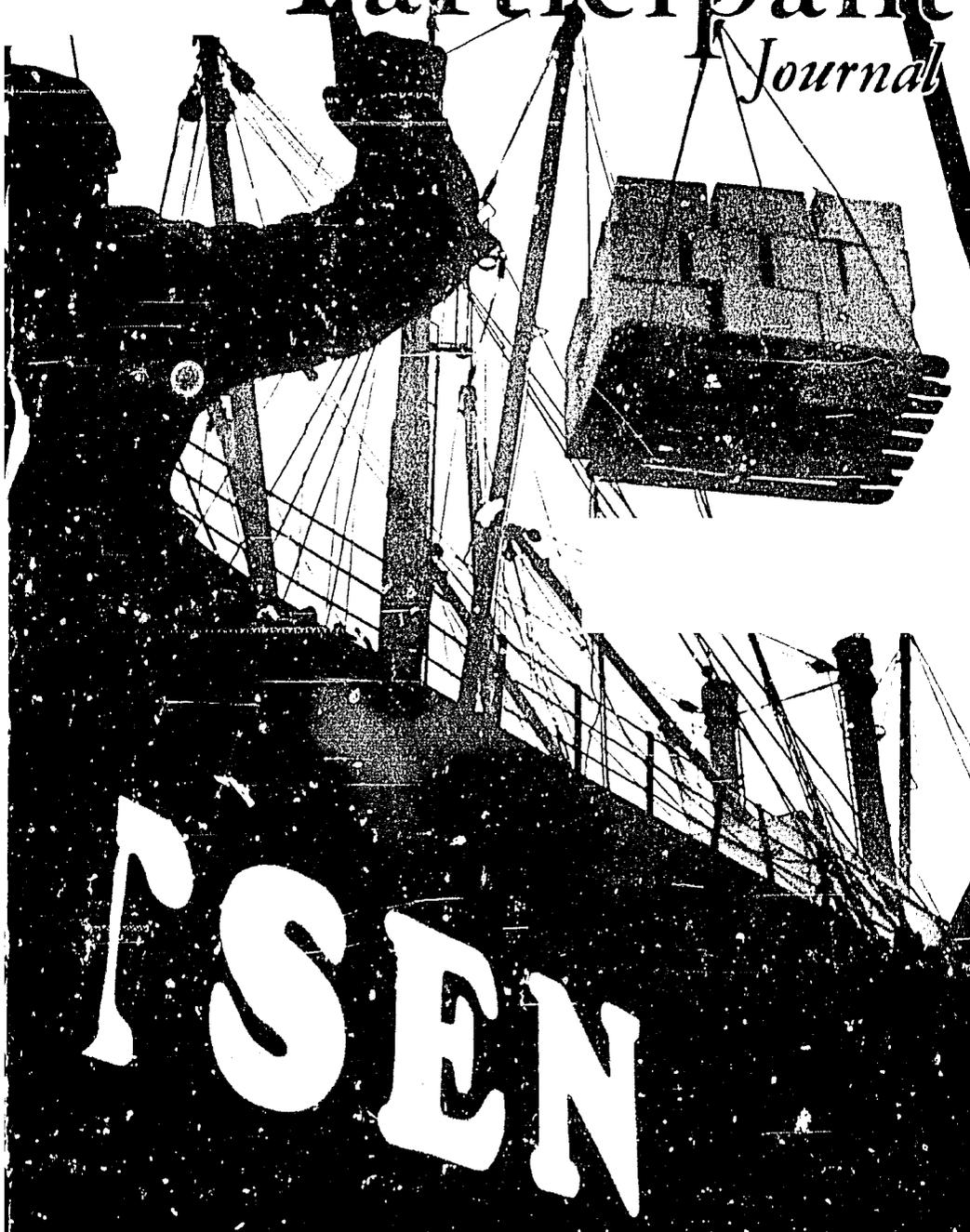


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Participant *Journal*



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Journal

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TURKEY'S EXPORTS

From President Sunay's speech at the Press Club in Washington D.C. on April 4, 1967:

"Turkey is rapidly advancing in the path of economic growth.

"This, no doubt, is a difficult task. But the progress achieved so far is heartening.

"Exports have for the first time reached the half billion dollar mark and a considerable change is taking place in the structure of our exports, with industrial products getting a greater share. The remittances of Turkish workers abroad are already providing an important and much needed addition to our foreign exchange receipts. In the future years the development of tourism and the expansion of exports will secure still larger revenues. We will also be able to exploit to a growing degree our national resources. To give one example, it is estimated that timber exports alone can bring to Turkey in the future 200 million dollars a year, although at present we import this product."

This issue of the Participant Journal is devoted to "Turkey's Exports." The opening article by Ahmet Türkeli, Minister of Commerce, underscores President Sunay's and Government of Turkey's position on exports.



President Cevdet Sunay meets with President Lyndon B. Johnson and government officials at a White House banquet.

DIŐ TİCARET POLİTİKAMIZ VE İHRACATIN GELİŐTİRİLMESİ

Yazan : Ahmet Trkel

M emleketimizin dıŐ iktisadi mnasebetlerinde uygulanan politkanın amacı, dıŐ demeler dengesinin sađlanması istikametindedir. Bnyevi sebeplerle devamlı surette acık veren dıŐ deme bilançosunun dengeye ulaŐtırılabilmesi, ancak Kalkınma Planımızda belirtilen zaman iinde ve tedbirlerin alınması ile mmkn olabilecektir. DıŐ ticaret politikamız bu ilkeyi gerekleŐtiren ekilde tanzim ve idare edilmekte, bir taraftan ihracatımızın bnyesinin deđiŐtirilmesine ve kıymet olarak arttırılmasına gayret edilirken, diđer taraftan da sanayiimizin kurulup geliŐmesini ve ithalt ikamesini sađlayacak yatırım malları, ham ve yardımcı maddelerle iŐletme malları ithaltına ncelik tanınmak suretiyle dıŐ ticaret mbadelelerimiz Kalkınma Planı yıllık Programlarında gsterilen hacimler iinde yrtlmesine alıŐılmaktadır.

Planlı kalkınma dnemine giriŐ yılı olan 1963'den itibaren yıllık ithalt-ihracat programları ve bunların realizasyonları aŐađıda gsterilmiŐtir:

Yıllar	İTHALT		İHRACAT		FARK	
	(milyon Đ)		(milyon Đ)		(milyon Đ)	
1963	632	687	348	368	284	319
1964	640	537	375	411	265	126
1965	665	572	410	459	255	113
1966	725	718	450	490	275	228
1967	800		510		290	

Grldđ zere, Yıllık Programlarda ngrlen hedefler, ihracatta devamlı surette aŐılmıŐ, ithaltta ise, 1963 yılının istisnası ile, Program rakamlarının altında kalınmıŐtır.

İthaltımızın 1964 ve 1965 yıllarında Program hedeflerinin ehemmiyetli miktarlarda altında kalmasının baŐlıca sebebi, finansmanı yabancı kaynaklardan sađlanan Proje Kredileri ile enfastrktr ve off-shore, zel yabancı sermaye ithaltındaki noksanlıklardır.



Minister of Commerce Ahmet Türkel (center) discusses Turkey's export plans with Mr. James P. Grant, Director of the USAID Mission in Turkey (left), and Mr. Lloyd Jones, Assistant Director for Economic Planning.

1966 yılında Proje Kredilerinin zamanında sağlanması, özel yabancı sermaye, enfastrüktür ve off-shore ithalâtının Program çerçevesinde tahakkuk etmesi sebebiyle 1966 yılı genel ithalâtımız Programda öngörülen hedefin yüzde 99'u oranında gerçekleştirilmiştir.

Son yıllarda ihracatımızda görülen dikkate değer hamle ve geleneksel ihraç mallarımızın arasına bir çok yeni ve özellikle sanayi mallarının girmiş bulunmasına rağmen, bu sahada gerek kamu, gerek özel sektör bakımından daha çok gayretler sarfetmemiz lâzım geldiğine inanmaktayım.

Memleketimizin daha mamur ve müreffeh bir hayata kavuşabilmesi, halkımızın hayat standardının yükselmesi ihracat ticaretimizin geliştirilmesine bağlıdır. Bu bakımdan ihracatçılarımızın modern ticaretin icaplarına uymak, yeni pazarlama metotlarını memleketimizde de uygulamak, mallarımızın dış pazarlarda sürümünü arttırmak, yeni pazarlar bulmak bakımından bugünkünden daha fazla çalışmaları gerekmektedir. Bu yolda hareket eden bir ihracatçı, insanî ve bu bakımdan gayet normal olan şahsî

kazanç güdüsü ile hareket etmesi yanında aynı zamanda memleketine hizmette bulunmanın manevî zevkini tatmış olacaktır.

Bu faaliyetlerle ilgili Devlet hizmetlerinde bulunan selâhiyet sahiplerinin de, ihracatımızın geliştirilmesi bakımından ihracatçıya her çeşit kolaylığı göstermeleri ve bir koordinatör, bir öğretmengi gibi davranmaları, ihracatçının zorluklarını ve sorunlarını kendi derterli, kendi sorunları gibi görmeleri ve halletmeye çalışmaları lâzımdır.

Ihracatımızın geliştirilmesi ancak, ihracat faaliyetlerinde rol alan bütün sektörler ve personelin yani halk ile Hükümetin el ele ve müşterek gayretleriyle tahakkuk edebilecektir.

Hükümet saflarında bulunanlar ile iş hayatındaki temsilcilerin geleneksel muhafazakâr tutumdan kurtulmaları lâzımdır.

Başarılı sayılan iş adamlarının dahi, muhafazakârlıktan hamleciliğe geçişte başarılı olabilmeleri için daha başka ve daha iyi yollar öğrenmeleri gerekmektedir.

Pazarlama problemleri bugün araştırma merkezleri içinde çözüm bulmaktadır. Yeni teşebbüslerde öncülük edecek iş adamları evvelâ kendi kendilerinin yardımcısı olmalıdır. Bilgili ve dikkatli çalışma metodu içinde cesur olmak bir tacirin öğrenülecek hasletleridir.

Yurdumuzu az gelişmiş olmaktan kurtaracak husus işte bu vasıftakilerin ekonomimize getireceği gelişme zinciridir.

Şüphesiz başarıda ve ilerlemede diğer unsurların da yeri vardır. Ancak kalkınmaya açılan kapının anahtarını yine bu ülke halkı çevirecek ve açacaktır.

Ekonomi alanında atılması gereken en önemli adım, bu hamleci vasatta gelişme zincirine ayak uydurulan adımdır. Bunun bir diğer adı, birlikte çalışmadır.

Şüphesiz başka memleket ihracatçıları gibi, Türk ihracatçıları da bir takım problemlerle mücadele durumundadır. Ancak Hükümetle işbirliği hem bu problemlerin çözümüne, hem de ekonominin gelişimine müncer olacaktır.

Ihracat faaliyetinde yeni bir felsefeye ihtiyacımız vardır. Bu yeni felsefe, yalnız ihracatla uğraşan iş adamı tarafından değil, aynı zamanda ihracat faaliyetlerini kontrol eden Devlet memuru tarafından da izlenmelidir.

İlgili herkes şunu bilmeli ve bizler herkese şunu anlatabilmeliyiz:
- İhracatçılık ikinci sınıf bir ticari faaliyet değildir. İhracatçı kendine kazanç sağlama yolunda Devletin gücüne yeni bir katkı yapan kimsedir.

İhracatın artması istihsalin artmasına yol açar. Gerilmesi ise istihsal hızını keser ve hareketsizlik temayülüne girer. Bunun önlenmesi için psikolojik faktörlerin de değerlendirilmesi gerekir.

Kazanç hırsı ve isteği bu faktörlerden ancak bir tanesidir. Esas olan, ilerleme ve sınırlı bir çevre içinde kalmama azmidir.

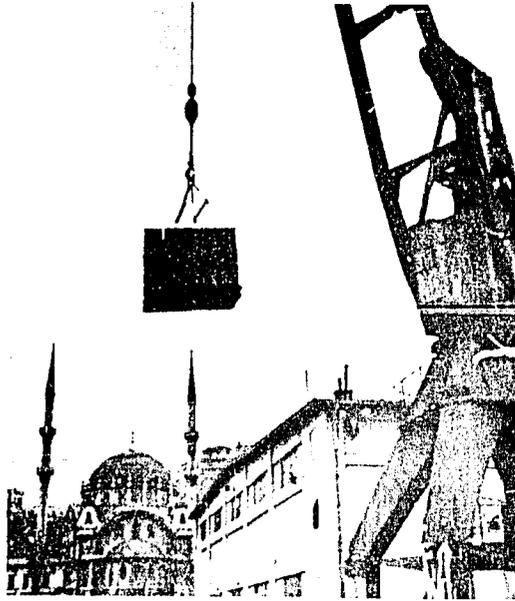
İş alemi tek başına değişmez. Değişimde başarılı olmak halk ve Hükümetin işbirliğine bağlıdır.

Son bir kaç yıl içinde Türkiye'nin ihraç ettiği mallar listesine bir çok yeni malların adı eklenmiştir. Bu mallar yurdumuzda evvelce de vardı. Ancak bu ilâve, bu yeni gelişme, Türk iş adamlarının bir yeni görüşü ve bir yeni hamlesi olarak vasıflandırılmalıdır. Fakat bu kâfi değildir. Rakamlar ve imkanlar ortadadır.

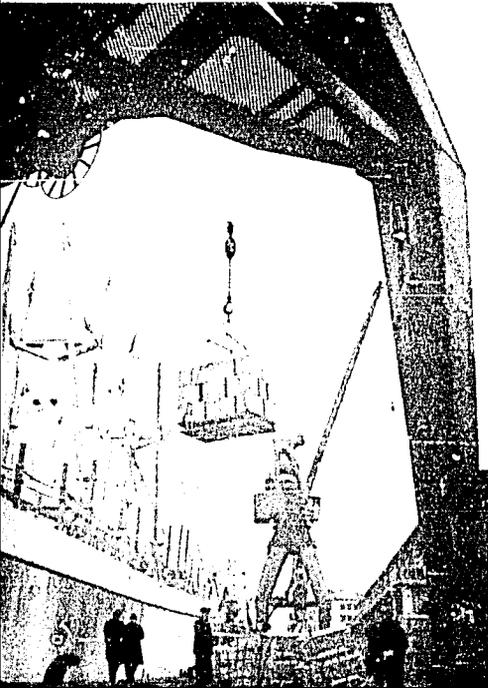
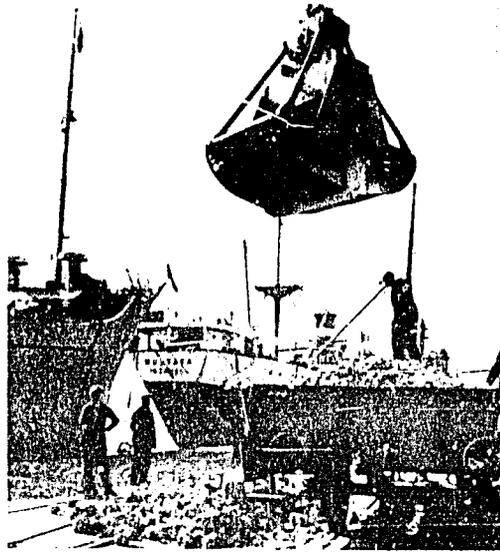
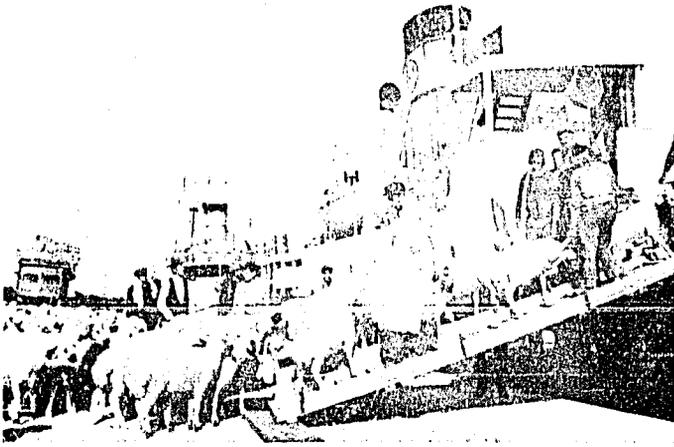
Daha yapacak çok iş vardır. Daha hızlı, daha iyi çalışıp, daha çok işbirliği yapmalıyız. İhracat alanında başarıya ulaşmak için çok uzun mesafeler katetmemiz gerek. Araştırma imkânlarımız yok gibi. Pazarlarımız pek az gelişmiş bir durumda. Ulaşım imkânlarımız ise çok yetersiz. Modern ticari kuruluşlar ile olan ilişkilerimiz kısıtlı. Ancak, ticaret hayatında yeniliklerden yana olan bir toplum için bütün bunlar aşılması mümkün engellerdir. İhracat alanında başarılı bir ulus olabilmemiz için her şeyden önce kusurlarımızın, sınırlarımızın ve hatta başarısızlıklarımızın tanımlanmasını yapmamız gerekir. Elimizde olan ham madde, insan gücü ve deha kaynağı, güzel yurdumuz ve iyi insanımızdır. Şimdi bizlere düşen bunları alıp, yeni bir ilke—değişme isteği—ile beraber aynı kapta karmak ve böylece yepyeni bir güç kaynağı yaratmaktır.

Tasarladığımız bu amaca varma çabamızda ister istemez bunalımlar, güçlükler, katı rekabet durumları ve sık sık nahoş sürprizlerle karşılaşacağız. Geleceğin dertsiz ve pürüzsüz olacağını kimse iddia edemez. Ancak, yaratıcı güç ve inisiyatif, hareketlilik ve ciddi bir çalışma ile, halk ve hükümet elele bu amaca ulaşacaktır. Türkiye'nin ihracat gücü, ikinci Beş Yıllık Kalkınma Planınca öngörülen hedefe ve hatta bu hedefin ötesine ulaşacaktır.

In the preceding article, Minister of Commerce Ahmet Türkel discusses Turkey's policies and plans regarding exports. Among the points made by Mr. Türkel are:



- In order for Turkey to reach a more comfortable standard of living, exports have to be developed.
- Exporters must work to implement new marketing techniques, increase the sale of Turkish goods in foreign markets and find new markets for Turkish exports, thus experiencing the spiritual satisfaction of serving their country as well as making a profit.
- The responsible people in government agencies must assist the exporters, help coordinate their efforts, and treat the problems of exporters as their own problems. At the same time, exporters must cooperate with the government.
- Much has to be done to increase Turkish exports and Turkey must recognize its present short-comings in this field.
- Turkey must use its assets—manpower, intellectual resources, beautiful country, good citizens—to create a new source of power by mixing these assets with a new attitude and a desire for change.
- No doubt there will be difficulties, but with active and serious efforts, the public and the government will reach and surpass the targets set forth in the Second Five-Year Plan.



A New Land for a

Both production and export opportunities have flourished in the Çukurova region of Turkey. Fifteen years ago Çukurova was just another agricultural region. Today, through intensive mechanization of agriculture, increased irrigation, and use of all essential physical inputs, Çukurova has become one of the most progressive agricultural regions in Turkey. It has become a new land for a new people.

Although Çukurova, consisting of the provinces of Adana, İçel and Hatay, is an area of only 38,413 square kilometers (five per cent of the total area of Turkey), its people number more than six per cent of the total population. From na-

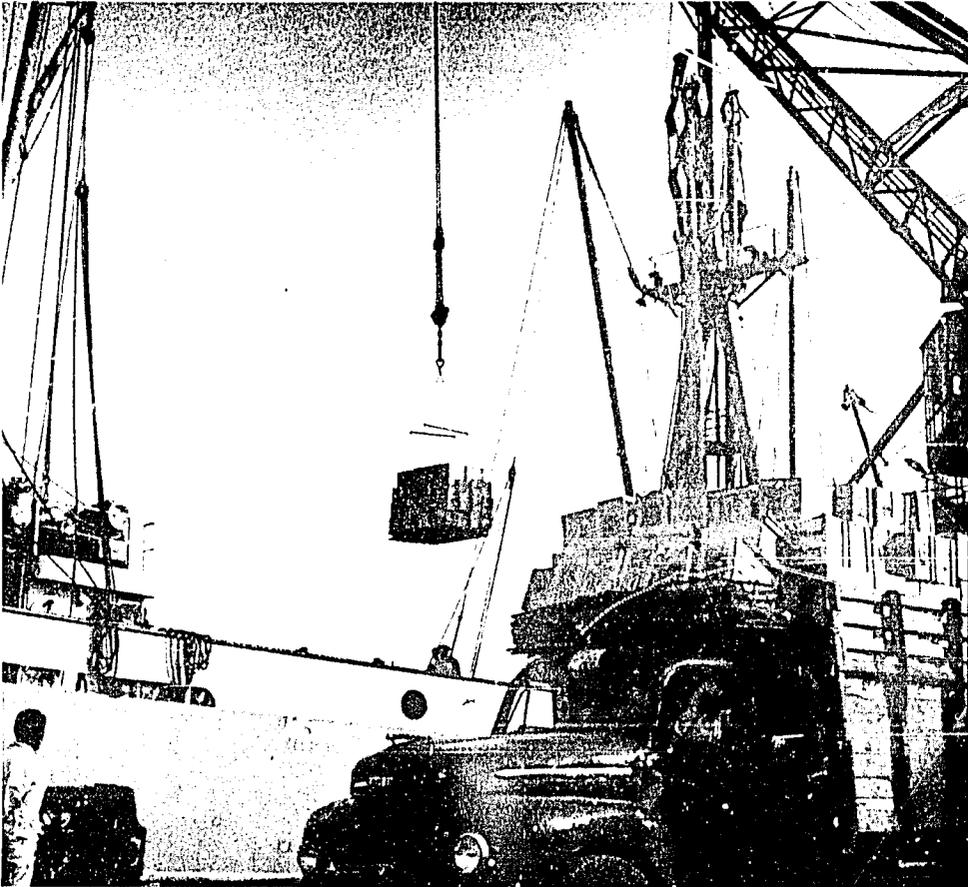
tural causes the increase in the region's population is 3.1 per cent; including immigration it reaches 4 per cent annually, the highest figure in Turkey. This immigration is economically of major importance because mostly people of working age have come to the region. Today 57.8 per cent of the population of Çukurova falls into the 15 to 64-year-old group, again the highest of any region in Turkey.

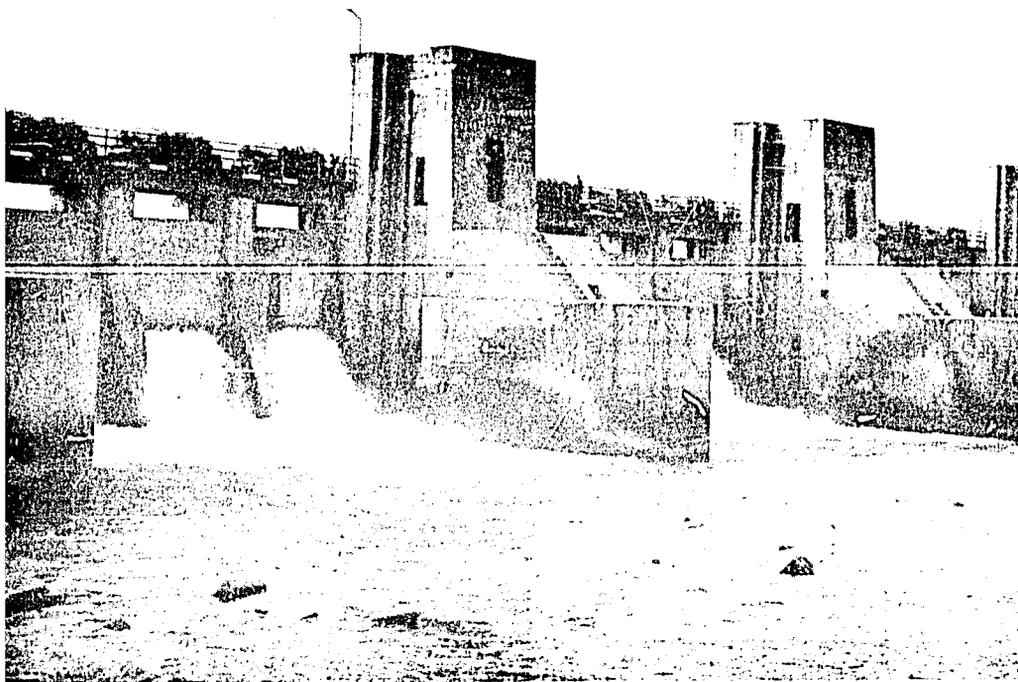
With its two ports of Mersin and Iskenderun, Çukurova has become one of the largest export centers of Turkey. The very existence of these two ports, with the modern cold storage facilities of the state-controlled Meat and Fish Combine, have proved to be incentives for

For increased Export thrust
Government and People
must work together

New People

Citrus fruits—a new export.



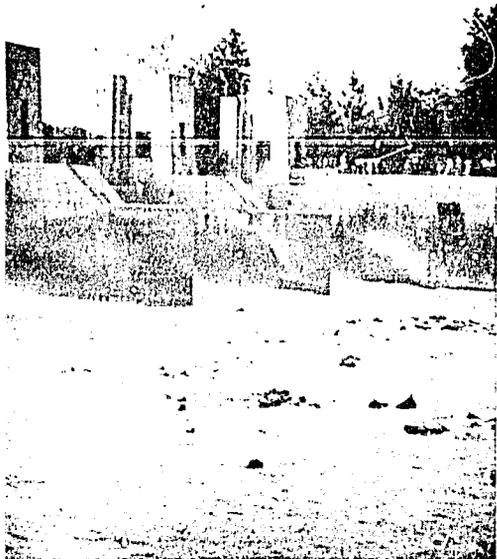


The future was enhanced after the building of the Seyhan Dam.

attempts at developing export companies. Moreover, Mersin has an all-weather harbor which can load and unload three 10,000-ton vessels simultaneously. Its yearly loading and unloading capacity is 5.7 million tons. Loading and unloading in Iskenderun is possible throughout the year except in very stormy weather. The capacity of this port is 2.2 million tons per annum.

Cotton is the principal agricultural product produced and exported from Çukurova.

Five years ago, 22,000 tons of cotton were exported from Çukurova. In these five years cotton production has increased by 250 per cent, and exports have risen by 514 per cent. The Mersin and Iskenderun harbors handle 80 per cent of all Turkish cotton exports. In recent years Çukurova exporters also began exporting linter cotton (short fiber remains after ginning cotton) and cakes (remains of seed-shells after oil extraction). In 1966 the exports of



these comparatively new commodities exceeded five million dollars.

Çukurova's future as an exporting region is most important. A healthy growth in agricultural commodities production in the region and the hinterland of Maraş, Niğde, Malatya and Gaziantep makes increased exports indispensable, an economic must. The producers of the hinterland provinces rely mostly on the Çukurova exporters to sell their products abroad.

An example is livestock. Livestock ownership in the Çukurova region is 1.5 per capita, as compared to the 2.3 per capita national average, chiefly because of mechanized agriculture. But more than 50 per cent of all livestock exports of Turkey go through Çukurova ports or the national boundaries at the Hatay region.

Exporters claim that if livestock smuggling could be curtailed, livestock exports to the Middle East could be at least trebled. They stress that the Middle East countries must eat meat, which they can obtain from Turkey. They emphasize that incentive measures would have better results than repressive measures; incentive measures would make smuggling a less profitable business. They point out that herd-owners move with their capital, and that all retardation because of red tape, burdensome formalities, and lack of veterinarians for control, endanger this capital, and thus make livestock raising an unpopular venture. Likewise, livestock exporting becomes a less attractive venture. Above all, these exporters stress how they want to work cooperatively with the government.

THE NEXT FIVE YEARS

In the next five years Çukurova will offer much more to the internal and external markets. Both conservative-minded and pioneer-minded exporters in this region stress that much has to be done, especially in more aggressive marketing abroad. These men, who are becoming the central element in Turkey's export development, need a great deal of encouragement and assistance from the government.

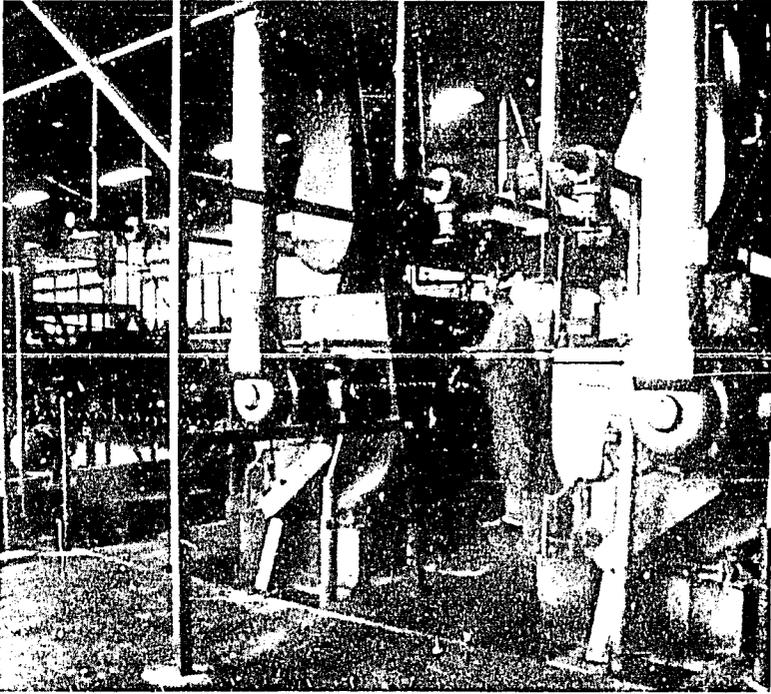
Aggressive national leadership is needed to encourage and aid businessmen, the potential exporters, to reach the first and most crucial step: to want to sell in markets abroad rather than to limit themselves to markets at home. The government has the power to motivate exporters by creating, or by helping to create, a favorable export climate. Seldom, especially in developing countries, has any export promotion program succeeded without government involvement. The exporters of the Çukurova region claim that such involvement is essential in the form of a partnership or a tutor-



Çukurova cotton.

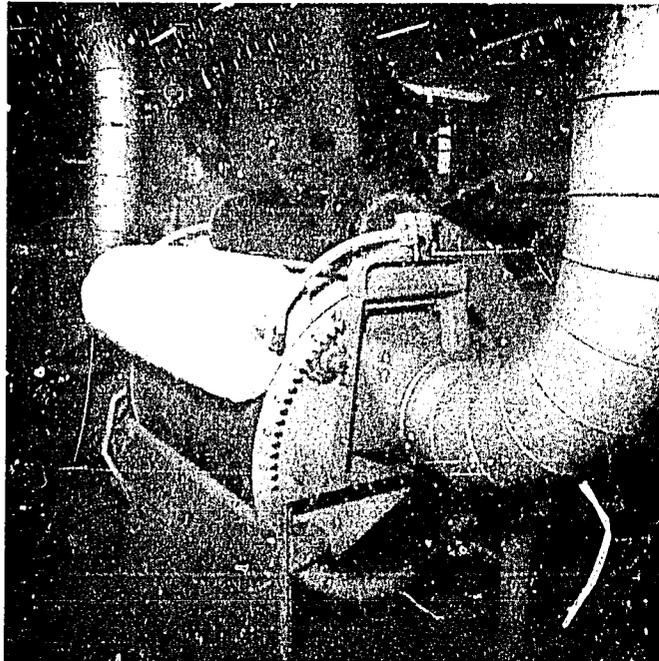
ship, rather than in the form of a controllership.

Businessmen claim that in addition to a smoothly operating marketing system an effective information system is also a prerequisite to an export promotion program. Many businessmen are confident that success in export ventures can and will help forestall economic troubles arising from over-production. Businessmen suggest that a concerted export expansion program needs



Adana Toros Factory produces cotton seed oil for local consumption and cake for exports.

Linters cotton—a new export commodity.



government help in the following areas:

- a. creating a desire to sell abroad;
- b. providing timely analysis of foreign markets;
- c. providing means of publicizing the products overseas; and

d. providing channels for getting products into overseas markets.

“What we, in fact, want,” said one new exporter in Adana, “is a new philosophy. And we want the government to be the philosopher and we the disciples.”

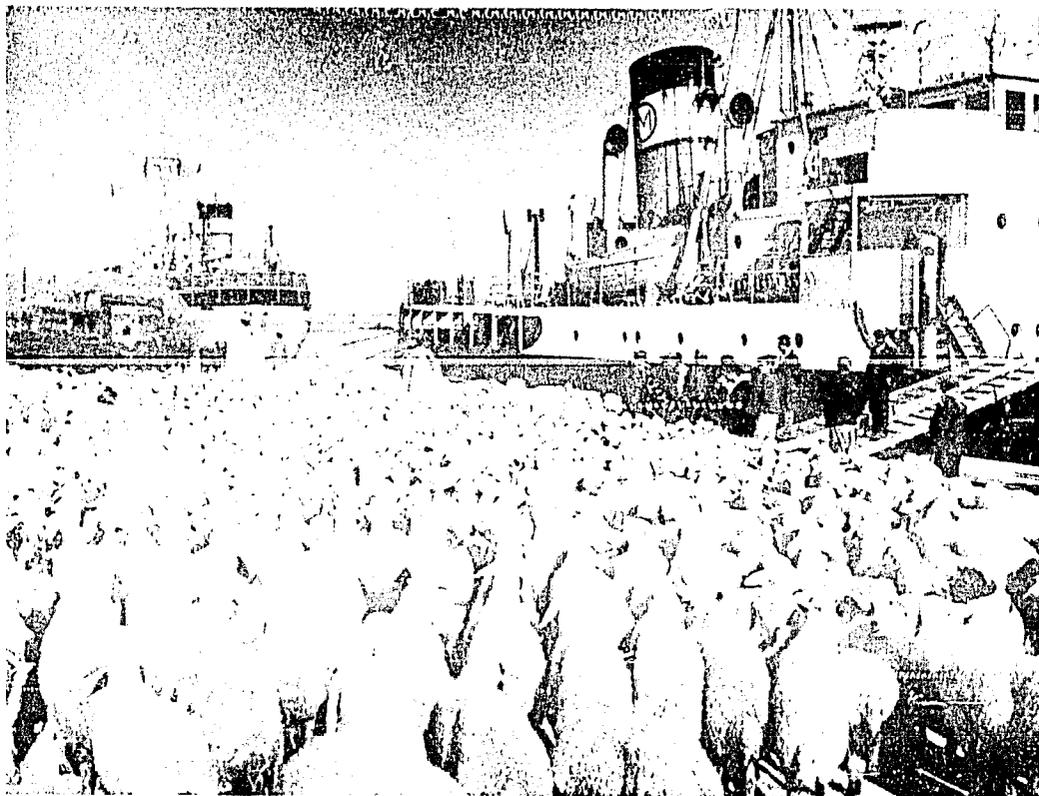
The following are figures from an economic study of the Çukurova region prepared by the Adana Chamber of Commerce:

COTTON AND CEREAL PRODUCTION OF THE ÇUKUROVA REGION

<u>Year</u>	<u>Cotton-Tons</u>	<u>Cereals-Tons</u>
1961-62	99,172	552,481
1962-63	122,667	557,652
1963-64	108,715	508,217
1964-65	154,500	758,805
1965-66	166,838	827,837



*Iskenderun
livestock
exports
can,
must...*



...and will increase.

In the next five years (1967-1972), it is estimated that land cultivated in cotton will be reduced by six per cent. But with greater use of fertilizer, irrigation and other physical inputs, this should not lead to a decline in production. As Çukurova region farmers work on a full rotation system, no decline in cereals is expected, especially because of the use of new seeds and more effective irrigation.

Citrus, other fruits and vegetables

Çukurova is consistently the largest citrus fruit exporting region of Turkey. Estimates are that citrus groves will cover 40,000 hectares of the Çukurova region by 1972 and annual production will be about 800,000 tons. This commodity will need a great deal of export promotion.



Chestnuts exported from Iskenderun to Beirut.

Foreign and local demands for fresh vegetables and nuts are increasing daily. Estimates are that by 1972 the arable land assigned to these commodities will be 110,000 hectares, which will bring in an estimated yield of 187,000 tons. Cultivation of these items is easier and less costly than that of other crops predominantly cultivated in the Çukurova region. But exporters say that charter planes must be available if fresh vegetables are to be exported to European and Middle East markets.

Some progressive farmers have been very successful in viticulture in the Çukurova region. It is expected that many others will enter this profitable field of agriculture with probable exports. It is estimated that by 1972 the cultivable land assigned to grapes will be around 45,000 hectares with an expected yearly output of 225,000 tons. To export fresh grapes, charter planes will be essential. Exporters hope that the government will help in providing or arranging for the availability of this type of

transportation.

The Adana Chamber of Commerce also expects a yearly 225,000 ton crop of apricots, apples, peaches, figs and prunes, all exportable commodities, by 1972.

Improvements in olives and olive oil production are also expected in the Çukurova area, especially in the more mountainous regions. But olive oil exports are erratic. For this reason, Çukurova businessmen do not attach great importance to exporting this commodity.



Çukurova citrus exports are increasing...



...and have already become one of the major export commodities of this region.

WORLD - WIDE MARKETS

Exports from Iskenderun harbor totalled 374 million T.L. (\$42 million) in value during calendar year 1965. At the end of 1966 the export figure for that year from the same harbor was 360 million T.L. (\$40 million). Exports were made to the following countries (in diminishing

order of value): United States, Belgium, Lebanon, France, Italy, England, Western Germany, Spain, Denmark, Soviet Russia, Syria, Austria, Greece, Portugal, Switzerland, Hungary, Holland, Poland, Yugoslavia, Jordan, Finland, Eastern Germany, Saudi Arabia, Japan, Iraq, Kuwait, Lybia, Czechoslovakia, Malta, and Cyprus.

EXPORTS OF PRINCIPAL COMMODITIES * ÇUKUROVA REGION

COTTON

Year	Turkish Lira	U.S. Dollars
1961 - 1962	172,678,000	19,186,000
1962 - 1963	252,149,000	28,017,000
1963 - 1964	207,680,000	23,076,000
1964 - 1965	365,310,000	40,590,000
1965 - 1966**	600,000,000	73,889,000

CITRUS FRUITS

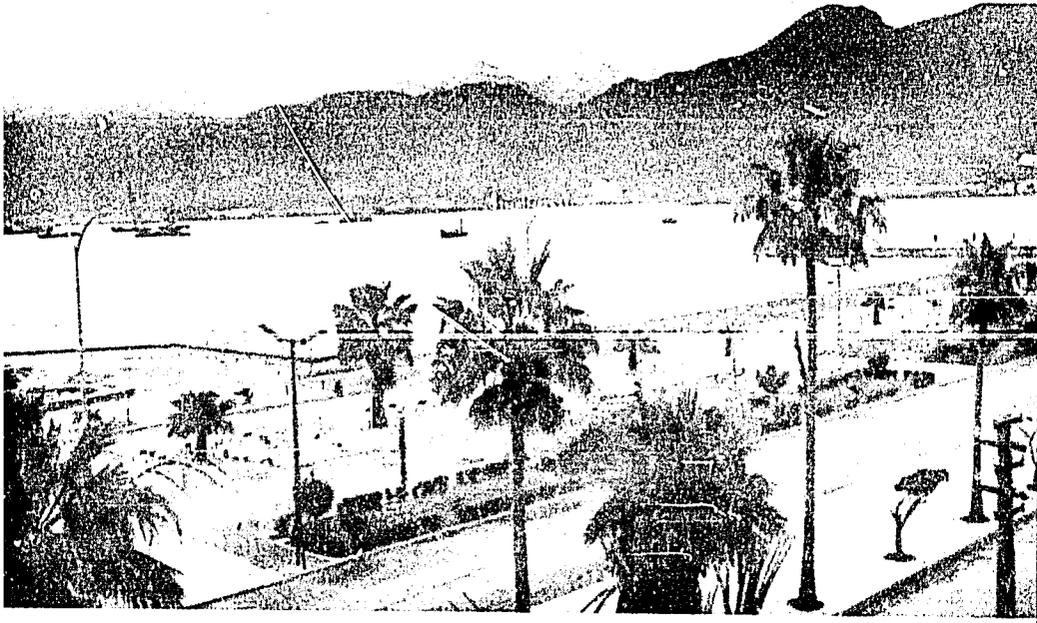
1961 - 1962	10,354,000	1,150,000
1962 - 1963	24,320,000	2,702,000
1963 - 1964	15,148,000	1,683,000
1964 - 1965	21,148,000	2,350,000
1965 - 1966	23,392,000	2,599,000

LIVESTOCK

1961 - 1962	114,500,000	12,722,000
1962 - 1963	128,398,000	14,266,000
1963 - 1964	98,965,000	10,996,000
1964 - 1965	99,289,000	10,032,000
1965 - 1966	70,533,000	7,837,000

* Figures were supplied by the Exporters' Union of Mersin.

** Figure provided by Cotton Exchange, Adana, and Adana Chamber of Commerce.



Iskenderun harbor.

The principal products and countries to which Mersin harbor exports are not identical with those of Iskenderun. While cotton is the main export from Mersin, livestock and citrus fruits are the important exports from Iskenderun. The major cotton buyers are: England, Portugal, Germany, Italy and Belgium.

Nearly one hundred separate items form the export commodity list of Çukurova. Principal products and their by-products include oil-seed cake, hides, and intestines. New items are added daily, such as turtles, shrimp,

watermelon seeds, dried peppers and all types of oil seeds.

New men almost daily become exporters. These men have formidable stamina and a will to work harder than ever before. They know that to maximize their profits they must export more. They know that if they say exporting is difficult, costly, and risky, and do not budge from their insularity, they are doomed not only to remain where they are, but probably even to retreat. They need a guiding hand and a new philosophy which they will doubtless follow.



Mersin Exporters' Union board members meet in Adana to discuss outstanding problems.

WORLD - MINDED MEN

Mehmet Ali Zeybek is one of the four partners of the Balık-Iş Kollektif Şirketi, the largest fish exporting firm of the Çukurova region. Based in Iskenderun, Mehmet Ali Zeybek and his partners follow the profession of their fathers and their grandfathers who were all Mediterranean fishermen.

The firm began exporting in 1958 after the Meat and Fish Combine built its freezing plants in Iskenderun and made space available to private entrepreneurs. Mehmet Ali Zeybek runs the export side of the business.

The firm handles over 90 per cent of the frozen fish exports from Iskenderun. In iced fish exports to the Middle East countries, there is more competition.

Mehmet Ali Zeybek and his partners now export frozen yellow pike to the United States and Austria, shrimp to the United States and France, and bass, dorade, anguilles, small tunafish, sea turtles and inkfish to Italy, France, Austria and Western Germany. Some of these types of fish, and less expensive types, are steadily exported to Middle Eastern countries

which cannot afford to pay the higher prices of European countries and the United States.

The following table shows the increase in exports of this one fishing firm in Iskenderun. The figures show what hard work can do for men with a will.

EXPORTS TO EUROPE AND USA

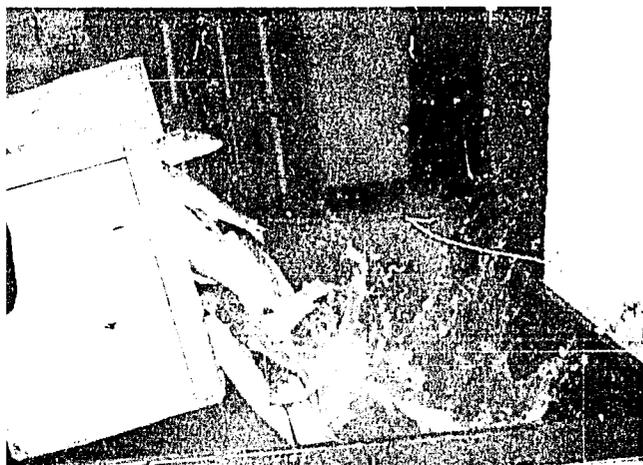
1964	\$ 81,840
1965	\$122,319
1966	\$144,850

EXPORTS TO EUROPE, UNITED STATES AND MIDDLE EAST COUNTRIES

1959	\$ 60,040
1960	\$ 92,800
1961	\$123,000
1962	\$140,000
1963	\$211,000
1964	\$211,000
1965	\$250,835
1966	\$233,000



Shrimp for France and frozen yellow pike for the United States.



Fish frozen for export.



Citrus exports from Mersin are expected to double within a few years.

In Adana there is a small-scale exporter named Süleyman Yılmaz. He exports dry fruits, oilseeds and beans to Middle East countries. He is by no means satisfied with what he does. "The potential is limitless," he says, "but we in Çukurova just do not know how to get together and work together. And individually we cannot cope with those men in Lebanon who buy from us and then re-export to Syria, Bahrein, Iraq, Kuwait and Saudi Arabia."

Süleyman Yılmaz suggests several ways to improve exports. He stresses that several small businessmen could get together, which would make it possible

for one or two of them to go to the purchasing countries to develop markets. Fresh vegetables, he claims, would find a large market in Kuwait, Bahrein and Saudi Arabia, but without charter planes the export of fresh vegetables would be impossible. "Before we can convince others, we must be able to convince ourselves," says this man whose business began small, has grown bigger, and still wants to grow.

"For us to succeed, to improve in the export field," says Yılmaz, "it is essential that the men in the Chambers of Commerce and the government control agencies think like busi-

nessmen and act like our partners. Exports of early-season fresh fruits and vegetables, says Yilmaz, could become major foreign currency earners for Çukurova and the nation. "But," he says, "the government must work with us, and we all must learn how to work together. I am a small businessman, a small exporter. I naturally want to grow bigger. If my competitors work with me, and the government helps us, guides us, we all shall grow bigger. And who will it hurt? No one. Also the cus-

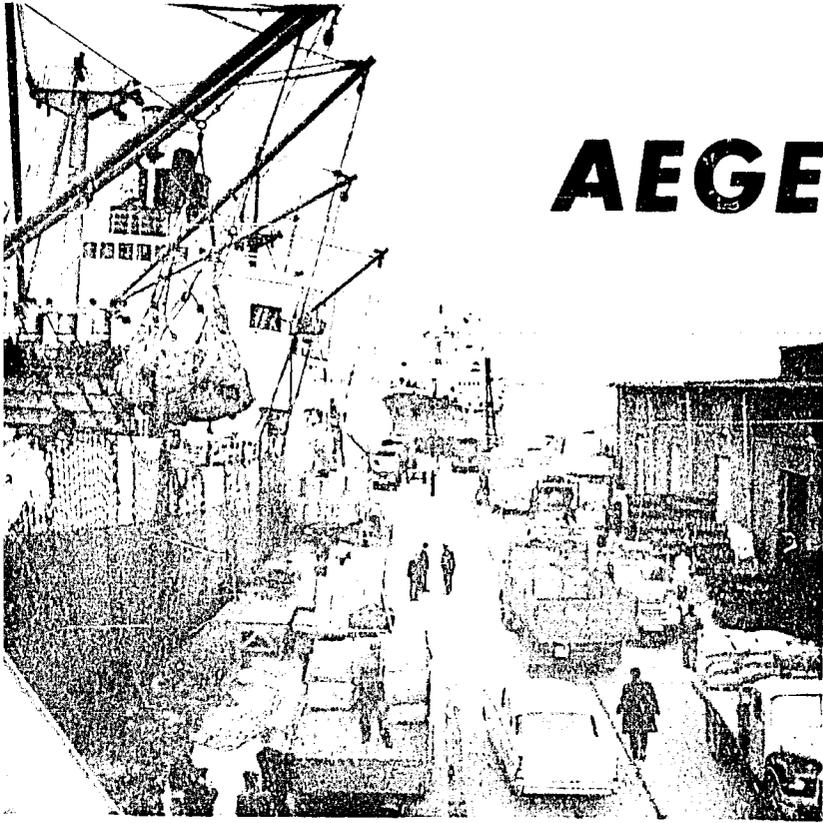
tomers will be satisfied. We must first learn to think right, then act right. I am willing to help myself. But none of us will get anywhere if we do not help each other."

This is the story of Çukurova—the land and the people who cannot afford to stop—the land and the people who have to progress so as to live—the land and the people whose future is in their own hands—the land and the people who can never again go back but must always push forward.

Shop of exporter Süleyman Yılmaz in Adana.



AEGEAN



WHERE OLD AND NEW COMPETE

*Forty centuries of past
trade—forty per cent of
present exports.*

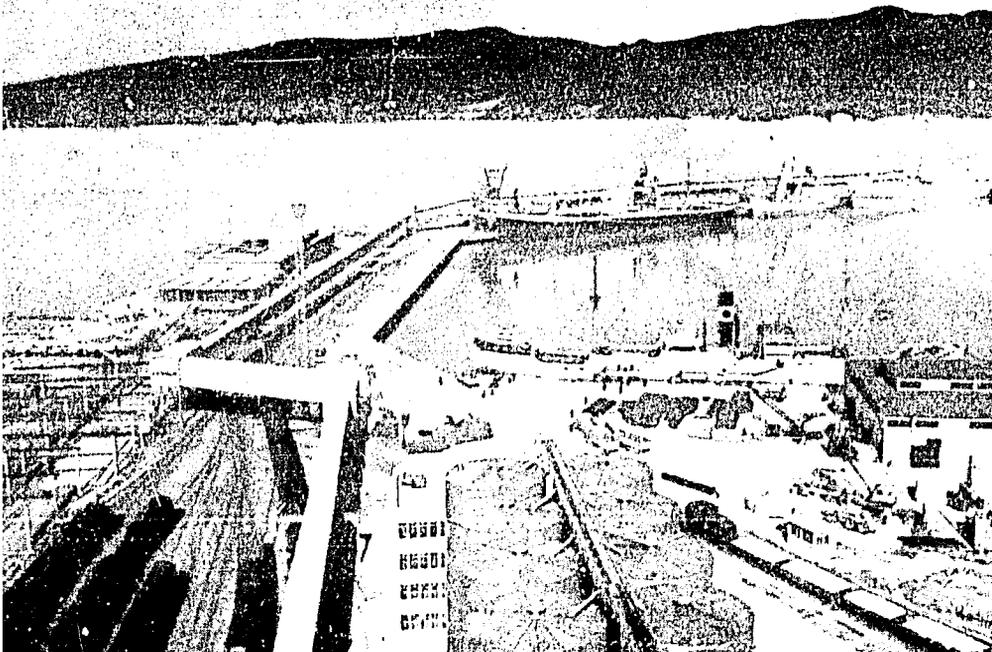
The largest regional foreign exchange earner for Turkey is, and always has been, Izmir. Forty centuries ago Izmir, then Smyrna, was the largest port and business center of Asia Minor. Today about forty per cent of Turkey's total exports is shipped from the harbor of Izmir.

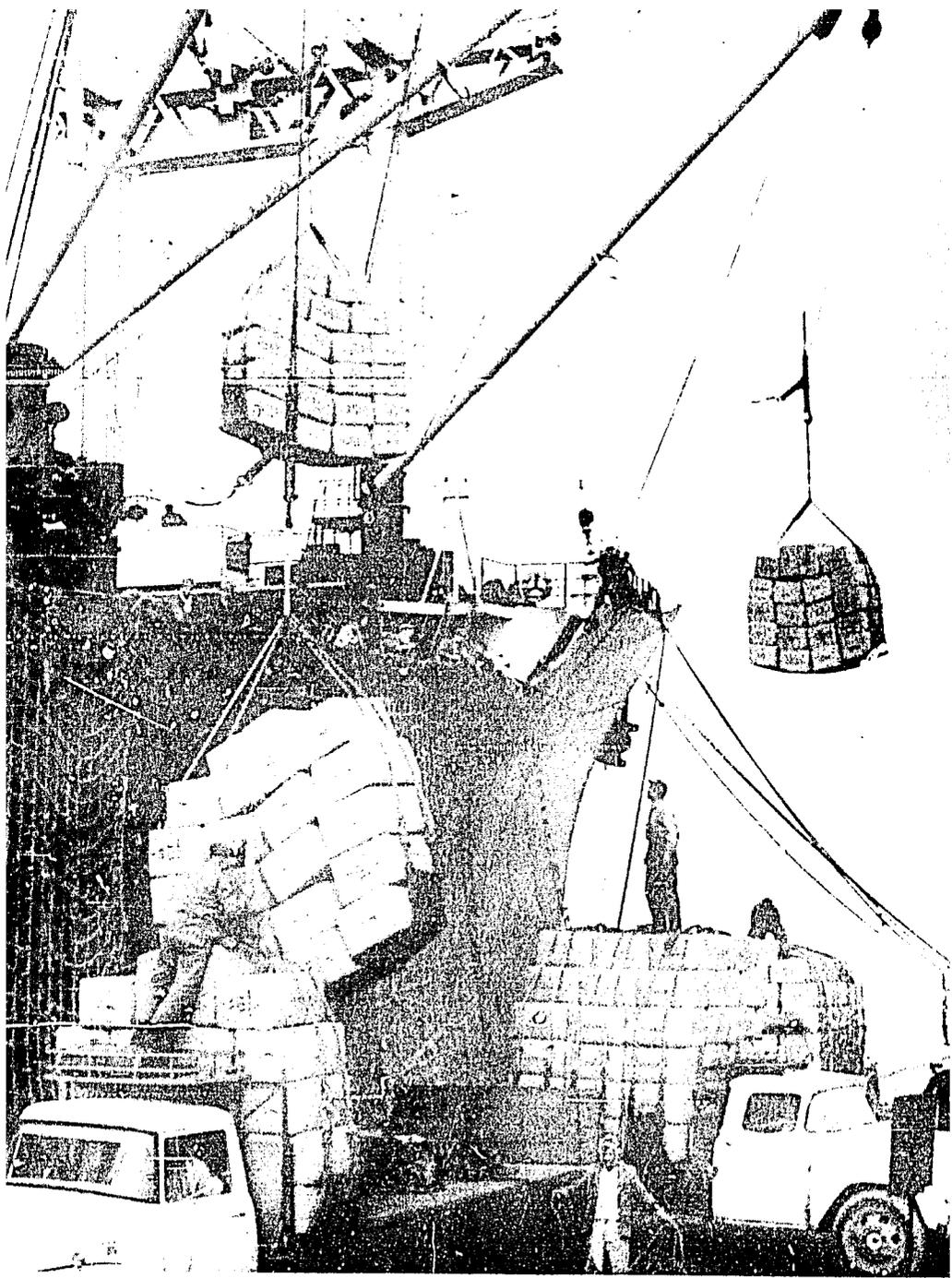
The Aegean Region includes the following provinces: Aydın, Balıkesir, Burdur, Denizli, Isparta, İzmir, Manisa, Muğla and Uşak. Its 2,166 kilometer coast line encompasses some of the most fertile land in Turkey. Total land area is 108,158 square kilometers. The population of this region in 1965 (1965 Census) was 5,148,871.

Izmir is destined to play a leading role in the future successful development of Turkey. The land and people are ready and ever eager to change so that Turkey may meet its export targets.

Commodity exports will undoubtedly continue to be the largest foreign exchange earner during the next Five-Year-Devel-

Izmir harbor accounts for more than forty per cent of Turkey's exports.





Aegean tobacco exported from Izmir harbor.

opment-Plan period. Tentative targets for individual commodities as well as the \$700 million aggregate goal are difficult to reach, but they can be reached. One of the most important factors in this race in the very near future will be a changed Turkish approach to exporting. Exporters say they want a very high priority; exports should no longer be regarded as subsidiary to meeting domestic demands.

Attaining these goals depends largely on what happens in the Aegean region. The people there will have to diagnose and resolve many old and new problems. Moreover, it is essential to have mutual and effective cooperation between government and the people.

The hard-working farmers and ambitious businessmen of the Aegean have the drive needed for modernization. More than the people of any other region in Turkey, they have always been in contact with more modern societies. The region now is in a transitional period. The people know it. They also have come to realize that real success will come with group achievement rather than through achievements only of certain individuals.

Leading businessmen in

Izmir, whether they deal in tobacco, cotton, citrus fruits, olive oil or other exportable commodities, believe that, by bringing more modern techniques to bear in all sectors and by a significantly increasing government leadership and guidance, there is no reason why Turkey should not be on the list of developed nations by the end of the second Five-Year Development Plan.

"Take Denmark, Belgium, Holland," said one Izmir exporter, "their production per hectare is much higher than ours in Izmir. Why? Our land is more fertile and our climatic conditions are better. It is only when we have answered that question, not in theory, but in practice, that we can claim that we are in essence developing, not just recovering."

"The opportunities to increase exports are many; so are the barriers," said another Aegean businessman. "To succeed, to reach the target at which the government and the business community is aiming, all the resources of the government and this community must be coordinated. It is only thus that the opportunities can be put to test and the barriers that check such action lifted."

Oil-seed cakes being loaded with out-dated system...



The business community generally wants to work closely with the government. Many businessmen stress that their very success depends on the scope of government cooperation. They recommend that the government and the business community together look at every aspect of the problems facing the exports of Turkey, whether monetary, legislative, or administrative.

Exporters, producers, and processors seek firm government support of strong promo-

tion, including reappraisal of any government regulations and practices which impede a smooth flow of exports. They also seek government help in finding new export markets, establishing more frequent contacts with foreign buyers, and advertising.

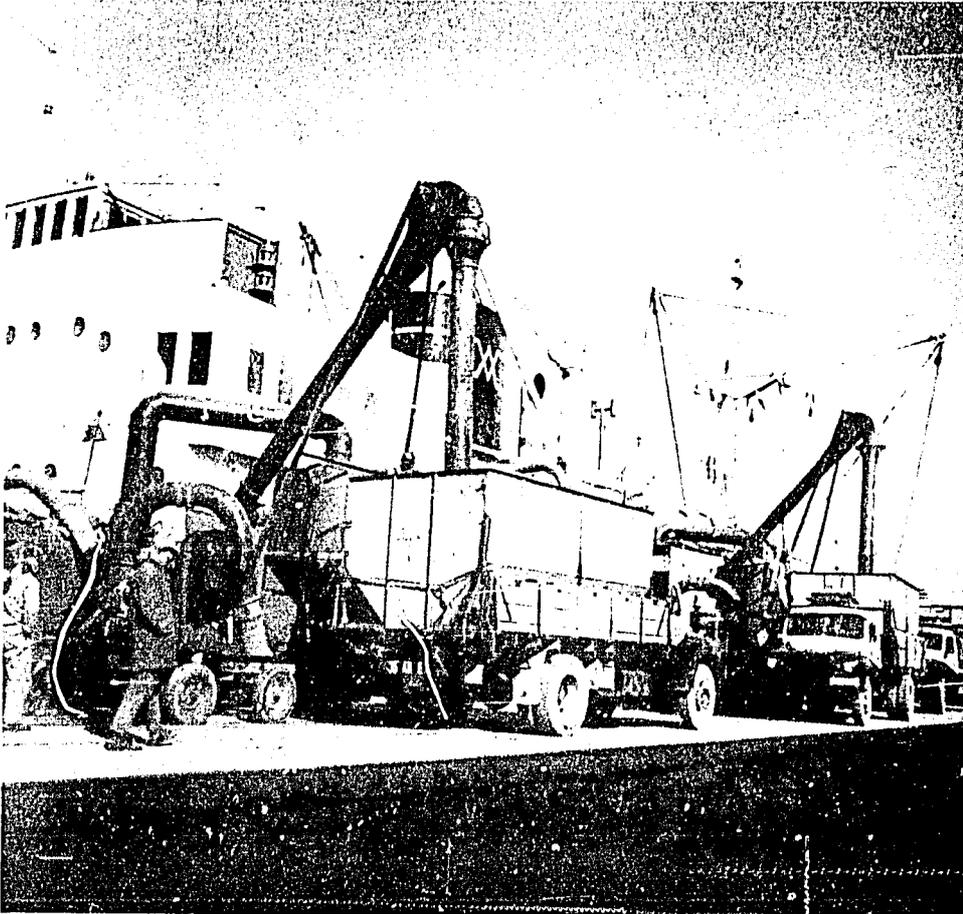
Meanwhile they realize that they themselves must be more active in the search for exportable commodities and especially in constant efforts to increase production, improve quality, and reduce costs.

WHERE SUCCESS AND PROBLEMS GO TOGETHER

Aegean region exports have been increasing steadily, but as in all development processes

the problems increase with progress. Foreign exchange generated by Aegean exports this year were two billion TL, nearly 17 per cent higher than the previous year. The following table shows 1966 Izmir harbor exports throughout the world.

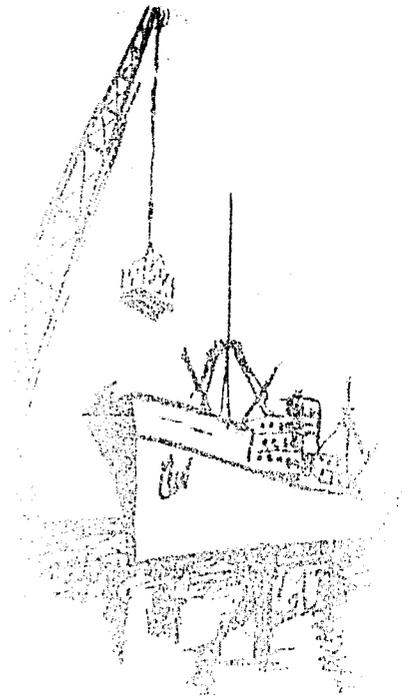
...and with ultra-modern system which cuts costs.



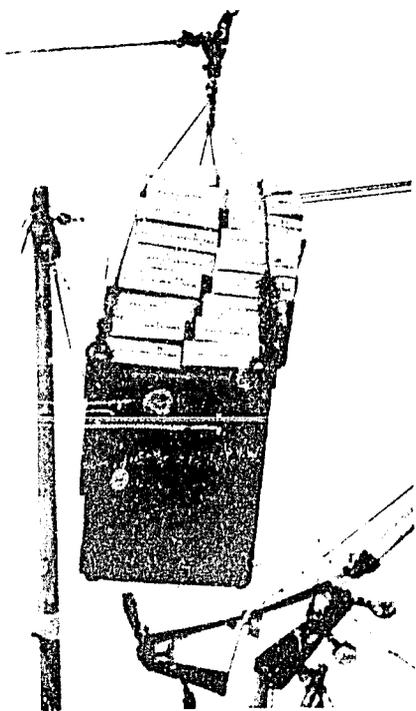
1966 EXPORTS FROM AEGEAN SECTOR

Exports Izmir Harbor	Common Market Countries	European Free Trade Countries	Other European E.M.U. Countries	Dollar Area
	(1)	(2)	(3)	(4)
1966	T.L.	T.L.	T.L.	T.L.
January (268,838,447)	49,489,493	39,684,149	4,301,641	124,995,056
February (171,148,546)	29,657,731	28,009,513	5,225,120	63,289,783
March (170,893,930)	43,773,344	29,095,386	6,745,312	63,471,752
April (146,549,717)	41,928,989	27,535,493	7,270,951	43,725,948
May (65,547,197)	14,055,414	15,714,064	2,905,525	15,893,179
June (64,183,085)	14,005,905	15,777,721	4,665,061	11,628,962
July (30,698,114)	10,084,036	12,179,892	1,519,532	225,110
August (32,977,048)	14,091,003	13,381,317	432,203	982,709
September (63,373,733)	37,617,901	13,122,525	1,639,983	897,652
October (145,276,203)	63,999,630	36,277,527	4,953,745	25,478,760
November (205,109,197)	54,998,345	49,649,658	7,158,964	64,611,676
December (396,984,189)	134,268,506	48,009,952	13,833,780	138,346,851
Total: 1,761,579,406	507,970,297	328,437,197	60,651,817	553,547,438

Communist Bilateral Agreement Countries	Other Bilateral Agreement Countries	Other Countries
(5)	(6)	(7)
T.L.	T.L.	T.L.
37,236,726	1,607,676	11,523,706
39,709,775	4,525,958	730,666
24,299,200	60,213	3,448,723
17,120,462	5,441,106	3,526,768
13,547,663	917,049	2,514,303
15,277,048	960,483	1,867,905
5,086,748	1,238,267	364,529
1,850,203	1,499,377	740,236
7,471,082	1,253,174	1,371,416
8,540,671	3,747,698	2,278,172
21,101,115	6,284,908	1,304,531
27,560,745	5,674,163	29,290,192
218,801,438	33,210,072	58,961,147



- 1) W. Germany, Belgium, France, Holland, Italy, Luxembourg.
- 2) Austria, Denmark, England, Sweden, Switzerland, Portugal, Norway.
- 3) Spain, Greece, Ireland.
- 4) United States, Canada.
- 5) E. Germany, Bulgaria, Czechoslovakia, Hungary, Poland, Romania, Russia.
- 6) Finland, Israel, Pakistan, Tunisia, Egypt, Yugoslavia.
- 7) Australia, Algeria, Nat. China, South Africa, Hong Kong, Japan, Kuwait, Libya, Lebanon, Jordan, Saudi Arabia, Paraguay, Costa Rica, Kenya, Argentina, Malta, Philippines, Tanzania, Venezuela, Peru, Thailand, Congo, Cyprus, Ethiopia, Korea, New Zealand.



Sultana grapes being loaded for transport to England.

An example of the problems is given by one of Turkey's exports, tobacco. Uncontrolled and (as some leading tobacco men term it) irresponsible tobacco cultivation, especially in the Aegean area, has led this year to frustrations for producers, buyers and the government.

Haydar Aryal, President of both the Association of the Aegean Tobacco Merchants and the Istanbul Tobacco Merchant's Union, stressed that in the production of tobacco, which must

be regarded as a national agricultural commodity, national discipline is essential. Cultivation of tobacco on unsuitable land, as was the case this year in the Aegean provinces, causes low-quality crops. This tobacco not only sells at low prices but indirectly affects the sales of high-grade tobacco because of over-production.

Fifty to 80 kilograms of tobacco per-decare is obtained from the Aegean producing areas. The quality is good because the soil here is rich in iron and potassium. Last season growers planted tobacco in fields previously used for fig and grape cultivation. The output of these fields was much higher than ever produced in any area of the Aegean, but the quality was lower. In Izmir, the tobacco-growing farmers will be, said one Izmir grower, "very careful in the future not to play with fire that turns into ashes before it even gets hot."

The importance of Izmir's tobacco cannot be over-estimated. The Aegean sector produces 65 to 70 per cent of Turkey's tobacco. More than one-fifth of all Turkish foreign exchange yearly is derived from tobacco exports. Turkey is the seventh largest tobacco pro-

ducer in the world and ranks fourth in tobacco exports in world-wide competition.

The tobacco merchants of the Aegean claim that a considerable increase in tobacco exports should not be expected. They aim to produce high-quality tobaccos and to prevent farmers from producing low-quality grades in the bottomlands. It is generally agreed that government support prices should continue to be paid to growers—but not on tobaccos of low grades cul-

tivated in the bottomlands. Tobacco merchants insist that these supports should be maintained within realistic levels, so that the price of Turkish tobaccos after manipulation and a reasonable profit for the tobacco merchants do not exceed what buyers are willing to pay. Turkey today supplies 60 per cent of the oriental tobacco used in the United States. Increased sales could probably be realized in the USSR, Japan, and Europe, given greater sales effort.

Izmir tobacco being tested before sale.



Another Aegean crop is cotton, comparatively new to the region but completely successful. The region now produces over 40 per cent of all cotton grown in Turkey. Since the Aegean growers have been using improved seeds from the United States and have increased fertilization and irrigation, cotton has become Turkey's major export commodity. In 1964 and 1965 cotton exports constituted 22 per cent of total Turkish exports. In 1966 this increased to 26 per cent. Members of the Cotton Exchange in Izmir hope that shortly Izmir will also ex-

port considerable quantities of cotton thread and products.

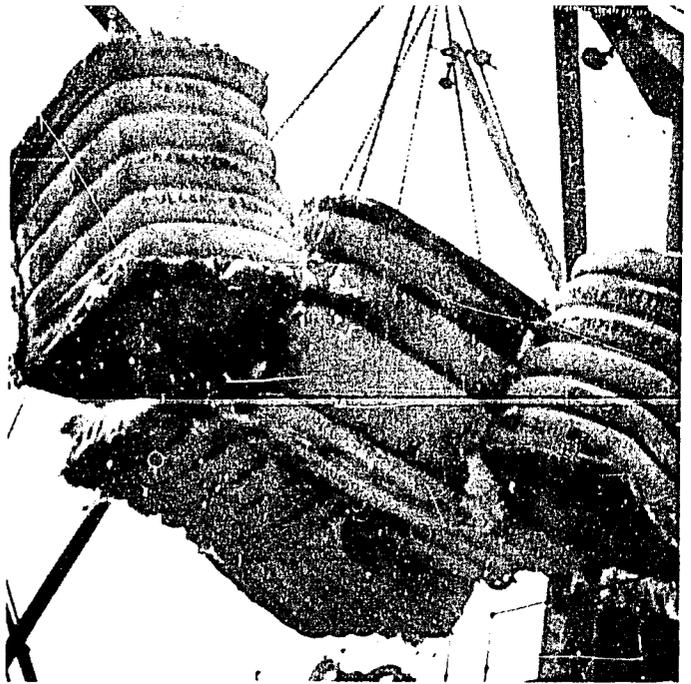
The Aegean cotton-producing region takes in the provinces of Aydın, Balıkesir, Bursa, Çanakkale, Denizli, Izmir, Manisa and Muğla. Throughout Turkey, cotton cultivation rose from six million decares in 1961 to seven million decares in 1966. The Aegean region cultivated two million decares of this land, about one third of all cotton grown in Turkey.

The principal requirement for further increases in production and export of this important agricultural commodity is greater

Aegean cotton being transported to harbor for export...



*...and
being
loaded
on ship.*



use of irrigation and fertilizers. Use of pest control insecticides is also essential, especially against pink worm, agrotis and thrips. One of the real problems facing cotton growers is rotation, which has not been carried out as needed. Over-zealousness (agricultural experts call it over-greed) has led to the constant use of the same land for cotton in various areas. In Söke, Mene-men and Nazilli great tracts of land have become useless because of salinization from constant use in cotton cultivation. The top cotton dealers stress that "national discipline" must be imposed on such men who "are not intelligent enough to

know their own good." Said one cotton exporter: "Every decare lost, every decare that becomes useless wasteland, is not only land lost to that individual farmer, but lost to the nation."

Emphasis is now being placed on teaching the cotton growers how to improve themselves and in that way their product. More profits depend on how much more per-decare a grower can obtain, without loss of quality. This increased and improved production depends solely on better methods: modern machinery, seeds, fertilizer, irrigation, pest control, rotation of crops, and judicial and timely use of available credits. "Ten

years ago we grew only very low quality cotton here," said one grower, "now we must learn how to do better what we are doing."

All Turkey's raisin exports come from the Aegean region. Raisins constitute one of the oldest and principal export commodities of the Aegean region and of Turkey. Although Turkey is only fourth in world raisin production, it produces a superior raisin for many uses.

Raisins are grown in the Manisa, Izmir and Denizli provinces of the Aegean region. These areas produce 60,000 to 100,000 tons of raisins annually. The 524,000 decares of sultana grapes yielded 72,000 tons in 1964-1965.

Local consumption of raisins is about 15,000 tons a year; the average export figure has been about 70,000 tons for several years. Experts believe that along with better transport facilities for fresh fruits, an increase in export of raisins can be expected—if world demand also can be increased through intensive sales promotion efforts.

Many growers who have to re-plant their vineyards now are changing from raisins to other types more suitable for export as fresh grapes, and for wine-making. These are early

maturing varieties. Small shipments to European countries, especially Western Germany and England, have proved satisfactory. With good packaging, charter plane transportation, rigorous quality control, there is no reason why fresh grapes should not, in the near future, become one of the principal export commodities of the Aegean region.

Another principal export commodity of the Aegean region for many years has been dry figs. Total production averages from 40,000 to 60,000 tons per annum. Annual local consumption of dry figs is between 5,000 and 8,000 tons. Dry figs are produced in the Aegean provinces of Aydın, Denizli, Izmir and Manisa.

World purchase prices of dry figs are low, and competition is stiff. Yet greater per-decare yields through the use of more fertilizer, irrigation and pest control can raise yields by 30 per cent without any deterioration in quality, according to specialists in this field. Terracing and use of better technology will also help to control fig cultivation in these regions, in the opinion of agricultural engineers. It is essential that the world demand for Turkish figs be increased at the same time.



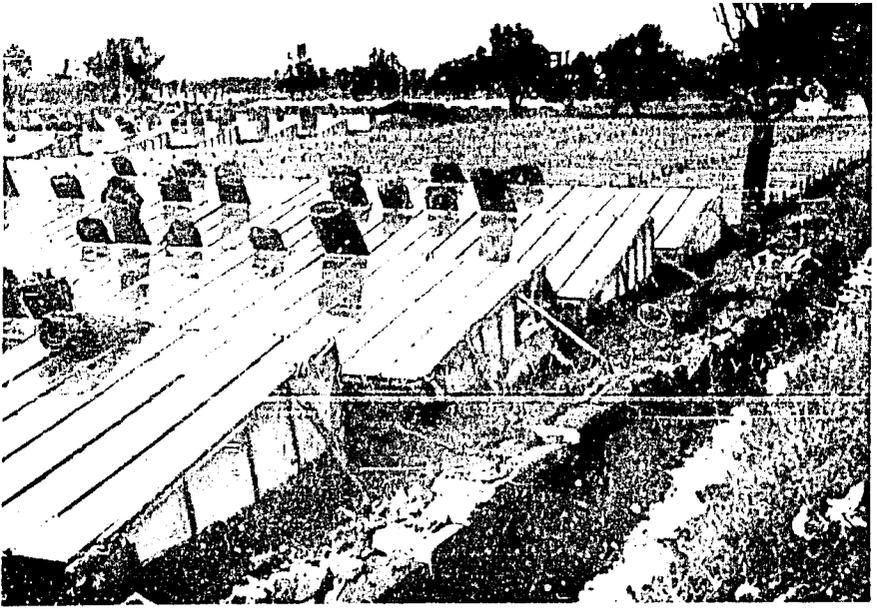
Tangerines are graded at Gümüldür village before being exported to West Germany.

POSSIBILITIES FOR NEW EXPORT COMMODITIES

Citrus fruits are comparatively new export commodities, which promise to become major export items in the Aegean as well as in the Mediterranean region. All the Aegean and Mediterranean coastal areas have proved to be excellent citrus fruit growing regions. Tangerines of the Satsuma type from Rize are grown more than other citrus fruit varieties in the Aegean re-

gion, especially in the Izmir, Bodrum and Sultanhisar areas.

Aegean farmers began growing citrus trees about ten years ago. As the trees grow, the yield increases yearly. A striking example of fast-rising tangerine production can be noted in the Izmir sector. According to the Technical Agricultural Directorate of Izmir. Two million kilogrammes of tangerines were produced in the Izmir sector in 1964. This figure rose to six million kilogrammes in 1965. According to the Chamber of Commerce in Izmir, the export figure in 1966 for tangerines alone was 8,897,368 kilograms, bringing in TL 12,648,717 in foreign exchange.



Pre-season vegetables are raised in Izmir area.

As in the case of tobacco or cotton, the tangerine-growing farmers have to learn to help themselves. Pest control, use of fertilizer, and irrigation are essential in tangerine growing. In marketing, many villages are forming their own export cooperatives to deal with the foreign customer on the spot in the village. On the whole, tangerines have opened a new horizon.

Such products as olive oil, pulses, and fresh vegetables also have export possibilities. The potential is there. But the transformation of that potential into actual exports will not be an easy matter.

In olive oil, the domestic price is often higher than the international price. In the olive oil international market, a steady flow of yearly exports is essential before buying countries will be ready to regard the exporting country as a reliable source. Recently Turkey has been able to export olive oil. Through the continued grafting of wild olive trees and completion of TARIS's storage facilities a steady flow of olive oil can be obtained for exports every year. Turkey may then become a competitor with Italy, Spain and Morocco in the world markets.

Charter planes and refri-

gerated trucks are essential to export vegetables. All concerned say that to market such products and to transport them to European markets, the government, the business community and the producers will have to work in close collaboration. Potential fresh vegetable exporters explain that with this commodity there is no way of putting things off until even the next day.

The Aegean Area can and is producing excellent early season vegetables. The production could easily be increased to satisfy both local and foreign demand. But the organization for marketing and exports must, in this commodity, be completed even before cultivation begins. The same requirements exist for exporting fresh fruits.

The export of green vegetables has not increased substantially, in part because of increasing domestic demand. Here again the application of better technology and more of the right physical inputs could increase exports.

The determining factor is the degeneration of the seeds in the production of lentils for export. Most improvements will have to begin with a great deal of research and testing before new seeds can be planted. Once

a major export commodity, lentils have been lagging behind because of the low quality of goods exported as compared with the goods exported by other lentil-producing countries.

Many other commodities are exported from the harbor at Izmir, Snails, shrimp, sea turtles and other once unimaginable items are sent to scores of countries all over the world. Minerals and forest products are exported. The quantity of these exports is increasing, and the quality is improving each year. Each day more names are added to the list of exporters. Once regarded as only suitable for minorities, this profession has become one of the most coveted in Izmir, the commercial heart of Turkey.

A successful export drive will be a major element in increasing Turkish foreign exchange earnings and possibly domestic savings, in the opinion of Turkish businessmen, economic experts, and high-level government officials. All these men and the producing farmers must get together, work together, and think together if the target Turkey has set for itself is to be met. The men in the Aegean region are demonstrating how to get results through such cooperation.

THRACE - MARMARA

The businessmen of the Istanbul (Thrace—Marmara) region want to be, have to be, and will be the pioneers in the transition from traditionalism to modernism.

**ISTANBUL
SHELVES
THE PAST
AND
REACHES
FOR
THE FUTURE**

Istanbul embraces milleniums of history. That is for the tourists. She has a future of equal grandeur—and that will affect every Turk.

This metropolis linking two continents—Asia and Europe—also links the past and the future of the nation. Still a city of beauty, charm and mystery, historic Istanbul is today the focus of Turkey's development.

More than half the industry of the country is concentrated within or near this city of 2.3 million. Many of Turkey's most astute businessmen live and work here. Istanbul is educating tomorrow's national leaders in her universities. And in her harbor—one of the most beautiful in the world—every day the world of Turkey meets with the world outside.

Sixty-three foreign countries are recipients of the world exports that clear from Istanbul's harbor—about 20 per cent of Turkey's total exports (see table

I). The value of these goods last year was 479 million TL (\$53 million) as compared with 459 million TL (\$51 million) the previous year (see table II). More than 60 per cent of all goods entering Turkey come through the harbor of Istanbul.

Composed of the Marmara and Thrace areas, the Istanbul region also clears such exports as Black Sea tobacco and hazelnuts. Possibly of even more importance to the future, many of its larger factories have export promotion as one of their ultimate targets.

For the first time in Turkey tires are being exported from Derince to the Netherlands.

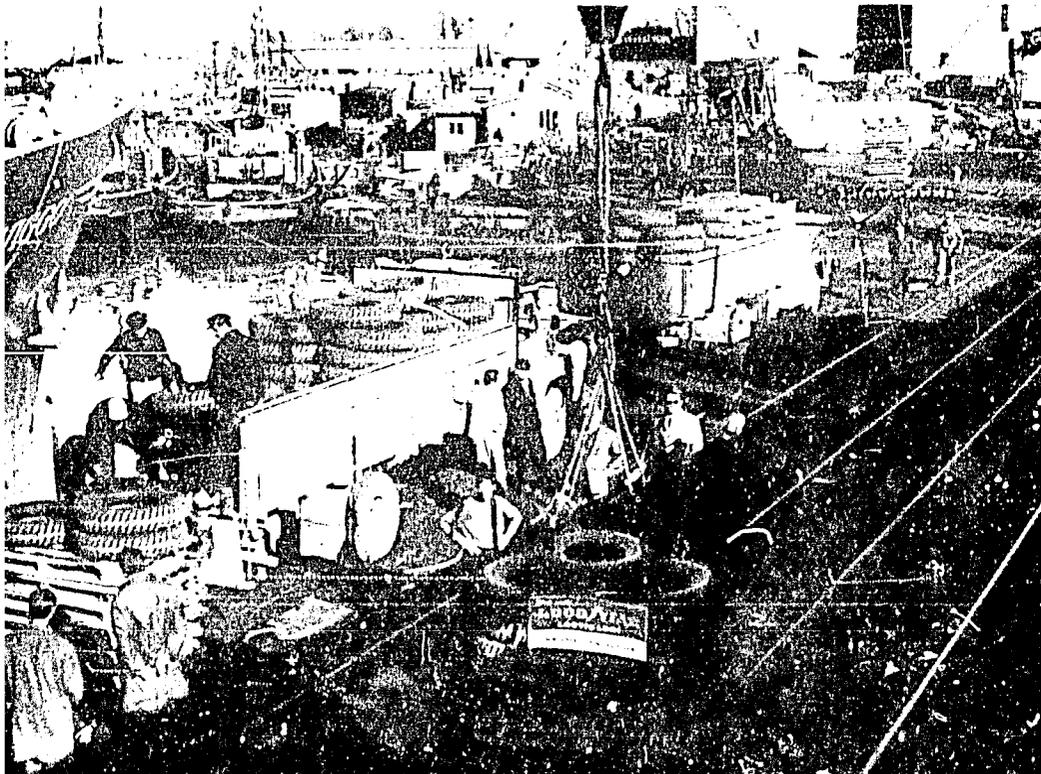


TABLE I

EXPORTS FROM ISTANBUL HARBOR
IN 1966, BY COUNTRY

EXPORTS TO COUNTRIES	PERCENTAGE*		
West Germany	15.52	Norway	0.16
U.S.A.	10.44	Portugal	0.16
France	8.54	Pakistan	0.14
Hungary	6.31	Lybia	0.11
Belgium	5.85	Iran	0.08
Italy	5.54	Cyprus	0.08
Switzerland	5.47	Luxembourg	0.07
England	5.37	Australia	0.06
Russia	4.59	Malta	0.05
Czechoslovakia	3.77	Algeria	0.04
Yugoslavia	3.45	Monaco	0.04
Japan	3.08	South Africa	0.03
Israel	2.45	Tunisia	0.03
East Germany	2.34	Jordan	0.02
Bulgaria	2.28	Hong Kong	0.02
Austria	1.95	Philippines	0.01
Poland	1.88	Sudan	0.01
Greece	1.42	Nigeria	0.01
Spain	1.37	Kenya	0.01
Romania	1.33	Saudi Arabia	0.01
Holland	1.22	Albania	—
Denmark	0.86	Antilles	—
Lebanon	0.77	Brazil	—
Canada	0.72	Gibraltar	—
Sweden	0.53	Iceland	—
Finland	0.51	India	—
Vietnam	0.41	Kuwait	—
Egypt	0.38	Mexico	—
		New Zealand	—
		Panama	—
		Syria	—
		Tanzania	—
		Zambia	—
		Above unmarked countries—Total	0.28
		TOTAL:	100.00

* Figures from Istanbul Chamber of Commerce.

Ten years ago there were no insecticide factories in Turkey. Today there are eight, and some have even begun exporting pesticides on a small scale. In recent years, many large textile and a few ready-to-wear factories have become exporters. Pharmaceutical and cosmetic plants are gearing for export, hopefully this year.

On January 16, 1882, the first Chamber of Commerce was formed in Turkey—in Istanbul.

TABLE II

TOTAL EXPORTS FROM ISTANBUL HARBOR IN 1966, BY MONTHS

	T.L.
January	34,009,690
February	31,186,252
March	36,142,968
April	33,235,392
May	36,718,080
June	42,906,314
July	29,011,188
August	51,024,335
September	42,789,822
October	37,341,233
November	49,449,085
December	55,118,873
Total	478,933,232

1965 exports from Istanbul harbor according to State Statistical Institute.
\$51,022,000 - 459,198,000 T.L.

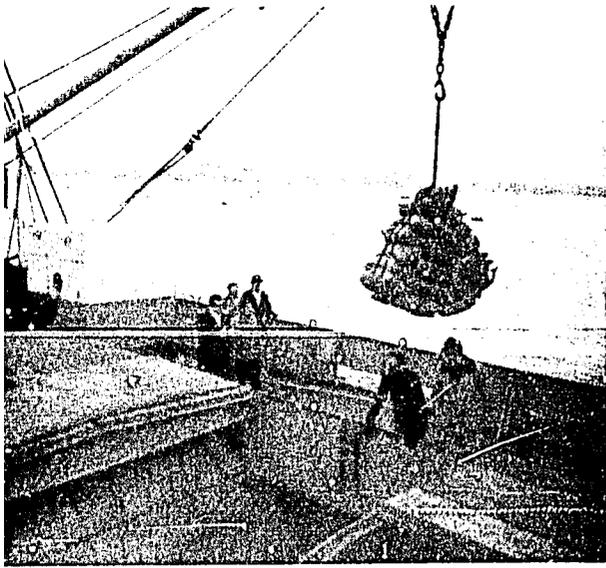
It had 250 members. Today its membership is more than 40,000. Though some of these members are exporters of long standing, many more are planning to enter the field. The eventual success of these potential exporters depends largely on the development of manufacturing in this region.

Most of the best commercial brains in Turkey are concentrated in Istanbul. These men and concerned authorities are ceaselessly studying ways and means to promote exports of industrial products. For, while Çukurova and the Aegean regions can rely on their agriculture, here progress must come from the industrial sector.

At present 42 manufactured and semi-manufactured items are exported from Istanbul. These include tanned skins, carpets, rugs, towels, furniture, glassware and toys.

Some of the people who make and export them are old-timers, members of firms which have been exporting for decades. But many are new businessmen who have decided to break with the past. Although they realize the magnitude of the change required, they willingly accept its challenge.

“Who ever thought that we could export snails, turtles and



Exports from Istanbul harbor.

frog legs from Istanbul?" a tobacco exporter asked. He added: "Since the days of my grandfather, my family have been tobacco dealers and exporters. This is the conservative side of my family. But now many of our younger members are dealing in unconventional products which have export potential. They know that tobacco buyers who have worked with us since my father's childhood may continue to buy, probably the same amount year after year. This does not satisfy them. They want a challenge, the challenge of change."

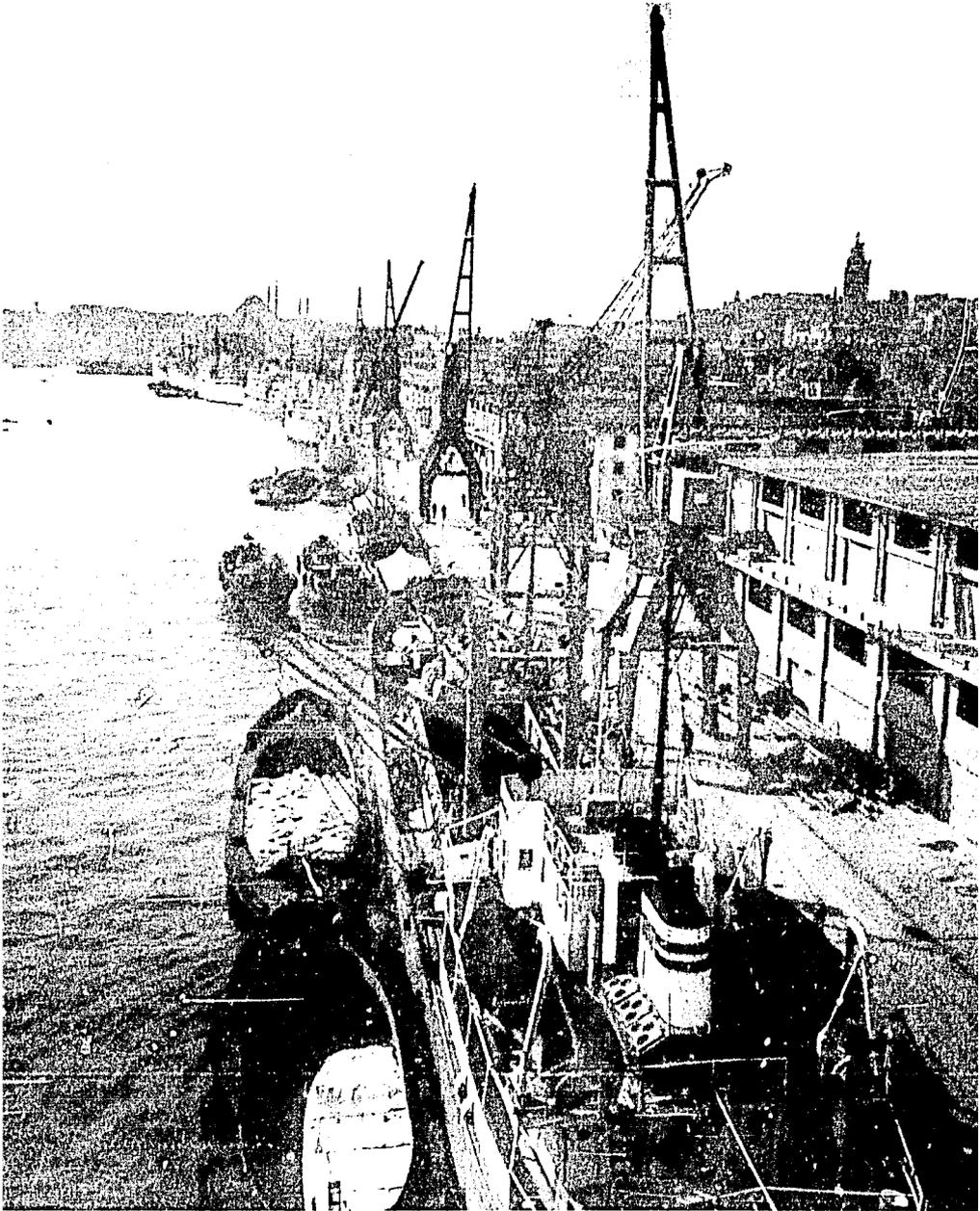
The men who have accepted this challenge stress that they cannot perform alone. They want the producer to meet the standards of the outside world. They

want the government to create and maintain a basic economic climate favorable to exports .

The association of exporters, the Chamber of Commerce, and the Chamber of Industry of the Marmara-Thrace area are very busy organizations. They not only have to deal with the everyday problems of their thousands of members; they have to lay foundations for the future.

The exporter, especially the novice, acknowledges the hurdles to be overcome before his operations run smoothly. He depends upon his Chamber of Commerce or his Exporters' Association to help him clear them. Simultaneously, the government and the Chambers of Commerce and Industry contin-

Istanbul barbor.



ually keep in mind that, if Turkey is to increase its exports, it must have more exporters. Special emphasis is being made to encourage manufacturers to reach the crucial point of desiring to compete in export markets.

As an agricultural country, Turkey must adapt to the requirements of an industrialized world. This can be done with increased emphasis on foreign trade. The Government is helping already. Steps have been taken to increase industrial production, especially of exportable commodities. Fiscal encouragement has been given for such products.

"But all these measures," said an Istanbul exporter, "are like aspirin. They relieve the pain but they are not the cure." The government must work with them, the exporters claim, not just control them.

"If we are to build," another businessman said, "all of us, from the producer in the field to the processing exporter, to the government, must share in the building."

These Istanbul exporters say the government should help more and more in collecting and processing market information. They urge that it be firm about quality control. They also be-

lieve that too much red tape makes exporting difficult and in some commodities, such as perishables, impossible.

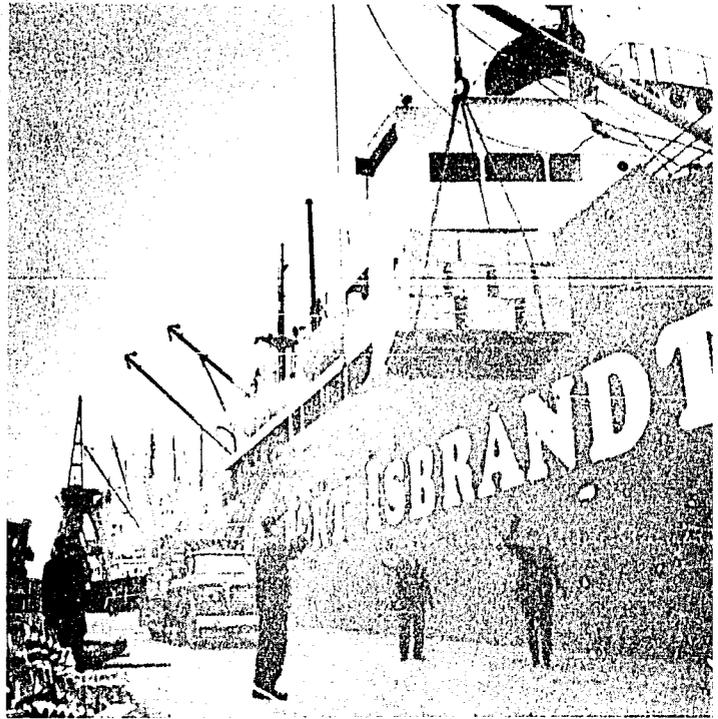
IMPORT SUBSTITUTION

Ten years ago Turkey imported all her insecticides, motor-vehicles, motors, refrigerators, paint, glass and glassware. She also imported most of her pharmaceuticals, woolen materials and newsprint.

Today when one speaks to the leaders of the Turkish industries which manufacture all these goods, one realizes what giant forward steps this country has taken on its road of progress. Sewing machines are manufactured with 100 per cent local material; motorcars and trucks, with 50 per cent; insecticides and pharmaceuticals with 75 to 100 per cent. The list goes on and on. And in these factories thousands of workers, foremen and engineers work night and day to bring a better life to their families and to Turkey.

Said one manufacturer-exporter: "Everyone is cognizant of the magnitude of change required in Turkey if we are to

More exports for more progress.



meet the goal we have set for ourselves in the time limit we have set for ourselves. But where we are lucky is that we are living in an era when technology is reaching a new peak each day. And, fortunately for Turkey, all our friends are willing to share this technology with us. We do not have to invent, only accept and adapt to our local conditions. Today when someone says so-and-so is building a plexiglass plant, or so-and-so is opening a printers' ink factory, we accept these as nor-

mal happenings. Ten years ago he would have been laughed at."

These are only some of the people who live and work in the Istanbul region. Some are less enthusiastic; still others are over-optimistic. But all—pessimists, realists and optimists—know that the break with the past is a fact, that change has come, that new values must be accepted and met, and that in the transition from traditionalism to technological and economic modernity everyone will have to do his part.

EVERY DAY AHEAD OF YESTERDAY

"Our factories"—The story of Arçelik and DYO.

MIRACLES OF PROGRESS

As a developing country Turkey has achieved so much but still needs to achieve so much more that some advances which are almost miracles of progress are accepted as normal changes. But these are not small changes. Giant steps have been taken, although many more must be made on the journey to progress. The revolution in Turkey today is not only agricultural and industrial. It is also psychological. Turks think differently, work differently, even hope differently.

This article describes two Turkish firms and what they achieved in a decade. We have intentionally chosen two of the great industrial concerns in Turkey, for their successes have fostered the successes of others. We have also intentionally picked these two firms because neither has ever received any assistance from USAID. Despite this, their success is cause for pride in USAID. For we of USAID are in Turkey to help and see Turks succeed. Success is our mutual goal.

ARÇELİK

Ten years ago Turks had to import refrigerators, washing machines, stoves, water heaters, vacuum cleaners and many other household appliances. Then a group of businessmen got together and built the Arçelik factory in Istanbul.

Today more than half the refrigerators and washing machines sold in Turkey are Arçelik-made. When Arçelik began production in 1956, its capital was 1.5 million TL. Now it has a capital of 20 million TL., and

if necessary can draw on a capital of 100 million TL.

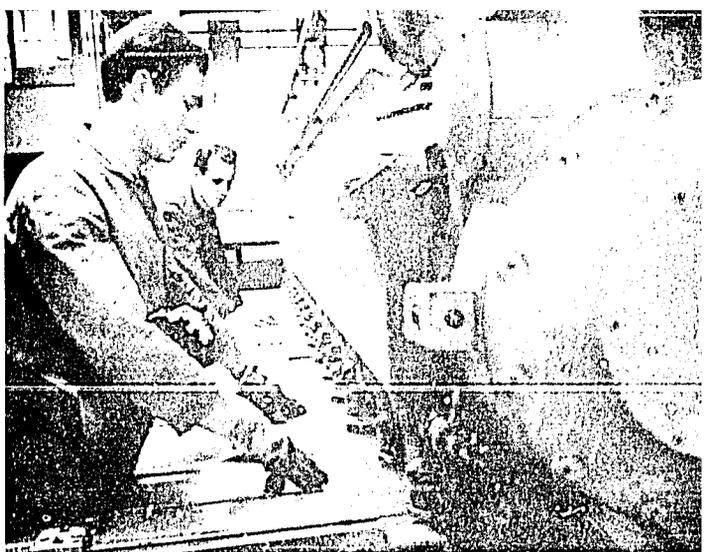
Today 200,000 Arçelik refrigerators, 150,000 washing machines, and thousands of other machines, including motor scooters, are being used in Turkey. The refrigerators, which first sold for 5-6000 TL. are now offered at 2500-3000 TL. Arçelik now has 600 dealers throughout Turkey selling its products.

In the early days \$120 worth of parts had to be imported for each refrigerator. Today this has decreased to \$40. Soon Arçelik, as a partner in the newly con-



Ten years ago Turks had to import all their refrigerators. Today most refrigerators used in Turkey are manufactured in Turkey - 50 % by Arçelik.

*Big press of
Arçelik factory
in Istanbul.*



structed General Electric Industries factory, will be able to have all its equipment manufactured in Turkey.

The young energetic general director of Arçelik, Ali Mansur, says: "What we have achieved is much. But it is nothing compared with the opportunities open to us. Every day we are ahead of yesterday." Arçelik has outgrown its 17,000 square meter factory on the Golden Horn in Istanbul. This year it will move to Izmit, where a 40,000 square meter factory is being built on a lot of 600,000 square meters. "We do not know how far we will grow. We do not want to be cramped again," Ali Mansur explains.

There are 1,450 men working for Arçelik. Of these about 600 are skilled laborers, 600 are

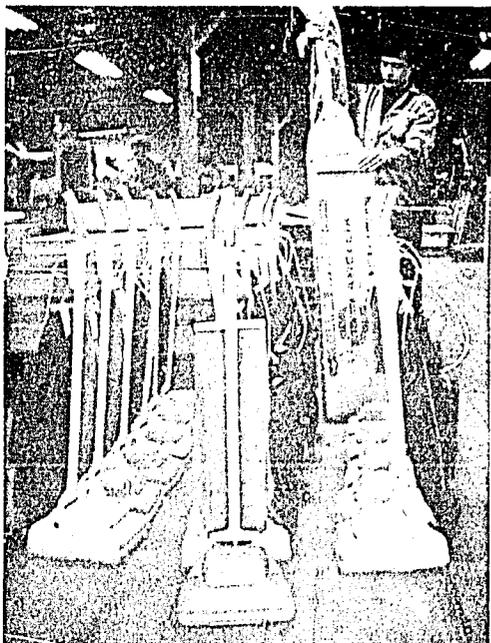
unskilled, and the remainder are technical and administrative personnel. Included in the latter are 10 economists, 40 mechanical, electrical and chemical engineers, and 80 trained technicians. At the Izmit location Arçelik is also building housing for its labor force.

Arçelik has a small apprentice school where 20 youngsters between 14 and 17—all sons of Arçelik workers—are enrolled by competitive examinations each year. They are boarded, housed, and clothed. They also receive wages which rise as their skills improve during the three-year course. Half the money is saved for them in a special fund, the other half given for spending money. At the end of the course, the graduates must fulfill their military service. When this is

completed, they receive their savings. Then they are free either to join Arçelik as trained workers or to work anywhere else they choose—even with competitors of Arçelik. "Our aim," says Ali Mansur, "is not only to train men for Arçelik but for Turkey."

Arçelik sold 130 million TL worth of manufactured goods in 1965. Sales rose to 170 million TL in 1966. For the last two years the factory has also been manufacturing seed selectors and mobile insecticide sprayers. "We have also entered the field of agricultural equipment," Ali Mansur says. The factory is now working with an Austrian concern to set up a unit for building

Arçelik vacuum cleaner.



Arçelik washing machine.

agricultural combines in Turkey.

Many of the parts used in Arçelik machines are made by other factories, acting as subcontractors. For these assignments the five subcontractors employ at least as many workers as Arçelik does itself. These factories invested five million TL in machinery in 1966.

Arçelik has strict quality control. Also, it employs a 110-man service unit from which technicians are sent to customers for repairs and adjustments whenever there is a complaint.

Arçelik is a success because of men who saw change coming and met it with dynamism and courage.

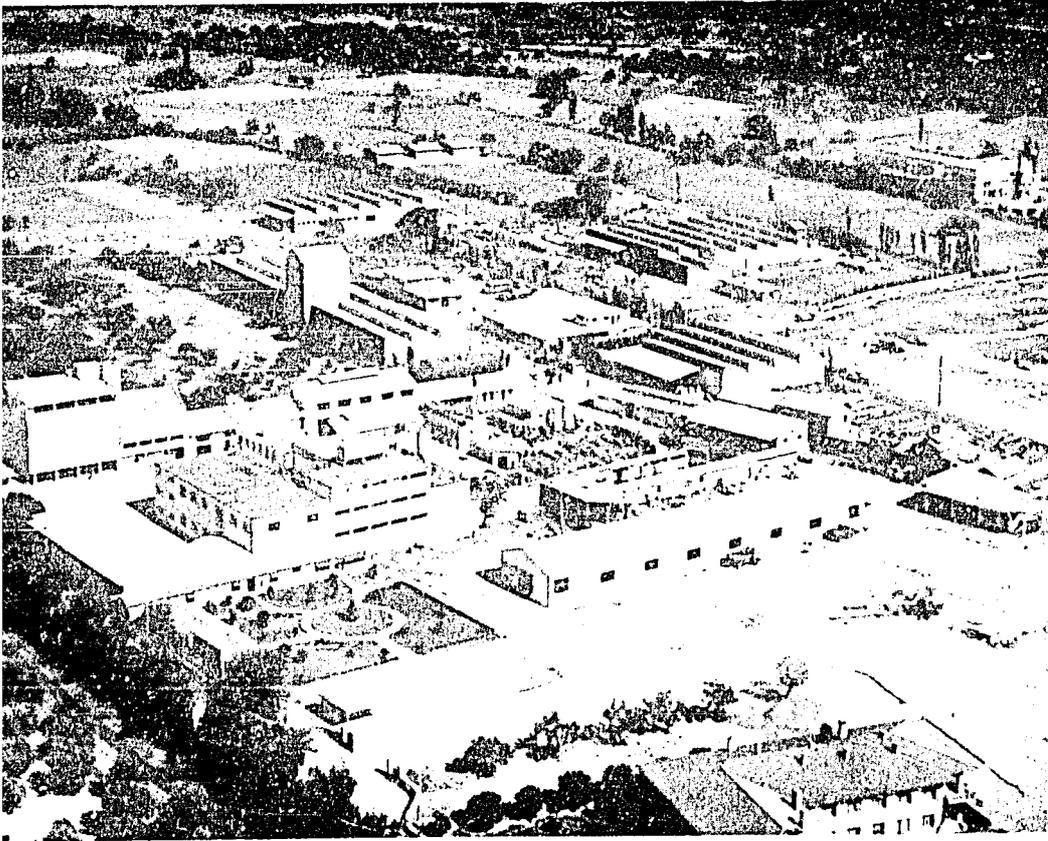
DYO (Durmuş Yaşar ve Oğulları)

DYO (Durmuş Yaşar and Sons) of Izmir is the first, largest, and most rapidly expanding paint manufacturer in Turkey. Beginning with ten workers in 1954, it now has 550 skilled men and engineers in its factories sprawling over 70,000 square meters on the Izmir-Bornova road.

There are now 32 other paint factories in Turkey, but DYO alone manufactures more than the total of all. In 1965, DYO opened its second factory, DYOSAD, to produce industrial paint in partnership with Sadolin and Holmblad of Denmark.

DYO is still growing. It now has its own tin can factory,

DYO factory as it stands today.



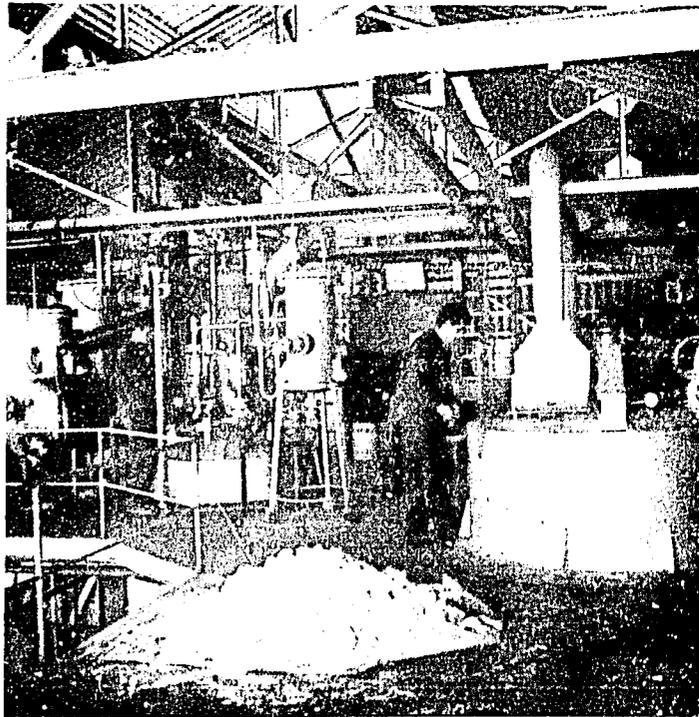
BOTAS, supplying the 18,000 containers DYO needs daily, as well as its own paint brush factory under a patent obtained from England's M. G. Harris and Company .

DYO and DYOSAD, which produce 7,000 tons of construction paints, 7,000 tons of industrial paints, 5,000 tons of varnish, 5,000 tons of Standoil, and 3,500 tons of Alkid yearly, are now manufacturing 12,000 tons of micromized minerals

per-annum in a brand-new plant.

These micromized minerals (consisting of kaolin, kalsit, talcum, barit, magnezium, kiselgur, benonit and feldspat) are manufactured to a thinness of five micrones. Although their raw materials are abundantly available in Turkey, these materials were imported until DYO began manufacturing micromized minerals. Now, besides meeting the demands of the Turkish market, DYO is also exporting micro-

DYO micromozed minerals department.



*Packaging of
DYO products.*



*Final touches on
SADOSAN paint be-
fore marketing.*

mized minerals to West Germany, Denmark, Greece, Israel and Libya.

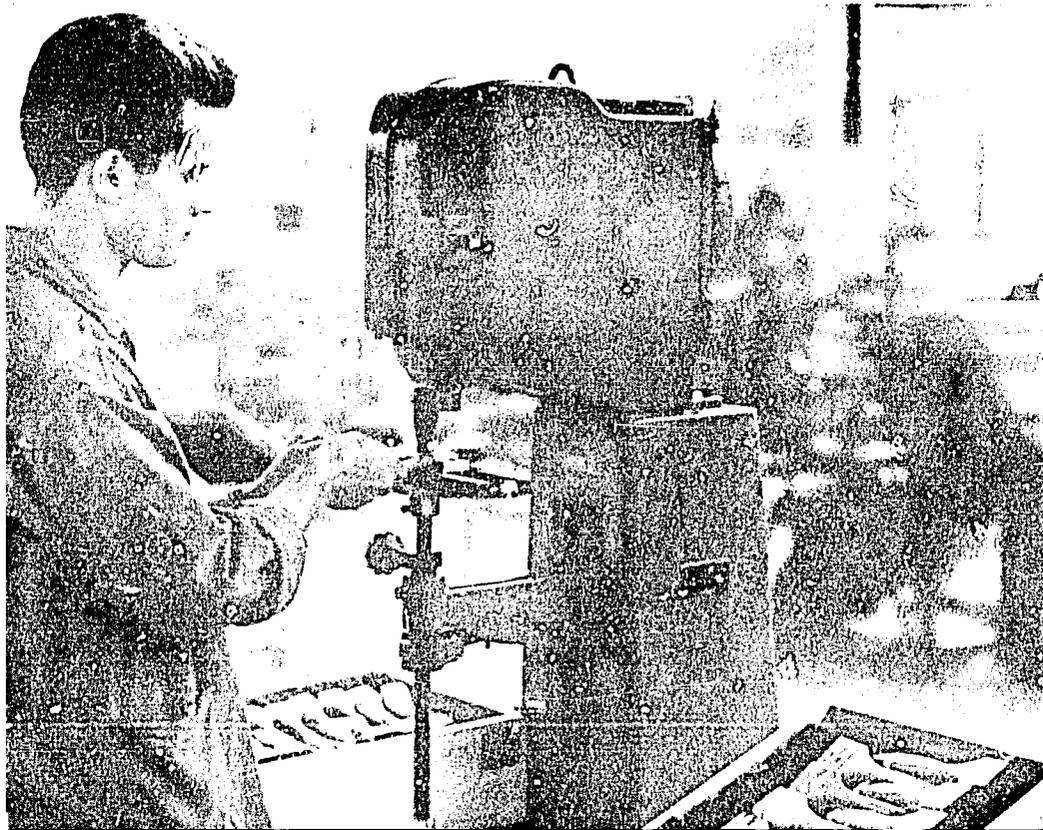
At present DYO has to import only 25 per cent of the raw materials for its paint industry. On completion of the new petrochemical plant soon to be built, half of this material can also be obtained locally.

This year DYO plans to open Turkey's first printing-ink factory. Meeting all the demands of the country, it will provide additional important progress in import substitution.

Açelik and DYO are different types of industries. But there is a striking parallel in their development. Both are run by men who know what they are doing, who are uninterested in yesterday but look forward to tomorrow, who knew that change would come and were ready and eager to meet it.

When you talk with workers or technicians or engineers in DYO and in Açelik, you never hear them speak of "the factory in which I work." They invariably say "in our factory."

DYO paint brush department.



TARIŞ

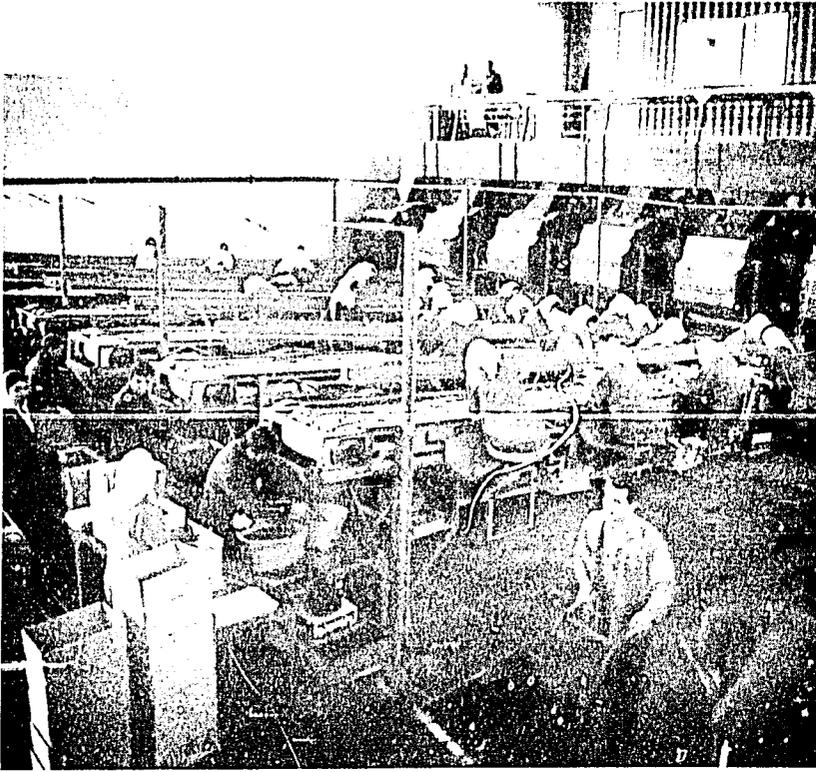
The export

*cooperatives union
which has mastered
the art of teamwork.*

An organization which belongs to the people, is headed by a man appointed by the government, and acts as mentor and guide to the business world? Is it an impossible dream? No. It is TARIŞ of Izmir.

TARIŞ is the union of four of Turkey's largest and most important agricultural sales cooperatives: figs, olive oil, raisins and cotton cooperatives of the Aegean region.

Other similar types in Turkey are: the Adana agricultural cotton sales cooperatives union; Fiskobirlik—the hazelnut agricultural sales cooperative; the Bursa silk work (Koza) products cooperative; the Marmara olive cooperative; the Antalya cotton cooperative; the Antalya rose and rose-oil cooperative; the Nevşehir grape cooperative; the Gaziantep pistachio cooperative and the



TARIŞ workers classifying raisins.

Adana citrus-fruits and vegetables cooperative. All told, there are 235 agricultural sales cooperatives in the Turkish unions.

Producers – farmers – own the cooperatives. The general director, according to the statutes of the unions, is appointed by the Ministry of Commerce. All other appointees are chosen by him. TARIŞ buys, processes and sells the products of its

members. All this work is accomplished in TARIŞ's 23 gins in the Aegean area, its large cotton oil combine, nine olive-oil factories and in its modern raisin and fig processing plants located throughout the region.

TARIŞ now has through its member cooperatives 1,100,000 partners. The members agree to deliver all their produce to the union of cooperatives which in turn pays each a nominal price.

At the end of the season, if profits from sales are higher, the difference is paid to the farmer-partner. TARIŞ, as a farm cooperative, pays no taxes. Its members can obtain agricultural equipment on credit as wholesale equipment.

When it began operations in 1935, TARIŞ purchased 26,000 tons of cotton. Last year its cotton purchases were 105,000 tons. In its raisin processing plant, 150 tons of raisins are processed daily and made ready for export. The cotton-oil combine, besides producing oil, exports substantial quantities of oil-seed cake. In figs and olive-oil, the TARIŞ plants also work in technical conditions termed "the best" by Izmir exporters.

In effect, TARIŞ is a competitor of the Izmir exporter; when the Government finds it necessary to enter the market for support buying of raisins, figs and olive oil, it is the organization used. But, psychologically, the exporters of Izmir do not look on TARIŞ as a competitor, but as a guide. One exporter explains: "TARIŞ is concerned with getting profits for the farmer, not outdoing us. TARIŞ sets the pace and we follow. TARIŞ has the best



TARIŞ Sultanas ready for export.

relations with foreign firms; from it we learn about the world markets. If TARIŞ were dissolved, we in Izmir would really be in hot water. It would be a tragedy for the Izmir business world."

TARIŞ has helped its 1,100,000 partners avoid what they call "falling into the grip of middlemen." Also, TARIŞ has been instrumental in quality control. More than 80 per cent of its purchases are exported, with TARIŞ standards for high quality setting an example for other exporters of Izmir to follow.

TURKEY'S FORESTS

The unbelievable potential: In 15 years exports of Turkey's forest products can equal, even surpass, the combined value of present tobacco and cotton exports.

THE IMPOSSIBLE IS POSSIBLE

There are a host of pioneers in Turkey who work alone in the dark to bring light to many and who desire no fanfare for the feats they accomplish; who are confronted with a problem so great that if it is overcome, they will have verily transformed the impossible into the possible. They are the foresters of Turkey.

If Turkey intensifies her recent progress in forestry, in 15 years the value of her timber exports can surpass \$200 million annually. This is almost as much as the combined value in 1966 of her two principal exports—tobacco and cotton. Assuming that this timber harvesting is properly done—and there is no

TARIŞ keeps in constant touch with its members. For example, this year it warned them that neither world prices of figs nor demand would increase. Members were urged to concentrate on raising quality and obtaining more yield per hectare rather than planting additional land to figs.

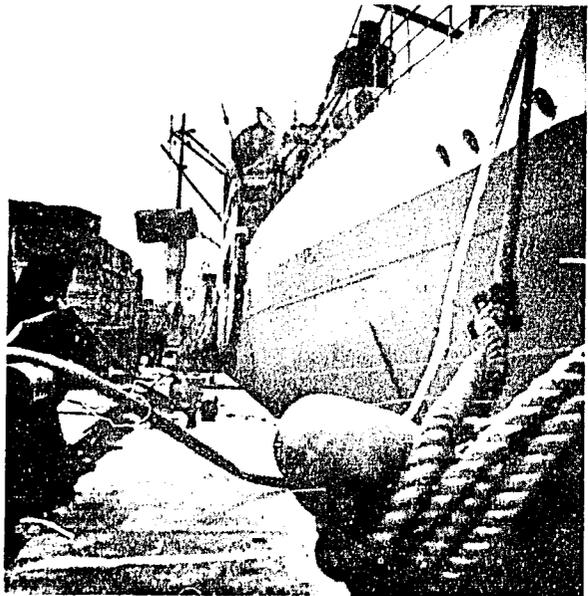
In the offices of TARIŞ, contacts with foreign cotton, raisin, fig and olive oil buyers are made daily. All world markets and exchanges are studied by trained men. And all this is done with quiet efficiency.

Izmir businessmen are never shy about asking TARIŞ for advice. They know that

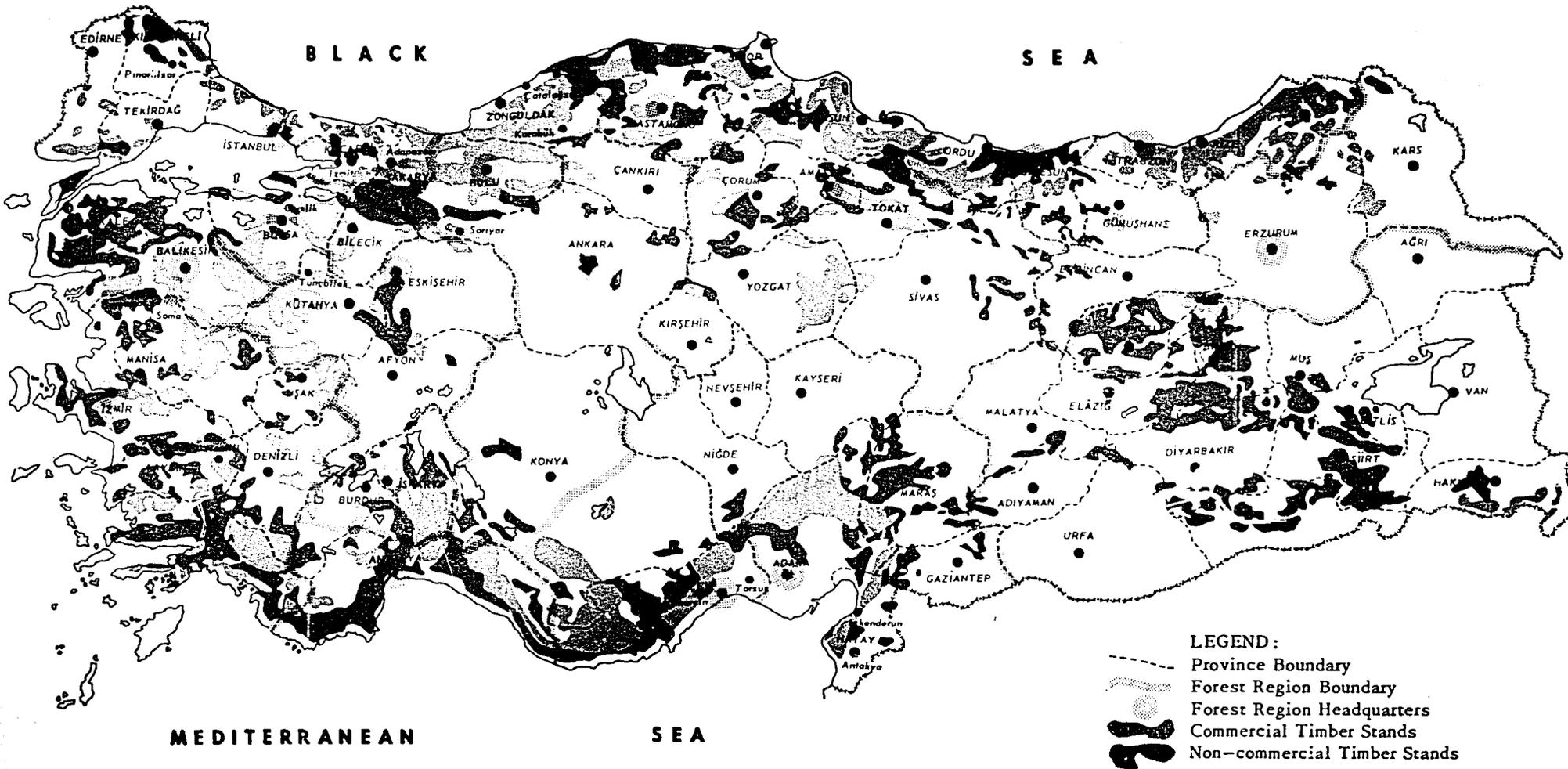
they will receive the best available market information in Turkey at no charge. TARIŞ does not regard them as competitors, not because these men are not geared for it, but because their success—so far as TARIŞ is concerned—is indirectly also the success of the producer.

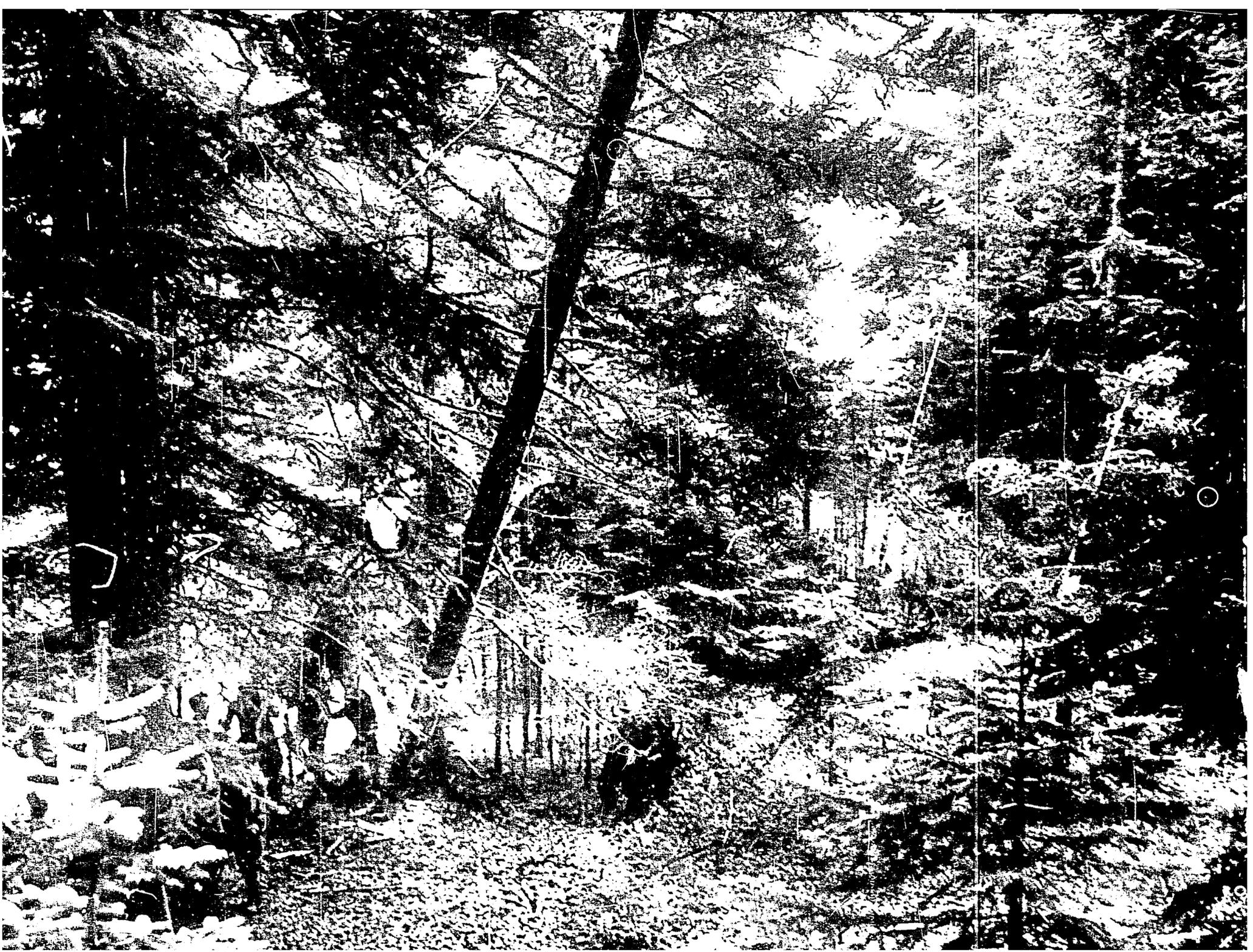
In a time when so much is changing, businessmen—especially the smaller businessmen—cling tenaciously to TARIŞ, not for direct aid, but for direction. TARIŞ itself has to keep up with the change, and in the process it does its best to help the smaller businessmen along the highway of progress.

*TARIŞ products
exported from
Izmir harbor.*



TURKEY'S FORESTS





reason to assume that Turkey's pioneers of the forests will do otherwise — Turkey's forests will be in an even more productive position than they are today.

In a recent talk with USAID participants, USAID Director James P. Grant said: "In the past five years we have all witnessed progress that people only ten or fifteen years ago would have said was impossible in such a short period. In ten years—mostly in the last five—forest roads, the arteries which make possible timber production with conservation, have increased from only 12,000 kilometers to 44,000; seedling plantings have increased from 20 million to nearly 200 million annually; log production has increased more than threefold; Turkish forests have already accomplished what a few years ago others would have said was impossible."

Turkey is now growing at a rate which doubles her productive output every ten to twelve years. It is almost unbelievable that in the course of her first and second Five-Year Plans she expects to increase by 100 per cent the production capacity that she had attained in 1962 only after many decades of effort.

These are exciting days for Turkey, and most exciting for

her foresters, whose goal is to transform Turkey into a major timber and wood products exporter of the world.

The validity of such a goal can be seen in a comparison with Finland, which has somewhat more than one-third the land area and one-seventh the population of Turkey. With an annual timber growth about the same as the potential annual growth in Turkey, in 1965 Finland exported wood pulp valued at \$550 million, plus \$430 million in paper.

An idea as to how much the value of timber products exports might be to Turkey is indicated by the difference in the volume of the present removals and the present increment per year as given by the Forest Service. From 1955 through 1964 the average volume of commercial removals (exclusive of fuel wood) came to 2,100,000 cubic meters per year.

Forests in good sites under managed conditions grow at least three per cent of their wood volume per year. In virgin, wild, or unmanaged forests, however, there are off-setting factors such as decay, wind-throw, or insect attacks. So, by accepting a conservative three per cent volume increment per year as the allow-



Forest roads—a must in forestry development.

able cut under forest perpetuation limitations, it is indicated that an annual removal volume of 22,500,000 cubic meters of industrial wood (excluding fuel wood which comes from treetops, dead trees and discards from other products) could be attained without exceeding the potential increment. The Forest Service reports that under present over-mature forest conditions, the

Watershed restoration is necessary for the needs of future generations.

annual increment is 9,580,000 cubic meters.

Currently the total annual industrial removal of wood is 2,100,000 cubic meters. But this generalized, though reasonable, computation of potential growth shows that in-so-far as the permanence of the forest is concerned, removals could be 22,500,000 cubic meters, or over ten times the present cut. At the present rate this would indicate an exportable surplus, over and above Turkey's current wood use, of 20,000,000 cubic meters.

Such volume of allowable cut cannot be attained until the Forest Service has put the forests under intensive management. This could be accomplished in 20 years under a rea-



sonably urgent program. During this period, as the "reconditioning" progressed, the annual removals could increase at a regular rate from the current increment of 9,580,000 cubic meters per annum to the 22,500,000 cubic meter potential.

The 20,000,000 cubic meters of exportable surplus, both broadleaf and coniferous, at an average price for logs in depots of about 200 TL per cubic meter, indicates a potential forest products income to Turkey of 4,000

million TL. (\$440 million) per year. Should some or a major portion of this log volume be converted in Turkey into sawwood, plywood, particle board, fiber board, pulp and paper, the foreign exchange return would be several times higher. This \$400 million level, which would take up to 20 years to realize, can be reached gradually but steadily if Turkey continues active forest improvement and large-scale modern economical harvesting of the already mature trees.

FRUSTRATIONS OF PAST YEARS —CHALLENGES OF TOMORROW

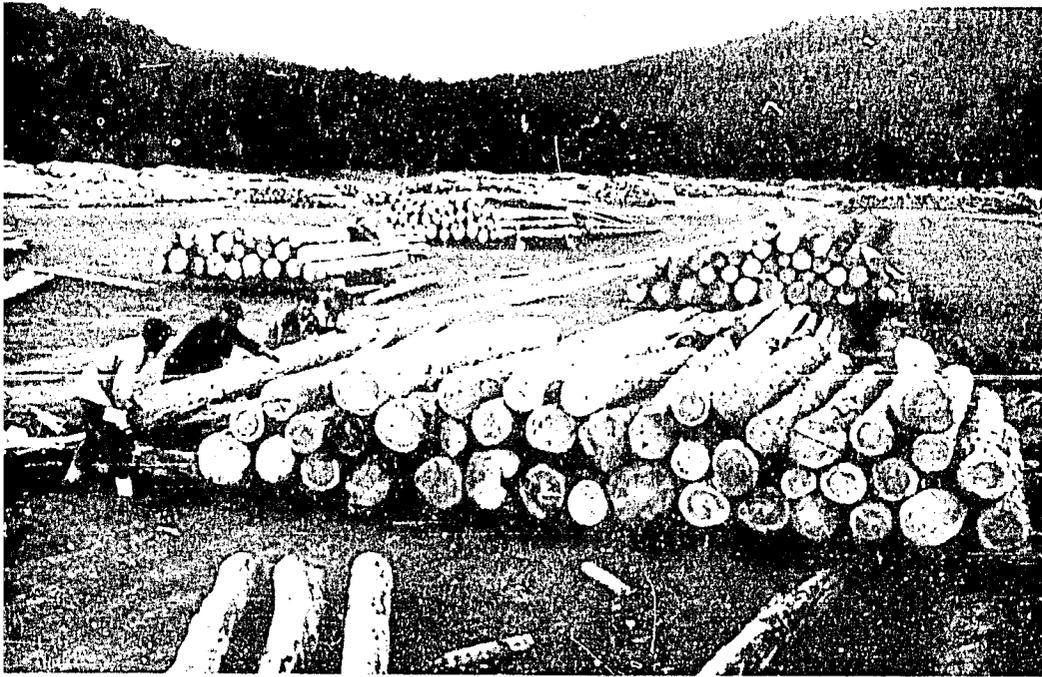
Prior to 1947, when all private forests of Turkey were nationalized, the annual cut in some

forests was far in excess of forest increment. This, coupled with complete lack of forest pro-





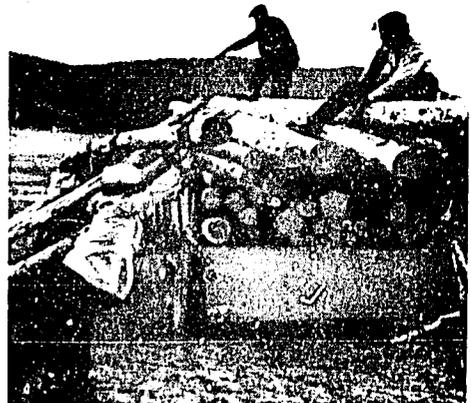
*These photos
show progress...*



...that people only ten or fifteen years ago...

tection, led to rapid and often complete degradation, especially in the more accessible areas. A consequent policy of over-protection and extremely conservative management led to the other extreme, where the annual cut was far less than annual growth. This in turn led to the development of overstocked and over-mature forests, especially in the higher, inaccessible areas.

...would have said was impossible in such a short period.



The goal of the Forest Service now is to harvest this over-mature timber over a period of years and replace it with vigorous, fast-growing young stands. Simultaneously, regenerative measures will be effected to convert degraded areas into productive forests. Selective cleaning and weeding of young trees will be carried on to improve stands and to encourage natural regeneration and faster growth. Additional forest roads are being constructed, and this effort is expected to continue.

The implementation of new management plans and greatly accelerated harvesting of trees will, therefore, bring about a vast change in the balance of internal supply and demand. This could make Turkey one of the largest wood and wood products producing countries in the world and one of the major sources of supply to expanding world markets.

Timber harvesting on a commercial and economical scale requires removal of more wood per hectare than is now customary in Turkey. Because of the economies of scale, heavier cutting is likely to lower the cost of logging and transport. It also speeds the change from slow-growing virgin stands to

rapid growing, vigorous second-growth stands. Heavier cutting is therefore highly desirable from both the economic and the silvicultural points of view.

The forest area of Turkey now comprises 10,900,000 hectares of a total national area of 73,500,000 hectares. In this timber area 7,400,000 hectares are presently unproductive, leaving 3,500,000 hectares of good growing forest. Nearly all the forests are in mountain regions where the terrain is rugged. Until logging roads were constructed within the past ten years, access to them was strictly limited.



The wood volume in the forests is stated to be 750 million cubic meters. About 60 per cent are coniferous species such as pine, fir and spruce; 40 per cent are hard woods, predominantly beech with some oak and walnut. Having been isolated for so long, the forests consist of mature and over-mature trees of large size. Except where deterioration from old age has occurred, they are of excellent quality .

Even so, this natural wealth is only a relic of formerly vast expanses of fine forests which were ravaged by thousands of years of forest fires, and uncon-

trolled cutting. A prime concern of the people of Turkey today is to save what is left of their forests, and the Forest Service is charged with this responsibility. Remembering the past, the possibility of timber famine and the ruining of the remaining forests have become matters of concern for the people and the governments of Turkey.

The Forest Service has been sympathetic to this concern for the safety of the forests and has been hesitant to double or even triple the removal of the present volume. But today the people of Turkey must know that



Currently the total annual industrial removal of wood is 2,100,000 cubic meters.

these dedicated men under no circumstances would destroy, even risk, that which they have salvaged.

For better forestry practices—aside from economic progress—forest removals in Turkey will have to be increased. The people of Turkey must, however, be given positive assurances that the forests will not be threatened and that the nation will benefit.

POTENTIALS

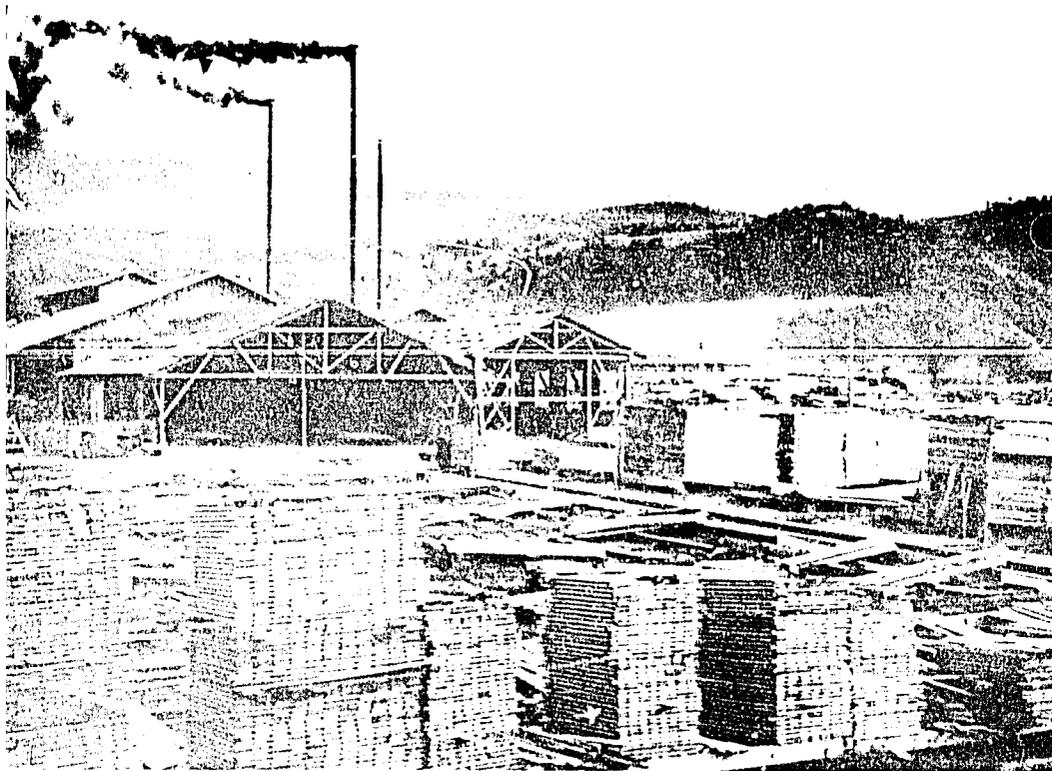
Turkey has a most strategic position as a potential supplier of forest products in its trade sphere. All its near neighbors are virtually treeless, and the four seas that wash Turkey's shores offer ready access to more distant timber markets. There is no doubt that a market for Turkish lumber, especially beech lumber, can be developed in Europe and in many other countries in the Mediterranean area. Also, Forest Service information indicates a substantial increase in coniferous removals would help the forests—both technically and economically. Those coniferous logs produced in excess of domestic needs

*In twenty years
Turkey can be in a
position to export
yearly 20,000,000
cubic meters of
timber worth
4 billion TL.*



could readily be exported, even in the early stage.

Before substantial exports of wood products can be developed, both logging and milling must be modernized, and an export marketing agency must be established. Strong quality control measures must also be introduced in production of lumber, plywood, particle board and other products. This would guarantee continued high quality and assure that products will



meet standards established by both domestic and world trade requirements. Products must also be standardized according to international rules, classification and grading.

Before Turkey can launch an all-out forestry products export drive, it will be essential to form an export organization, train wood marketing specialists, and make more extensive use of Turkey's commercial attaches abroad to gather reliable market-

ing information.

The potential is there. Demand in the world market exists. Turkey has the forestry technicians to do the job. As everywhere in Turkey, change must come. Forestry, a national irritation 40 years ago, in ten to 20 years will become a national elation. Those most to benefit are the Turkish people. Those most to admire and be thankful to are the silent volunteers of progress—the foresters.

TÜRKİYE'NİN YERALTI SERVETLERİ

Prof. Dr. Ekrem Göksu

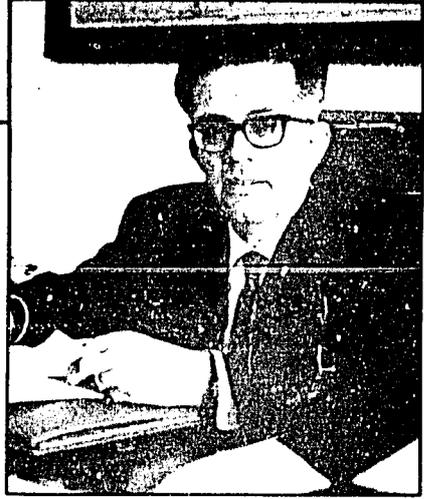
Türkiye'de madencilik binlerce yıl geriye gider. Mesela Asurlar zamanında bilinen ve hala da işletilen madenler arasında Ergani bakır ve Keban kurşun madenlerini zikretmek mümkündür. Bugün işlettiğimiz madenlerin bir çoğu, o zamanki teknikle elde olunamayan cevherlerdir ki bunların kaymağı alınmış, cürüfları bırakılmıştır. Bu cüruf yığınlarının binlercesi dağlarda görülmektedir.

Belki de bahis konusu maden tezahürlerinin çokluğu, sauhta mostra verenlerinin pek nadir hallerde büyücek bir madeni teşkil edişidir ki, "Türkiye fakir madenler bakımından çok zengindir" diye bir çok kişi tarafından söylenmiştir. Hiç değilse son yıllara kadar bu düşüncede olan yerli, yabancı jeolog ve maden mühendisleri mevcuttu.

Cumhuriyetin ilanından beri geçen 43 yıl içinde pek çok şeyin deðiştiği gibi, madenlerimiz hakkındaki peşin verilmiş kararlar da deðişti. Daha bugünden diyebiliriz ki, "Türkiye bir çok madenler bakımından dünya ölçüsünde rezerv ve imkanlara sahiptir.

Diğer taraftan, yetkili ve yetkisiz ağızlardan "Türkiye'nin henüz el sürülmemiş yeraltı servetleri" sözü sık sık işitilir. Bu sözlerden,

Prof. Dr. Ekrem Gökse 1917 yılında Konya'da doğmuş, Lise öğrenimini de orada bitirmiştir. 1937-46 yıllarında M.T.A. Enstitüsü hesabına İsviçre'nin Zurich Politekniginde mühendislik jeolojisi öğrenimi ve doktorası yapmıştır. 1946'dan 1954 yılına kadar, 1,5 yıllık askerlik ve bir yıllık Kara Yollarındaki hizmeti hariç, petrol ve maden konularında saha jeoloğu, servis şefi ve



şube müdür yardımcılığı görevlerinde bulunmuş, bilhassa Boksit ve Uranyum prospeksiyonlarında çalışmıştır. 1953'de Amerika Atom Enerjisi Komisyonunun çağırışı ile Amerika ve Kanada'nın uranyum maden ve tesislerini gezen 3 kişilik kurula katılmış ve 1954 Ağustosunda yeni açılan Maden Fakültesine Jeoloji Doçenti olarak girmiştir. 1957-1959 yıllarında Amerikan İlim Akademisinin verdiği bursla Stanford Üniversitesinde ve büyük petrol şirketleri laboratuvarlarında petrol ile ilgili araştırmalar yapmıştır. Yurda dönüşünde yeni kurulan Petrol Arama ve İşletme Kürsüsüne profesör olarak 1.Mart 1960'da atanmış ve 4 ay sonra da Fakülte Dekanı seçilmiştir. Dekanlık süresi bitiminden beri Je Kürsüsünde çeşitli idarî ve meslekî konularda çalışmaktadır.

Dekan iken, AİD ve Maliye Bakanlığı Milletlerarası İktisadi İşbirliği Teşkilatıyla birlikte hazırladıkları proje gereğince, Fakültede petrol, izabe ve mühendislik jeolojisi şubeleri açılmış ve Amerikalı 3 profesörden başka 250,000 dolarlık laboratuvar malzemesinin yurda ithali mümkün olmuştur. Halen 10 milyon liraya varan bu projenin müdürlüğünü; İstanbul'daki Maden Okulunun Şefliğini; Milletlerarası Teknik Stajyer Mübadele Teşkilatının (IAESTE) 1960 yılından beri Türkiye'de Genel Sekreterliğini; İ.T.U. Senatörlüğünü; Fakülte ve Üniversite'de çeşitli kurul ve komisyon üyeliklerini yapmaktadır. Ayrıca çeşitli jeoloji ve maden cemiyetleri, Dünya Petrol Kongreleri Yönetim Kurullarında meslekî görevleri vardır. Almanca, İngilizce ve Fransızca bilir; 20 kadar telif ve tercüme eseri vardır.

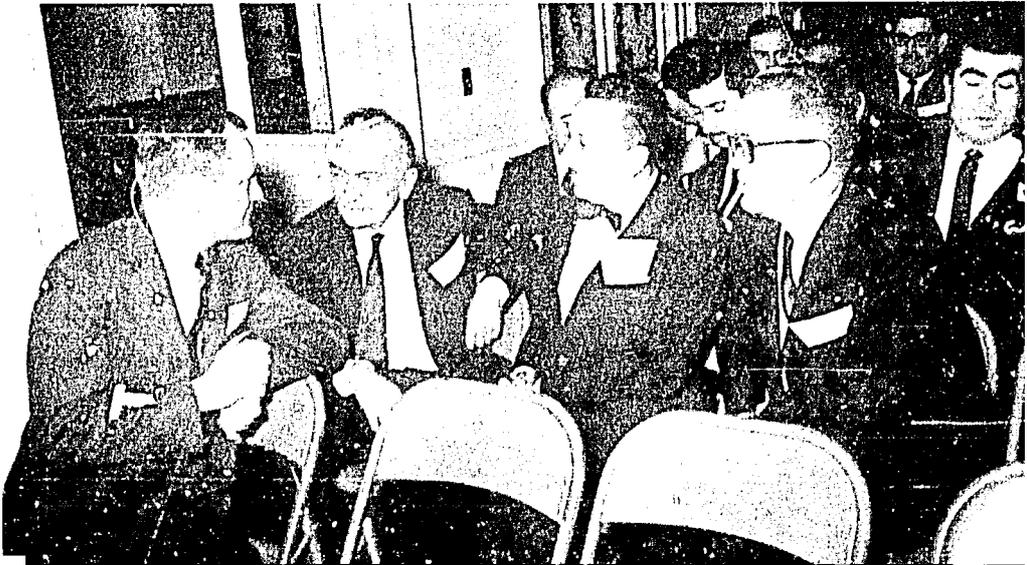
memleketin içinde bulunduğu ekonomik güçlüklerden en tez yeraltı ser-
vetleriyle kurtulmanın mümkün olabileceği, başkaca büyük bir ihtimalin
bulunmadığı düşüncesini anlamamağa imkan yoktur.

Buna mukabil, "Türkiye'de henüz el sürülmemiş klasik bir maden
yoktur" demek de büyük bir hata yoktur; şayet el sürmekten kasıt,
Hititlerden beri bilinen kazma kürek ile maden arama ve çıkarma kaste-
diliyorsa! Eğer jeoloji ve Jeofizik bilimlerinin kaydettikleri muazzam
gelişmeler ile modern madencilik tekniği kasdolunursa, hakikaten Tür-
kiye'de madencilik henüz başlangıç safhasındadır, yapılması gereken
pek çok iş vardır.

Türkiye'nin çabuk kalkınması için yapılması gereken pek çok işlerin
bulduğunu herkes biliyor; bilinmeyen veya üzerinde tartışılan husus,
hangisine öncelik tanıyalım ve mahdut imkanlarımızı en iyi ne şekilde
kullanalım. Bilhassa ziraat mı, yoksa endüstri mi sorusu endüstri le-
hinde ağır bastıktan sonra, artık düşüncecek fazla bir şey kalmadı; maden-
lerimizi bir an önce arayıp çıkarmak, bir taraftan endüstrinin gerektir-
diği ham maddeyi temin etmek ve mümkün merteye işlenmiş hale sokmak;
diğer taraftan da tüketim fazlasını, mümkün olduğu kadar mamul halde
dışarıya ihraç edip döviz sağlamak lazımdır.

Soldan sağa: USAID Başkanı James P. Grant, İstanbul Sanayi Odası Başkanı
Fazıl Zobu, Paşabahçe Şişe ve Cam Fabrikası Genel Müdürü Şahap Kocatopçu,
Prof. Dr. Ekrem Göksu İstanbul'da Participant'lar için yapılan törende.

*From left to right: USAID Director James P. Grant, Istanbul Chamber
of Industry President Fazıl Zobu, Paşabahçe Glass Factory General
Director Şahap Kocatopçu, Prof. Dr. Ekrem Göksu at Istanbul Par-
ticipant ceremony.*



İşte bu iki satır içinde özetlenebilen yeraltı servetleriyle ilgili bütün işleri yapabilmek için, her diğer teknik alanda olduğu gibi, madencilikte de: a) Teknik personel, b) Teknik teçhizat, c) Sermaye ve d) Mevzuat konuları birinci derecede önem taşıyanlarıdır. Bu dört şartın yerine getirilmesi ihmal olunursa, yapılacak plan ve projelerin tam olarak tahakkuk etmesi tabiidir ki beklenemez.

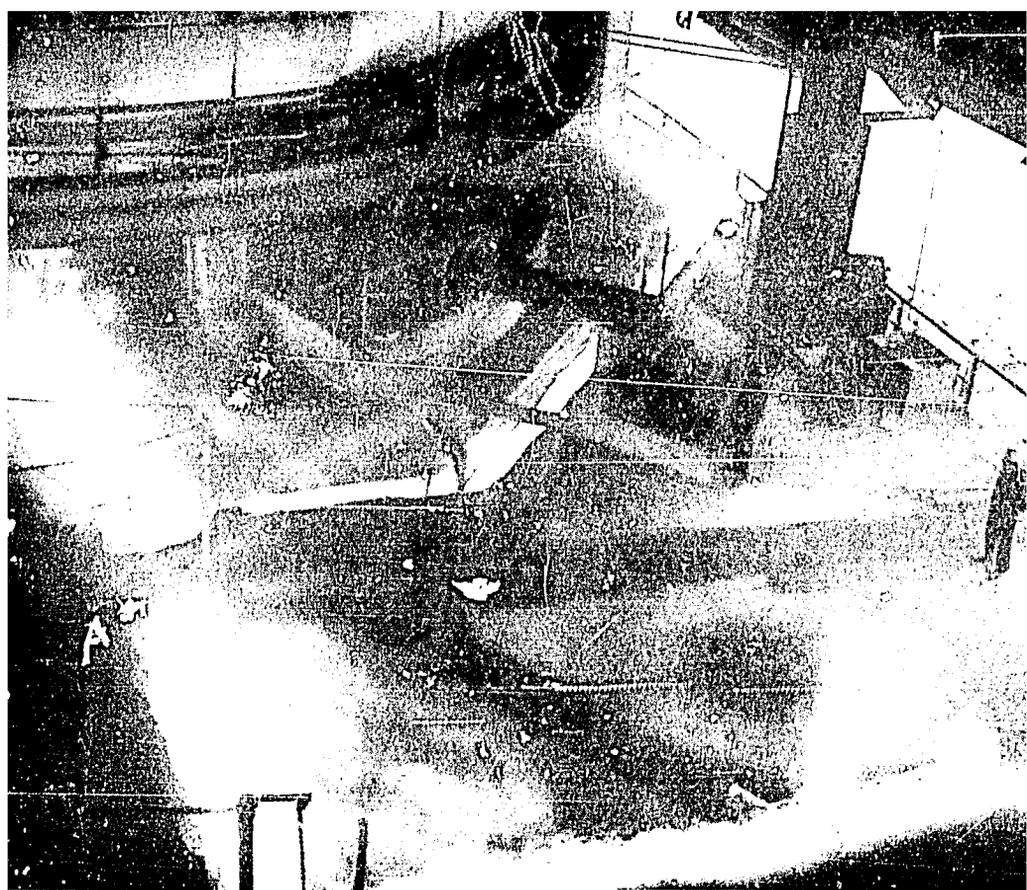
Şimdi Türkiye'nin madencilik durumunu inceleyelim:

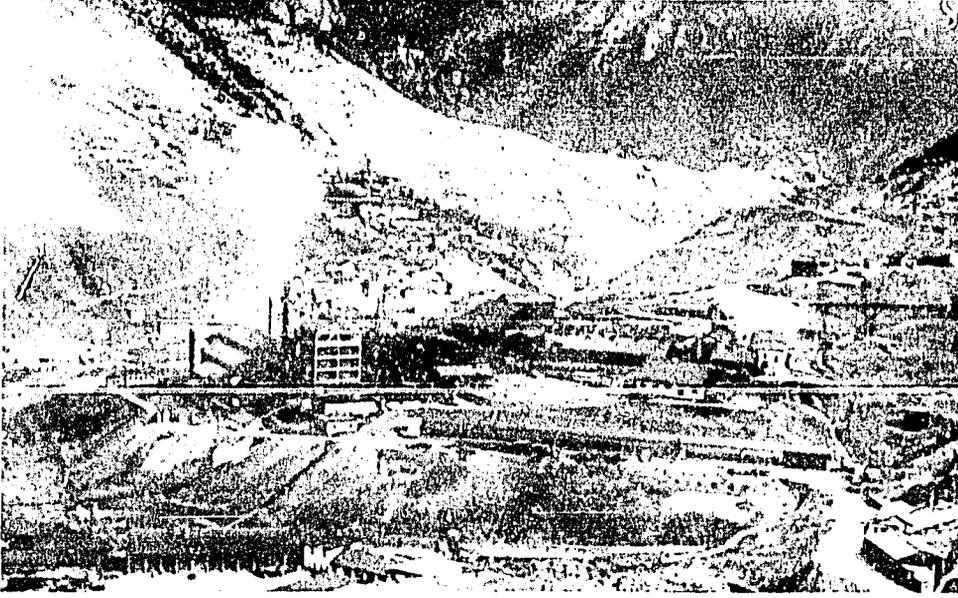
DEVLET SEKTÖRÜ

Türkiye'nin kalkınmasının karma ekonomi ile gerçekleştirileceği prensibine göre hareket eden Devlet Planlama Teşkilatı ve bu teşkilatla müştereken 5'er yıllık planları hazırlayan kuruluşlar, maden alanında yapılacak yatırımlarda devlete esas yükü yüklemişlerdir. Bugüne kadar devlet ve özel sektör madenciliğindeki duruma ve sermaye teşkili imkanlarına bakarak, başkaca bir karara varmak da zaten çok güçtür. Esasen öteden beri Cumhuriyet hükümetlerince takip olunan maden politikasının esası şudur: Türkiye'nin yeraltı ve yerüstü servetleri kamunun malıdır. İşletilebilecek büyüklükte ve evsafa olanlarını devlet eliyle işletmelidir. Ancak devlet tarafından işletilmesi rantabl olmayan küçük madenler özel kişilere bırakılmalıdır.

Gerçe 1954'de kabul olanun maden kanunuyla bu durum bir hayli değişmiş, özel madencilere bir çok haklar tanınmıştır. Fakat bir zamanlar, özel teşebbüsün elindeki madenlere, büyük işletme olabilir diye devlet tarafından el konması, bugün dahi özel madenciye düşündüren bir husustur. Bu yüzden, hemen hiç bir özel maden sahibi, madeni hakkında detaylı bilgi vermek istemez; hatta imkanı olsa bile, rezerv vesair etüdleri jeolog ve mühendislere yaptırtmaz. Bu düşüncenin arkasında yatan endişe, ya maden büyük çıkar da devlet el koyarsa korkusudur! Özel madenciliğin kalkınması istendiği bir devrede göz önünde tutulması gerekli bir faktördür bu.

Türkiye'de madenciliğin devlet tarafından yapılmasını öngören ve gittikçe seslerini duyurmağa başlayan işçi sendikaları ve bunlara bağlı olan maden-petrol kollları, bu yoldan daha yüksek ücret ve garantili sosyal haklar temin edeceklerine inanmaktadırlar. Halen özel madenlerde çalışan işçilerin bir çoğunun düşük ücret alması, hatta bir çoklarının da işverenden





Murgul Bakır İşletmesinin genel görünüşü.

General view of Murgul copper mines.

ÖZEL SEKTÖR

Türkiye'de özel teşebbüsün (yerli ve yabancı sermaye ile) işlettiği madenler daima mevcut idi, halen de pek çok özel madenci mevcuttur. Ancak bunların yurt madenciliğinde oynadıkları rol, daima düşük seviyede kalmış, istenilen mevkie halâ da ulaştırılamamıştır. Gerçe son yıllar içinde belirli bir gayret göze çarpıyorsa da, ileriye doğru atılan adımlar hem küçük ve hem de çok çekingen olmaktadır.

Halbuki Türkiye'de madenciliğin kısa bir süre içinde kalkınması ve memlekete döviz getirir veya hiç değilse döviz tasarruf ettirir bir hale gelebilmesi için, özel madenciliğin gereği şekilde kalkındırılması şarttır. Her şeyi devlet yapamayacağı gibi, devletin yaptığı her teşebbüs için hazineden paraya, geniş bürokratik bir teşkilata ve en önemlisi zamana ihtiyaç gösterir. Halbuki özel teşebbüste daha ekonomik ve dolaşısıyla küçük çapta, süratli çalışmaya imkan vardır; şayet gerekli şartlar temin olunabilirse. Üstelik özel madencilik, devlet madenciliğini tamamlar şekilde olur, birbirine rekabet bahis konusu olmaz.

Halen Türkiye'de 5000'den fazla maden ruhsatına sahip özel kişi bulunmakla beraber işleyen ve istihsal yapan madenlerin sayısı bu rakamın çok altındadır. Bunlardan pek çoğu mevsimlik veya piyasa fiyatlarına göre açılıp kapanan işletmelerdir, pek basit imkanlarla çalışırlar.

Türkiye'de özel madencilik, bütün zorluklara ve çeşitli imkânsızlıklara rağmen meselâ 1965 yılında 238 milyon lira değerinde 20 kadar çeşit maden istihsalinde bulunmuştur. Aynı devrede devlet işletmelerinin istihsalı ise 1,1 milyar lira olmuştur. Nisbet 1/5 kadardır. Eğer bu kıyaslama dış memleketlere ihraç olunan madenlerin tonajı ve değeri bakımından yapılırsa, 1962-1965 yılları ortalaması olarak, devletin 1 ton ihracına mukabil, özel teşebbüs 0,8 ton; devletin 1,75 değerine mukabil özel teşebbüsün 1 değerinde ihracat yaptığı görülür. İhraç değerleri arasındaki iki misline yakın fark, devlet sektörüncü ihraç olunan ve fiyatı son yıllarda çok artan bakırdan dolayıdır.

Genel ihracatta madenlerin hissesi ve bu hissenin devlet sektörü olan Etibank'a ait kısmı mukayeseli olarak Tablo 1'de verilmiştir:

TABLO 1. TÜRKİYE'NİN GENEL İHRACATINDA MADENLERİN HİSSESİ

(Total Value of Turkey's Exports in Mineral Exports)

Yıllar	Genel İhracat TL1,000	Madenlerin			Etibank Payı	
		Payı	Yüzde	Ton	Yüzde	TL1,000
Years	Total Exports	Share of Minerals	Percent	Tons	Percent	Etibank Share of
1959	990,636	65,729	6.6	639,544	30.9	
1960 (I-VIII)	526,312	\$ -2.8 TL 59,571	11.3	668.367	46.5	
1960 (IX-XII)	1,194,856	\$ -9 TL 97,962	8.2	325.825	45.2	
1961	3,120,659	236,345	7.6	940.036	45.8	101,068
1962	3,430,777	279,687	8.1	1,329,563	57.4	125,590
1963	3,312,781	233,604	7.6	1,217,591	57.1	86,741
1964	3,696,942	316,016	18.5	1,438,752	54.9	176,186
1965	4,130,296	379,413	10.5	1,335,551	51.0	309,157

MADEN YARDIM KOMİSYONU

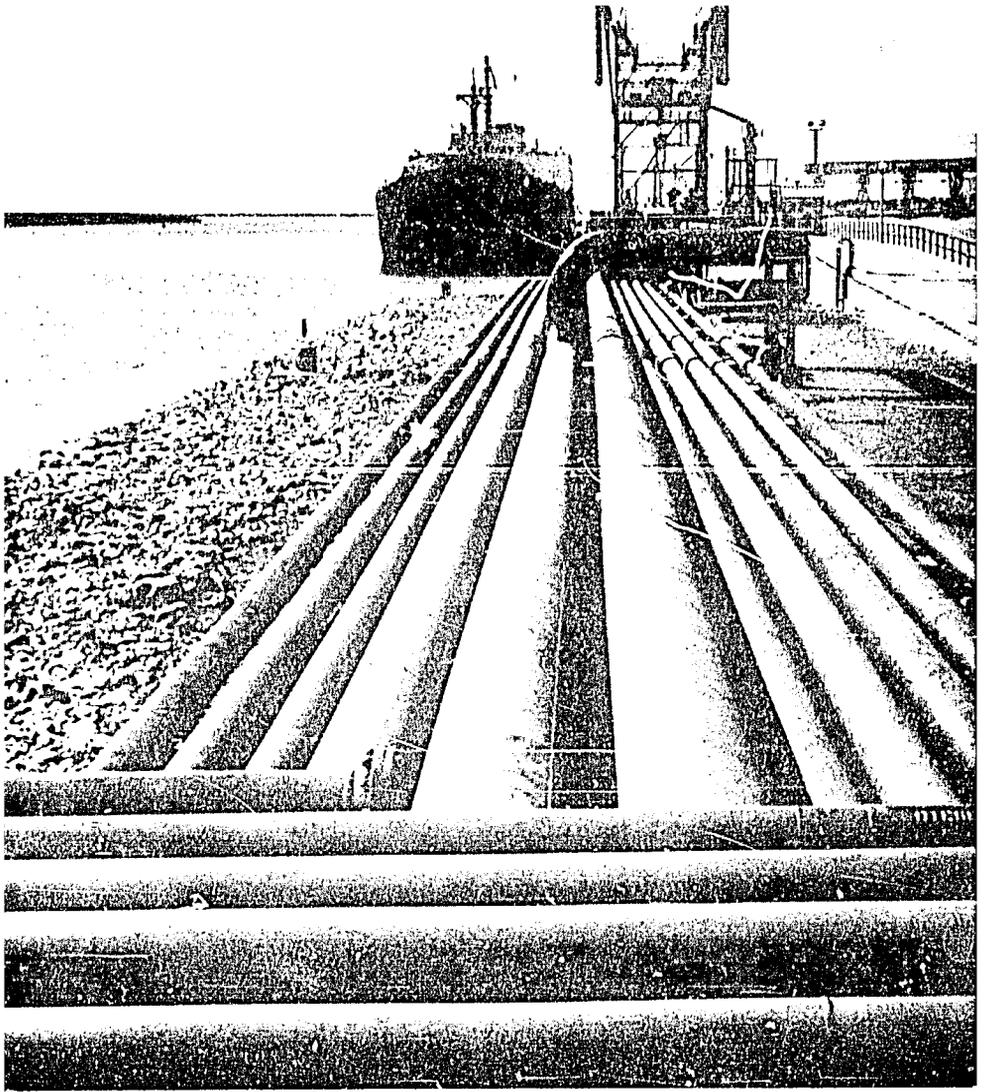
Özel madenciliği kalkındırmak için ötedenberi bazı teşebbüslere geçilmiş, pek mahdut başarılar elde olunmuştur. Çünkü özel teşebbüse gerekli teknik bilgi, sermaye ve iyi bir maden mevzuatı konuları tam olarak ele alınıp bir neticeye bağlanmamıştır.

1961 yılında Ticaret Odaları, Sanayi Odaları ve Ticaret Borsaları Birliği ile A.I.D. tarafından verilen fonlarla kurulan Maden Yardım Komisyonu, özel madencilik alanında etkisini kısa zamanda hissettiren bir teşebbüs olmuştur. Nitekim ilk 5 yıllık faaliyeti esnasında bu komisyon, özet olarak şu işleri yapmıştır:

- 1) Halen işlenmekte olan 42 madene ait olmak üzere jeolojik, jeofizik ve madencilik bakımından gerekli etüdüler,
- 2) Kapanmış madenlerde yeniden etüdüler yapmak suretiyle, tekrar açılmağa değer olanlara ait 18 maden etüdü,
- 3) Mali yardım veya kredi talebinde bulunan 884 müracaattan 100 tanesine ait proje tanzimi ve hepsine ait ilk tetkik programı hazırlanması,
- 4) Madencilik ruhsatı bulunan 4 demir, 1 sodyum sülfat, 1 zımpara, 1 cıva, 1 barit madenine ait detaylı etüdüler,
- 5) Önemli bir konu olan yabancı sermayeyi teşvik amacıyla proje ve teklif hazırlanması ve bu amaçla 15 raporun tanzimi,
- 6) Komisyon emrine verilen paralarla 56 ayrı projeye 12 milyon liranın üstünde yardım yapılmıştır.

Döviz getiren madenler üzerine yapılan teknik ve mali yardımlar neticesi olarak, komisyonca sarfolunan her bir liraya mukabil 1966 yılında 7 lira civarında (toplam olarak 53 milyon liralık) dövizin sağlandığı hesaplanmıştır.

Yukarıda özet olarak faaliyetlerinin bir kısmı belirtilen ve ayrıca Etibank ile sıkı teşriki mesaide bulunan Komisyon faaliyetinin 5 yıllık süre içinde özel madencilik sahasında önemli etkileri olduğu açıkça görülmektedir.



Mersin limanında petrol boru hattı.

Petroleum pipe line at Mersin harbor.

TÜRKİYE PETROLLERİ A.Ş. VE YABANCI PETROL ŞİRKETLERİ

Türkiye'nin yeraltı servetlerini komple olarak verebilmek için, petrol yataklarından da kısaca bahsetmek ve bazı istatistik bilgileri vermek lâzımdır.

Türkiye'nin petrol kaynakları, Maden Kanunu dışında ve 1954 tarihinde kabul olunan 6326 sayılı kanuna göre işletilir. Maden Kanununun aksine, devlet direkt olarak petrol arayıp işletemez; hükmi şahsiyeti haiz bir şirket kurması lazımdır. Bu bakımdan Petrol Kanunu çok daha liberal bir kanundur.

Türkiye'de esas petrol aramaları M.T.A. Enstitüsünün kuruluşu ile 1935 yıllarında başlar. İlk bulunan petrol sahası Raman dağ ve Garzan dağ sahalarıdır. İlk rafineri de yine MTA tarafından Batman'da kurulmuştur, fakat 1954'de yeni çıkan Petrol Kanunu ile, bütün haklar yüzde 90 sermayesi devlete ait olan Türkiye Petrolleri A.O.'na devredilmiştir.

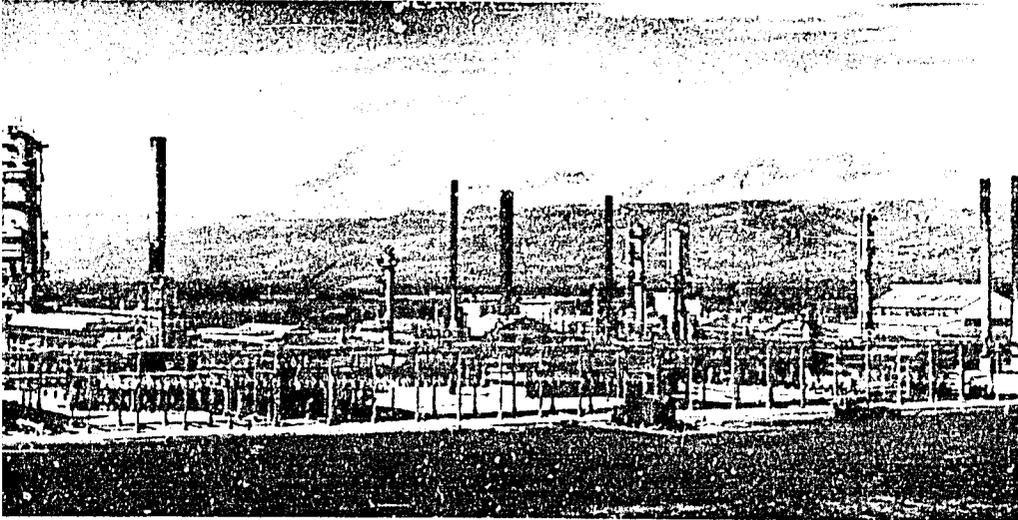
T.P.A.O., ayrıca İPRAŞ rafinerisinin (1,3 milyon ton/yıl kapasiteli) yüzde 51 hissesine; Batman-İskenderun arasında açılan 494 km.lik boru hattının tamamına (400 milyon lira değerinde), 500 milyon lira sermaye ile kurulan PETKİM Petro-Kimya Endüstrisi kuruluşunun yüzde 51'ine sahiptir.

T.P.A.O. 12 yıllık faaliyeti esnasında 450.000 metreden fazla sondaj yapmış, 6 muhtelif sahada petrol bulmuştur.

1966 yılında Türkiye'nin ham petrol üretimi 2 milyon ton olduğuna göre, 1/3 kadarı T.P.A.O. ve gerisi Mobil ve Shell tarafından üretil-

Mersin ATAŞ Petrol rafinerisi.

ANTAŞ oil refinery at Mersin.



mektedir. Buna mukabil dışarıdan ithal olunan ham petrolün 1966 yılındaki miktarı 3 milyon tondan biraz fazladır ve 450 milyon lira civarında döviz ödenmiştir.

Devlet sektörünü temsil eden T.P.A.O.'nın petrol faaliyetlerine paralel olarak ve 6326 sayılı petrol kanunu uyarınca teşekkül etmiş 20 kadar yabancı petrol şirketleri arasında şimdiye kadar yalnız iki büyük şirket, MOBİL ve SHELL Türkiye'de petrol bulabilmişler, dolayısıyla memleketin döviz kazandırma faaliyetine önemli katkılarda bulunmaktadır.

Siirt, Diyarbakır ve Adana dolaylarında 10 muhtelif sahada petrol bulup üretime geçen şirketler, T.P.A.O.'nun kurduğu boru hattı tesislerinden de istifade ederek 1967 yılı içinde petrol üretimini 2,5 milyon tona yükseltecekleri tahmin olunmaktadır. Aynı yıl içindeki tüketimin ise 6 milyon tona yaklaşacağı ve döviz ödenerek 450 milyon lira değerinde petrol ithal olunacağı hesaplanmaktadır. Halen 5 milyon ton kapasite ile çalışan 3 rafinerinin 1969'dan itibaren memleket ihtiyaçlarına kafi gelmeyeceği, 4. rafinerinin T.P.A.O. tarafından İzmir'de kurulacağı (3,5 milyon tonluk) bilinmektedir.

SONUÇ

1. Türkiye, 5000 yıllık bir madencilik geleneğine sahip olmakla beraber, resmî sektör dışında pek az modern madencilik yapılan bir ülkedir. 5000'den fazla maden ruhsat sahibi madenci mevcuttur. Bakır, krom, wolfram, borasit, lületaşı, mermer, zımpara gibi birinci derecede döviz sağlayan madenler bakımından dünya ölçüsünde; belki altın-gümüş-kalay hariç, diğer bütün klasik madenler bakımından da kendine yeterli rezervlere sahip olduğu ve halen Türkiye'de bir nevi maden mühendisi enflasyonu bulunduğu halde, istenilen gelişmeler temin olunamamaktadır. Halbuki sırf M.T.A. Enstitüsü tarafından 30 yıldan beri yapılan araştırmalar sonunda memlekette toplam değeri 80 milyar liraya yaklaşan maden rezervleri bulunmuş veya bulunabilirler geliştirilmiştir.

2. 1965 yılında toplam değeri 1,350,000,000 liraya varan 21 çeşit madenden 14,000,000 ton kadar istihsal yapılmış; ayrıca toplam değeri 250,000,000 lira tutarında 1,5 milyon ton ham petrol üretilmiştir. Böylece

elde olunan maden ve petrol değerleri 1,6 milyar liraya ulaşmış ve bu değer 1966 yılı sonunda 2 milyara yaklaştığı hesaplanmıştır.

3. Elde olunan üretime mukabil, dışarıya yapılan ihracatın toplam değeri, yine 1965 yılı içinde, madenler için 379,413.000 liradır ki, bu genel ihracatın yüzde 10,5'ini (Tablo 1) ve tonaj olarak da yüzde 51'ini teşkil eder. Buna mukabil 1965 yılı içinde ithal olunan ham petrole sarfedilen döviz, 435.000.000 liradan fazladır. Bu rakam 1966'da 450 milyon kadar olmuştur.

4. 1965 yılında dışarıya yapılan 379 milyon liralık ihracatın 370 milyonu Etibank'a, gerisi özel teşebbüse aittir. Son yıllarda özel madencilerin elde ettikleri ihracat dövizleri 70 ile 140 milyon lira arasında değişmektedir (dünya maden piyasası şartlarına göre).

5. Yavaş da olsa, memleket madenciliğinde devamlı bir ilerleme kaydolunmaktadır. Devlet sektöründeki ilerleme daha hızlı gelişmektedir.

6. Özel madencilik sektöründe M.T.A. Enstitüsünün sınırlı yardımları ve Maden Yardım Komisyonunun da teknik, mali yardımlarıyla ve Etibank kanalıyla verilen mahdut kredilerle gözle görülür ilerlemeler kaydolunmuştur. Nitekim Maden Yardım Komisyonu'nun yaptığı her 1 liralık yardıma mukabil 7 liralık döviz temin edildiği hesaplanmaktadır.

Gerek devlet, gerekse özel sektörde yapılacak çalışmalarla ve tahakkuk ettirilecek yatırımlarla ikinci 5 yıllık plan devresi sonunda ihracat bakımından şu hedeflere ulaşmanın mümkün olacağı hesaplanmıştır:

1973 yılında erişilmesi muhtemel ihracat hedefi:

Bakır:	400 milyon lira
Kurşun-Çinko:	200 milyon lira
Krom:	100 milyon lira
Bor Mineralleri:	100 milyon lira
Manyezit:	100 milyon lira
Diğer Madenler:	100 milyon lira
Toplam:	1 milyar lira

fazlasını özel sektöre yatırmak ve en önemlileri ayağıya sıralanmış tedbirleri almak lazımdır:

1. Maden arama işlerine hız vermek, rezerv tenör hesaplarını modern usullerle yapmak gereklidir. Bu hususta M.T.A. ve Maden Yardım Komisyonu koordine çalışmalı, gerekli teknik teçhizat temin olunmalı ve bilhassa maden jeolojisi ve prospeksiyon alanlarında isim yapmış uzmanlar getirtip, üniversitelerin de yardımıyla teknik personeli bol sayıda yetiştirmelidir.

2. Maden aramaları devam ederken, projesi hazır madenlere yatırıma geçmelidir. Gerekli finansmanı temin amacıyla da, hazırlıkları ilerlemiş Maden Kredi Bankası bir an evvel kurulmalıdır.

3. Uzun zamandır kamu cyunda tartışması yapılan, fakat bir türlü Meclislere gelemeyen Maden Kanunu günün şartlarına ve memleket realitelerine uygun olarak çıkarılmalı, kanunla birlikte bir de esaslı teşkilat kanunu kabul olunmalıdır. Böylece Maden Dairesi gerekli personel ve imkanlarla teçhiz edilmeli, elemanlarına yeterli ücret sağlanmalıdır. Merkezi teşkilat, maden bölgelerine doğru genişletilmeli, hizmetleri nisbeten madencinin ayağına götürmeli; bir az da güleryüzlü bir maden politikası benimsenmelidir.

4. Devlet, maden ihraç eden firmalara ve ihraç olunan madenlere mahsus olmak üzere özel tedbirler almalıdır. Bu tedbirler arasında önemlileri şunlardır:

- a) Bilhassa A.B.D.'de olduğu gibi, muayyen madenlere ihracat veya istihsal primi tatbik olunmalıdır.
- b) İhraç olunacak madenler için Demiryolları ve Denizyolları özel tarife tatbik etmeli; keza liman resimleri de indirilmelidir.
- c) Madencilikte kullanılacak makina ve teçhizat ithali için petrol Kanunundakine benzer prensipler uygulanmalıdır.
- d) Maden direği, dinamik ve karpit gibi lüzumlu malzemeler yeteri kadar ve maden sahalarına yakın yerlere taşınmalıdır.
- e) Tütün ve fındık emsali, maden satın alan ve bunları stok yaparak ihracatı kolaylaştıran bir teşkilat kurulmalıdır.

THE MINERAL WEALTH OF TURKEY

(Summary of Dr. Goksu's Article)

Mining activities in Turkey date back to the Assyrian era. Much of the rich ores were removed and the numerous tailings found in the mountains of Anatolia are the only evidence remaining. Consequently, until recent years the outlook for development of new mineral wealth was not encouraging.

In the 45-year history of the Turkish Republic, much exploratory work, especially by the MTA (Mining Research Institute), has changed this picture.

Today Turkey ranks among the world leaders in respect to reserves of chromite, copper, boron salts, meerschaum, emery and marble. She is self-sufficient in most other common minerals and metals excepting possibly gold, silver and tin. In recent years barite, magnesite and other new export minerals have been developed to a state that they have become important foreign exchange earners for Turkey.

Turkish mines in the state sector are generally equipped with modern machinery and are operated according to modern techniques. On the other hand, the private sector is not so progressive. Although a limited number of private firms use modern equipment and methods, many private mining operations are relatively primitive.

The fact that all the subterranean and surface mining wealth of Turkey belongs to the State and that the State is given first opportunity to acquire potentially profitable mineral deposits is the reason the public sector predominates over the private sector. Although the mining law enacted in 1954 granted rights to the private sector, fear of expropriation still inhibits the development of large reserves and tends to foster secrecy in this respect. Labor also tends to support eventual state ownership of mining operations, believing this will result in higher wages.

Petroleum is produced in Turkey by the state-owned Turkish Petroleum Company (TPAO) and by MOBIL and SHELL. Of two million tons of crude petroleum produced in 1966, one-third came from TPAO. Three million tons of crude petroleum were imported at the cost of 450 million TL. in foreign exchange.

The Mining Assistance Commission, formed by the Union of Chambers of Commerce and Industry and JSAID to assist the private mining sector through financial and technical means, has loaned 12 million TL in a total of 56 worthy mining projects.

Turkey produced in 1965 a total of 1,340 million TL. worth of 21 kinds of minerals. Of this, 1,102 million TL. worth was contributed by the public sector, and 238 million TL. by the private sector. Besides this amount, 1.5 million tons of petroleum, worth 250 million TL., were produced in the same year.

Development of Turkey's mining industry can be accelerated by giving encouragement and assistance to the private miners. In fact, it is thought that if planned investments by both sectors are realized, production can be increased so that, by 1973, exports would increase in value to 400 million TL. for copper; 200 million TL. for lead and zinc; 100 million TL. for chromite; 100 million TL. for boron minerals; and 100 million TL. for magnesite and other minerals. This would provide a gross income of one billion TL. in foreign exchange.

To reach to such a goal, the following steps must be taken:

- 1) To expedite mining exploration, MPA and the Mining Assistance Commission must coordinate their activities, and foreign mining and exploration geologists should be brought to Turkey. Cooperation with the technical personnel of the universities will augment the number of qualified specialists.
- 2) The establishment of the Mining Development Bank is essential to provide the necessary financing for expanded mining activity.
- 3) The mining law should be revised to fit present requirements and enacted by the Grand National Assembly. Also the Mining Department should be decentralized to serve the local mining areas, and its staff improved through provision of adequate financial compensation to its personnel. The State should take all steps to encourage the mining industry and to promote mineral exports.

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