca District Healthcare Group Presidency
- Buca District Public Education Centre
- Buca District Social Assistance and Solidarity Foundation
- Buca District Special Administration Directorate
- Buca Education Affectionate Association
- Buca Municipality
- Buca Municipality Buca City Council
- Buca Municipality Directorate of Cultural and Social Affairs
- Education, Culture and Solidarity Association for Selanik Turks and Buca Yıllacılar Society
- Kaynaklar Municipality

9. Çeşme District SWOT Analysis Meeting Participants

- Çeşme Association of Businessmen
- Çeşme Chamber of Drivers and Automobile Owners
- Çeşme District Directorate of Agriculture
- Çeşme District Directorate of Culture and Tourism
- Çeşme District Directorate of National Education
- Çeşme District Governorship
- Çeşme Tourism Association
- Çeşme Touristic Hotel Managers Union
- Destination İzmir Group
- Dolphinland Dolphin Show – Therapy Centre
- Ege University Çeşme Tourism and Hotel Management Graduate School

- S.S. Çeşme Dalyanköy Aquaculture Cooperative
- Turistik Çeşme Journal
- Turkey Association of Agriculture Chambers Çeşme Chamber of Agriculture
- Ulusoy Çeşme Port Establishment

10. Çiğli District SWOT Analysis Meeting Participants

- Çamaltı Salt Operation Directorate
- Cigarette Industry Enterprises and Commerce Inc.
- Çiğli District Directorate of National Education
- Çiğli District Directorate of Public Education
- Çiğli Chamber of Drivers and Automobile Owners
- Çiğli Chamber of Tradesmen and Craftsmen
- Çiğli District Governorship
- Çiğli District Healthcare Group Presidency
- Çiğli Gentel
- Çiğli Türk Telekom Directorate
- İzmir Atatürk Organized Industrial Zone
- İzmir Governorship Revenue Office
- Sasalı Municipality

11. Dikili District SWOT Analysis Meeting Participants

- Bahçeli Village Alderman
- Çamlıca Culture and Assistance Foundation
- Deliktaş Village Alderman
- Dikili Agricultural Development Cooperative
- Dikili Chamber of Tradesmen and Automobile Owners
- Dikili Chamber of Tradesmen and Craftsmen
- Dikili District Directorate of Agriculture
- Dikili District Directorate of National Education
- Dikili District Governorship
- Dikili Fiscal Directorate
- Dikili Nature and Bicycle Volunteers
- Gökçeşim Village Alderman
- İzmir Regional Directorate of Forestry Dikili Forestry Operation Directorate
- Nebilen Village Alderman
- Provincial Directorate of Culture and Tourism
- Yahşibey Village Alderman
- Zeytindalı Thermal Hotel

12. Foça District SWOT Analysis Meeting Participants

- Foça Chamber of Tradesmen and Craftsmen
- Foça Culture, Education and Solidarity Association
- Foça District Directorate of Agriculture
- Foça District Directorate of National Education
- Foça District Governorship
- Foça District Special Administration
- Foça Municipality
- Foça Union for Service Conveyance to Villages
- The Ministry of Culture and Tourism Foça Tourism Information Directorate

13. Gaziemir District SWOT Analysis Meeting Participants

- Gaziemir Association of Industrialists and Businessmen
- Gaziemir Chamber of Tradesmen and Craftsmen

- Gaziemir District Directorate of National Education
- Gaziemir District Governorship
- Gaziemir District Public Education Centre
- Gaziemir Healthcare Group Presidency
- Gaziemir Municipality
- General Directorate of Free Zones, Aegean Free Zone Directorate

14. Güzelbahçe District SWOT Analysis Meeting Participants

- Güzelbahçe District Governorship
- Güzelbahçe Healthcare Group Presidency
- Güzelbahçe Municipality
- S.S.Güzelbahçe Aquaculture Cooperative
- Yelki Municipality
- Ziraat Bank Güzelbahçe Office

15. Karaburun District SWOT Analysis Meeting Participants

- Karaburun Chamber of Tradesmen and Craftsmen
- Karaburun District Governorship
- Karaburun Municipality
- Karaburun Social Assistance and Solidarity Foundation
- Karaburun Yerel Gündem 21
- Underwater Research Association – Mediterranean Monk Seal Study Group
- Karaburun Project Office

16. Karşıyaka District SWOT Analysis Meeting Participants

- Dünden Yarına Karşıyaka Journal
- İzmir Tax Office Presidency Karşıyaka Tax Office Directorate
- Karşıyaka Association of Industrialists and Businessmen
- Karşıyaka District Directorate of Security
- Karşıyaka District Directorate of Youth and Sports
- Karşıyaka District Governorship
- S.S.Karşıyaka Tradesmen and Craftsmen Credit and Guarantee Cooperative
- Turkey Red Crescent Association Karşıyaka Office
- Turkish Youth Federation İzmir Youth Union Association

17. Kemalpaşa District SWOT Analysis Meeting Participants

- Akfi Agency
- Kemalpaşa Association of Industrialists and Businessmen
- Kemalpaşa District Governorship
- Kemalpaşa Municipality
- Kemalpaşa Organized Industrial Zone Directorate
- Kemalpaşa Small Scale Industrial Site Building Cooperative
- Yukarı Kızılca Municipality

18. Kiraz District SWOT Analysis Meeting Participants

- Kiraz Chamber of Agriculture
- Kiraz Chamber of Tradesmen and Craftsmen
- Kiraz Directorate of Libraries District Public Library
- Kiraz District Directorate of Agriculture
- Kiraz District Directorate of National Education
- Kiraz District Directorate of Population

- Kiraz District Directorate of Security
- Kiraz District Fiscal Directorate
- Kiraz District Governorship
- Kiraz District Special Administration Directorate
- Kiraz Municipality
- Kiraz Tax Office Directorate
- S.S İğdeli and Neighbouring Villages Agricultural Development Cooperative

19. Kınık District SWOT Analysis Meeting Participants

- Bahçivanoğlu Agricultural Products
- Kınık District Directorate of Agriculture
- Kınık District Governorship
- Kınık District Public Education Centre
- Kınık District Special Administration
- Kınık Small Scale Industrial Site
- Poyracık Municipality
- Savran Olive Oil

20. Konak District SWOT Analysis Meeting Participants

- İzmir Nevvar Salih İşgören Alsancak State Hospital
- İzmir Provincial Directorate of Healthcare Alsancak Oral and Dental Health Hospital
- Konak District Directorate of Civil Defence
- Konak District Directorate of National Education
- Konak District Governorship
- Konak District Healthcare Group Presidency
- Konak District Public Education Centre
- Konak District Special Administration Directorate
- Konak Municipality
- Kordon Association of Businessmen
- S.S. İzmir Tradesmen and Craftsmen Credit and Guarantee Cooperative
- The Ministry of Health Dr. Suat Seren Thoracic Diseases and Surgery Education and Research Hospital
- The Ministry of Health Tepecik Education and Research Hospital
- Turkish Women's Union İzmir Branch

21. Menderes District SWOT Analysis Meeting Participants

- İTOB Organized Industrial Zone
- Menderes Agricultural Unions
- Menderes Chamber of Tradesmen and Craftsmen
- Menderes District Directorate of Agriculture
- Menderes District Governorship
- Menderes Estim Industrial Site
- Menderes Wood Product Industrial Site

22. Menemen District SWOT Analysis Meeting Participants

- Ege Agricultural Research Institute Directorate
- Menemen Chamber of Commerce
- Menemen Chamber of Tradesmen and Craftsmen
- Menemen Directorate of Deeds Registry
- Menemen District Directorate of National Education
- Menemen District Directorate of Population
- Menemen District Fiscal Directorate

- Menemen District Governorship
- Menemen District Healthcare Group Presidency
- Menemen District Mufti
- Menemen District Special Administration Directorate
- Menemen International Agricultural Hydrology Research and Education Central Directorate
- Menemen Municipality
- Menemen Organized Industrial Zone
- The Ministry of Health Menemen State Hospital

23. Narlıdere District SWOT Analysis Meeting Participants

- ING Bank Narlıdere Office
- Narlıdere District Directorate of National Education
- Narlıdere District Governorship
- Narlıdere District Healthcare Group Presidency
- Narlıdere Tradesmen and Craftsmen Credit and Guarantee Cooperative
- Türkiye İş Bank Narlıdere Office
- Ziraat Bank Narlıdere Office

24. Ödemiş District SWOT Analysis Meeting Participants

- Birgi Municipality
- Ödemiş Chamber of Agriculture
- Ödemiş Chamber of Metalworks
- Ödemiş District Directorate of Agriculture
- Ödemiş District Governorship
- Ödemiş Municipality
- Ödemiş Park and Garden Plants Association
- S.S.Ödemiş Bademli Agricultural Development Cooperative
- Türk Ticaret Bank Inc. Ödemiş Office

25. Seferihisar District SWOT Analysis Meeting Participants

- Doğanbey Municipality
- S.S. İzmir Seferihisar Ürkmez Aquaculture Cooperative
- Seferihisar Chamber of Agriculture
- Seferihisar Chamber of Tradesmen and Craftsmen
- Seferihisar District Directorate of National Education
- Seferihisar District Governorship
- Seferihisar Municipality
- Ürkmez Municipality

26. Selçuk District SWOT Analysis Meeting Participants

- Selçuk Chamber of Agriculture
- Selçuk Chamber of Commerce
- Selçuk Chamber of Tradesmen and Craftsmen
- Selçuk District Governorship
- Selçuk Municipality

27. Tire District SWOT Analysis Meeting Participants

- Denizbank Tire Office
- Kırıkkaya Food Ind.
- S.S. Dairy Products Agricultural Development Cooperative

- Tamtad Canned Products
- Tire Chamber of Commerce
- Tire Chamber of Tradesmen and Craftsmen
- Tire District Directorate of Agriculture
- Tire District Governorship
- Tire District Special Administration
- Tire Municipality
- Tire Organized Industrial Zone
- Vakıfbank Tire Office
- Ziraat Bank Tire Office

28. Torbalı District SWOT Analysis Meeting Participants

- Pancar Organized Industrial Zone
- Torbalı Chamber of Commerce
- Torbalı Chamber of Tradesmen and Craftsmen
- Torbalı District Directorate of Agriculture
- Torbalı District Directorate of Security
- Torbalı District Fiscal Directorate
- Torbalı District Gendarmerie Headquarters
- Torbalı District Governorship
- Torbalı District Healthcare Group Presidency
- Torbalı District Special Administration Directorate
- Torbalı District Tax Office Directorate
- Torbalı Municipality
- Torbalı Organized Industrial Zone

29. Urla District SWOT Analysis Meeting Participants

- Urla Chamber of Agriculture
- Urla Chamber of Commerce
- Urla Chamber of Tradesmen and Craftsmen
- Urla District Governorship
- Urla Municipality

18-19 NOVEMBER 2008 WORKSHOPS WORKGROUPS

1. Workgroup on Productivity and Diversity in Agricultural Production

- Association of Agricultural Economy – E.Ü. Faculty of Agriculture
- Dokuz Eylül University
- DSİ 2nd Regional Directorate
- Ecological Agriculture Organization (ETO)
- Ege Institute of Agricultural Research
- Rapunzel Organic Products Company
- Ege University Faculty of Agriculture
- Ege University Soil Department
- EBİLTEM
- İzmir Provincial Directorate of Agriculture Projects and Statistics Office
- İzmir Trade Exchange
- Menderes District Directorate of Agriculture
- Ödemiş Chamber of Commerce
- Ödemiş District Directorate of Agriculture
- TARİŞ Product Coordination Directorate
- TARİŞ R&D Directorate
- Torbalı District Directorate of Agriculture

2. Technology and Innovation Workgroup

- BASİFED
- Dokuz Eylül University Faculty of Architecture
- EBİLTEM
- EBSO
- Ege University Department of Economics
- Ema Klima
- Ges Electrics
- Gökçüoğlu Automotive
- İYTE Department of Mechanical Engineering
- İzmir Technology Development Zone
- İzmir University of Economics Faculty of Computer Sciences
- METU
- NETSİS
- PETKİM

3. Renewable Energy and Sustainable Environment Workgroup

- Association of Biodiesel Industrialists and Businessmen
- DEÜ Environmental Engineering Department
- DEÜ Geothermal Energy Research and Application Centre
- DEÜ SÜMER
- Directorate of Provincial Special Administration
- DSİ 1st Regional Directorate
- EBİLTEM
- EBSO
- Ege Institute of Agricultural Research Department of Plant Genetic Origins
- ESBAŞ
- EÜ ÇEVMER
- EÜ Solar Energy Institute
- İBB Healthy Cities Project Office
- İYTE Geothermal Energy Research and Application Centre
- İzmir Geothermal
- İZSU
- İZTO Recovery Committee
- Kemalpaşa OIZ
- Provincial Directorate of Environment and Forestry

4. Healthy Urbanization and Infrastructure Workgroup

- Dokuz Eylül University Department of Urban and Regional Planning
- Directorate of Provincial Special Administration
- Highways 2nd Regional Directorate
- İzmir Metropolitan Municipality
- İzmir Institute of Technology Faculty of Architecture Department of Urban and Regional Planning
- İZTO
- Provincial Directorate of National Education
- TCDD 3rd Regional Directorate
- Turkey Association of Traffic Safety
- Turkey Maritime Organization İzmir Operation Directorate

5. Competitiveness for SMEs Workgroup

- ABİGEM
- Aegean Export Unions

- DEÜ Faculty of Economical and Administrative Sciences
- EBİLTEM
- EBSO
- Ege Free Zone
- Ege University Faculty of Economical and Administrative Sciences
- İESOB
- İzmir Atatürk OIZ
- İzmir Chamber of Commerce
- Kobi-der
- KOSGEB
- National Productivity Centre
- Provincial Directorate of Industry and Commerce
- Tire OIZ

6. Competiveness and Innovation in Tourism Workgroup

- Aegean Union of Touristic Enterprises and Accommodations
- Bergama Association of Culture and Tourism
- Bergama-Dikili Zeytindalı Thermal Facilities
- Çeşme Touristic Hotel Managers Union
- Club Yalı Hotels & Resort
- Destination İzmir
- DEÜ Faculty of Architecture
- Foça Tourism Information Branch Directorate
- İBB Directorate of Historical, Environmental and Cultural Assets
- İYTE Department of Architectural Restoration
- İZFAŞ - İzmir Fair Services Culture and Art Works
- İzmir Inner Wheel Association
- Jestur
- Provincial Directorate of Culture and Tourism
- TAV İzmir Terminal Operation
- TÜRSAB İzmir Branch
- Yaşar University Faculty of Architecture

7. Social Development Workgroup

- Bayraklı District Directorate of National Education
- Bornova Nedret İhsan Keten Elementary School Directorate
- DEÜ Department of Architecture
- DEÜ Department of Econometrics
- DEÜ Department of Finance
- DEÜ Department of Public Administration
- Ege University Department of Sociology
- EÜ EKAM
- İş-Kur İzmir Provincial Directorate
- İzmir Businesswomen Association
- İzmir University of Economics Department of Business
- Muscle Diseases Association
- Nevvar Salih İşgören Education Campus Vocational High School
- Provincial Directorate of National Education Secondary Education Branch Directorate
- Provincial Directorate of National Education Vocational Education Branch Directorate
- Provincial Directorate of Social Services
- TÜİK İzmir Regional Directorate
- Tülay Aktaş İzmir Volunteer Organizations Collaboration
- Yerel Gündem 21

SECTOR WORKSHOPS WORKGROUPS

1. Participants of the Food and Beverage Industry Workshop Held on May 29th, 2009, in Cooperation with EĞİAD

- Balsarı Oil Industry
- Bayteks Agricultural Products
- Ege Chelab Food Analysis Laboratory
- Ege Nkm Food Industry
- Ekiz Oil and Soap Industry
- Ertuğ Fish Production
- Etem Özsoy Agriculture
- İzmir Chamber of Agriculture
- Kristal Yağ
- Şentaş Agriculture
- Seyrekli Arboriculture
- Tamtad Canned Goods
- Te-Ta Technical Agriculture
- Tuntaş Food Industry
- Yaşar Foreign Trade
- Yeni Asır Newspaper

2. Participants of the Renewable Energy Sector Workshop Held on June 13th, 2009, in Cooperation with EBSO

- Aero Wind Industry
- DATA Tsp
- Dinamik Isı
- Ege Foundation of Technology And Progress
- Elkima Transformer
- Ema
- Ena Engineering
- Enda Energy Holding
- EÜ Solar Energy Institute
- Geo
- Ges Electrics
- Güçbirliği Holding
- İmer Hotel Management
- İzmir Geothermal
- Salim Arslanalp Engineering
- Teknogen
- Tekpan Teknik

3. Participants of the Logistics Sector Workshop Held on June 17th, 2009, in Cooperation with İZTO

- Barsan Global
- Can-Mar International Forwarding
- Chamber of Maritime Commerce İzmir Branch
- Elmas Group Logistics
- Günaydın Logistics
- Güneydoğu Forwarding
- Hamburg Süd İzmir
- Horoz Logistics
- İnci Logistics
- İZTAŞ International Forwarding
- Karmer International Forwarding
- MAERSK Mersinler International Forwarding
- Sakaoğlu Customs

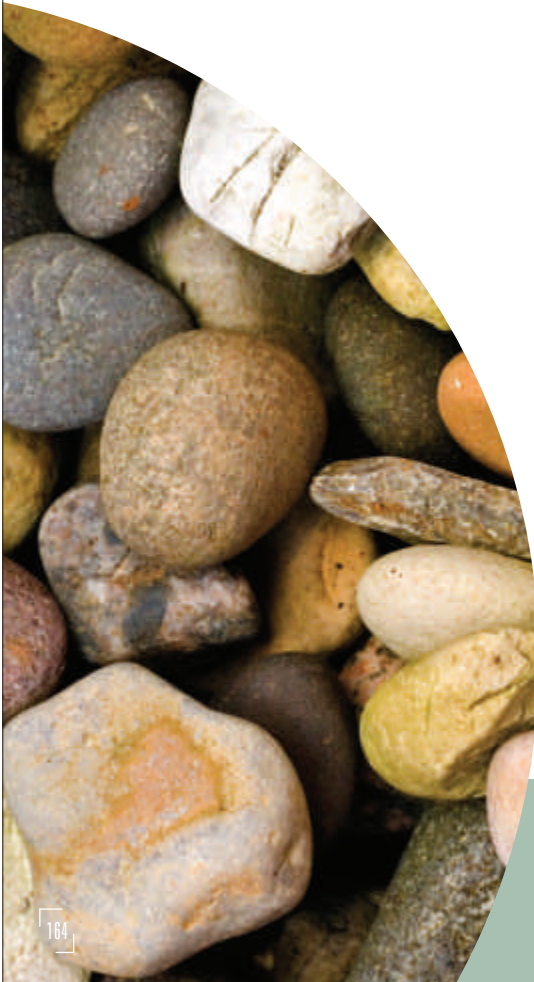
- Solo Maritime Yacht
- TAV
- Trans-Nak International Cargo-Logistics
- Turksped
- UND International Forwarders Association
- UTİKAD
- Yeni Nakliyat Kargo
- Yurtiçi Kargo Aegean Regional Directorate

4. Participants of the Textile / Clothing Materials Industry Workshop Held on June 30th, 2009, in Cooperation with EGİAD-BASİFED-EGSD

- Aegean Clothing Industrialists Association
- Aegean Shoe Industrialists Association
- Aytenler Textile
- Çelik Nakış
- Demoteks
- İzmir Wash-Off Paint Est.
- Kulim Kuloğlu Embroidery
- Kuloğlu Textile
- Kulsan
- Makara
- Menemenlioğlu Textile
- Örünler Textile
- Pamuklar Textile
- Sepiciler Leather Industry
- Şimşek Machinery
- Yalaz Textile

5. Participants of the High Tech Industries Workshop Held on July 10th, 2009, in Cooperation with İYTE

- Akdeniz Chemical Industry
- Aklens Optics
- Arkas Holding
- Bilset Computer
- Deflab Robotic Technologies Lab
- Diasel Medical Systems
- EBİLTEM
- Ege Biotechnology
- Egebimtes
- Elektral Electro Mechanics
- Genmar Diagnosis Products
- İzmaş İzmir Machinery
- İZTEK
- Kaltek Engineering
- Netsis Software
- Olgu Computer
- PETKİM
- Teknodem Medical Devices
- Teknosel Technical Services
- Türkiye IT Association
- Türklab



ANNEX-3: Definitions and Concepts

Average household size: This term refers to the average number of people constituting a household.

Biological diversity: Biological diversity is defined as the whole variety difference between or within species formed by the living beings' according to their genetic structures. This represents the diversity and variety of land, sea and other water ecosystems and the living organisms within these sources.

Boutique hotel: This is a hotel with at least ten rooms that presents a genuine structure due to its structural characteristics, architectural design, furnishing, decoration and utilized materials, employing outstanding standards and high quality in terms of operation and services, giving customers customized services with its experienced or field-expert personnel.

Chronic poverty: This is the poverty situation continuing throughout the longer part of the individuals' lifetimes, often passed on to their children and conveyed from generation to generation. Chronic poverty is not a static definition explained as having low-income but a dynamic definition that accepts poverty as a long term process that prevents the individual's fundamental abilities such as nourishment, education and health.

Clustering: Clustering is defined as; several interrelated companies functioning within the same sector with competition between, their suppliers providing goods and service providers, related institutions (universities, professional organizations, institutions defining and controlling the standards relevant to the business line, etc.) being concentrated (centred) upon the same geographic region.

Ecological tourism / Ecotourism: This is an approach or attitude that ensures the sustainability of earth's natural resources, and protects and preserves the social and cultural integrity of the local dwellers while supporting their economic development.

Elderly population: This term refers to the Population comprising of 65 years and older ages.

Formal education: Formal education is the education type applied regularly to individuals at a certain age group and the same level, with purpose-prepared programs under the body of a school. Formal education is the education process beginning from preschool and covering university education.

Functional goods, nutraceuticals: These are foods or food components that provide additional benefits to human physiology and metabolic functions further than meeting the fundamental nutritional elements of the body, thus act towards aiding protection from diseases and reaching a healthier life.

Handling: This definition covers tasks conducted on the customs-supervised goods, such as; the goods being stored without altering essential characteristics, moved, transferred from large containers to small containers, renewal or repair, aeration, sifting, mixing of containers, and similar tasks.

Household: This is the populace comprised of one or several people who, whether or not relatives, live within the same residence or a section of the same residence, eats from the same kitchen, do not separate incomes and expenses, and join in the service and management of the household.

Informal education: Informal education encompasses education, learning, counselling and implementation activities organized along or outside of formal education, for individuals who are either never participated or presently at any level of formal education, or individuals who got out of these levels. Teaching reading-writing, giving fundamental knowledge, developing personal and professional knowledge and skills are among the purposes of informal education.

Labour force: This is the total population formed by the employed and unemployed people.

Lifelong education: Lifelong education or learning, mentioned frequently especially in the education and employment policies of the European Union, encompasses increasing and renewing the personal skills, interests, knowledge and qualities in all age groups from preschool to post-retirement, increasing the professional knowledge and skill levels along with personal and social purpose learning, gaining essential knowledge and skills including literacy (reading-writing).

Median age: This is the age of the person who is found at the middle when the ages of people constituting a community are listed from the youngest to oldest. Therefore, one half of the Population are older and the other half of the Population are younger than this age.

Multifunctional textile: Multifunctional textile products are such textile products that provide at least one additional function in any kind of field health, Security and informatics fields at the lead other than the fundamental task of protection from exterior factors.

Net immigration: This is the difference found between the immigration amounts to and from a certain Region. In case the number of immigrants taken in is Higher than the number sent, net immigration is positive; and in case the number of immigrants taken in is lower than the number sent, net immigration is negative.

Niche market: This is the market of goods or services which has a yet unmet demand within the whole market. It especially covers a set of genuine services or goods not met by the large-scale enterprises conducting serial or mass production; in this context it aims for a person-based, customized service.

Niche products: These are customized products without many alternatives produced for special small sized customer groups that have shared characteristics and unmet demands.

Peninsula Region: This is the region covering Urla, Karaburun, Çeşme and Seferihisar districts within İzmir.

Population density: This is the population amount per one square kilometre.

Process: This term is defined as the body of works displaying the whole production process in an enterprise.

Protected area: These are areas such as cities or city remnants that are the product of various civilizations from prehistory to our day, reflecting the social, economic, architectural and similar characteristics of their ages, places where significant historical events has taken place and areas that have to be protected with the determined natural environment properties.

Psychomotor skill: Acts that occur in result of the combined work of sense organs, mind and muscles are called psychomotor. And psychomotor skill is the coordinated muscle activities utilized during performing a task, directed by the conscious mental activity (such as handwriting, keyboard or instrument performance). Psychomotor skills has an important place in daily life, their development begins at early childhood era and continues throughout the whole life.

Schooling rate: Schooling rate shows the accessibility of the education service at a certain education level (preschool, elementary etc.) within the population constituting the relevant age group and the society. Gross schooling rate is obtained through the total student number at the education level in question being divided by the population constituting the relevant age group (theoretical population). While net schooling rate is calculated through the number of only those at relevant age group among the overall number of students at the said education level being divided by the theoretical population.

Sensitive ecosystem: Ecologic systems that are constituted by the interactive relations of the housed rare species within a certain area and their surrounding nonliving environment while presenting sustainability are defined as sensitive ecosystems.

Smart packaging: Small packaging technology is a system that enables the quality of packaged food products to be tracked during handling and storing. Small packaging technology is the system displaying the mechanical, chemical, electrochemical, enzymatic or microbial changes in foods.

Smart textile: If the textile product detects the effect or effect change and reacts on it, this is called "Smart Textile Product". Smart textiles are one of the fields of use with the highest added value and highest technology utilization, among all technical textiles.

SME: Enterprises that employ less than 250 personnel and have net sales revenue or financial balance of less than 25 million TL are defined as SME and classified under the classes of micro enterprise, small sized enterprise and medium sized enterprise in Turkey.

Technical textile: Technical textiles are such textile products that are utilized in industry, space industry, military field, maritime sector, medicine, construction, geotextiles, transportation and high technology applications, necessitating functionality.

Tourism destination: This is the area where tourism is a relatively significant activity field and economic, social and physical effects of tourism can be seen within. In other words, they are countries, regions, cities where tourism is among the fundamental economic activities.

Unemployed youth: This term refers to unemployed people within the age group of 15-24.

Unemployment rate: This term refers to the ratio of unemployed population to the labour force.

Urban population: This is the population of city and district centres (centrums), within municipality borders.

Urban tourism: This is the urban-centred tourism type that focuses mainly on urban life, cultural features (such as museums, restaurants and shows) and aspects to be seen at the city (such as architecture, monuments and parks); a tourism type especially seen in Europe.

Warehouse: These are the storerooms in which the goods under customs supervision or if permitted the import goods are put.

Youth unemployment rate: This term refers to the ratio of unemployed people within 15-24 age group, to the labour force of the same age group.





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