CHANGES IN THE PRODUCTION ORGANIZATION AND LOCATION SELECTION PROCESSES OF THE TEXTILE AND CLOTHING INDUSTRIES IN ANKARA: A COMPARATIVE STUDY BETWEEN 1990 AND 1998

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ABSTRACT

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The textile and clothing industries have been the most prominent sectors of Turkish economy since the early 1980s. In addition, exports of the clothing industry reached up to two-thirds of the exports of the textile and clothing indutries as a whole. As a result of the importance of this industry, its nature of organizational structure and site selection processes should be analyzed in the wider contextual framework.

The most important goal of this study is to unravel the nature and dynamics of the prevailing forms of location selection of the textile and clothing industry in Ankara. The location selection processes of this particular sector has been examined through field surveys that were carried out at two different periods of time, i.e. 1990 and 1998. Findings of these field surveys have been evaluated in order to develop an understanding regarding to the process of relocation. In a wider contextual framework of analysis the relocated firms' organizational and site selection processes have been examined through five different variables. These variables are the scale of firms, product types, market characteristics, inter-firm relations and labor market characteristics. Moreover spatial configurations of the textile and clothing industries have been examined under four different categories, which have been developed with reference to the five variables that were mentioned previously. Finally, this study has shown that the textile and clothing industries in Ankara has gained profound importance with regard to the scale of firms, product types, market characteristics, inter-firm relations, and labor market characteristics, namely all of these five variables that were taken into consideration throughout the study.

Key Words: Clothing Industry, Site Selection Processes, Organizational Structure, Relocation Processes, Subcontracting

ÖZ

ANKARA'DA TEKSTİL SANAYİNİN ÜRETİM YAPISI VE YER SEÇİMİNDEKİ FARKLILIKLAR:
1990 VE 1998 YILLARI ARASINDAKİ ÜRETİM YAPISI VE YER SEÇİMLERİNİN KARŞILAŞTIRMALI ÇALIŞMASI

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1980'li yılların başından bu yana tekstil ve konfeksiyon sanayileri Türkiye ekonomisinin en önemli sektörleri konumundadır. Dahası, giyim sanayindeki toplam ihracat tüm tekstil sanayi ihracatının üçte ikisini oluşturmaktadır. Dolayısıyla bu sektörün daha geniş bir çerçevede yer seçimi ve örgütsel yapısı önem kazanmıştır ve incelemeye değer bulunmuştur.

Bu çalışmanın en çok vurgulanan amacı, tekstil ve konfeksiyon sanayiinde hüküm süren yer seçim yapısı ve yer seçim yapısında zaman içinde süregelen değişimler olacaktır. Ankara'da 1990 ve 1998 yılları itibariyle gerçekleştirilen alan araştırması, buradaki yer değiştirme yapısını anlamamıza yardımcı olacaktır. Yer değiştiren firmaların örgütsel ve yer seçim yapısı 5 değişik değer ışığında daha detaylı olarak incelenecektir. Bu beş değer sırasıyla; firma ölçeği, ürün yapısı,

pazar ilişkisi, fason ilişkileri ve işçi pazarıdır. Aynı zamanda tekstil ve konfeksiyon sanayinin yersel konfigürasyonu dört değişik kategoride ele alınıp yukarıda söz edilen değerler esas alınarak irdelenecektir. Son olarak, bu çalışma göstermiştir ki, Ankara tekstil ve konfeksiyon sanayi, tüm çalışma süresince yer alan 5 değer açısından, yani, firma ölçeği, ürün yapısı, pazar ilişkisi, fason ilişkileri ve işçi pazarı açısından önemli bir değer kazanmıştır.

Anahtar Kelimeler: Konfeksiyon Sanayi, Yer Seçim Yapısı, Örgütsel Yapı, Yer Değiştirme Yapısı, Fason İlişkiler

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ABBREVIATIONS

ACC	Ankara Chamber of Commerce
ACIA	Ankara Clothing Industry Association
SIS	State Institute of Statistics
SPI	State Planning Institution
TCSA	Turkish Chambers and Stocks Association
TAECC	Turkish Architects and Engineers Chamber of Corporation

CHAPTER I

INTRODUCTION

In the last 30 years, low-wage areas, particularly South-East Asia, have become a major force in the global textile industry (Appelbaum and Christopherson, 1994; Deyo, 1992; Dicken, 1992; Smith, 1994). The clothing industry is one of the most competitive segments of the textile industry. Like the textile industry, in general, clothing industry is extremely labor intensive and organizationally static. Fabricating technologies are usually old, and remain essentially at the elementary level of such simple mechanical devices as the cutting knife and the sewing machine. In addition, textile and clothing production takes place within vertically disintegrated subcontracting networks (Christopherson and Appelbaum, 1995:1363). In fact, subcontracting has been a persistent component of developing economies as well as that of certain industrial sectors in particular advanced economies. However, the features of subcontracting have played a key role in the industrialization strategies of certain developing economies as extensive utilization of subcontracting relationships has been essential for the integration of these economies into global economic system, particularly in certain consumer industries such as clothing, through which uncertainty in fluctuating international markets can be responded (Kayasu, 1995:5).

First of all, it should be stated that the share of clothing industry in total textiles' export is much higher in developed countries in general, and also increasing at present. On the other hand, the yarn production and weaving industries continue to be more prominent in terms of exports in developed countries however, in developing countries, the clothing industry is more prominent than others.

The Turkish textile and clothing industry expanded rapidly after the early 1970s, playing an increasingly important role in the economy. The success of textile industry in export markets was based largely on its access to low cost labor and cheap raw materials, particularly cotton (Pincheson, 1993), like many other developing countries. As it is mentioned, the textile industry is composed of two distinct but inter-linked subsectors. The first subsector involves the manufacture of textiles; i.e. the weaving industry; whereas the second one involves the manufacture of clothing, i.e. the clothing industry.

All in all, during the 1980s the export of Turkish textile industry registered a rapid and generally consistent growth. The share of textile exports in total exports reached up to 33.4 percent by the end of the decade. On the other hand, the exports in the clothing subsector of the textile industry constituted the two-thirds of the total exports in the textile industry as a whole (TAECC, 1991). Exports in the textile industry have concentrated mainly on the clothing industry, particularly after 1982.

Geographically, the units of production within the clothing industry are highly concentrated. In Turkey, around 80 percent of these units are located in the Istanbul region, which offers good transportation services, abundant skilled labor and a developed subsidiary sector. The industry is also located in the major provincial centers like Bursa, Denizli and so on. Ankara is not known as being one of the most prominent cities in Turkey in terms of the existence of the textile and clothing industry. However, the evidence indicates that even though there were only 156 textile and clothing firms in 1990 (Kayasu, 1995), the total number of firms at different scales rose up to 1700 in 1998 and the total number of unregistered employees in these firms is 68.000 (according to ACIA data). Obviously, there has been a drastic growth from 1990 to 1998, in the number of particularly international market, due to their low labor cost, increasing experience in clothing, and geographical proximity to other regions. In addition to that, increased city population has therefore increased the range of industrial activities and industrial investments. The Custom Union Agreement and government incentives have also affected the growth of this popular industry in Ankara.

The dramatic growth in this sector is observed within the years of 1990 and 1998 respectively. This research is a comparative study and 1990 data is obtained from a field survey undertaken by Serap Kayasu, whereas, 1998 data is gathered by the researcher through a field survey conducted in Ankara. The data used in this study come from the address of firms which take place in the list of ACC and TCSA.

An in-depth discussion on structural and locational change of clothing firms located in Ankara will be undertaken in the following chapters. Throughout the discussion a lengthy analysis of the interrelation of location and linkages is undertaken. Particular attention is paid to the role of subcontracting in the clothing industry as a linkage phenomenon with complex locational effect. It is then shown how the industry is spatially organized around its own center of gravity. As enlargement and standardization of production processes come about, some decentralization of industry occurred. It is demonstrated that, in Ankara, the process of decentralization has been due to the high degree of organizational interdependence between firms. This study seeks to highlight some of the detailed components of this change in the site preference processes and change in whole organizational structure of this industry. Furthermore particular emphasis is given on certain flexible form of production, namely subcontracting relations, in the clothing industry in Ankara.

Consequently, one important trend should be underlined amongst the forms of relocation and decentralization of textile and clothing firms. Namely, that is the trend towards export-oriented, highly standardized, decentralized production structures which assume one of several forms including less rigid production technologies, more flexible labor processes, standardized, export-oriented, innovative production and new forms of inter-firm linkages.

The transaction-costs and social embeddedness school of economic organization are able to shed light on the paradox of the geography of clothing production (Christopherson and Appelbaum, 1995). Textile and clothing producers cluster themselves geographically in order to reduce the costs and increase the time efficiency of seeking out subcontractors, exchanging large amounts of detailed information, exchanging capital and commodities, and transporting goods. According to this argument, the location of production in industries marked by vertically disintegrated production networks is influenced greatly by geographic proximity to suppliers, contractors, and final markets, particularly when transactions are small-scale, irregular, and involve production for quickly changing niche markets (Storper and Scott, 1990). Larger, vertically integrated firms are more able to disperse production to low-wage locations because they are able to internalize transactions, thus reducing the costs and risks of transactions (Christopherson and Appelbaum, 1995).

An extensive review of the literature on industrial location selection theories has been carried out and discussed in the first chapter. In this chapter, industrial development on the basis of classical and neoclassical theory of location is explained . In this theory, location is typically treated as a problem in industrial decision making and behavior, relative to given spatial environment. Every decision maker is assumed to minimize the global costs of transport and production, so that important trade offs occur between transport inputs and other kinds of inputs in the final locational decision. In addition to that, location selection dynamics of the industry in inner urban areas are also examined by incubation hypothesis that is about the changing locational selection characters of small firms that is matured in the central city areas and decentralize to fringe of the city with different kinds of organizational structure. In addition, this chapter also includes a discussion on clothing production that have important distinguishing characteristics of subcontracting as having intensified externalization of production relations, i.e. through inter-firm linkages, small and flexible firms have had the tendency to establish production networks of various nature. In fact, production networks known as being a form of collaboration and cooperation among firms of various sizes at the wake of intense competition. It had been suggested that those production units that are engaged in dense inter-linkages have tendency to agglomerate locationally (Scott, 1988; Storper and Christopherson, 1987).

In the second chapter, general information about the structure of the world clothing industry is given. This chapter is also an attempt to evaluate the internal organization of the textile and clothing industry. The place of the textile and clothing industry in the Turkish economy is also emphasized with the related information and data. Turkish apparel manufacturers fall into two broad categories; small workshops and large integrated firms. The existence of a large number of small firms which operate on a subcontracting basis, results in a high levels of flexibility. On the other hand, large scale clothing industry that produced more standardized products has become increasingly export-oriented, and some recently established firms cater exclusively for the export market. Another objective of this chapter is to explain general industrial development of Ankara, within the historical perspectives that prepared this city to become specialized in clothing activity.

The third chapter, includes a field survey conducted in Ankara in order to elaborate on the interwoven relationships among the components of organizational structure (this phenomenon includes the scale of firms, products types, market characteristics and labor demand of clothing industry) by districts in the context of the clothing industry. Finally, the emphasis of this chapter is on the prevailing forms of relocated structural organization in the clothing industry in

Ankara. Moreover, in this chapter, an evaluation will be made of the internal organization of the textile and clothing industries, with an emphasis on the latter. In this sense, the evolution of this particular industry in terms of the composition of exports, internal organization and relations with international markets has been overviewed.

The fourth chapter includes a field survey conducted in Ankara in order to elaborate on the interwoven relationships among the components of organizational structure and locational selection process by districts in the context of the clothing industry in Ankara.

In the field survey, it was determined that the firms interwieved in the clothing sector was selected through stratified random sampling, based on the sectors, proportional share, in total number of firms by districts.

At this point, the scale of a firm is measured in terms of employment. Those firms with a total work force of 1-50 are called small scale enterprises. Those with a work force of 51 or more are classified as large scale enterprises (SIS).

In this study, the aim of interviews was twofold, one was to uncover the dynamics of production process and the other was to analyze the process of location selection. Given that the two processes are closely interrelated. The production process has been examined by using five variables. These variables are the scale of firm(s), product types, market characteristics inter-firm relationships and characteristics of labor demand. These variables are studied with reference to the location of particular firms. In addition, in the 1990s' survey results, some of the above questions were not asked. These are about the scale of firms and characteristics of labor demand. Therefore, these topics could not be examined well in the comparative manner between 1990 and 1998 .

Finally, at the end of the study, it is found that there has been change in the characteristics of location selection processes and organizational structure of the textile and clothing industries in Ankara. As a result of this, by the late 1990s, the dominating spatial configuration of the clothing industry and urban landscape began to change and a new pattern have become progressively more evident. In this sense previous industrial centers in the central city, are now faced with stagnation and decline spatially and economically in Ankara today. As manufacturing firms are closed, new ones do not prefer to select these locations. As a result, new capital is invested in cheap labor sites which are located at the outskirts of the city or to low income districts. Therefore, a number of new industrial growth centers in Ankara has emerged and expanded at a rapid pace during the end of the 1990s.

CHAPTER II

ORGANIZATIONAL STRUCTURE AND SITE SELECTION PROCESSES OF INDUSTRY

The recent past years, geographers and regional scientists have tended o deal with matters of industrial development on the basis of the classical theory of location as codified by Alfred Weber (1929) and by neoclassical theorists such as Hoover (1937), Isard (1956). In this theory, location is typically treated as a problem in individual decision making and behavior relative to a given spatial environment. Each decision maker is assumed to seek out location such that the transport costs incurred in assembling inputs from their sources and in dispatching outputs to their final markets are at a minimum. In more elaborate versions of the theory, decision makers are assumed to minimize the global costs of transport and production, so that important tradeoffs occur between transport inputs and other kinds of inputs in the final locational decision. Almost all versions of the theory also make reference to the role of agglomeration economies in locational decision making, through because of its limited sense of inter and intra-industrial dynamics, the conception of agglomeration that typically informs the Weberian theory of location leaves much to be desired (Scott, 1988: 44).

One of the location selection dynamics of the industry in inner urban areas are also explained by incubator hypothesis (Hoover and Vernon, 1937; quoted in Scott, 1988). The story begins with the idea that small new firms require "incubation" if they are to survive. Such firms are said to be extremely fragile, and they therefore seek out for themselves an economic environment that can provide them with supportive facilities and services. Many theorists have taken in it for granted that environments like this occur above all in the vicinity of the core of the city. Thus, the core is said to function as an incubator or seedbed in the sense that small new firms can maximize their chances of survival if they are attached to it (Hoover and Vernon, 1959; Struyk and James, 1975). This situation is seen as the real process of the division of labor and the endogenous creation of external economies of scale.

According to incubator hypothesis, in the beginning of development periods, industries are very fragile not only economically but also financially. This environment is available in city center and its surrounding continuum areas which can provide agglomeration economies. For this reason, city centers and their surrounding continuum are the most available places in order to act as an incubation machine. In spite of this advantageous conditions, less number of newly established firms get a chance of development, get enlarged and be successful. The incubator hypothesis goes on to claim that many seedbed firms will grow and expand within the nurturing environment of the central city, and as they do so, they will increasingly be able to provide internally for themselves the economies of scale that they formerly consumed as pure externalities. They thus become steadily more self-sufficient, and they may in fact eventually be able to disperse entirely with their initial incubator location. Accordingly, once they have outgrown their original premises, they are likely to start to abandon the central city for the cheaper land of the urban fringe (Scott, 1988: 207).

In life cycle of industries, incubation phase is really a very critical period. Whenever the industries complete this phase in a successful manner, their tendency and dependency to agglomeration economies decrease. In other words, parallel to industry's development, firms won't be no more in need of external advantages of city center. Industry can also attain these external advantages in the city center. Yet, as the land prices are expensive, annual rents of the real estates' are high and property ownership is divided, establish costs are very high. By the way, when the industries get enlarged and developed, they leave inner metropolitan areas, complete incubation phase and decentralize to fringes of the city. In this context, by the way, the term decentralization is meant to refer not just to the actual physical migration of industrial plants from core to peripheral regions, but also, and more significantly, to the decline of the core and growth of the periphery as a result of (a) closures and *in situ* employment increases in the latter. Actually, as both Birch (1979) and Schmenner (1982) have demonstrated, only a very small proportion (less than four or five percent a year) of industrial plants in the United States do actually physically shift location.

Vernon and Hoover support this issue and claim that when the developed industries moved out of the city, newly establishing small industries tend to settle in center areas. Ratio of renters are high in numbers in the city center and areas surrounding city center, whereas ratio of renters are low in the fringes and outskirts of the city (Güvenç, 1989; Tümertekin, 1972). Incubation hypothesis ensures that, location selection phase occurs in a dynamic situation and industry movement to outskirts of city happen in a successful manner. This hypothesis is also related to the subjects "product cycle" that had hitherto been developed as a largely a spatial concept (Norton and Rees, 1979; Thompson, 1969; Vernon, 1960) and product diffusion". When a country which is producing technologies is taken into consideration, new industrial products lead 3 production phases.

These are as such;

1. Diffusion phase in which the new industrial product is supplied to the market.

2. Development phase: Production capacity increase an consequence of increase in demand for the new industrial production.

3. Maturation phase: Demand for the product is saturated and is reached to a stable phase.

Product cycle revolves around the proposition that technological change in any sector can be defined in terms of non-reversible "learning curve" economies. In the early phase of the cycle, producers are alleged to be small and labor-intensive and to face uncertain markets. This phase essentially coincides with the incubator process and is associated with centralized locational development. Then, as markets expand, technologies are stabilized and routinized, and producers grow in size. They become more capital-intensive, more given to production of large stabilized and routinized, and producers grow in size. They become more capital intensive, more given to production of large standardized batches of output, and ever more ready to relocate in non-central areas. Finally, a stage is reached in which fully routinized, mass-production technologies (using largely unskilled labor) are installed. This stage correspond to the upper reaches of the producer's learning curve; and in product cycle term it represents full industrial maturation. By the time this stage is attained, production is concentrated in large branch plants organized within oligopolistic corporations (Markusen, 1985). This final phase in product cycle is also associated with considerable dispersal of units of production. These locate primarily in medium-sized or small towns in peripheral areas where adequate supplies of cheap, unskilled (frequently female) labor are available.

Product cycle which is a formulation in the incubation hypothesis can be explained as a combination of location selection, organization of industrial production and market dynamics (Scott, 1988: 205-9)

According to this new hypothesis, newly produced industrial products are small in scale, financially fragile and high labor oriented. When the demand for the new product is increased and reach to a stable level, more capital intensive production techniques will be used. This will lead to large-scale firms producing standard products.

When the firms gather all phases of production in their own production structures, their dependency on agglomeration economies will decrease.

When the demand for the product is saturated and reached to a stable point, phase of production will reach to maturation point and dependency of firms on metropolitan area and city center will decrease.

Capital intensive firm will choose a middle scale district to locate. This is the result of getting independent of labor power and labor qualification.

This final phase in product cycle is also associated with considerable dispersal of units of production. These locate primarily in medium-sized or small towns in peripheral areas where adequate supplies of cheap, unskilled (frequently female) labor are available. As a result, large-scaled capital intensive firms generally choose medium sized small towns and exploit cheap, unqualified labor force (Scott, 1988: 207-8).

The latter locational process also comprises the hierarchical filtering component of the story. The claim is that as process and product technologies evolve , according to the cycle, so industrial plants are repelled from large metropolitan regions and diffuse steadily downward and outward through the urban system. The unfolding of this trend has been characterized by Thompson (1969) as the movement of plants " from places of greater to lesser industrial sophistication"

Yet, this above view considers industries which most frequently produce technologies in developed countries. Hence developing countries which are dependent on exported technologies during production of industries, can evaluate described above phases for themselves.

This adaptation to developing countries can be two situations. Firstly, dual structure which is an outcome of locally produced technology and exported technologies of developed countries, should be taken into consideration. This dual industrial structure and its effect on location selection are important. Secondly, squatter houses, pseudo urbanization and so on. And these rapid sudden changes in population and effects of them on transformation of society structure and as a result their effects on industry location selection is very important.

First issue is emphasized on Kıray's "Urbanization Phases of Underdeveloped Countries" study (Kıray, 1975). This study details on the industries working with exported technologies, in an organized production structure, and show that these industries choose new locations in a continuous manner and differing manner. Kıray says that, this dual industrial structure can be defined as such; First type moves to an outer urban area which includes necessary infrastructure, transportation and telecommunication possibilities and act as a industrial campus. Second type includes the benefits of agglomeration of metropolitan area, mass transportation possibilities, and so on (Kıray, 1975).

This model relates industries' location selection with technological development and inner and outer dynamics of dual industrial structure as being locally produced and exported technologies together.

2.1 Textile Industry in the World

Textile production is growing rapidly and is increasingly dispersed across the globe. Global textile exports grew 181 percent during 1973-1979, and 132 percent during 1979-1987, and an additional 22 percent during 1988-1991. In last 30 years, low-wage areas, particularly in East Asia, have become a major force in the global clothing industry. In 1991, Greater Chine, which includes Hong-Kong, Taiwan and the People's Republic of China, accounted for 40 percent of US textile imports, and in 1992, Hong Kong and China together accounted for 30 percent of world textile exports (Christerson and Appelbaum, 1995:1363).

Like the textile industry in general, clothing industry that is one of the most competitive segments of the textile industry is extremely labor intensive and organizationally static. Fabricating technologies are notoriously archaic and remain essentially at the rudimentary level of such simple mechanical devices as the cutting knife and the sewing machine. The production process as a whole generally consists of seven basic steps, i.e., designing, pattern-making, cloth-cutting, sewing, finishing, packing, and sales. Many of these steps are in practice broken down onto more minutely detailed operations, as a for example in the case of sewing which is often (through not always) organized as section work where operators specialize in the sewing of one specific part of a garment, such as sleeves, or hems, or pockets. High quality producers are less inclined to such division of labor , and, in these cases, sewing operations are recombined in a "making through" process (Scott, 1984).

In addition, in the clothing industry, vertically disintegration of functions is very common, and much work is subcontracted out. Most firms which market brand-name labels in apparel do not take part directly in any manufacturing activities, but focus on design, marketing and retailing. These 'manufacturers without factories' farms out all manufacturing activities to networks of independent fabric mills, either foreign or domestic, and arrange for the delivery of this fabric and the garment patterns to cutting contractors. The cut fabric, along with buttons, zippers or other components, are then delivered to on independent sewing contractor. These contractor sew the fabric and components together under the supervision of quality control inspectors, either from the brand-name firm or from on independent agent. The garments are then delivered to the brand-name company's warehouse, or directly to retailers (see Figure 2.1).

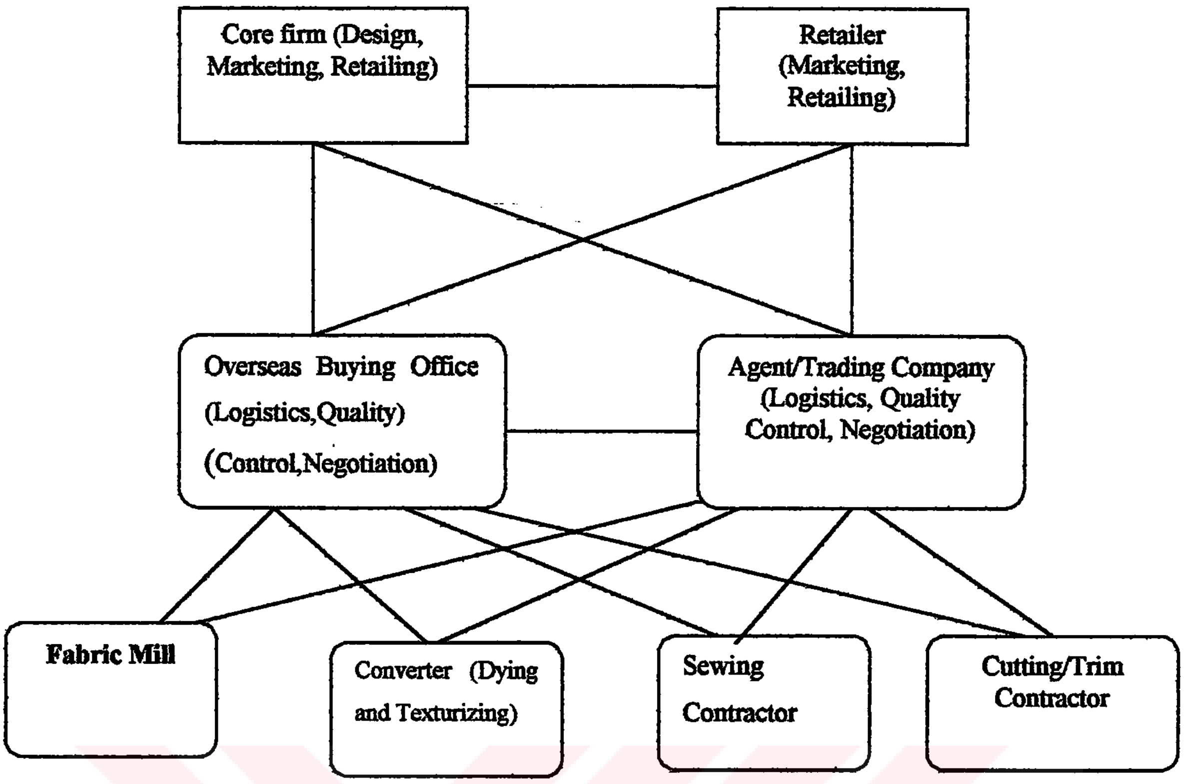

Figure 2.1: The Organization of Textile and Clothing Production. (Christopherson and Appelbaum, 1995).

Labor intensive apparel production has shifted to low-wage Asian nations, yet continues to flourish in the United States and other high-wage areas. B.Christerson and R.P.Appelbaum's paper explains this apparent contradiction by concluding that in addition to labor costs, firm size, ethnicity, market strategy , and trade regulations powerfully affect the location of apparel production. Large firms are more able to disperse production globally than small firms. The apparel industry has often been characterized as an example of the New Industrial Division of Labor. According to this argument, advances in transportation and communications technologies allow multinational corporations to move manufacturing facilities to whichever part of the world can provide the most profitable combination of capital and labor. Labor-intensive activities are thus decoupled from capital-intensive activities, an dispersed to low-wage areas around the globe, while capital-intensive activities remain in heavily capitalized industrialized nations. According to this argument, since apparel production is highly labor-intensive, production will shift to developing nations to take advantage of cheap labor.

While this has definitely occurred, over 60 percent of clothing produced for US market is still produced in the US, and high-wage European nations such as Italy, France, and Germany, are still among the top exporters of apparel in the world.

This could very well explained the persistence of domestic apparel manufacturing in the US and Europe, despite the higher wages. Textile and clothing production is vertically disintegrated, transactions intensive, and involves extremely volatile demand conditions and highly specialized niche markets. Furthermore, apparel production in the United States is highly concentrated in industrial districts in cities such as New York and Los Angeles (Appelbaum and Christopherson, 1997).

In addition, the clothing industry in New York in particular, had drawn considerable attention. Waldinger and Lapp (1993) carried out their research in the quest for unraveling the fact that whether this particular industrial organization should be considered as being a new form of sweatshop phenomenon or an emergence of informal sector in the post industrial west (Kayasu, 1995). According to this approaches, the 'sweatshop' phenomenon in New York's garment industry. That the garment industry has gone 'back to the sweatshop' is a crucial piece of evidence in the entire informal sector story. As Portes and Castells argue in their recent edited book on the subject:

> Furthermore, it is the expansion of informal activities in a largely regulated context that gives a new historical meaning to the current process of a rising informal economy. It is often argued that uncontrolled, exploitative relationships are the oldest story, so that sweatshops represent classical capitalism, not advanced capitalism. But it is precisely the development of production to become new ones. An old form in a new setting is, in fact, new. (Portes and Castells, 1989).

Indeed, the sweatshop revival in New York's garment industry figures prominently and frequently in accounts of the 'informal economy' in the United States.

On the other hand, A.J. Scott examine the clothing industry in Great Los Angeles. The paper opens with a brief description of the organizational structure of the women's dress industry. The geography of the industry in the Greater Los Angeles Region is described. A sample of dress plants is factor analyzed in order to determine the basic dimensions of organizational variation, These dimensions are shown to be standardization, scale and technology. A lengthy analysis of the interrelations of location and linkages is undertaken. Particular attention is paid to the role of subcontracting in the women's dress industry as a linkage phenomenon with complex locational effects. It is then shown how the industry is spatially organized around its own center of gravity. As enlargement and standardization of production processes come about, some decentralization of the industry occurs. It is demonstrated that, in the Greater Los Angeles Region, the process of decentralizations been arrested by the high degree of organizational interdependence between plants.

CHAPTER III

SITE SELECTION PROCESSES AND ORGANIZATIONAL STRUCTURE OF THE TEXTILE AND CLOTHING INDUSTRIES IN TURKEY

The textile industry is composed of two distinct sub-sectors. The first sub-sector is the manufacture of textiles i.e. The weaving industry; however the second one involves the manufacture of clothing i.e. The clothing industry. The processes of the manufacture of textile goods, yarn production and that of knitted products are sub-sectors of the textile industry in the international terminology. Whereas, the production of cotton yarn, that of artificial and synthetic fibers, the knitting industry and the manufacture of weaving industry are the contents of the weaving industry according to the State Institute of Statistics' records in Turkey. On the other hand, the production of ready-to wear clothing and other sawn products, such as fur and leather are included in the clothing industry in both the State Institute of Statistic records in Turkey and the international terminology.

In this analysis, sub-sectors of the textile and clothing industry are defined in various ways by different studies in this study, the following classification has been accepted (Kayasu, 1995).

THE TEXTILE INDUSTRY

1. Artificial and synthetic fiber
2. Yarn

   Cotton yarn

Wool yarn

Silk yarn

Artificial and synthetic yarn

3. Weaving

   Cotton weaving

   Woolen weaving

   Silk and synthetic weaving

   Carpets and rugs

4. Knitting

   Round knitting

   Straight knitting

THE CLOTHING INDUSTRY

1. Knitted clothing
2. Woven clothing

3.1 Evolution of the Textile and Clothing Industries in Turkey

The textile industry have been through major transformations since the foundation of Turkish Republic in terms of production and exports. In accordance with government policies and the demands of the international markets, certain sub-sectors gained importance, while the importance of some others declined with in the industry.

During the period between the 1920s and 1930s, the most important trend has been the shift from production and exports of raw materials to that of manufactured products. At the end of this period, however, demand for raw cotton fallen, and this caused negative impacts on Turkish importation.

The development of textile sector in terms of manufacturing was one of the aims of the First Economic Congress in İzmir. Sümerbank, the first textile plant subsidized by the government, was founded in 1933. Between 1935 and 1942, production of woolen textiles grown seven times. During this period, private sector also began to invest in the textile industry while public sector's capacity was increased with the increased demand of the military.

Importing textile machinery, and also the notions of increasing the capacity of existing plants and modernization of the textile industry were encouraged by government policies in the beginning of the 1940s.

During the 1950s, due to rising income levels, the extended internal markets were opening up in the textile industry. Hence, The number of establishments in both weaving sectors and yarn production rapidly increased.

Production of private sector was greatly increased during 1950s particularly due to government subsidies provided for individual enterprises.

In the late 1960s, a very significant point is that the share of manufactured textile products in total exports was still quite low, whereas that of textile raw materials.

In total exports was considerably high. In addition to that, production of cotton and woolen yarn was still exceeding production of woolen and cotton in Turkey, during 1960s. In order to the high production costs, the Turkish textile industry could not compete in the world markets during this period. As well as increasing the production capacity and exports, the major aim of the First and Second Five Year Development Plans was that the modernize the technology of textile industry.

In the beginning of the 1970s, availability of cheaper raw materials caused low production costs with in the textile industry. This gave effort to private sector compete with in the International Markets.

The Turkish textile and clothing industry expanded rapidly after the early 1970s, playing an increasingly important role in the country's economy (Pincheson, 1993). Turkey's apparel manufacturers fall into two broad categories; small workshops and large integrated plants. The existence of a large number of small firms, which operate on a subcontracting basis, results in a high level of flexibility. The search for flexibility led to new forms of industrial organization, i.e. in the context of small and flexible production units and accompanying production networks among them in advanced capitalist economies; whereas certain forms of –already existing- production relations have also provided the flexibility that global capital seeks for. Both in advanced and developing economies, subcontracting relationships constitutes an eminent example for this particular type of production organization. Subcontracting relationships coincides with that of developing economies in responding to uncertain global markets in the context of consumer industries.

The industry has become increasingly export oriented, and some recently established firms cater exclusively for the export a market. The success of textile industry in export markets was based greatly on its low cost labor supply and cheap raw materials, particularly cotton. The EC is an important market, especially Germany. Many of the joint ventures between Turkey and foreign companies are with German firms. Rising labor costs in Turkey have led to a decline in Turkey's exports of highly cost sensitive goods to the USA. Meanwhile, Turkish apparel manufacturers are attempting to move up-market.

As well as catering for demand From the domestic market, Turkish clothing producers in the private organized group are increasingly responding to foreign markets. The EC is Turkey's biggest export market, taking about three quarters of its apparel exports (Pincheson, 1994: 124).

During the 1980s, exports of textiles registered a quite rapid and generally steady growth with the high capacity utilization, at about 90 percent. By the end of the decade, the share of textile exports in total exports reached up to 33.4 percent. On the other hand, the exports in the clothing sub-sector of the textile industry constituted the two-thirds of the total exports in the textile industry as a whole (TAECC, 1991).

According to the data given from State Statistics Institution (SIS), textile and clothing industry occupied 31.8 percent of consumption goods production, 11.5 percent of manufacturing industry production and 8.4 percent of the total production in Turkey. These values are sufficient to emphasize the size and importance of textile and clothing industry production in the Turkish economy (Figure 3.1).

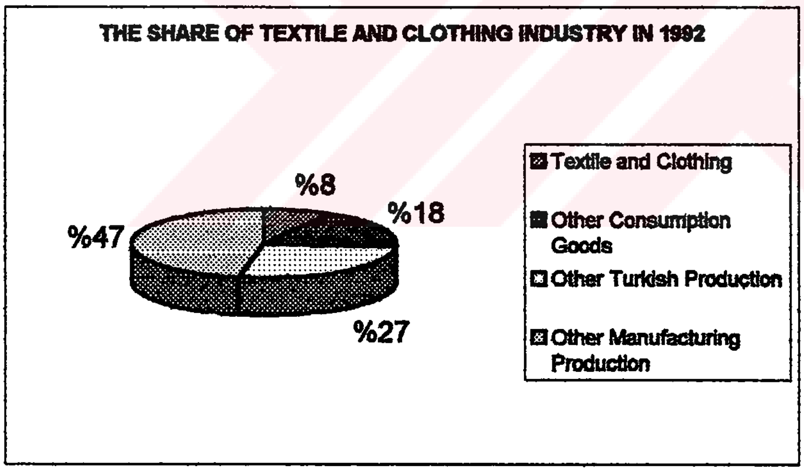

Figure 3.1: The Share of Textile and Clothing Industry in 1992

According to the mentioned data base, there were 3.596.459 workers employed in the manufacturing industry at the beginning of 1993 (Yaşar, 1993). This figure relates to insured and registered workers. Approximately 10 percent were employed in textiles. According to same data 9.8 percent of the Turkish manufacturing employment was accounted by textiles: This share is doubled if textiles and clothing are considered together. This employment share constitutes an important degree for the Turkish economy.

In the first half of the 1980s the textile industry's share is in total value added was 15 percent. In addition, textile exports constituted more than 10 percent of the total industrial exports except for processed agricultural products (Pazarcık and Turunç, 1986).

Today in clothing sector, there are four main categories of firms. One of them is the clothing producers and exporters. The second one is the subcontracting firms which work with domestic and foreign companies. Third one is the export capital firms which do not produce but only deals with the exporting of the goods of small firms. There are also household which are organized by individual trades.

In former stages of textile production, firm got cotton material then made thread and then spinning it, finally reached cotton fabric. Hence, this has low value-added compared to garment industry. But, since 1980s, ready-made-cloths were exported. First products was the T-shirt then were complicated products like women's' and men' dress was made ready-made-textile-production has higher value-added. Because, when exporting final goods value-added becomes higher. In recent years, 25 percent of our total exportation is the ready-made-cloth sector (Yaşar, 1993).

In brief, since the early 1980s as well, the textile industry itself had been through a number of changes in terms of product differentiation in export-oriented products and the composition of export-oriented sub-sectors; namely the emphasis has shifted from the production of basic T-shirts to that of design and quality oriented, differentiated products.

3.1.1 Production and Export in the Textile and Clothing Industries

Even though it is very difficult to find any information on production in Turkey, there are several valuable studies conducted by SIS. The production information submitted by SIS forms a base for annual government programs.

The production figures of Turkish textile and clothing industries between 1984 and 1993 are given in Table 3.1 and Figure 3.2.

The production of Turkish textile industry in 1984, based on 1988 fixed prices, was TL 4.2 trillion. The total textile and clothing production had increased along the years and reached TL 5.6 trillion, at the end of 1992 with an annual average of 3.8 percent.

Table 3.1: Turkish Textile and Clothing Production, 1984-1993 (1988 Prices)

	TEXTILE		CLOTHING		TOTAL	
YEARS	(mn TL)	%	(mn TL)	%	(mn TL)	%
1984	4.166.761		2.041.560		6.208.321	
1985	4.573.612	9,76	2.207.130	8,11	6.780.742	9,22
1986	4.562.839	-0,24	2.513.176	13,87	7.076.015	4,35
1987	4.682.638	2,63	3.145.928	25,18	7.828.566	10,64
1988	5.123.638	9,42	3.617.248	14,98	8.740.886	11,65
1989	5.242.177	2,31	4.460.651	23,32	9.702.828	11,01
1990	5.169.200	-1,39	4.431.764	-0,65	9.600.964	-1,05
1991	5.238.500	1,34	4.911.200	10,82	10.149.700	5,72
1992	5.628.500	7,44	5.368.600	9,31	10.997.100	8,35
1993	5.878.600	4,44	5.941.400	10,67	11.820.000	7,48

Developments in the clothing industry, on the other hand, have been more remarkable compared to the developments in the textile industry. Turkish clothing production increased from TL 2 trillion in 1984, to TL 5.4 trillion with an annual average of 12.8 percent.

The collective production of the textile and clothing industries had grown shiftily from 6.2 trillion to TL 11 trillion with an annual average of 7.5 percent, which has higher than the growth rate of the Turkish economy during the same period.

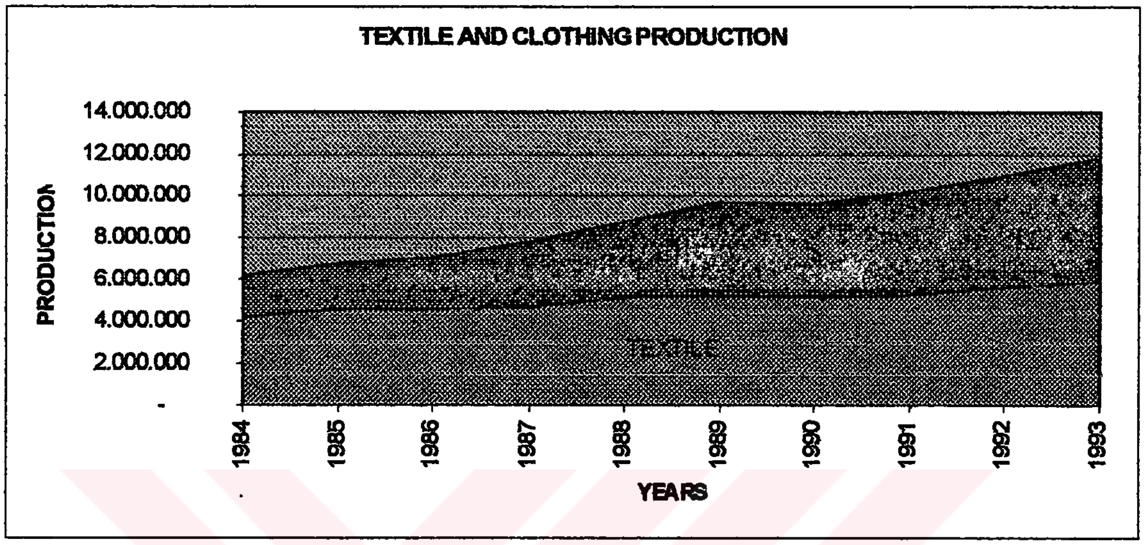

Figure 3.2: Turkish Textile and Clothing Production, 1984-1993

Textile and clothing industry is one of the largest industries which constitute Turkish industrial production. Total physical production figure for TL Turkey in 1992 was 134 trillion based on 1988 fixed prices (SPI; 1993). Manufacturing industry had the greatest portion of this production (TL 98.4 trillion). Production in the manufacturing industry is classified as consumption goods, investment goods and intermediate goods. Textile and clothing industry constitute a sub category under the consumption goods category. The production of consumption goods in Turkey in 1992 was above TL 35.5 trillion. On the other hand, the production value of textile and clothing industry in 1992 was above TL 11 trillion. According to given data, textile and clothing industry occupied 31.8 percent of consumption goods production, 11.5 percent of manufacturing industrial production and 8.4 percent of the total production in Turkey. These values are sufficiently emphasize the size and importance of textile and clothing industrial production in the Turkish economy. The share of the textile and clothing industry in the total Turkish production in 1992 is illustrated in Figure 3.2.

Exports in the textile industry have concentrated mainly on the clothing industry, particularly after 1982. Exports of cotton thread, however, have started to decline after 1982 as exports in overall textile industry have continuously increased. At the end of the 1980s, the clothing industry constituted the two-thirds of exports within the textile industry. Moreover, exports of fabrics and knitted products have been on the increase (Kayasu, 1995).

According to the Table 3.2, the clothing industry had the largest share in exports within the textile industry, while cotton weavings had the second largest share in exports. Both sectors experienced a drastic growth from 1985 to 1987.

Table 3.2: Export in the Textile Industry, 1985-1987 ($ 000)

Type	1985	1986	1987
Cotton thread	252,7	278,8	340,5
Cotton weavings	109	110,8	533,5
Clothing	800,3	900,9	1543,8
Leather clothings	450,1	293,2	654,9
Synthetic fibre	410	356,2	436,6
Carpets	85,9	82,9	121,1

Source: Dünya, Feb. 9, 1988

In the clothing industry, the important trend appears to be the significant rise in exports of knitted clothing. Although woven clothing had the largest share in exports in 1986, this sector experienced a drastic decrease from 1984 to 1986. Whereas, exports in knitted clothing were almost doubled up during the same period (Table 3.3).

Table 3.3: Export in the Clothing Industry, 1984-1986 ($ 000)

Type	1984	1985	1986
Leather clothing	338,5	450,1	227,2
Furs	57,1	13,1	26,7
Knitted clothing	176	312,1	301,9
Woven clothing	707,5	488,1	405

Source:Özenç, 1987

The increase exports of knitted clothing and the decline in woven clothing between 1988 and 1990 (Table 3.4).

Table 3.4: Exports of Knitted and Ready-Wear Clothing Industries of Turkey to EEC Countries, 1988-1990 ($ 000)

Type	1988	1989	1990
Knitted clothing	850,552	940,077	1198,195
Ready-wear clothing	644,129	717,2	925,997

Source:The Undersecretariat of Treasury and External Trade

In the case of exports, the textile and clothing industries have experienced the major leap. While these industries have changed their position from being important producers of cotton to being exporters of clothing the recent goal appears to be becoming exporters of design-oriented and high-quality, innovative products that provide high value-added. The change in exports of these industries throughout the decade between 1984 and 1994 is shown in Table 3.5, as Figure 3.3 demonstrates visual interpretation of the data.

Table 3.5: Exports in the Textile and Clothing Industries, 1984-1994 (1988 Prices)

YEARS	TEXTILE		CLOTHING		TOTAL	
	(mn TL)	%	(mn TL)	%	(mn TL)	%
1984	1.587.140		903.654		2.490.794	
1985	1.501.256	-5,41	1.285.544	42,26	2.786.800	11,88
1986	1.507.163	0,39	1.643.102	27,81	3.150.265	13,04
1987	1.403.811	-6,86	2.431.774	48,00	3.835.585	21,75
1988	1.748.523	24,56	3.007.696	23,68	4.756.219	24,00
1989	1.642.746	-6,05	3.658.033	21,62	5.300.779	11,45
1990	1.387.886	-15,51	3.497.751	-4,38	4.885.637	-7,83
1991	1.389.900	0,15	4.062.800	16,15	5.452.700	11,61
1992	1.357.500	-2,33	4.616.300	13,62	5.973.800	9,56
1993*	1.471.100	8,37	5.256.900	13,88	6.728.000	12,63
1994*	2.489.240	69,21	6.292.989	19,71	8.782.229	30,53
* Estimated						
Source: State Institute of Statistics						

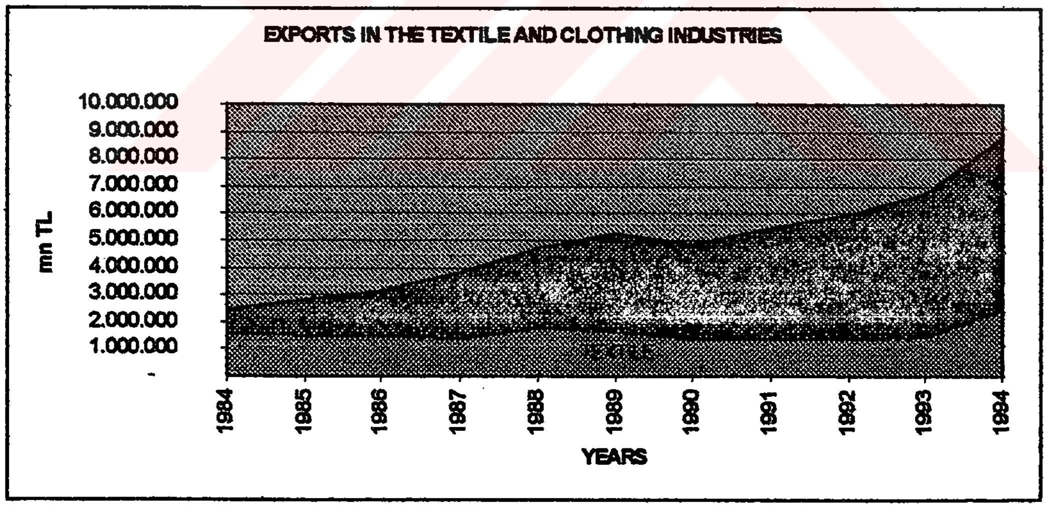

Figure 3.3: Exports in the Textile and Clothing Industries, 1984-1994

In addition, the new foreign policy which started in 1980 in Turkey allowed the textile and clothing industry to benefit from it. The reasons such as cheap labor, abundance and high quality of the raw materials, proximity to export markets and commercial partnership with EC made textile and clothing industry be the star of Turkish export. Table 3.6 shows the import and export values for Turkish textile and clothing industry during 1989 and 1992.

Table 3.6: Foreign Trade of Textile and Clothing Industries, 1989-1992

			TEXTILE		%	%	%
	1989	1990	1991	1992	90/89	91/90	92/91
	($ 1,000)	($ 1,000)	($ 1,000)	($ 1,000)			
Export	1.427.301	1.424.248	1.374.356	1.369.322	-0,21	-3,50	-0,37
Import	624.280	1.049.012	872.912	1.189.310	68,04	-16,79	36,25
			CLOTHING				
Export	2.401.495	2.898.349	3.219.350	4.009.615	20,69	11,08	24,55
Import	6.617	17.984	26.516	35.066	171,78	47,44	32,24
			TEXTILE AND CLOTHING				
Export	3.828.796	4.322.597	4.593.706	5.378.937	12,90	6,27	17,09
Import	630.897	1.066.996	899.428	1.224.376	69,12	-15,70	36,13

Source: Treasury and External Trade Undersecretary

After 1989, there has been a trend for recession in the Turkish textile exports. The reason of this situation is the anti-dumping taxes applied by EC to Turkish textile products and the lack of competitive power of Turkish products with low value-added.

During this period, as the exports of Turkish textile remain constant, there is a considerable increase in imports. Turkish textile imports were $624 million in 1989, and increased 90 percent in 1992 reaching $1.2 billion.

By the way, if clothing industry is examined, a totally different situation has been observed. While the Turkish clothing exports were $2.4 billion in 1989, in the following 3 years they increased by 67 percent and exceeded $4 billion. That number is well above the economy average. In conclusion, the clothing exports carried their share in total Turkish exports up to 27.2 percent.

In addition import of clothing industry has also been significant increases between the years 1989 and 1992. While the imports for the Turkish clothing industry were $6.6 million in 1989, they increased by 430 percent in the following 3 years and reached $35 million.

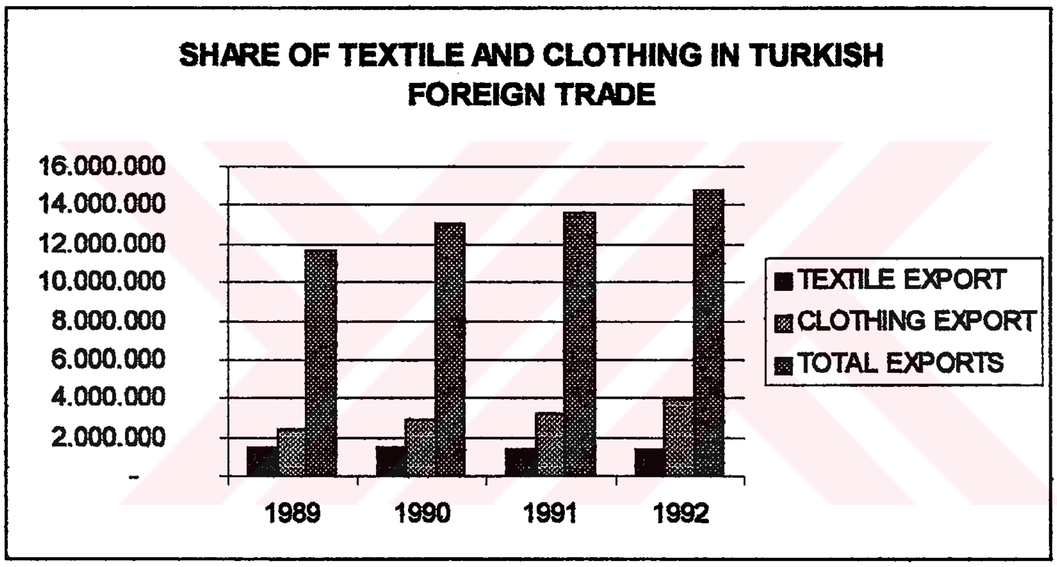

Figure 3.4: The Share of Textile and Clothing Industry in Turkish Foreign Trade, 1989-1992

It has to be stressed that while export of Turkish textile and clothing industry were $3.83 billion in 1989, they reached $5.38 billion at the and of 1992. Indeed, Figure 3.4 illustrates that the share of the textile and clothing industry in total exports has been increasing. In 1990 and 1991, this share risen slightly . In 1990, the share of the textile and clothing industry in total export revenues reached 33.4

percent and in 1991, it reached 3.8 percent. On the other hand, in 1992, since there were a major difference in total Turkish export increase rate and the textile and clothing exports increase rate (total export increase rate: 8.2 percent), the sharer of the textile and clothing industry in total exports revenues increased to 36.6 percent. Therefore, it can be stated that the textile and clothing industries that has a share of more than one-third of country's export revenues have been the most prominent industrial sectors of Turkish economy

3.1.2 Import of the Textile and Clothing Industries

Imports of ready-made garments into Turkey remain small, consisting mainly of niche products and well known international brands. However, following cuts in import duties. Imports have risen rapidly since 1990.

3.1.3 Government Incentives

The Turkish government offers a range of investment incentives for the apparel industry. For an entirely new investment (rather than expansion and modernization of capacity), these include exemptions from custom duty (100 percent) investment discounts on machinery imports (30-100 percent) and an incentive premium (25 percent).

Moreover, the apparel industry is one of a number of sectors which are treated more favorably than other sectors. Almost all machinery and equipment imports are exempted from custom duties.

3.1.4 Capacity Utilization of Textile and Clothing Industries

Another data base, that is constructed by SIS is the capacity utilization ratios of various industries.

The capacities of the Turkish fiber production and woven industries have been among the top 10 in the world (Özer, 1993). For example, at the end of 1992, 2.4 percent of the world's short fiber thread production capacity and 2 percent of the world's open-end thread production capacity is held by Turkey. In addition, Turkey accelerated the procedures for developing the quality of machines used by means of the investments made in the recent years. To illustrate, Turkey is the third largest country in investing on open-end system in the world (Yaşar, 1993).

Table 3.7: Turkish Textile and Clothing Industries Capacity Utilization Ratios, 1984-1993

	TEXTİLE AND CLOTHING	MANUFACTURING	(A/B)
YEARS	(A)	(B)	(%)
1984	76,30	74,20	102,83
1985	76,00	70,30	108,11
1986	75,40	70,00	107,71
1987	82,70	77,50	106,71
1988	83,10	76,80	108,20
1989	71,70	69,50	103,17
1990	79,30	74,40	106,59
1991	76,40	74,20	102,96
1992	79,30	76,40	103,80
1993	80,60	77,70	103,73

Source: SIS (taken from the department of Public Relations)

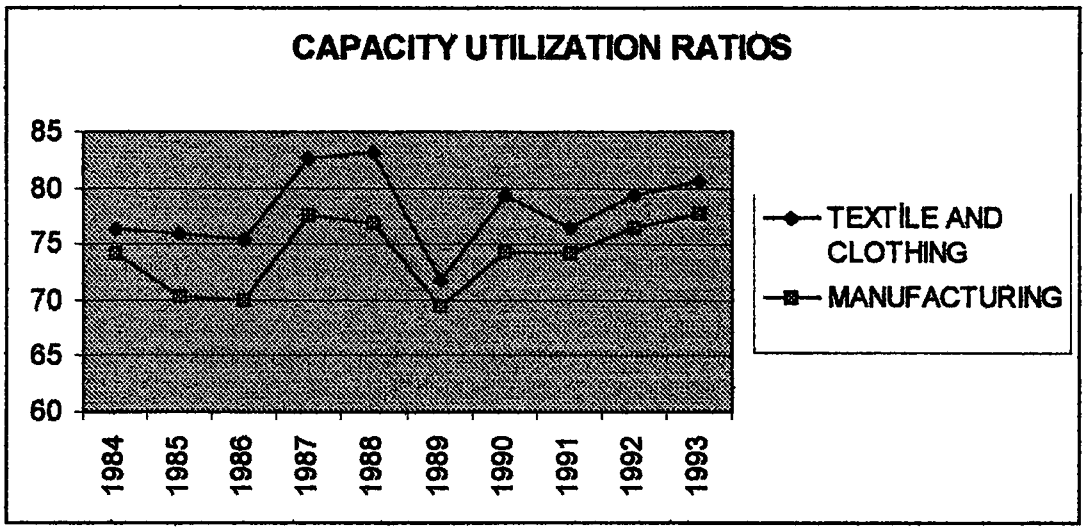

Figure 3.5: Capacity Utilization Ratios of Turkish Textile and Clothing Industry, 1984-1993

Although Turkish textile and clothing industry has an important portion in the total established capacity utilization ratio will determine the effectiveness of this sector. Table 3.7 shows the capacity utilization ratios of Turkish textile and clothing industry and manufacturing industry. Moreover, Figure 3.5 illustrates the advances in these two capacity utilization ratios along the years between 1984 and 1993.

The capacity utilization of Turkish textile and clothing industry in 1984 was 76.3 percent. This rate remained above 75 percent until 1993. The highest capacity utilization ratios of Turkish textile and clothing industry was 83.1 percent reached in 1988. On the lowest rate was 76.4 percent in 1991. In 1992 and 1993, a significant increase was observed.

By the way, if capacity utilization ratios of Turkish textile and clothing industry and that of manufacturing industry is compared, it is seen that, the former is always above the latter. There is an average difference of 4 percent between these two capacity utilization ratios. As a result, it is clearly stressed the driving power of textile and clothing industry in Turkish manufacturing industry.

3.1.5- Technology

Only large Turkish firms have the capital available to install and operate high-tech equipment. Smaller companies may therefore lose their ability to respond quickly to changing demand and taste. The industry relies very heavily on imported equipment.

Many production stages are still manual, although some high-tech processes have been introduced by the larger firms, particularly for cutting. Some firms cater exclusively for regular foreign customers, following design specifications given by the client. Most Turkish companies, however, glean their style directions from fashion magazines. Very few manufacturers retain their own designers , although a few hire foreign stylists on a limited contact basis.

3.2 Evolution of the Textile and Clothing Industries in Ankara

Industrial process is the main determinant of local differences in the metropolitan city of Ankara. The locational differences of industry is explained in the four period;

3.2.1 Between 1923 and 1950

Industrial development that was mainly owned by the public was situated near by the railroad route into the city. Due to non-existence of highway in this period, the railroad was the main determinant of industrial location selection. The railroad passed through the west of the city at Atatürk Orman Çiftliği and here government supplied cheap and sometimes free land for private enterprises. This is another attracting industrial enterprises for selecting this location. In this period, Ankara was planned to develop according to a city plan due to the fact that it was the capital city of Turkey. Hence, the first industrial districts established along the railroad in Maltepe. Most private industrial enterprises scattered around the old city center of Ankara, in the vicinity of Ulus. In the old city center, the production was generally dependent on the consumer goods for satisfying the demands of citizens. The two traditional production activities textile and tanning had disappeared completely. In addition to that, in this year, in the northwest of the city repair-shops and workshops were being established. Around these establishments squatter areas emerged like Altındağ, Atıfbey.

3.2.2 Between 1950 and 1970

The site selection processes of industry in this period can be explained as ;

1. Public industry continue to develop and transformed in the old location, Maltepe, along the railroad and attached to the railroad as in the previous times.

2. Small scale private manufacturing also tended to be located in the vicinity of city center mainly in Ulus and Kızılay, and also started to attract production activity in this period. Hence, Kızılay appeared to be an important production place.

3. Around the 2km radius from Ulus, as a construction cooperatives, industrial market buildings began to attract the small manufacturers that were located in the center locations. Ring Road has then determined the location of industrial market.

4. The small scale industry that had spontaneously and randomly developed at the northwest of Ulus and Soğukkuyu had tended to locate the industrial districts in this period.

5. After 1960, large scale private enterprises that have been using vast land got located on the outskirts of the city which is along the Istanbul Road.

6. Industries that agglomerated different parts of the city created their labor pool around this area.

3.2.3 Between 1970 and 1989

In Ankara there were 3 different areas (circles) in which industry has located.

The first area (circle) consisted of Yeni Sanayi, Büyük Sanayi, Ata Sanayi, and Demir Sanayi with İskitler, Siteler, Kızılay, Ulus, Çankaya, Maltepe, Tandoğan. In other words it was the most densely populated settlements of the city.

Second circle extended to 25 km away from the city center along the main road. Ostim was located in this circle. Outer circle comprised at being 75 km away from the city of metropolitan sphere of influence.

In the first circle, firms generally established with the capital of small private enterprise. These firms mostly did not use government incentives. Government investments, foreign and joint-ventures firms capitals were being used by large firm establishments that were located in the outer circle of the city. These were used as a support from the government. In the first circle firms produced their products according to the order or sold their products directly to the customer at retail shops. In other words, unstandardized production with unorganized and discontinuous demands were satisfied with their production. On the other hand, the firms were located in the outer circle had standardized production and they had to differentiate units of marketing. They used the vast lands that were sufficient to expand production capacity and also they owned the land. Illegal construction was generally observed in this area. However, in the first circle more than half of these workshops were rented. Therefore these workshops were not big enough to make their productions. Unlawful development was less in this area. The ratio of using child labor and un-insured labor was high in this inner circle. However, in the outer circle, the reverse condition (a contour condition) is observed. In other words, in the outer circle, labor with social insurance was used for production. In general, in the inner circle after the industrial development, a squatter area did emerge, around this construction area rather than in the other areas (in the inner area the industrial development is really and intensely related to the squatter areas. However, the firms that established in the outer circle of the city preferred to transform their labor with the buses from the squatter areas and low income districts.

When it is investigated that if there is a mutual dependence between the two different structure of firms that are small in inner and larger areas of Ankara metropolitan city, the dependency of it is determined that large integrated firms subcontracted out certain stages to small scale firms. However this ratio is lower than the most developed country.

In Ankara, a research among the four different industrial sectors that was conducted at the ends of the 1970s showed that the mutual relations between the firms were limited compared to that of Turkey's average. The sectors that were studied were metal industry, furniture industry, shoe industry were small industries had the division of labor. The larger of these firms subcontracted the smaller firms for production. These two sectors, the firms expanded, as they produced all their own goods within themselves. They later re-located the larger firms to the outer area, therefore working relations between the two became detached. In other words, in large scale firms, all different stages of the production processes were done within the firms. Mutual dependency was important for small scale firms that were located in the inner circle.

The distribution of the firms in a certain section of this shows the balance condition in the city after the production processes. The different types of the industrial activity that were located in the inner or outer circle were caused by the above processes. These processes also included the emergence of new firms in a certain place, then relocation with different phases of experience and then finally the closing down of firms. The only empirical data that included the development of industry was studied by a Master of Science Thesis in METU (Işıl, 1987). In this research, the firms that were in the coverage of the Annual Production Industry Statistics between 1963-1973 and 1973-83 of two different periods defined the effects of the above processes. In the first ten years periods, 77.8 percent of the firms were newly established firms, 40.6 percent of the firms were those firms which got closed, 33.3 percent of the firms were those firms relocated and 26 percent of the firms were the ones which did not change their location. Although in the second ten years period, 83.2 percent of the firms which got closed and 19.4 percent of the firms did not change their location. In both periods almost nearly the same ratios showed a stable condition of the period. This empirical data also showed that there was a dynamic industrial activity. Between both decades, the firms that did not change their location was also 20-25 percent which is a very small ratio. In spite of a very dynamic industrial structure in the city, there was a stable industrial pattern. As a result of this formations old industrial patterns had renewed themselves. While newly established or relocated firms selected new forms of selected new locations in the city, this changed the existing industrial pattern and new forms of site selection and organizational structure emerged in the industrial pattern.

3.2.4 After 1989

The distribution of industry was effected by 3 central location in Ankara.

These were;

1. İskitler- 2-3 km southwest from Sıhhiye that is the geographical center of Ankara (Ata, Demerciler, Büyük Çarşı complexes)

2. Siteler- 5 km southwest from the geographical center (furniture, marble, transporters complexes)

3. Macunköy- 10 km west from the city center (Ostim Industrial Districts, and other firms that are located in Istanbul Road).

The 86 percent of the total industrial firms in Ankara are located within 10 km, 38 percent of them within 5 km and 19 percent of them within 2.5 km of city. Thus, it was clearly seen that nearly half of the industrial establishments are located between the 5-10 km, and the remaining half of them are located between 0-5 km. This agglomeration is caused by the attraction of 3 industrial center which was explained above. The 14 percent of the total industry has selected locations which are 10-25 km away from the city. This industry is a large scale industry that each has more than 50 employees and large capital stock. They are more organized establishments than other firms that are located in inner part of the city (Güvenç, Şenyapılı and Tekeli, 1991)

In particular, the location selection processes of textile and clothing industry in Ankara metropolitan city becomes important in this research. In this sector, when the firms start to enlarge, the parts of production processes that are subcontracted out to the other firms became limited and firms tend to perform all stages themselves within the firm. This then reduces the dependence to the center of the large integrated firms and facilitate the decentralization of them to the periphery of the city. On the other hand, inter-firm linkages are still vitally important for the locationally agglomerated small scale firms.

Before 1990, the textile and clothing industry mainly that is mostly small scale firms tended to concentrate in the old city center of Ankara, Ulus, firstly and then Kızılay. There was very limited numbers of large scale firms that involved in this sector. On the other hand, after that year, while the apparel industry were started to agglomerate more organized industrial districts like İskitler (more near to center) or Siteler (more specialized industrial districts), the large scale matured firms involved in this sector was scattered to also districts like Akyurt, Sincan, Kayaş, etc. Therefore, in this study, it is clearly observed that, there has been change in characteristics of site selection processes and organizational structure of this sector in Ankara between 1990 and 1998.

CHAPTER IV

TEXTILE AND CLOTHING INDUSTRY IN ANKARA

A field survey is conducted on the clothing industry by districts in Ankara. The total number of registered firms at different scales are 225 in 1998 whereas 80 firms in 1990 according to the Ankara Chamber of Commerce. The number of firms to be interviewed in the clothing sector is determined by stratified random sampling based on the sector's proportional share in total number of firms by districts . Hence, 30 percent of total clothing firms in 1998 were asked for an interview. On the other hand, nearly 95 percent of them were asked in the field survey in 1990 (Kayasu, 1995).

The aim of interviews is twofold, one was to uncover the dynamics of production process and the other was to analyze the process of location selection. Given that the two processes are closely interrelated. The production process has been examined by using five variables. These variables are inter-firm relationships, the scale of firm(s), product types, market characteristics and characteristics of labor demand. These variables are studied with reference to the location of particular firms. In addition, in the 1990s' survey results, some kind of above questions was not asked (Kayasu, 1995). They are about the scale of firms and characteristics of labor demand.

In this study, the scale of a firm is measured in terms of employment. Those firms with a total work force of 1-50 are called small scale enterprises. Those with a work force of 51 or more are classified as large scale enterprises (SIS).

Spatial configurations of textile and clothing industries have been examined under 4 categories, which have been developed with reference to the 5 variables that were mentioned previously. These four categories are; city centers, low-income residential districts, organized industrial districts, and peripheral districts.

4.1 Field Survey in Ankara in 1990

A field survey was conducted on the clothing firms by districts in Ankara during 1990 (Kayasu, 1995). The total number of registered firms at different scales was 80, which constituted all clothing firms in Ankara at the time according to the Ankara Chamber of Commerce. Nearly 95 percent of them was examined in the field survey (Appendix II).

4.1.1 City Centers

4.1.1.i-) Kızılay

In , 49 clothing firms are located around commercial centers, i.e. Kızılay and Ulus. 65 percent of firms are situated around Kızılay. 53 percent have been established after 1970, have selected location in the vicinity of Kızılay i.e. more recent center of Ankara. As a result, it could be stated that small scale clothing firms have tended to locate in and around the city center. The reason of that; the most important ones are the tendency to become physically closer to the other firms as well as to customers, the need for face-to-face contact, availability of a large number of workers and accessibility (Kayasu, 1995).

11 out of 23 have been satisfied with their location whereas others stated that they would be better off if located in organized industrial districts in periphery of the city. Most clothing firms that have been located in Kızılay are small scale establishments. The research clarified that, these firms in Kızılay are involved in

women's garment trades. The row materials i.e. fabric, thread, accessories are bought from Istanbul and Bursa, whereas button, lining and zipper are bought from Kızılay and Ulus market.

Almost all of the small scale clothing firms that have located around the city center, make their production for the clothing markets within the city center i.e., stores that locate in the center. 3 out of 23 firms were involved in exporting their products to foreign markets.

Another point is that subcontracting relationships are quite important among the clothing firms that locate in Kızılay. Nearly half of the firms subcontracted out certain stages of production process to other firms that located in Kızılay, Demetevler, Sıhhiye and so on.

Another research conducted in Kızılay covered districts that workers live in. These districts were low income districts like Etlik Demetevler, Sincan, Keçiören, Kayaş, Mamak, Akdere, Abidinpasa, etc.

4.1.1.ii-) Ulus

Nearly 12 percent of small scale firms have selected location in Ulus. It is quite interesting to observe that firms that was established earlier have located in the vicinity of the traditional center, i.e., Ulus. When their preference of location asked, respondents referred to particular districts or roads in Kızılay location.

Like the Kızılay location, all clothing firms that have been located in Ulus were small scale firms.

3 out of 18 clothing firms were involved in knitting in Ulus. Other firms involved in clothing and produced mostly more simple and standardized products like men's clothing, trousers or company uniforms.

Most of the clothing firms in this district produced towards stores that locate in Ulus market.

In addition, it could be derived from the survey that four firms engaged in subcontracting for other firms whereas nearly half of the total clothing firms in Ulus subcontracted out certain stages to the other small scale firms in Ulus, Kızılay, Demetevler, Şentepe, etc. Only one firm utilized homebased labor force for their embroidery stage.

All employees that worked in clothing firms, in Ulus districts lived in different squatter areas of Ankara.

4.1.1.iii-) Sıhhiye

All clothing firms that were mostly small in size were located Sıhhiye after 1970. The research clarified that, 7 out of 13 firms selected Sıhhiye as a second or third place for being close to other firms and markets.

The research clarified that nearly half of the clothing firms in Sıhhiye were not satisfied with their workshops. Hence, they planned to change their location.

In Sıhhiye, clothing firms were involved in the production of various kinds of products from skirts to night dresses or men's trousers to children clothes. In fact, these firms preferred to remain flexible, retaining the ability to produce small quantities and a variety of products.

The findings suggest that, the clothing firms in Sıhhiye also involved in subcontracting relationships like the firms in Kızılay and Ulus. 4 out of 13 firms were subcontract receiving firms. It had also been stated that the practice of contracting out certain stages of production is very widespread, due to insufficiency of capacity of workshops.

4.1.1.iv-) Maltepe

There were five registered firms in Maltepe according to ACC. Whereas only 3 of them were surveyed in 1990. They were founded after 1980. 2 out of 3 moved from Kızılay to Maltepe. However, all firms were unsatisfied with their location and preferred totally different locations, like Istanbul or Eskisehir Road, or any industrial districts.

In Maltepe, two firms produced women's outer clothing for national markets. The other one produced children clothing to it's parent firm, Aytemizler.

The research clarified that, subcontracting relationships was limited in this districts. Since, there was only one subcontract-offering and one subcontract-receiving firm.

The firm that produced children clothing were the subcontractors of Aytemizler Firm in İskitler, whereas the other firm subcontracted certain stages of production process to firms in Kızılay.

Finally, the workers that worked in these firms lived in different low income districts like Sentepe, Etlik, Incırli, Kecioren and so on.

4.1.2. Low-Income Residential Districts

4.1.2.i-) Demetevler

There were 5 registered clothing firms in Demetevler, according to the ACC of which 4 of them were surveyed in 1990.

All firms in Demetevler had been founded after 1980, except one firm that moved from Kızılay to Demetevler. In addition, half of the firms in Demetevler did not plan to change their location, whereas, the other half did prefer to move to another districts.

Almost all firms produced standardized products like school dressing, track suit or company uniforms just like Ulus districts. The products of these firms were produced towards national markets.

Except one firm, most of the clothing firms offered subcontracts to smaller firms and also received subcontracts from larger firms at the same time. It was derived from the research that these firms that were involved in subcontracting relations selected offering and receiving firms in the same districts especially.

The main reason for establishing this district was that, large pools of semi-skilled and unskilled workers were employed. As a result of this, all workers that utilized in the clothing sector in Demetevler lived in the same district.

4.1.2.ii-) Balgat

In 1990, according to ACC there was only one registered clothing firm, but two large scale firms were actually found in this district. One of them is Dortel which is the biggest textile and clothing firm in Ankara.

Large-scale establishments were in limited numbers in 1990 in Ankara. They preferred the outskirts of the city in order to expand their production. The most important motives for these firms' decisions were, obviously, the availability of vast and cheaper land in the periphery, and increased accessibility of transportation facilities (Kayasu, 1995).

The research clarified that the practice of contracting-out certain stages of production is very widespread in Balgat.

These two firms had come from the central part of the city and then based on their own land in Balgat. The firm, Dortel, was also the oldest firm in Ankara that involved in both weaving and clothing.

Both two firms that were large scale firms produced differentiated and design-oriented products. Hence, overwhelming majority of these firms' products exported to foreign markets. A case study conducted in clothing provided evidence to suggest that, export-orientation is being a major factor in increasing the volume of subcontracts, in both weaving and clothing sectors (Senses, 1994).

Both firms used vehicles for labor transportation from their living areas so the distance of where employees lived was not an important issues.

4.1.2.iii-) Yenimahalle, Keçiören and Etlik

In 1990, there were two registered clothing firms in Yenimahalle and Kecioren according to ACC, however, in field survey four firms were found in Yenimahalle and Keçiören districts. In addition to that, in spite of not being any registered firms in Etlik, one of the clothing firms was surveyed in this district. It was estimated that, 3 out of 5 firms were small in scale, whereas, it is estimated that the rest were large scale firms. Since, exporting firms were relatively larger firms. They had been established after 1980 and they did not change their location after foundation period, due to having low rent price and supplying cheap labor. On the other hand, they were not satisfied with their location and preferred to be closer to other firms and closer to customers. Hence, when their preference for location was asked, they especially preferred Kızılay location or any other industrial districts.

In these districts, the product types of firms that, involved in clothing was varied from women's outer clothing to cotton clothes, track-suits, skirts etc. They utilized fabric, thread, and any other necessary accessories for production and they supplied these from Istanbul, Bursa, Izmir, Izmit, Denizli.

Although, one firm, Satteks, in Yenimahalle and one firm, Semateks, in Kecıoren produced towards foreign markets. Most of the firms produced for domestic markets especially in Central Anatolia.

The field survey clarified that, one clothing firm that located in Etlik received subcontracts from larger firm in Ulus and Kızılay. On the other hand, including the firm in Etlik, all firms offered subcontracting work to larger firms to meet the demand of products.

Like any other firms, they preferred to utilize workers who lived around their close vicinity of districts.

4.1.3 Organized Industrial Districts

4.1.3.i-) Siteler

In the beginning, Siteler had been founded by timbers cooperation. After that, in 1969 furnisher, in 1978 marble cutter industry come to this district. Therefore, it would be one of the most densely popular business and industrial center of Ankara. After all, this popularity attracted the squatter origination. Finally, production activity also continued to this squatter area.

There were 4 registered clothing firms in Siteler according to ACC and only one of them was surveyed in 1990. This was Bulvar Gıyım that was firstly founded in Kızılay in 1960 then re-located to their own building in Siteler. This location was satisfactory to them.

It was also stated that, this firm produced men's clothes for national markets. It subcontracted out certain stages of production process to small scale firms in Istanbul. In addition to those districts that employees lived in, were close vicinity of Siteler.

4.1.3.ii-) İskitler

Iskitler district was founded by a small manufacturing cooperation. Hence, there were Buyuk Industrial Sıtes (opened in 1955), Ata Industrial Sites (opened in 1962 with 110 workshops), Demir Industrial Sites (opened in 1974). Therefore, these industrial districts were totally based on the auto-mobile industry. However, an integrated clothing firm, Aytemizler, had been established after 1981 in this district. This firm was one of the largest scale firms in Ankara that had 14.000m2 open and closed area and 1100 workers.

Aytemizler was involved in both weaving and clothing. The firm buys only thread as a row material and then all stages of production processes, such as dyeing, knitting, cutting, sewing, quality control and packaging stages was accompanied by this firm. Aytemizler had 3 units, one unit that was established in Siteler were involved in weaving while the other one that was situated in Iskitler have been involved in clothing. Finally, Aytemizler has also a dyeing factory in Sincan. This larger integrated firm is export-oriented. In last year they exported 15 million products.

The research clarified that sewing operations were subcontracted out to the small firms in Kızılay and Maltepe. However, they utilized homebased labor force totally for knitting stages. Nearly 10.000 homebased employees were lived in such districts Şentepe, Altındağ, Karşıyaka, Demetevler, Keçioren, Etlik, İskitler, Sincan. In the future, they planed to locate totally in Sincan districts where their dyeing factory was established. However, due to credit problems they had to wait for 3 years.

4.2 Field Survey in Ankara in 1998

A field survey is conducted on the clothing firms by districts in Ankara during 1998. The total number of registered firms at different scales are 225, which constitute all clothing firms in Ankara at the time according to the Ankara Chamber of Commerce. Nearly 30 percent of them are examined in the field survey (Appendix III).

4.2.1 City Centers

4.2.1.i-) Kızılay

In Kızılay, most of the firms that are established in different places such as Siteler, Balgat, İskitler have showrooms on Fevzi Çakmak Street and Sümer Street. Some of them have both showrooms and at the back of them they have workshops. Although there are 50 firms that are registered in Ankara Chamber of Commerce in Kızılay, 8 out of 50 firms are interviewed in the research.

The research clarifies that, 63 percent of the firms that are located in Kızılay established before 1990. It is quite interesting to observe that, 38 percent of the firms in Kızılay change their location after foundation, but these firms change their locations in the same districts. Hence it is estimated that this relocations do not indicate any change, in structural characteristics of this firms. However, one of the firm which has 1600 m^2 of floor space moved from Demetevler to this district. This movement has provided ultimate change in the capacity and the structure of the production of the firm.

Most of the small firms already established in Kızılay move their location for various reasons. Among them, the most important one is the tendency to become physically closer to the other firms as well as to their customers. Other one as such; the need for face to face contact, availability of a large number of employees and accessibility (Kayasu, 1995). On the other hand, now, most of the firms that is located in this districts prefer to be located or relocated to cheaper and enlarged land than Kızılay due to the high rent price.

Moreover, when their preference of relocation is asked, two of the firms prefer Çubuk, Akyurt or İstanbul Road. Whereas one firm will open workshops in Siteler, 2 firms out of 8 search more wider workshops in the same district. Therefore, it is determined that there are only 2 firms that have been satisfied with their locations in Kızılay.

The study indicates that, 37 percent of the total firms are currently large scale firms with respect to both their number of employees and size of the floor space (larger than 500 m^2).

The research clarifies that, all of the firms in Kızılay engage in clothing, i.e. woven. Half of them are producing women's clothing, 25 percent of them are producing shirts, while one is producing only skirts and last firm is producing men's clothing.

It can be derived from the survey that, all clothing firms in Kızılay make production towards national market that include many different regions around the country.

The research clarifies that nearly 12.5 percent of the total firms are located in the this district, involved in subcontracting for other firms. They perform all stages except styling for parent firms. On the other hand, 67 percent of them subcontract out sewing stages to other firms in Kızılay and Istanbul. The firm that produces men's clothes, utilize subcontractors in Istanbul. Since it is easy to find specialized labor force particularly keen on men's clothing in this city.

According to the field survey, it is very interesting that most of the clothing firms prefer male workers in Kızılay, because of their ability. In addition to that, the number of educated workers are also quite limited. Meanwhile, the family workers are utilized by 3 firms. As a result, the employees of these firms live in low-income districts, like Keçiören, Demetevler, Yenimahalle, Sincan, Mamak etc.

4.2.1.ii-) Ulus

It is quite interesting to observe that, firms that had been established earlier, had been located in the vicinity of traditional center of Ankara i.e. Ulus. Whereas, after 1970 most of those firms have selected location in the vicinity of Kızılay i.e, recent center of Ankara (Kayasu, 1995). Therefore, it is clearly observed that small scale firms have tended to locate in and around the city center for a number of reasons; like being closer to other firms, customers and labor pools.

Figures of the Ankara Chamber of Commerce indicate that, there are 10 clothing firms in 1998 in Ulus. During the survey, half of these firms are interviewed. In addition to that, it is also determined in the field survey that, an overwhelming majority of the firms are small scale clothing firms that are based on standardized production. These firms are located along Rüzgarlı Street, Tahsin Piyade Commercial Building and Sanayi Han in Ulus (they produce with 4 or 8 machine capacity).

Most of the firms that are interviewed were established before 1990 and among them only one firm has changed its location in the same district. In addition to that, when their preference of location is asked, it is stated that only one of them plan to move to organized industrial districts like Siteler.

A study conducted among clothing firms in Ulus states that nearly all of the interviewed firms are small scale firms in respect to both number of workers and production areas except one firm, First Örme, that have 60 workers and 600 m2 floor space.

According to the field survey, it is examined that majority of the clothing firms produce standardized products like men's trousers, company uniforms, school clothing, etc. During a field survey, it is also determined that there is no change in the production type after the foundation period of the firms.

Except one firm, First Örme, almost all of the firms that have located around Ulus, produce towards the clothing markets within the city center, i.e. stores that locate in the center or street vender.

Among these firms only one small firm which is involved in subcontracting to other clothing firms is located in Kızılay and Ulus. It is specialized in men's trousers. All stages except styling and cutting are performed by this firm. The other firms, 4 out of 5 firms subcontract certain stages of production processes to the firms in Demetevler, Ostim (sewing company uniform), Kızılay, Siteler and Ulus (sewing trousers). None of these firms give out piecework to homes.

Except one firm, First Örme, all firms prefer male workers. The workers are generally live in close vicinity of Ulus and other low-income residential like Mamak, Keçiören, Abidinpaşa, Sincan, etc.

4.2.1.iii-) Sıhhiye

In Sıhhıye most of the firms have showrooms on Hanımeli street whereas their workshops are in different districts. Hence, only 21 percent of the total firms that are registered in Ankara Chamber of Commerce are interviewed.

Research conducted in Sıhhiye show that, 25 of the interviewed firms have been established before 1990.

When the future plan of interviewed firms is asked, it is indicated that only, one firm is actually satisfied with their location while 3 out of 4 firms plan to carry out their production to wider and cheaper location such places in Istanbul Road. One firm have the tendency of relocation in another cities like Çankırı or Kırıkkale where cheap labor, land and energy are available.

A total of 4 firms in Sıhhiye are called small scale firms that have i.e. employing less than 50 workers and having less than 500 m^2 floor space.

Observations in Sıhhiye show that all firms have to meet the unstable demand, which fluctuates due to a number of factors ranging from fashion to seasons. Therefore these industries are similar to other small scale firms in different districts adopted somehow flexible production processes. In these workshops the production process is quite unstandardized, relying heavily on skilled labor.

Fashion and style are important for these firms. So most of the firms that are interviewed in Sıhhiye involved in clothing i.e. woven and knitting. Three firms are producing women clothing, one firm is producing only men's trousers (standardized products).

All clothing firms in Sıhhiye are producing towards the national markets; most of them produce for other cities while some of them produce for retail stores in central areas.

It can be derived from the survey that, only one firm is engaged in subcontracting for other firms, which is located in Kızılay and specialized in sewing in general

Nearly 75 percent of the interviewed firms subcontract certain stages of production processes to the small-scale firms especially in Ostim, Demetevler (12^{th} Street- cotton clothes) and Siteler (knitting work).

The research clarifies that, in Sıhhiye, none of the firms are giving out piecework to homes.

According to the field survey in Sıhhiye, the ratio of the number of female workers to that of all workers in the same district is approximately over 55%. None of the firms located in Sıhhiye utilize family workers. Hence, the firms establish in Sıhhiye has easy to access various squatter areas inhabitants. The labor force that work in there live in different parts of the city.

4.2.2 Low-Income Residential Districts

4.2.2.i-) Demetevler

In Demetevler, the clothing firms has widely scattered throughout district along the 12th, 11th, 10th,5th,4th, 3rd Street. According to the Ankara Chamber of Commerce there are 8 registered firms and half of them are interviewed in the field survey.

Findings of the survey indicate that the firms have been established in Demetevler and have not changed their location after foundation. Half of the firms have been founded after 1990, while the rest was there before this period.

During the survey research, when their preference of location is asked it is stated that two of the firms plan to move to more organized industrial districts such as; Siteler and Ostim.

A study conducted among clothing firms in Demetevler stated that all of the interviewed firms are small scale firms.

Almost all of the firms located in Demetevler produce standardized products such that men's suit, trousers, women tesettür dressing, school dressing, women under suit, except one which produces more design-oriented products. Furthermore, it is observed that, half of the interviewed firms changed their product types according to the unstable national markets. This is due to having in more dynamic structure. These firms specialized in only one type of production but, now, are producing various kinds of products at the same time. 25 percent of the firms produce mainly for retail stores in Demetevler while others produce for national markets, Central Anatolia.

Research also indicates that, 2 out of 4 firms are engaged in subcontracting for more integrated firms in Siteler and Ulus. While, sewing stage is subcontracted out to subcontractors, other stages such as cutting, quality control and finishing are performed by organizing firms.

Only one firm that produces more design-oriented women clothing subcontracts embroidery stage to other small scale firms in Kızılay.

At the time of the survey, in Demetevler, 75 percent of the clothing firms prefer female workers whose ages vary ranging from 14 to 35. However, only one of the firm that produces men's clothing rather utilize male workers due to their special skill on this type of products. The employees of firms that located in the district live in the close vicinity of Demetevler. Furthermore, the another important point is that the ratio of the utilization of family workers is very high compared to other districts.

4.2.2.ii-) Balgat

A field survey conducted in Balgat show that all of the clothing firms located along the Konya Road and around Dörtel Firm. Nearly 25 percent of the total firms that are registered in Ankara Chamber of Commerce are interviewed in the field survey.

Almost all of the firms that have well-known brand name for our countries' customers were established before 1985. The biggest firm, Dörtel that is involved in weaving and also clothing selected this location in order to reach lower income labor pools easily then after 1990s another largely integrated factory opened in Akyurt. All of these firms established on their own land with government encouragement.

Moreover, some of the firms that are located in central districts have also their own land along this routes. Therefore, these sites are preferred by many clothing firms even now for many reasons; the most important motives for these industries' decisions are obviously, the availability of vast and cheaper land and increased accessibility of transportation facilities. Hence, for example, Ekol Firm select this site in this year due to the above reasons.

Two of the firms prefer to scatter along this main transportation network, Konya Road, to Gölbaşı Districts in order to expand their production.

All firms located in Balgat are large-scale integrated firms in respect to the number of workers (having more than 100 workers) and production land (having 4000-6000 m^2 floor space and open space).

3 out of 4 firms involved in clothing while one of the firms, Dörtel, engaged in both weaving and clothing along with other stages of production processes such as yarn production, dyeing, printing, and cutting, finishing and so on.

All of the firms are specialized in design-oriented and differentiated products in women clothing for the world markets demand.

Most of the firms changed their production types after foundation according to the markets' demand.

Half of the firms produce for export while the rest, produce for the national market, create their own fashions for the worlds market demand. Therefore, in the future they plan to open up to the international market as well.

None of the firms are involved in subcontracting to other firms due to being of a large scale. On the other hand, nearly 70 percent of them subcontract out certain stages of production processes to the small scale firms in Balgat, Siteler, and Demetevler. These firms subcontract the sewing part while such processes as cutting, styling, quality control and finishing are performed by their parent firm in Balgat

Half of the firms give out piecework to the homes. Some routine parts of the work such as taking out off the stitches from finished works or printing etc.

Nearly half of the firms are involved in construction and food working industry besides clothing industry.

Most of the firms that are specialized in export-oriented production prefer highly skilled female labors. In other words, The high-skilled and educated labor force are preferred by these large scale firms. For example, one large firm in Balgat follow the successful students before graduation and then offer them their work in firm. Another interesting point is that two of the firms give rewards (premium, gold, etc.) to workers in order to encourage them. The workers live in different part of the low-income residential areas such as Sincan, Batıkent, Keçiören, Demetevler due to vehicle of the firms.

4.2.3. Organized Industrial Districts

4.2.3.i-) Siteler

Siteler is the place where furniture manufacturing workshop are firstly located in. Whereas, for 5 or 6 years, the clothing firms that are agglomerated in central part of the city in the past, select this location for many reasons. Moreover, these firms involved in this sector select location which is close to the other firms, due to subcontracting relationships. But in recent years, Siteler is not preferred by almost none of the clothing firms due to high rent price and high wages.

Figures of the Ankara Chamber of Commerce indicate that there are 24 clothing firms in 1998 in Siteler. During the survey research 13 of them are interviewed. In addition to that, it is also determined in the field survey that, 4 out of 24 firms that were involved in this sector are closed workshops in Siteler and relocated to Kırşehir in order to minimize production cost.

All firms that is involved in clothing established in Siteler after 1990, as it stated previously. Almost 70 percent of relocated firms (10 firms) founded firstly in different places like Ulus, Demetevler, Kızılay and then select the location in Siteler. More than half of the relocated firms are small scale firms until relocated to Siteler.

Furthermore, 2 out of 13 firms involved in this sector have showrooms and wholesale stores along the Fevzi Çakmak, Hanımeli or Sümer Street.

A field survey conducted in Siteler indicate that, almost 65 percent of the clothing firms are mainly large scale establishments with respect to number of workers. However, 7 out of 13 established more than 1000 m^2 land, while 6 firms have between 500 m^2 to 1000 m^2 land.

Almost 70 percent of the total firms located in Siteler produce women outer dressing. Besides this product, one of them are specialized in also child dressing and another one specialized in knitting.

Findings of the survey indicate that, 21 percent of the firms increased the production variation with time period according to the market demands. For example in the past, firm specialized in only skirts or trousers products, but, now all types of women dressing are produced by this firm.

Nearly 85 percent of the clothing firms produce towards national markets (all around the country). Therefore, only 2 out of 13 produce for European market. As a result of the survey, it is determined that several export-oriented large firms such as Çoksa, Beyza, Ülger relocated to Kırşehir in order to minimize production cost.

A study conducted among clothing firms in Siteler stated that only one firm involved in subcontracting to large scale firms located in Ostim and Kızılay (whereas in the past there were 6 firms that engaged in subcontracting). All stages of production except styling is performed by this subcontractor firm.

In addition, 6 out of 13 firms subcontract out certain stages of the production processes to the small scale firms located in Demetevler, Siteler, Kızılay. Sometimes two of them subcontract out to some operations to the firms in Istanbul. All the stages of the work except styling and cutting is performed by subcontractor firms.

Only two firms utilize homebased labor who living in the vicinity of the firms. In addition, these homebased workers are usually given some mechanical work that required no or little skill (Kayasu, 1995).

Besides clothing industry, almost 21 percent of the firms in Siteler engaged in furniture, computer and marketing activity.

According to the field survey, it is very interesting that most of the firms prefer male workers in their surrounding like Siteler, Mamak, Cebeci, Siteler. The average education is in primary level. Several workers are graduated from high school. Recently, some of the large scale firms prefer more qualified workers in order to produce more creative products.

4.2.3.ii-) İskitler

In İskitler, 56 percent of the firms, which is registered in Ankara Chamber of the Commerce, are interviewed. Those firms established along the Kazım Karabekir Road and in İskitler Large Industrial Site. Most of the firms preferred this location for being near the Aytemizler Firm that is the large scale knitted firm.

There were 5 manufacturing firms in İskitler which employed more than 50 person in the clothing industry according to 1999 survey. Therefore, they are called large-scale firms in respect to the number of workers.

The scale of the firms is different if we determined the sizes with respect to the area that is located. The 67 percent of the firms that are called large scale firms have more than 1000 m^2 land and 27 percent of the firms have 500 to 1000 m^2 land and the rest of the firms that is called as small scale firms have established less than 500 m^2 land.

The 38 percent of the large-scale firms that are surveyed in İskitler have wholesale and showroom in Hanımeli and Fevzi Çakmak Road.

The 78 m^2 of the firms have located in and around the traditional center i.e. Ulus before 1990 with 2 to 4 machine capacity small scale firms then after increasing capacity and scale they selected location in İskitler as a large scale firms. One of the relocated firm, Aytemizler, founded firstly in Siteler then come to İskitler, then after 1992 it opened another factory to Sincan while it located in İskitler as well. Therefore, it has 2 factory in İskitler and Sincan.

Here an important point is that when their preference of location was asked, two of the respondents referred to Akyurt, and Pursaklar where they have their own land. However it is bring out the difficulty of transportation and finding workers. Other two of the firms have insufficient place to their capacity and plan to move to the periphery of the city

Most of the clothing firms engaged in knitting including Aytemizler Firm in İskitler districts. In addition to that, half of the resting firms produce labors clothing; one tenth of the firms produce jeans and last part produce women shirt.

It was derived from the interviews that 44 percent of the firms are mainly working for foreign markets with mostly organizer firm's brand name. On the other hand, other 66 percent of the firms sell their products for internal markets that include mainly all regions of the country and around the city center.

It was derived from the interviews that 33 percent of the firms located in İskitler are involved in subcontracting for international markets. On the other hand, it was also derived that 89 percent of the firms which located in the same district subcontracts certain stages of the production processes to the small-scale firms especially in Demetevler, İskitler, Sincan and Siteler districts.

However, different from other firms, Aytemizler subcontracts dyeing, printing and knitting to the firms that located in Istanbul due to trusting in quality while subcontracts sewing operations to the firms of Ankara (districts such as Demetevler, İskitler, Sincan, Maltepe)

The firms which produce for foreign markets subcontract sewing operations to the subcontractor firm in Karabük, Afyon and Sivas while the styling, cutting, finishing and quality control jobs are performed by parent firms in İskitler.

If we looked at the previous subcontracting relationships, we found out that 67 percent of firms that are surveyed involved in subcontracting for other firms whereas, in recent times, only half of these are still engaged in subcontracting for other firms. This decline was caused by a change in organization of production after relocation to İskitler from previous place.

Aytemizler depended on subcontracting relationships wholly on dyeing operations to the subcontractors, however, for 6 months by renewing machinery they perform large portion of this job by themselves.

If we looked at the ratio of the firms which give out piecework directly to the homes, we stated that 33 percent of the firms do this activity in İskitler. They prefer to utilize homebased labor force that is located in the close vicinity of their firms. Particularly, the embroidery, printing stages and taking off stitches from finished products jobs are given out directly to the homes.

Even though, it has been specified that adopting technological innovations is now decreased the ratio of the utilization of homebased labor force.

In İskitler, it is quite common to observe in entire firm, especially 60 percent of the workers are informal female workers. The number of educated workers in these production units are quite limited. On the other hand, only the export-oriented firms give very importance on employing skilled and educated workers in İskitler. The workers of these firms are generally living in the surrounding low income residential areas that is in the vicinity of the firm like İskitler, Keçiören, Demetevler, Yenimahalle and so on.

4.2.3.iii-) İstanbul Road

All firms have been established in Gersan Industrial Area (500 firm's capacity) after 1997. According to Ankara Chamber of Commerce, only 6 firms are registered but in the field survey it is determined that there are 15-20 knitting, 10-15 clothing firms are located that place. As a result of this, 7 firms that are more than the number of registered firms are interviewed by the survey.

29 percent of the clothing firms in Istanbul Road has showroom and wholesale department in the Hanımeli Street. However rest of the firms are find that activity as expensive. One of the older company administrator said about this subject that " if you have showroom in Kızılay that has high rent price, consumer are reflected from high-priced products. Hence, it is very useful if manufacturing, showroom and wholesale activity department are appropriate in one place in Gersan Industrial Districts".

57 percent of the total clothing firms that relocated in Istanbul Road were moved from another part of the Ankara. One of the relocated firms chosen Istanbul Road as a third location and firstly established in 1975 in the traditional city center i.e. Ulus. Other 3 relocated firms founded Etlik (4 workers), İskitler (4 workers) Kızılay (30 workers) respectively after 1990, then, relocated to the Istanbul Road which have 2-3 times more workers, 4-5 times working area than older place.

It can be derived from the surveyed that the location selection decisions of the industry are that 85 percent of them do not want to change their location because of sufficient working area.

When the future plan were asked to the firms, it is seen that more than half of the firm plan to produce for international markets, one of the firm want to increase the production capacity form 150 pieces to 300 pieces, and finally, the subcontractor firms want to sell their products in the markets themselves, as being independent producers.

It can be derived the surveyed that most of the clothing firms in Gersan Industrial Districts (nearly 71 percent) are small scale establishments with respect to number of worker (less than 50 person).

If it were looked at the scale of these firms with respect to located working place, it is determined that all of them that have 500 m^2 to 1000 m^2 land classified as large scale clothing firms.

The product configuration of the firms that interviewed in Istanbul Road is that; 57 percent of them produce knitting products; 14 percent of them involved in women outer dressing (this firm has 60 workers and 1000 m^2 working place), 29 percent of them involved in women cotton dressing.

One of the firms that was the subcontractors of Aytemizler firm in earlier times that produced cotton T-shirts, after that, now, products configurations of firm is changed and chose to produce more design-oriented women knitting dressing.

All of the clothing firms in Istanbul Road has been producing towards internal markets of country except subcontractor firm which produce products to export-oriented parent firm.

The research clarified that only one of the firms is identified as subcontractors. Parent firm is located in Sincan (Aytemizler). Aytemizler are contracting out the cutting and sewing stages to this small firm; whereas the essential operations of styling, quality control and finishing are handled by parent (organizer firm). The products are produced for foreign markets. As a result of this, if the products could not finished at the right time or be unqualified, the subcontractor firm is punished heavily for every one of unapproved pieces. Each one of unapproved pieces are sold subcontractor firm in the selling price.

The firms involved in knitted when the order or demand of products increased more than capacity are subcontracted out mainly knitting stages of production. The firm that are large scale firm and involved in knitted subcontracted put knitting stages to small firms in İskitler and Demetevler; whereas cutting, styling, quality control and finishing are handled by the parent firm. The other firm that engaged in women outer dressing are contracted out sewing operations of under suit of the clothes i.e. trousers and skirts in the firms in Demetevler, Sincan, and İskitler.

The most interesting point is however 50 percent of these clothing firs were performing their tasks as a subcontractors, now, only one firm continue to this activity.

Moreover, if the changing dynamics of subcontracting relationship we find out that in the past, 3 firms relied on subcontracting relationship heavily for such jobs as knitting, sewing, etc. in Istanbul Road, now, one of these firm which engaged in knitted could produce their own products with new computerized knitting machine.

The research clarified that, nearly all of the firms that were engaged in knitting given out piecework's directly to homes for performing knitting in earlier times. However, after the computerized machines were owned they employed homebased labors as doing relatively simple and repetitious jobs such as taking off stitches out of finished products.

In addition to that, the firm owners stated that they prefer to utilize homebased labor force that is located in the close vicinity of their firms, Batıkent.

The other important point is that two large-scale firms in Istanbul Road involved in transport and real estate besides clothing industry.

According to the field survey, all of the company administrators stressed that they do prefer female employers due to their skills and lower wages they demand. Hence, 67 percent of the labor force are female workers. Moreover, nearly 60 percent of the total firms in Istanbul Road utilize 1 to 8 family workers in the firm.

The education of the workers is average in the primary level. Mostly these workers lived in and around the squatter areas of the industry. Examples of these districts would be Esertepe, Ayvalı, Demetever, and so on.

4.2.3.iv-) Sincan

There is 3 firms according to the registered data in Ankara Chamber of Commerce and all of these firms are interviewed. These firms are Aytemizler, Opal, and Kotonteks which are located in Sincan Organized Industrial Districts.

The firm Aytemizler has been selected İskitler and Sincan as places for production. The firm Aytemizler was established first in Siteler, then changed their location to İskitler. Finally they opened the new factory in Sincan at 1990. Meanwhile they continue their production at İskitler. Since then the two factories are in production. Aytemizler is the biggest firm in Sincan in clothing production in respect of production area and number of worker. The other firms, namely Opal and Kotonteks were first located in Siteler and Dikmen respectively, then they relocated to Sincan Organized Industrial Area after 1995.

All the Sincan clothing industry firms do not need to change their location. Because Sincan Organized Industrial Area has enough facility for production (All the firms do not prefer any other place for production because of well working conditions).

The total number of workers in all the firms that chose location in this place exceeds 140. The biggest one is Aytemizler and it has 322 workers in Sincan location, and 20 workers at İskitler location. Firms have more than 4000 m^2 open area in average.

Two firms Aytemizler and Kotonteks did not change their product types from that are produced in early foundation times. On the other hand, other firm, Opal, first has produced two different types of clothing product, then it's specialized in design-oriented women dressing.

All firms which are located in Sincan mainly produce for foreign markets (export oriented)

The research showed that, in Sincan, only the Opal firm has subcontracting practice in international markets. This firm (Opal) handled essential operations of styling, cutting, quality control and finishing processes.

Aytemizler and Kotonteks are large firms that are subcontracting out certain stages of production to the small scale textile firms. Aytemizler chooses the small scale firms in vicinity of Sincan, Siteler and Maltepe districts for the sewing stages of production whereas for dyeing, knitting and printing stages the firm chooses Istanbul clothing firms. However Kotonteks are subcontracted out the sewing processes to the small scale firms in Siteler, Demetevler, and Ulus.

In earlier times, Kotonteks firm has experience subcontracting in all stages of production for the same product types to the internal markets.

In addition to that, in the past, Aytemizler firm subcontracted out all the dyeing work to the small scale firms in Istanbul but now with new modern computerized machines all the dyeing stages accompanied by within the firm.

None of these firms do not utilize homebased labor force in any part of the production.

Two firms involved in machine industry, tourism, import-export besides clothing industry.

The ratio of the number of female workers to that of all workers in this sector are approximately over 70 percent. None of the firm utilizes family worker in production. The educated and experienced workers are demanded in these export-oriented firms. The workers who are worked in these firms lived in districts of the vicinity of Sincan, Keçiören, Yenimahalle squatter area.

4.2.4. Peripheral Districts

4.2.4.i-) Eryaman

There is only one firm, Hosta, located in Eryaman District according to the registered data in Ankara Chamber of Commerce in 1998. This firm has been established in 1980 as food producer. Hosta has advantages location as being a large scale clothing firms. It is close to the main road, river, railroad, airway, truck tariff, and labor pool. All these advantages is very important for export-oriented large firms.

It is integrated large scale clothing firms which is employing 169 workers, and established 6500 m^2 floor space and open space.

Firstly, Hosta started to clothing as producing military dressing to the Turkish Armed Forces. But in recent times it produce sleeping bag, trousers, and so on besides military uniform.

It was derived from the interviews that all of firms' products are wholly produced for foreign-market. On the other hand the 95 percent of the products that are produced by subcontractor firms sent to the international market while resting 5 percent remain to the national markets.

Hosta subcontract certain stages of the production processes to other firms that located in Tokat, Sivas, Adana, İstanbul, Eskişehir, Karabük, Kastomonu, Manisa and Ankara (Siteler and Demetevler). All of the stages except styling and cutting are giving out to subcontractor firms and if any problem appeared in products they carry out penalty to the subcontractor firms. In other words, all faulty and delayed goods are sold to that subcontractor firms.

More than half of the workers are female workers in this firm. In addition to that, the firm prefer more educated and skilled labor during hiring workers. The training about job is given to the workers in private classroom in every week.

4.2.4.ii-) Kayaş

There were 2 registered clothing firms in Kayaş. According to Ankara Chamber of Commerce only one of them visited in the field survey. This firm, Yılmaz Orme, has a showroom and wholesale store in Kızılay and factory in Kayaş. This firm is pleased with their location and also is a member of Ivedik Industrial Cooperation due to being closer to other markets and being located more organized location.

This firm is large scale clothing firm that utilized 60 workers and has 1500 m^2 floor space.

In addition to that, Yılmaz Örme involved in both knitting and clothing. Knitted pullover and cotton clothes are produced. The productions are towards both foreign (15 percent of total market) and national markets.

This clothing firm subcontracted out sewing operation of cotton clothes to the firm that located in Demetevler and Çankırı. They send cutted fabric for sewing to the firm Çankırı because of cheaper worker. The other stages like, styling, cutting, quality control and packaging are preferred within the firms in Kayaş. Moreover, they do not utilized homebased labor whereas in the past some kind of works like sewing of collar sent to homes. But, now, this work performed by new computerized machinery.

According to field survey like most of the clothing firms this firm prefer female employers due to their skills and lower wages they demand and also it utilizes five family workers in the firm.

4.2.4.iii-) Akyurt

The industrial firms has been preferred this location after 1990. Since this districts have been taken to industrial investment zone for 6 years. The industrial activity encouraged some kind of discount or any other supportive governmental policy. For example, for imported machinery value-added price postponed or there is investment discount for this districts. Therefore, since 1900, 190 construction licenses have been taken for building clothing firms whereas nearly ten large and integrated firms that involved in this sector established after this year due to economical crises. However, in the field survey, it is determined that many firms plan to relocate this area for many reasons like vast and cheaper land, encouragement policy, etc. There are large and well-known firms located this districts like Dörtel, Yıldırım, Çoksa, Bagi, Sonbay, Güleçler, Öncü Group, and so on.

In addition, according to Ankara Chamber of Commerce, there were 3 registered clothing firms whereas two of them are visited in the field survey. One is Güleçler Socks Firm and the other one is Öncü Group.

Both firms had been located firstly in Siteler and then moved to this districts after 1996. They are pleased with their location and, so, they will not plan to relocation. Their future plan is to increase the capacity of production and enter the new international markets for this reason they send their representatives to different countries and follow the international fair.

Güleçler and Öncü Group are both large and integrated firms that have 85 and 116 workers and 11.000 m^2 and 5.000 m^2 open and closed areas respectively.

They are involved in both weaving and clothing. One firm produced man, women and children socks with their brand name and the other produced fabric and military uniform. They utilized thread as a first products. Then, they processes this as a final products.

Güleçler firm produced towards both national and foreign markets, whereas, Öncü Group produced only national and military markets.

It can be derived from the survey that the firms that produced socks engaged in subcontracting for foreign firms. The firm perform all stages of production processes except styling. In addition, other firm, Öncü Group, subcontract out dyeing, sewing, quality control stages to small firms in different cities.

According to the field survey in Akyurt, the ratio of the number of female workers to that of all workers in the same districts are approximately 55 percent. Firms utilized unskilled labor who lived around the factories.

4.3 The Evaluation of the Research in 1990 and in 1998 in Ankara.

Two field surveys have been conducted on the textile and clothing industries in Ankara in both 1990 and 1998 respectively. The total number of registered firms at different scales are 180 in 1998 (according to the Ankara Chamber of Commerce), some of 35 percent of them interviewed during the field survey. In the 1990 research, however, 71 firms in total have been surveyed covering all 68 firms that were registered with the Ankara Chamber of Commerce (Table 4.1).

The number of firms to be interviewed in the clothing sector is determined by stratified random sampling based on the sectors' proportional share in total number of firms by districts. Hence, 35 percent of total firms in the clothing industry in 1998 is visited for an interview (Figure 4.1). Whereas, nearly 95 percent of them were visited in the field survey in 1990 (Figure 4.2).

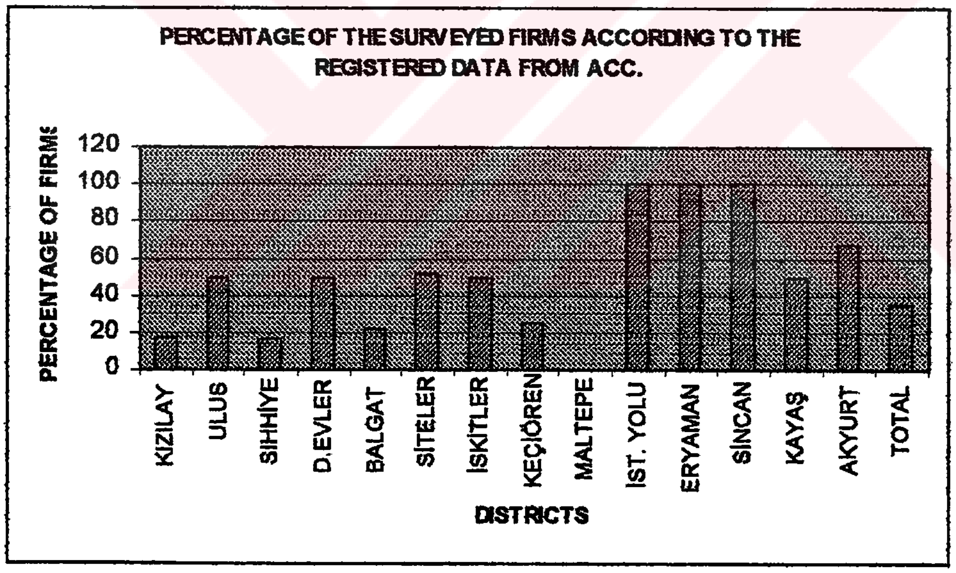

Figure 4.1: Percentage of the Surveyed Firms According to the Registered Data from Ankara Chamber of Commerce in 1998 (Source: ACC)

Table 4.1: The Survey Results of the Clothing Firms in Ankara, 1990-1998

THE SURVEY RESULTS OF THE CLOTHING FIRMS IN ANKARA IN BOTH IN 1990 AND 1998

	1990			1998		
	REGISTERED DATA OF ACC	FIELD SURVEY	% OF SURVEYED FIRMS IN 1990	REGISTERED DATA OF ACC	FIELD SURVEY	% OF SURVEYED FIRMS IN 1998
KIZILAY	39	23	59	50	9	18
ULUS	8	18	100(*)	10	5	50
SIHHİYE	3	13	100(*)	24	4	17
D.EVLER	3	4	100(*)	8	4	50
BALGAT	5	2	40	18	4	22
SİTELER	3	1	33	27	14	52
İSKİTLER	1	1	100	16	8	50
KEÇİÖREN	1	5	100(*)	4	1	25
MALTEPE	5	3	60	8	0	0
İST. YOLU	0	0	0	6	7	100(*)
ERYAMAN	0	1	0	1	1	100
SİNCAN	0	0	0	3	3	100
KAYAŞ	0	0	0	2	1	50
AKYURT	0	0	0	3	2	67
TOTAL	68	71	100(*)	180	63	35

(*) shows that the firms that visited is more than registered number of firms

As it is said before, the aim of the study was twofold, one was to uncover dynamics of production processes and the other was to analyze the process of site selection. The two processes are closely interrelated. The production process has been examined by districts through the utilization of five variables. These variables are the scale of firms, product types, market characteristics, characteristics of labor demand and inter-firm relations. These variables are the studied with reference to the location of particular firms in 1990 and 1998 field survey. As it has been indicated previously, those variables regarding to the scale of firms and characteristics of labor demand were not studied thoroughly due to the lack of 1990 data on these variables .

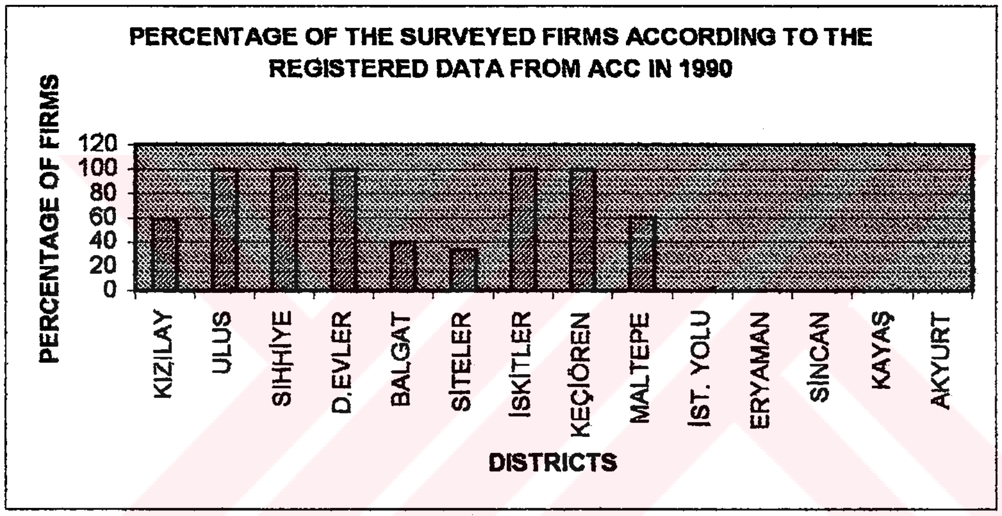

Figure 4.2: Percentage of the Surveyed Firms According to the Registered Data from Ankara Chamber of Commerce in 1990 (Source: ACC)

4.3.1 Spatial Configuration of Textile and Clothing Industries in Ankara in 1990 and 1998

If we compare the site selection processes of firms in clothing in Ankara with respect to the registered data from Ankara Chamber of Commerce, it is observed change in this processes from 1990 to 1998 (Figure 4.3).

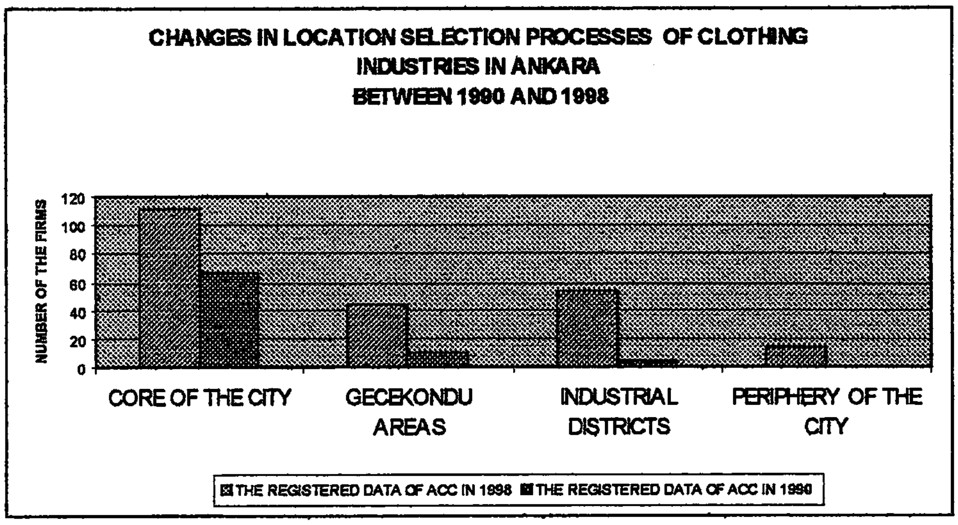

Figure 4.3: Changes in Location Selection Processes of Clothing Industries in Ankara, 1990-1998 (Source: ACC)

In 1990, it is interesting to observe that, nearly 82 percent of total firms that had been established in the core of the city, 13 percent established in low-income districts, and 5 percent of them located in industrial districts (Figure 4.4).

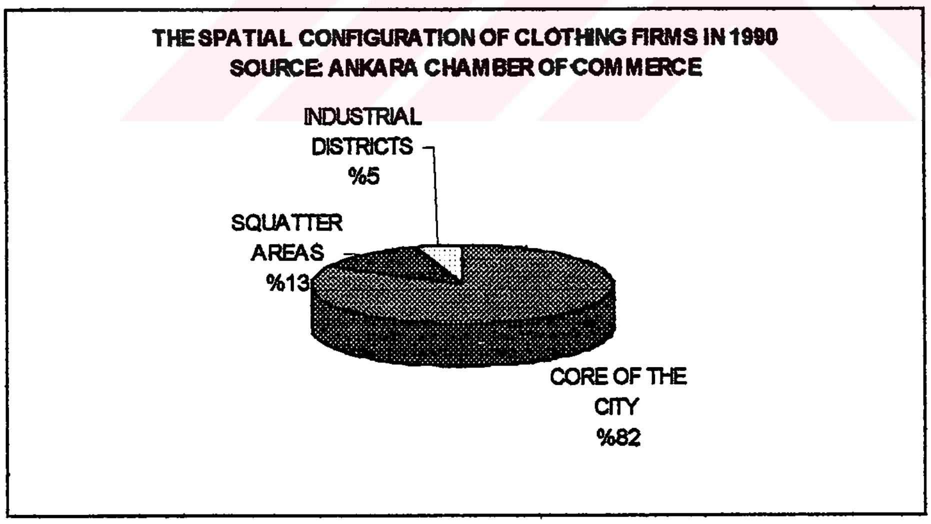

Figure 4.4: The Spatial Configuration of Clothing Firms in Ankara in 1990 (Source: ACC)

On the other hand, in 1998, it is interesting to observe that the city center is now faced with stagnation and decline, so, only half of the clothing firms resist to locate in the core of the city, whereas another half located in low-income districts (20 percent), industrial districts (24 percent) and periphery of the city (6 percent) (Figure 4.5).

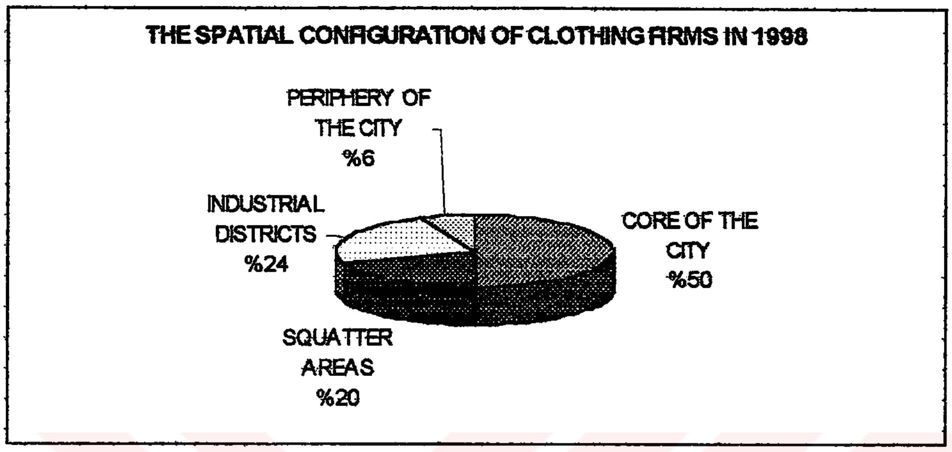

Figure 4.5:The Spatial Configuration of Clothing Firms in Ankara in 1998 (Source: ACC)

If the registered data in 1990 and 1998 compared by districts, it is clearly seen that all clothing firms which are located in city center increase in number. For example, Kızılay, Ulus, Maltepe. Yet, a striking decline has to be emphasized on proportion. However, Küçükesat district forms a special case in sampling. Clothing industries in Küçükesat decreased not only in number but also proportionally. İskitler and Siteler used the advantages of agglomeration economies as they are coded as organized industrial districts. Except from these new sparkers such as Balgat, İstanbul Road, Kayaş Sincan, Akyurt are observed (Figure 4.6).

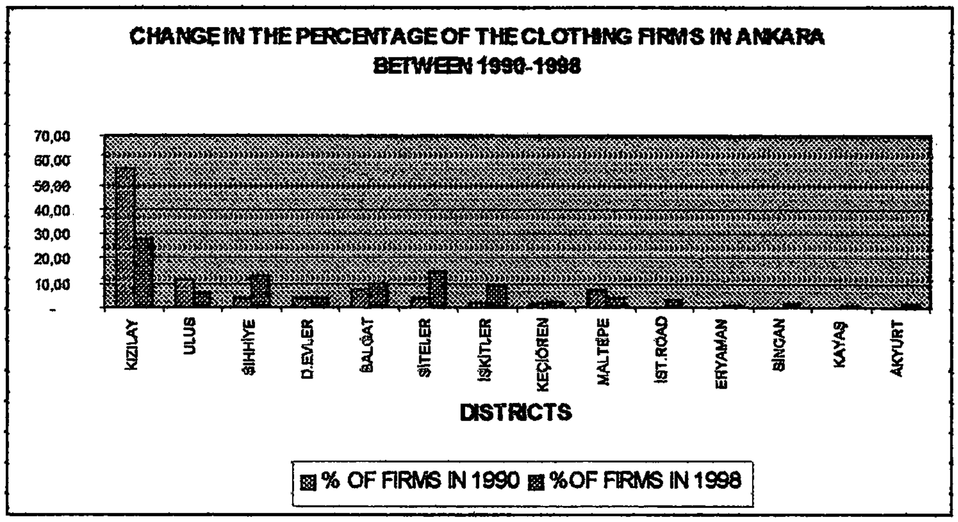

Figure 4.6: Change in the Percentage of the Clothing Firms in Ankara Between 1990-1998 (Source: ACC)

Here an important point is that when the site selection choices of company administrators is asked, most respondents located in the core declared that they were satisfied with their location while others prefer to locate particular streets or roads. Most of these firms are small in size, the clothing firms located in periphery of the city like Balgat and Eryaman and firms in industrial districts are satisfied with position and do not consider relocation. The firms that are located in low-income districts like Demetevler, Yenimahalle, Keçiören and Etlik prefer to relocate more central areas or to organized industrial districts in order to increase disintegration of production processes and concentrate spatially and by being close to other firms. Therefore, the research clarified that factors that effect the site selection decisions of firms are as such; first, the tendency to be closer to the center, and, second to be close to other firms.

The clothing producers tend to cluster tightly together in the core of the city are reason of this behavior is to reduce the costs of their collective transactional activity and the second one is that they supply face to face contact with person and customer. Yet, these producers have to deal with some problems like transportation and parking problems, narrowness, ventilation problems, insufficiency of energy, insufficiency of security and health service. Not only the above disadvantages of being central but also maturation of industry obliges clothing producers to relocate in the outskirts and periphery of the city. In 1998, the research clarified that factors that attracts the firms to peripheral areas are transportation facility, the possibility of providing cheap and vast land, cheap labor supply and finally, the physical structure of land are all very important for the place of new factory settlements.

Figure 4.7 and 4.8 indicate the locations of clothing industry in Ankara in 1990 and 1998. It is noticed that the dense spatial masses of firms settled in the core of the city (Figure 4.7) have collective tendency to move steadily uptown, away from the center of city towards the organized industrial districts, periphery of the city and mainly lie along the main road such as Çankırı Road, İstanbul Road, Eskişehir Road and Konya Road (Figure 4.9).

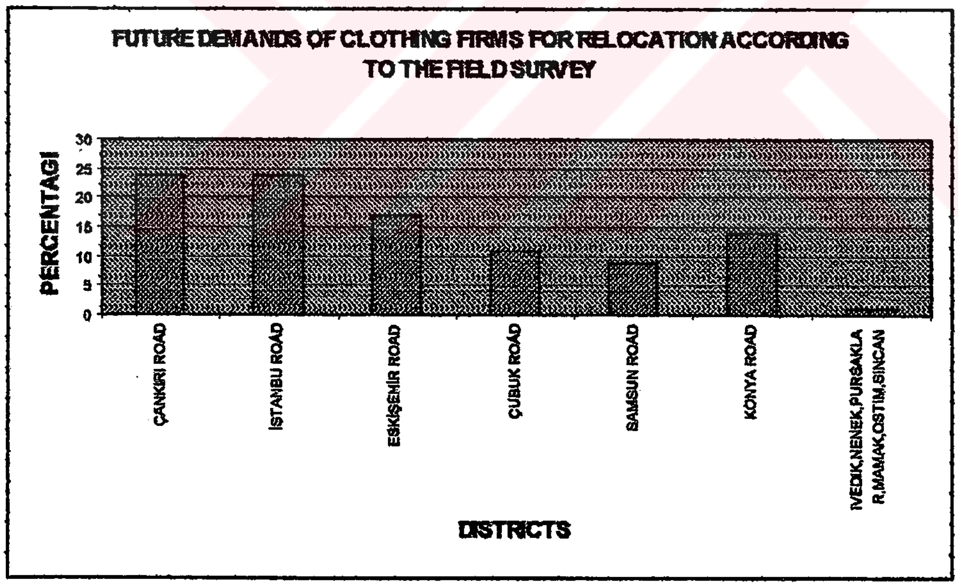

Figure 4.9: Future Demands of Clothing Firms for Relocation in Ankara According to the Field Survey

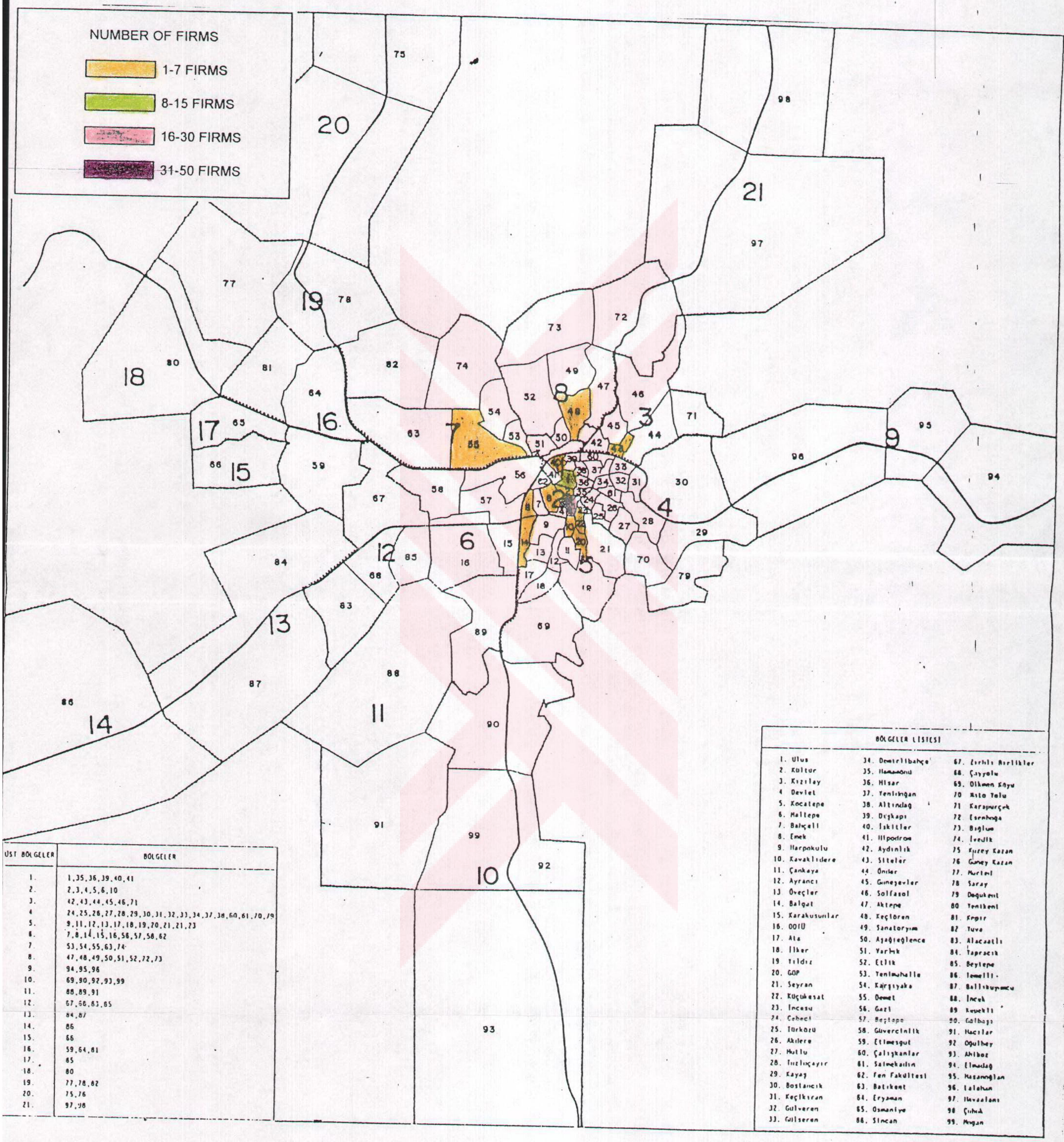

Figure 4.7: The Spatial Configuration of Clothing Firms in Ankara in 1990
(Source: Field Survey)

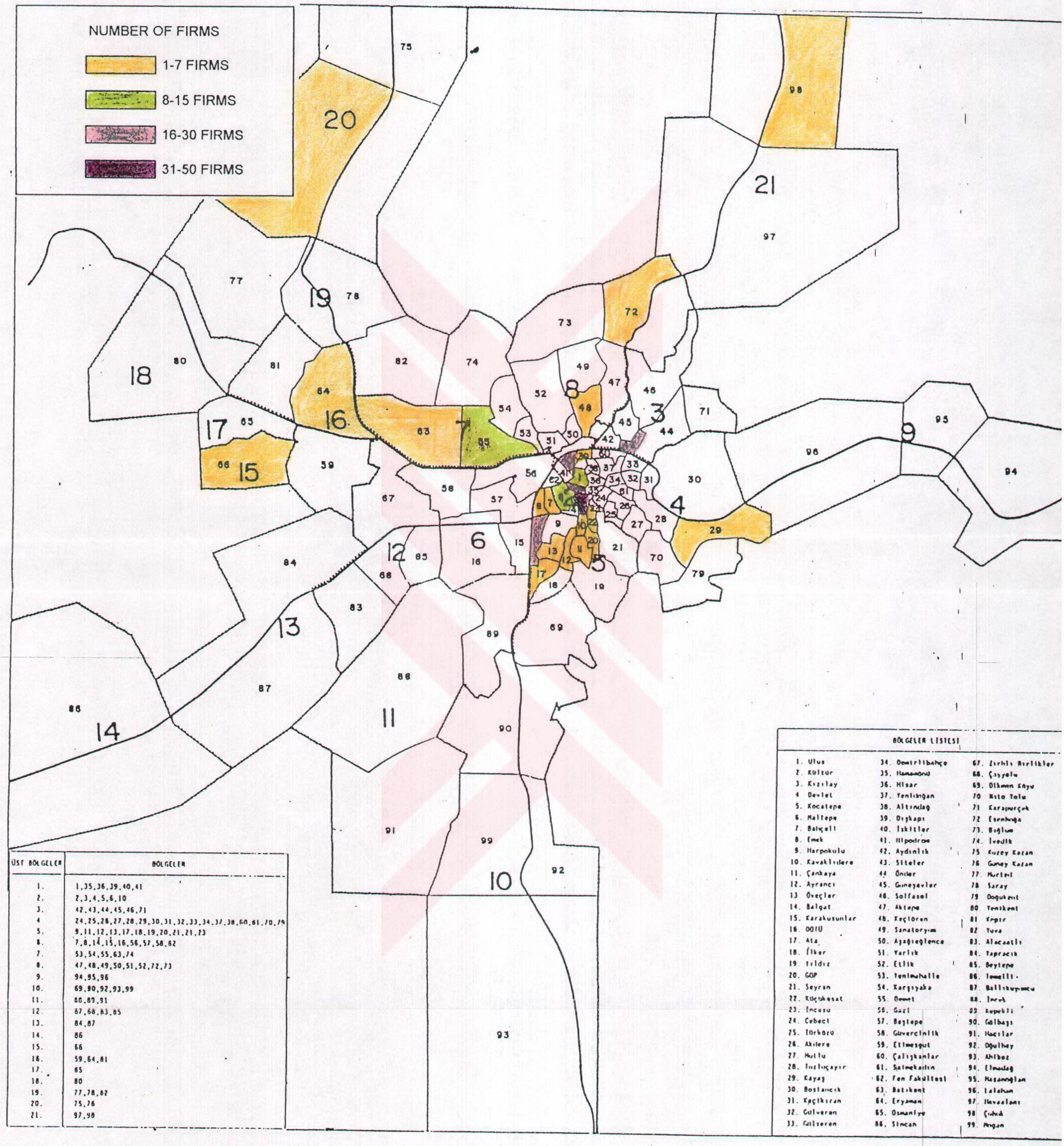

Figure 4.8: The Spatial Configuration of Clothing Firms in Ankara in 1998
(Source: Field Survey)

4.3.2 Comparison of the Scale of the Firms in Clothing in 1990 and in 1998

The clothing industry is characteristically organized around small labor intensive plants producing restricted batches of output in limited runs (Scott, 1988: 72). Hence, in 1990 and 1998 the number of these firms were more than the large integrated firms. However their ratios had been decreased for 8 years In 1990, there was no any registered data about the size of the firms. However, it was estimated that nearly 70 percent of the firms were small in size. On the other hand, the field survey in 1998 indicate that 54 percent of total firms in that sector called small scale firms (Figure 4.10). The rest are large scale firms in terms of number of labor. Therefore, there is an increase in the number of large scale firms in clothing that has grown to produce export oriented products.

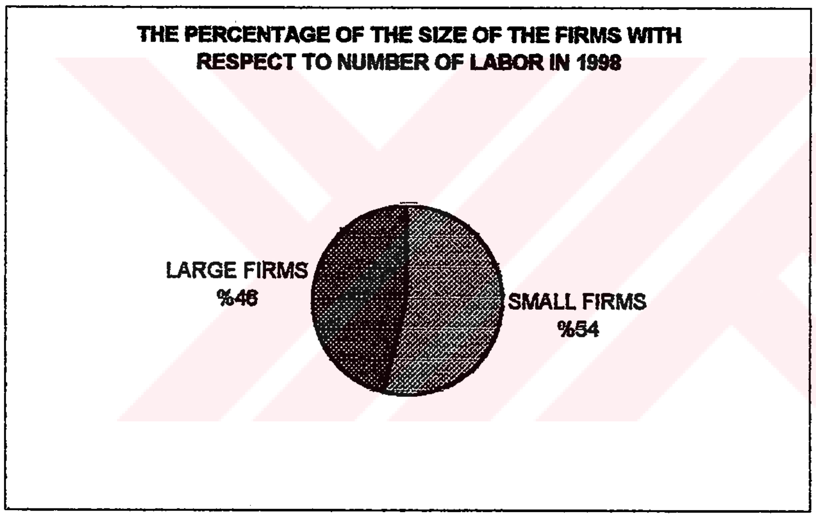

Figure 4.10: The Percentage of the Scale of the Clothing Firms with respect to the Number of Labor in 1998 (Source: Field Survey)

If we looked the size of the clothing firms according to districts it is clearly seen that in 1990, a large scale firms that are limited in numbers located in Balgat districts (Konya Road) that are located along main transport axes and İskitler which are organized industrial districts. On the other hand, in other more central districts mostly small scale clothing firms located in. However, in 1998, the research show industrial growth at the fringe of the city and most of the matured large integrated clothing firms located in the periphery of the city particularly along the main transport routes like Istanbul Road, Çankırı Road, Konya Road in order to expand production. The most important motives for large scale industries decisions are obviously, the availability of vast and cheaper land in the periphery, and increased accessibility due to the availability of transport facilities. Whereas Sıhhiye, Ulus, Demetevler, Etlik mainly preferred for location by small scale firms and Kızılay, İskitler and Siteler preferred by both scale of clothing firms in 1998 in Ankara (Figure 4.11).

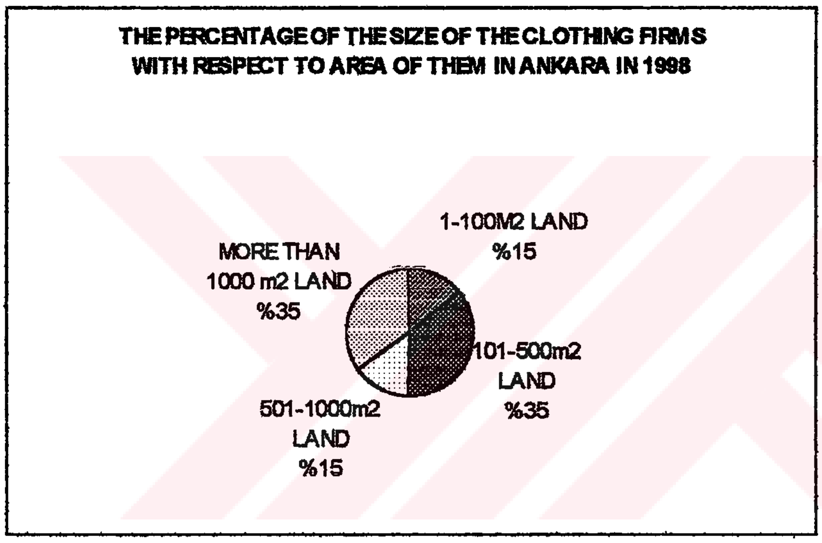

Figure 4.11: The Percentage of the Size of the Clothing Firms with respect to Area of Them in Ankara in 1998 (Source: Field Survey)

4.3.3 Comparison of the Product Types of the Firms in Clothing in 1990 and in 1998

In clothing industry, small scale firms generally have to meet the unstable demand, which fluctuates due to a number of factors ranging from fashion to seasons and they are constantly pushed into product differentiation strategies as a means of warding off the market depredations of their competitors (Scott, 1988: 72). In these workshops the production processes is quite unstandardized and skilled labor is much in demand and also producing limited output

Whereas, large scale firms perform more standardized (routinized) large batch and relying on unskilled labor in countries where cheap labor is available (Lyberaki, 1990). However, few firms in Ankara specializes in the more fashion oriented and differentiated products toward the demand of world market.

The differences of product type observed between the core areas and periphery in 1990 and 1998, in particular between the high quality flexible forms of manufacturing in the core, and the routinized or export oriented forms of manufacturing in the periphery.

If we compare the differences in product types of clothing industry in 1990 and in 1998 in detail. Figure 4.12 indicates in 1990 the product types divided into many pieces in order to meet unstable demand.

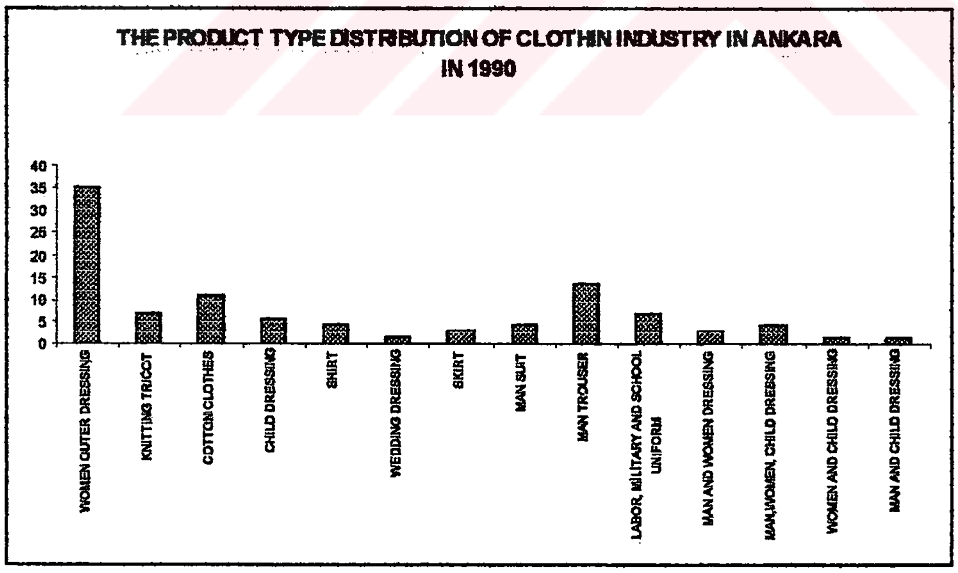

Figure 4.12: The Product Distribution of Clothing Industry in Ankara in 1990

However, in 1998, in Ankara clothing firms specialized in fashion oriented women clothes (32 percent), knitting (14 percent), cotton clothes (18 percent) (Figure 4.13). The women outer clothes that are produced in Siteler, Kızılay, Balgat, Sincan and İstanbul Road are seen as more design oriented competitive product in clothing industry. Whereas, the knitting products are produced in İskitler, Kayaş, İstanbul Road, Sincan and Balgat. On the other hand, cotton clothes produced in Etlik, Demetevler. Labor and military uniform and school dressing produced in Ulus and Demetevler.

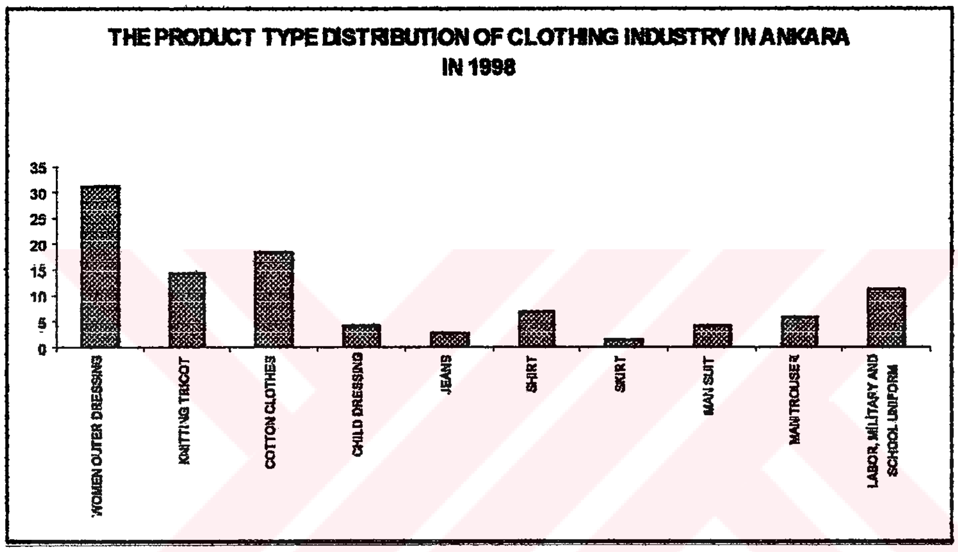

Figure 4.13: The Product Type Distribution of Clothing Industry in Ankara in 1998

4.3.4 Comparison of the Market Relations of the Firms in Clothing in 1990 and in 1998

Over the last decades, the market relations of the textile and clothing firms in Ankara has expressed important changes. As the Figure 4.14 and Figure 4.15 suggest, the firms that involved in this sector is produced mainly towards internal markets, the rates of this increased after 1990.

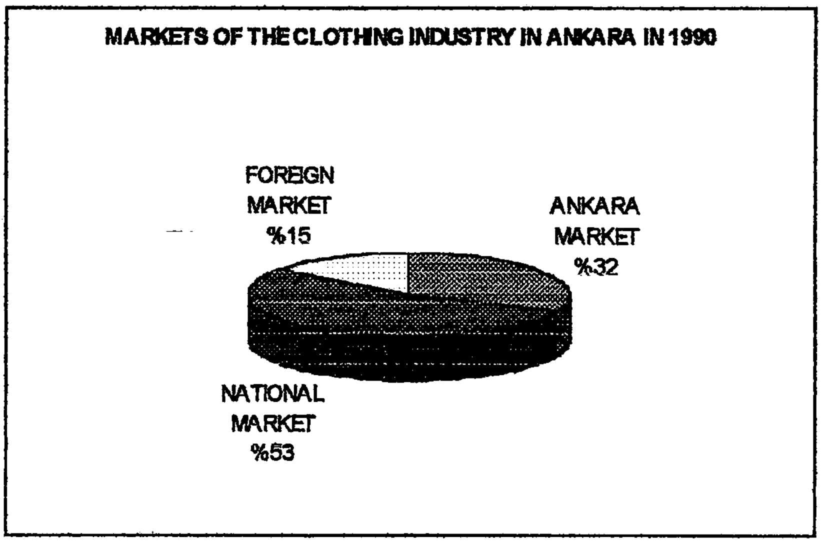

Figure 4.14: Markets of the Clothing Industry in Ankara in 1990 (Source: Field Survey)

This is caused by the decrease in the number of the firms that produced only Ankara Market i.e. stores that locate in the center. These firms located in Kızılay, Ulus and Sıhhiye. However except the several firms in Ulus all of the firms that located these districts, today, produced towards domestic market demands.

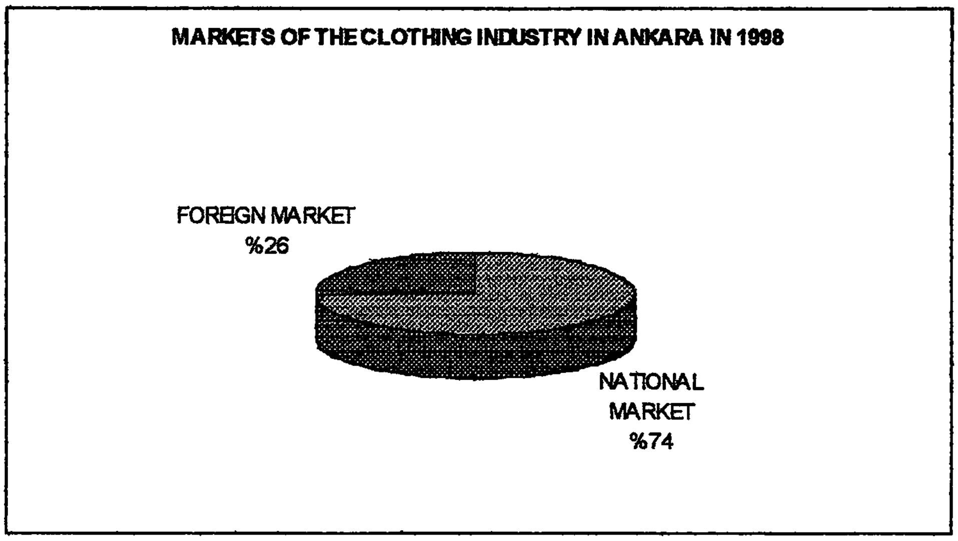

Figure 4.15: Markets of the Clothing Industry in Ankara in 1998 (Source: Field Survey)

It is interestingly observed that in 1990 the firms that located in the central part of the city like Kızılay, Sıhhiye, Maltepe, Küçükesat, Kavaklıdere and in the low income district area like Yenimahalle, Etlik produced towards foreign market (Figure 4.16).

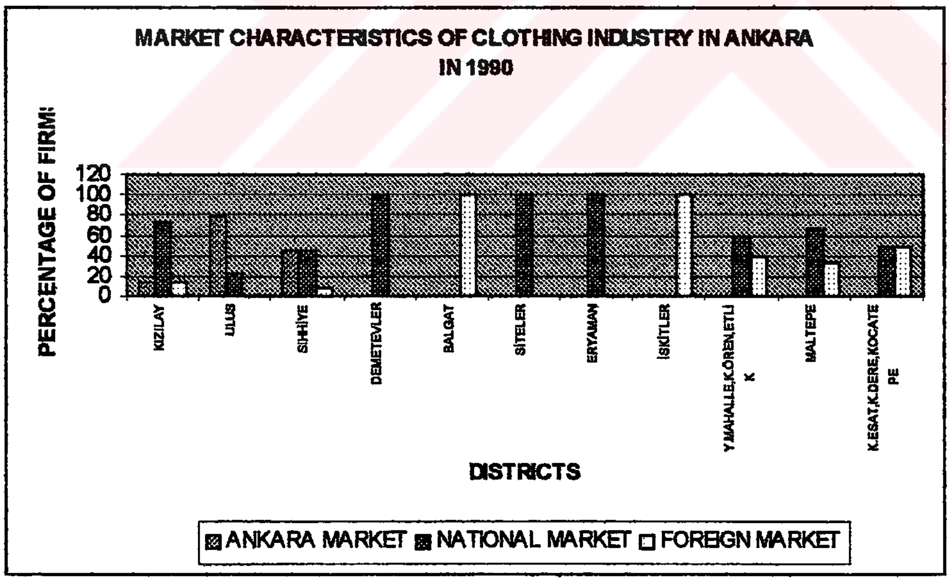

Figure 4.16: Market Characteristics of Clothing Industry in Ankara by Districts in 1990 (Source: Field Survey)

On the other hand, all of the firms that specialized in export-oriented and differentiated products located in the outskirts of the city like Akyurt, Kayaş, Sincan, Eryaman and in the organized industrial districts like İskitler, Siteler and İstanbul Road (Figure 4.17).

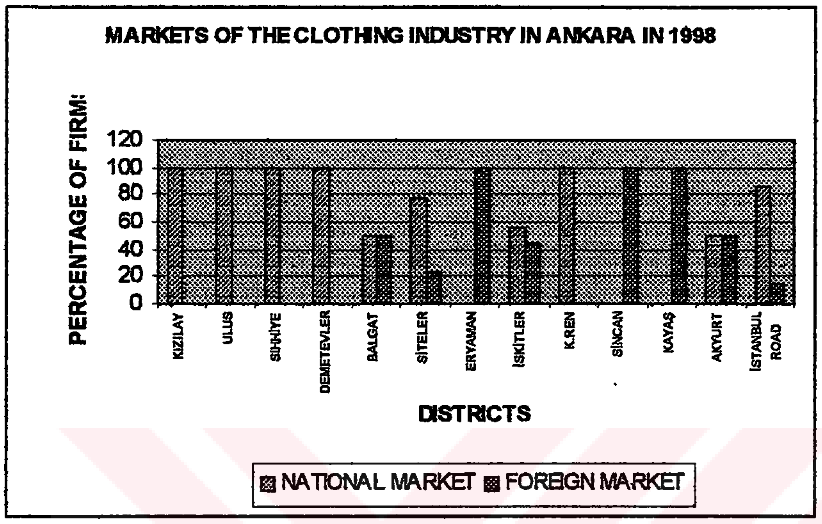

Figure 4.17: Market Characteristics of Clothing Industry in Ankara by Districts in 1998 (Source: Field Survey)

According to the field survey, for 8 years the percentage of the firms that produced towards foreign market has increased from 15 percent to nearly 26 percent (Figure 4.14 and Figure 4.15). In these export-oriented firms, high-technology processes have been utilized and are introduced to the smaller firms. They follow foreign fairs and fashion magazines. They started to create their our fashion. Most of the producers in Ankara retain their own designers – although a few hire stylist and designers from İstanbul. Therefore, It is clearly seen that, in Ankara the number of large integrated firms has grown to meet the rising foreign and domestic demand. In 1998, Firm Aytemizler and Dörtel started to sell their brand-name in the world market.

4.3.5 Comparison of the Subcontracting Relations of the Firms in Clothing in 1990 and in 1998

The firms in Ankara show four types of subcontracting relations : those firms that are not involved in subcontracting, those receiving subcontracts (subcontractor), those offering subcontracts (organizer or parent firm) and those both offering and receiving subcontracts (Kaytaz, 1994: 141). In this sector, a large proportion of firms is involved in some form of subcontracting relation. Table 4.2 and Table 4.3

TABLE 4.2: Distribution Of Firms in Clothing Industry by Subcontracting Relations According to the Districts in 1990 (Source: Field Survey)

subcontract offering firms	Subcontractors addresses
KIZILAY	KIZILAY
KIZILAY	DEMETEVLER
KIZILAY	CEBECİ
KIZILAY	İSTANBUL
KIZILAY	SIHHİYE
ULUS	DEMETEVLER
ULUS	ULUS
ULUS	KIZILAY
ULUS	İSTANBUL
ULUS	OTHER CITIES IN INNER ANATOLIA
SIHHİYE	SIHHİYE
SIHHİYE	KIZILAY
SIHHİYE	SİNCAN
SIHHİYE	DEMETEVLER
SIHHİYE	OTHER CITIES IN INNER ANATOLIA
DEMETEVLER	DEMETEVLER
DEMETEVLER	KIZILAY
DEMETEVLER	ULUS
DEMETEVLER	OTHER CITIES IN INNER ANATOLIA
BALGAT	YENİMAHALLE
BALGAT	KEÇİÖREN
BALGAT	SIHHİYE
BALGAT	DEMETEVLER
SİTELER	İSTANBUL
ERYAMAN	ULUS
İSKİTLER	MALTEPE
İSKİTLER	KIZILAY
Y.MAHALLE,K.ÖREN,ETLİK	KIZILAY
Y.MAHALLE,K.ÖREN,ETLİK	DEMETEVLER
Y.MAHALLE,K.ÖREN,ETLİK	SIHHİYE
MALTEPE	KIZILAY
K.ESAT, K.DERE,KOCATEPE	ETLİK
K.ESAT, K.DERE,KOCATEPE	SIHHİYE
K.ESAT, K.DERE,KOCATEPE	DEMETEVLER
K.ESAT, K.DERE,KOCATEPE	ULUS

subcontract receiving firms	Parent firms adresses
KIZILAY	KIZILAY
KIZILAY	ZİRAAT BANK
ULUS	GOVERNMENT INSTITUTION
ULUS	ULUS
SIHHİYE	SIHHİYE
SIHHİYE	ULUS

SIHHİYE	KIZILAY
SIHHİYE	GİMA
DEMETEVLER	DEMETEVLER
DEMETEVLER	YENİMAHALLE
DEMETEVLER	KIZILAY
DEMETEVLER	ULUS
BALGAT	İSKİTLER
Y.MAHALLE,K.ÖREN,ETLİK	KIZILAY
Y.MAHALLE,K.ÖREN,ETLİK	ULUS
MALTEPE	İSKİTLER
K.ESAT, K.DERE,KOCATEPE	İSTANBUL
K.ESAT, K.DERE,KOCATEPE	KIZILAY

TABLE 4.3: Distribution Of Firms in Clothing Industry by Subcontracting Relations According to the Districts in 1998 (Source: Field Survey)

	subcontract offering firms	Subcontractors adress	Subcontracting Work	no.of firms
	KIZILAY	KIZILAY	C,B,A,C	4
	KIZILAY	DEMETEVLER	A	2
	KIZILAY	YENİMAHALLE	A	1
	KIZILAY	İSTANBUL	C	1
cotton clothes	SIHHİYE	DEMETEVLER	A,H	2
knitting	SIHHİYE	SİTELER	A,H,D	3
	SIHHİYE	OSTİM	D	1
	ULUS	SİTELER	C	1
	ULUS	KIZILAY	C	1
	ULUS	ULUS	A	1
	ULUS	DEMETEVLER	D,B,I,F	2
	ULUS	OSTİM	D	1
	İSKİTLER	DEMETEVLER	E,E,B	3
	İSKİTLER	KARABÜK, SİVAS,AFYON	B,B	2
	İSKİTLER	SİNCAN	I,F	2
	İSKİTLER	SİTELER	I	1
	İSKİTLER	İSKİTLER	F	1
	BALGAT	SİTELER	B	1
	BALGAT	BALGAT	H	1
	BALGAT	DEMETEVLER	H	1
	DEMETEVLER	KIZILAY	F	1
	ERYAMAN	TOKAT,SİVAS,SAMSUN, ADANA	B	1
	İSTANBUL YOLU	İSKİTLER	E,A	2
	İSTANBUL YOLU	DEMETEVLER	A,E	2
	İSTANBUL YOLU	SİNCAN	A	1
	KAYAŞ	DEMETEVLER	B	1
	KAYAŞ	ÇANKIRI	B	1
	SİNCAN	SİNCAN	G,B	2
	SİNCAN	SİTELER	G	1
	SİNCAN	MALTEPE	G	1
Painting, pressing, Knitting	SİNCAN	İSTANBUL	G	1
	SİNCAN	ULUS	B	1
	SİNCAN	DEMETEVLER	B	1
	SİTELER	YENİMAHALLE	A	1
	AKYURT	AKYURT	G	1
	AKYURT	SİTELER	G	
	AKYURT	İSTANBUL	G	
	AKYURT	OTHER CITIES	G	
	SİTELER	DEMETEVLER	A,C,C	3

	SİTELER	İSTANBUL	H,C	2
	SİTELER	SİTELER	C	1
	SİTELER	KIZILAY	C	1

Subcontract receiving firms	Parent firms adresses	Number of firms	subcontracting work
KIZILAY	KIZILAY	2	b
ULUS	KIZILAY	1	b
ULUS	ULUS	1	a
SİTELER	KIZILAY	1	a
SİTELER	OSTİM		
İSKİTLER	FOREIGN MARKET	2	a
KEÇİÖREN	KIZILAY	1	a
SİNCAN	FOREIGN MARKET	1	b
AKYURT	FOREIGN MARKET	1	a

A: the under suits such as skirts, trousers produced from the cut fabric to final products

B: the sewing part subcontracted out, whereas other stages like quality control and ironing performed by subcontract offering firms
C: from cut fabric to final products

D: except design all stages performed by subcontractor firms

E: only knitting stages subcontracted out to other firms other stages like quality control, cutting and sewing are performed by subcontract offering firms
F: collar embroidery, armorial bearings, emblem, cliche, letter dyeing
H: knitted and cotton clothes
I: cotton clothes

a: from the fabric to final products

b: from the cut fabric to final products shows the survey results of the subcontracting relations of the clothing firms in Ankara in 1990 and 1998 respectively. The districts of the subcontract receiving and offering firms and the parts of the production stages that subcontracted are shown in this Tables (Appendix IV).

Both in 1990 and 1998 the large proportion of the firms are subcontract-offering firms in Ankara. The ratio of the subcontract-offering firms (60 percent) has not changed in both these years. The survey indicates that the proportion of the firms that are not involved in subcontracting were 15 percent in 1990 (Figure 4.18).

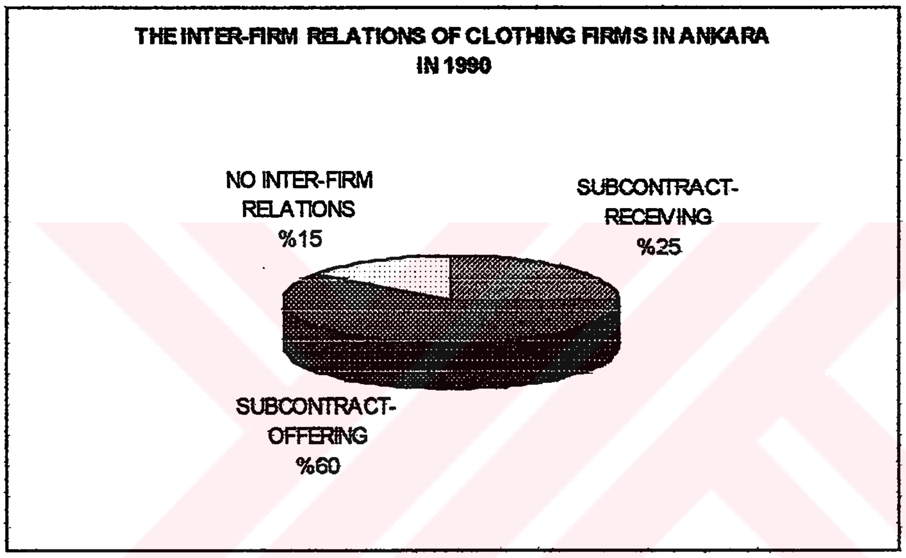

Figure 4.18: The Inter-Firm Relations of Clothing Firms in Ankara in 1990 (Source: Field Survey)

However this rate increased 26 percent in 1998 (Figure 4.19). In fact, in this sector when the firms started to enlarge, the parts of production processes that are subcontracted out to the other firms became limited and firms tend to perform all stages themselves within the firm. Thus, this reduces the dependence of to the center of the large firms. Finally, they select site in the outskirts of the city. Hence, the increase in the rate of the firms that are not involved in subcontracting shows the increase in the number of this kind of firms.

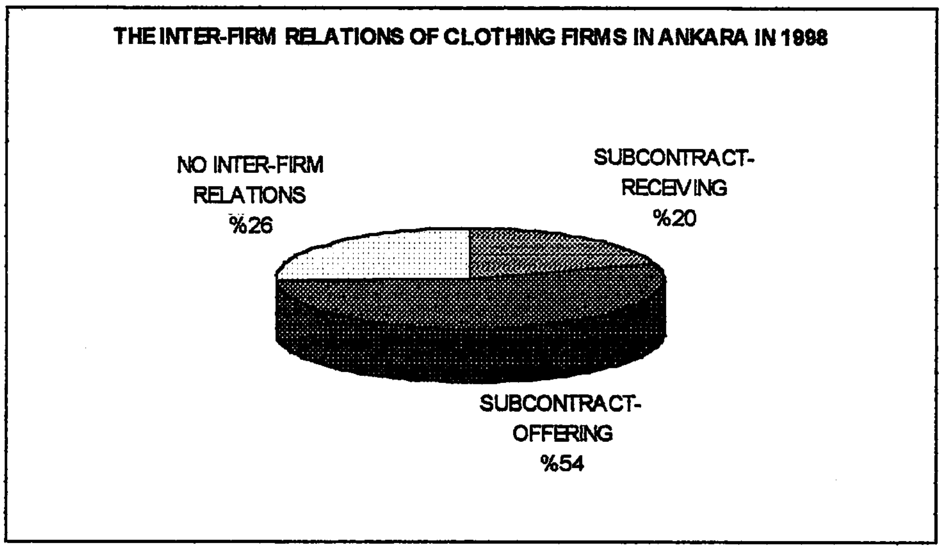

Figure 4.19: The Inter-Firm Relations of Clothing Firms in Ankara in 1998 (Source: Field Survey)

In clothing subcontract-offering firms constitute larger group than the receiving ones both in 1990 and 1998.

According to the field survey, in 1990, the most of the subcontract-offering firms were located in Kızılay, Ulus, Sihhiye, Demetevler, Balgat, Siteler, İskitler, Yenimahalle, Keçiören, Etlik while the most of the subcontract-receiving firms were located in Kızılay, Ulus, Sıhhiye (Table 4.2). On the other hand, in 1998, the most of the subcontract-offering firms are distributed all surveyed districts of Ankara except Demetevler district. Furthermore, the most of the subcontract-receiving firms located mainly in Demetevler, Yenimahalle, Siteler, İskitler, Sincan, and other cities like Karabük, Afyon, Sivas, Çankırı, and Istanbul. The firms that produce men's clothes prefer the small scale firms in Istanbul due to having skilled labor in that products. Istanbul is also preferred by the large-scale integrated firms that involved in both clothing and weaving because the dyeing and printing stages of the production processes need more professional. However, the firms that prefer the other cities like Karabük, Afyon, Sivas, Çankırı due to having cheap labor pool .

There are only two firms that involved in both clothing and weaving along with other stages of production processes such as yarn production, dyeing, printing, cutting, finishing and so on both in 1990 and 1998. These two firms subcontracted out sewing stages to small firms in Ankara while subcontracted out dyeing and printing stages to firms in İstanbul.

Most of the large scale firms that produced design-oriented and differentiated firms subcontracted out generally sewing operations of the easy part of the clothes like skirts, trousers, cotton clothes etc., whereas cutting, styling, quality control and finishing handled by the parent firm. Rearily the cutting stages of the production processes subcontracted out to the subcontractor firms.

Generally, firms that produced standardized products like trousers, skirts, company clothes subcontracted out all stages except quality control and packaging in Ankara.

Furthermore if the products are produced for foreign markets, the quality of the products and the delivery time gain importance. When the products could not finished at the right time and quality, the subcontractor firm is punished heavily for every one of unapproved pieces. For example, Firm Aytemizler sell each unapproved pieces in the selling prices to the subcontractor firm.

As a result of the field survey, it has been pointed out that clothing firms prefer to remain flexible, retaining the ability of produce small lots and a variety of types in Ankara both in 1990 and 1998.it has also been determined that the practice of contracting-out certain stages of production is very widespread, particularly the sewing and embroidery stages are subcontracted out to small scale firms, whereas the essential operations of styling, cutting, quality control, finishing are performed by subcontract-offering firm.

4.3.6 Comparison of the Labor Market of the Firms in Clothing in 1990 and in 1998

The textile and clothing industries have been among other industrial sectors most dependent on female labor (Enloe, 1983: 409). It has been observed in both years that the majority of workers in the firms that are surveyed are female. The ratio of the number of female workers to that of all workers in this sector are approximately over 60 percent in all cases. Some company administrators stressed that they do prefer female employers due to the skills they learn at childhood ability to work regularly and carefully and lower wages they demand.

The research conducted in Ankara in 1998 show that some firms that produce mainly men's clothes prefer specially male workers due to their seriousness in work and being wholetime labor.

After 1990, the research also indicates that most of the firms that are specialized in export-oriented products prefer to utilize highly skilled and educated labor. This is accompanied by different ways by these firms for example; one large firm in Balgat follows successful students before graduation and then offer them work in their firm. Furthermore, the firm that located in Eryaman give lectures to workers in private classroom in every week. Another interesting point that several large-scale firms that located in Balgat, Eryaman give rewards (premium, gold, etc.) to workers in order to encourage them.

The research indicates also that, the workers that involved in this sector live in the close vicinity of the firms, in low-income districts or squatter areas both in 1990 and 1998.

Finally, it is determined that in Ankara the several firms that located in İstanbul Road, Demetevler, Kızılay and Kayaş utilize 1 to 8 family-based labor in 1998. However there is no data about this subject in 1990.

CHAPTER V

CONCLUSION

In this study, the internal and external transactional consequences of the textile and clothing industries in Ankara has been examined, and several important locational consequences of this industry have been subjected to both theoretical and quantitative analysis. In this sense changes in the production organization and site selection processes and production organization of these industries have been examined through empirical research..

The vertical disintegration of production is an especially prominent organizational feature of the clothing industry. The clothing industry is typically volatile. Manufacturers face uncertain demand, and they are constantly pushed into product. Consequently, the industry is characteristically organized around vertically disintegrated labor-intensive plants producing limited number of output. These industry is also much given to fragmentation and subdivision of production processes (Scott, 1988: 73).

These kinds of small labor intensive plants had concentrated heavily in central city areas in Ankara in 1990. However, empirical evidence has suggested that in addition to the production of clothing, many different types of manufacturing activities, started to decline rapidly in the Metropolitan Area of Ankara following this year. High-level of commercial and official functions are particularly are now more prone to seek out locations in the cores of the metropolitan city. On the other hand, the process of decentralization regarding to the manufacturing of clothing has taken place in the city of Ankara. Since 1990, clothing activity has been continuing to concentrate heavily in industrial district areas, whilst simultaneously spreading out into peripheral areas.

The study also clarified that the collective tendency of clothing producers to move steadily uptown with the passage of time away from the center of Ankara and toward the major organized districts or outskirts of the city. Today, the firms involved in this sector have heavily located in the organized industrial districts.

Subcontracting arrangements within the confines of a particular industrial district may gain further emphasis. In this respect, small and unstandardized workshops may continue to locate at the core whilst large and/or standardized industries, which are oriented towards producing high-quality, high-cost products, locate dominantly towards the periphery. Consequently, those industrial districts that locate in the urban periphery will continue to attract low income residential areas into their vicinity, as these residential areas accommodate the vast reservoirs of labor. Along with the increased stability in labor processes, of least for highly skilled labor, those residential areas that choose location in the vicinity of residential districts will be of improved quality, i.e. possibly either in the form of mass housing or social housing projects.

It is stated that subcontracting relationships (inter-firm relations) are inevitable and indispensable components of the production processes in the clothing industry. They will continue to be integrated into the production organization of this industry so as to provide flexibility in the production process; yet the nature and dynamics of subcontracting relationships in the clothing industry in Turkey will transform along with the change in the ways in which this particular industry is embedded into global economic system. That is to say, the nature and dynamics of the subcontracting relationships in the clothing industry in Turkey will serve to improve products' quality and design as opposed to their prevailing rationale in cutting down on costs and providing flexibility in responding to uncertainty in the markets. Corollary to this, increased stability will enhance the emphasis on spatial agglomeration, and , this, the formation of industrial districts. By the same reason, they cluster compactly in a geographical space. This clustering is emphasized both by the small scale of most interactions within the industry and by the need of face-to-face contacts in order to negotiate the details of the subcontract work and the precise specifications of needed inputs. It is even further emphasized by the elastic system that ties manufacturers and subcontractors together in mutual symbiosis. This will have an impact not only on the spatial configurations of production organization, but also on that of residential location.

In 1990, it is interesting to observe that firms that had been established earlier had located in the vicinity of the traditional center, i.e. Ulus. However, 53 percent of those firms that have been established after 1970, have selected location in the vicinity of Kızılay, i.e. more recent center of Ankara (Kayasu, 1995). In fact, some small firms mainly locate in certain squatter areas of which inhabitants constitute the labor pool that is needed. Therefore, for these firms that located in Siteler, Demetevler, Balgat, Etlik, Keçiören indicated that accessibility to lower income labor pool is the first priority in their decision of location selection. It is clearly seen that the scale of establishments effects the site selection process of firms, along with the organization of productions. Since it is quite important for large scale firms to be accessible by low-income residential areas, such firms make their decision of location selection independently. These firms located in the periphery of the city like Eryaman and Konya Road.

On the other hand, in 1998, the structure of clothing industry has changed. In this city, formerly prosperous clothing industrial centers in spite of continuing to maintain activity such as Kızılay, Ulus, Sıhhiye were now faced with stagnation and decline as new capital investments were re-deployed to cheap labor and vast land sites at the peripheral locations like Istanbul Road, Konya Road, Kayaş, Çankırı Road, Sincan districts. As a result of this, several numbers of new industrial growth centers in Ankara were also expanding at a rapid pace during this period. Therefore, several of these centers have begun to emerge as major industrial districts like Akyurt, İstanbul Road, Sincan and so on.

Except for the small scale firms that have located in the vicinity of the two city centers and large scale enterprises that have selected location along the major transportation network, other clothing establishments have scattered in some lower-income districts such as, Siteler, Balgat, Demetevler, Mamak, Etlik, Yenimahalle, and so on in both 1990 and 1998. 41 percent of the total number of clothing firms in Ankara are located in those squatter areas in 1998 (TCSA). The factors that effects the location selection decision of these firms were indicated as firstly being close to cheaper labor pools; secondly being close to other firms, and finally, not being able to afford high land prices of the city center. Generally, their future plan are being in the industrial districts or being close to customers. Hence, if they would expand their production they achieved to relocate central city or industrial districts.

If we compare the scale of the clothing firms between 1990 and 1998, it is clearly seen that there is an increase in the number of large scale integrated firms that selected sites along the major transportation network. In 1990 there were several large firms located in and around Eryaman, Balgat, İstanbul Road and Iskitler, however, in 1998, in those districts there are 24 large scale textile and clothing industry that have more than 50 employees and nearly 1000 m^2 open and closed workshop areas. In addition to this development, new industrial growth centers selected also by matured large firms like Istanbul Road, Konya Road, Kayaş, Cankırı Road, and so on. On the other hand, in 1990, small firms selected sites in Kızılay and Ulus but now Kızılay has become too expensive for small firms and they prefer to locate to new industrial districts like Istanbul Road, Siteler, Iskitler more are more organized industrial districts. In addition, in recent years there are also small firms in low income districts like Demetevler, Etlik, Ulus, Sıhhiye, and Kızılay but they have tendency to relocate and concentrate in organized industrial districts.

Eryaman, Sincan, Kayaş, Akyurt, Istanbul Road, and Balgat were the place which large scale textile industry established after 1990. As it said before, the large scale firms produce mainly standardized products and using specialized machinery and predominantly utilize unskilled labor. Their products are mainly towards foreign markets

It has been mentioned previously that, several large scale firms produced design-oriented and differentiated products that satisfy the world market demand in 1990. However, in 1998, in Ankara 77 percent of the clothing firms produce toward the national market that is ranging from the Black Sea Region to the East Anatolian Region, while 23 percent of the firms actually export their products. The export-oriented firms are producing specialized and differentiated products in world market standards with respect to technology, fashion, quality. In addition, these firms can be regarded as being firms of formal sector that is largely comprised of firms that are specialized either in higher priced commodities or standardized items which are produced with assembly-line organization and advanced technology. These firms are usually unionized and adhere to minimum wage lows and labor standards (Waldinger, 1989: 343).

The comparison of small scale firms' size, production types, market characteristics, inter-firm relations and labor market in Ankara over some eight years between 1990 and 1998, suggests a constant continued growth in clothing production. In 1990 almost all of the small scale clothing firms except those in Ulus were located around the new and modern city center and produce mainly for retail clothing stores located in this center. However, in 1998, nearly all small scale firms produce mainly for the national market. Since the clothing firms has responded to both domestic and foreign market conditions that require good quality and low price but also quick response to changing demand, by adopting new technologies, particularly since 1990 in Ankara.

An examination of the clothing industry in Ankara indicates that small firms in Ulus and Demetevler were engaged in standardized and low-quality products toward the national markets in 1998, whereas the firms which established these districts were produced toward only Ulus market in 1990. This is the indicator fact that the industry has responded to new market conditions that require low price and good quality.

On the other hand, small scale firms that located Kızılay, Ulus, Maltepe, Demetevler or Yenimahalle manufacture a wide and varying set of customized products using flexible, general purpose machinery and multi-skilled workers. There is a trend towards flexible, low risk production structures which assume one of several forms including less rigid productions technologies, more flexible labor processes and new forms of inter-firm linkages.

In 1990 the product types of clothing industry were various in kind in order to meet unstable demand. However, in 1998, in Ankara clothing firms tended to specialized in fashion oriented women clothes. This is overwhelmingly the case with the Ankara, which specializes in the more fashion-oriented and competitive end of the market; namely the emphasis has shifted from the production of basic T-shirts to that of design and quality oriented, differentiated products.

According to the field survey, most of the subcontract-offering firms in Ankara are distributed around; İskitler, Siteler, Sincan, Kayaş, Istanbul Road, Eryaman., Kızılay. The subcontractors of those firms are located in Demetevler, Siteler, İskitler, Kızılay, Ulus, Istanbul, Ostim, and various inner Anatolian cities.

The survey results show that the subcontract-receiving firms are limited in numbers. It is observed that, overwhelming majority of the subcontract-receiving firms have located in İskitler, Siteler, Etlik, Ulus and Demetevler in 1998. Prior to this year Kızılay is the district where many subcontract-receiving firms locate in , but in recent years this central districts become too expensive for these firms.

Another important point is that many small scale subcontractor firms prefer to locate in the vicinity of large integrated firms such as Aytemizler (Sincan), Hosta (Eryaman), Dörtel (Balgat), and so on. Consequently, those large firms that locate in the urban periphery will continue to attract small scale establishments. It should be also emphasized at this point that two recent transportation systems, i.e. Ankaray and Metro, that have been introduced most probably have significant impact for the dynamics of industrial location selection. As these two modes of rail transportation enables easier access to the city centers, the central areas have become less affordable whilst peripheral areas of the city have become more accessible than ever.

The practice of contracting-out certain stages of production is quite widespread. The sewing and embroidery stages, in particular, are commonly subcontracted to small workshops on a commission basis. The essential operations of styling, cutting, quality control and finishing are unchangeably handled by the organizer, i.e. parent firm. Most of the large firms subcontracted routine processes of production due to quality concerns. The concept of installing machines according to their order in the production flow, and the use of assembly lines for rationalization, is not popular mainly in export-oriented firms.

In this sector, export orientation seems to be a major factor in increasing the volume of subcontracts, as exporting sectors have a higher proportion of subcontract-offering firms. The continued promotion of exports as a major policy would therefore establish even stronger subcontracting relations. Moreover, rigid quality requirements for the competitiveness of exports in world markets may also increase the linkages between counterparts (Şenses, 1994).

Finally, this study has shown that the textile and clothing industries in Ankara has gained profound importance with regard to the scale of firms, product types, market characteristics, inter-firm relations, and labor market characteristics.

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APPENDIX I

THE PRODUCTION OF THE TEXTILE AND CLOTHING INDUSTRIES

The production process of the textile can be defined as follows:

Fiber preparation
⇩
Yarn production
⇩
Dyeing of yarn
⇩
Weaving
⇩
Dyeing of textiles
⇩
The clothing industry

The production process of textile goods differ from one sub-sector to the other . For example, the production process of cotton yarn, wollen yarn, artificial and synthetic yarn and silk is quite different from one another. The weaving processes of each different type of material is also vary in terms of technique which are used in the production process. Consequently, it should be emphasized that the production process varies in each sub-sector of textile industry. Hence, the sub-sectors of both the textile and the clothing industries can be classified as follows;

Cotton Weaving

Cotton-gin
⇩
Fiber
⇩
Yarn — Conventional ring system (iğ)
Open end system (rotor)
⇩
Dyeing
⇩
Weaving
⇩
Dyeing
⇩
Finishing
Textiles

Silk Weaving

Production of silkwarm seed
⇩
Cocoon production
⇩
Reeling
⇩
Curling
⇩
Weaving
⇩
Finishing
⇩
Dyeing

There are also differences in the clothing industry in terms of the production processes of knitted and woven clothing.

The Production Process of the Woven Clothing Industry

Selection of textile
⇩
Preparation of Model
⇩
Cutting
⇩
Sewing
⇩
Ironing
⇩
Final touches
⇩
Quality Control
⇩
Packing and Shipping

The Production Process of the Knitted Clothing Industry

Cotton
⇩
Yarn
⇩
Knitted Textile
⇩
Dyeing
⇩
Pressing
⇩
Cutting
⇩
Sewing
⇩
Pressing
⇩
Packing and Shipping

APPENDIX-II

THE FIELD SURVEY OF CLOTHING FIRMS IN ANKARA IN 1990

KIZILAY

LOCATION

name	Location	Foundation	Location change	1st location	2nd location	3rd location
ÖZGÜN GİYİM	KIZILAY	1982	Yes	FEVZİ ÇAKMAK STR.	SELANİK STR.	
GÜNAL	KIZILAY	1951	Yes	ULUS	KIZILAY	
MODAS GİYİM	KIZILAY	1973	No			
PERRY MODA	KIZILAY	1978	Yes	FEVZİ ÇAKMAK STR.	ATATÜRK BOULEVARD	
MÜTAŞ MÜH	KIZILAY	1976	Yes	SIHHİYE	İZMİR STR.	KARANFİL
ARTI GİYİM	KIZILAY	1987	Yes	FEVZİ ÇAKMAK STR.	ZİYA GÖKALP STREET	
İZGİ BOUTIQUE	KIZILAY (ZİYA GÖKALP STR.)	1976	No			
SULE BOUTIQUE	KIZILAY (ZİYA GÖKALP STR.)	1975	No			
ELEGANT GOMLEK	KIZILAY	1975	Yes	FEVZİ ÇAKMAK STR.	YESİLIRMAK STR.	
OZANADOLU	FEVZİ ÇAKMAK STR.	1960	Yes	YENİMAHALLE	FEVZİ ÇAKMAK STR.	
IDIL	KIZILAY (ZİYA GÖKALP STR.)	1982	No			
BASKENT GIYİM	KIZILAY (KONUR STR.)	1972	No			
OZALP GIYIM	KIZILAY (GMK BLVD.)	1986	No			
NADI GIYIM	FEVZİ ÇAKMAK STR.	1970	Yes	MALTEPE	FEVZİ ÇAKMAK STR.	
UGUR GIYIM	KIZILAY (SELANİK STR.)	1983	Yes	ATATURK BOULEVARD	SELANİK STR.	
COLLECTION	KIZILAY (IZMIR STR.)	1986	No			
KARMEN	KIZILAY (IZMIR STR.)	1985	No			
TOPER SAN.	KIZILAY (SELANİK STR.)	1984	Yes	KONUR STR.	SELANIK	
BEGUL KONFEKSIYON	KIZILAY	1986	No			
TULIN GIYIM	FEVZİ ÇAKMAK STR.	1990	No			
SECIL GIYIM	KIZILAY (GMK BOULEVARD)	1982	No			
BERGI GIYIM	KIZILAY	1988	No			
AYGISA	KIZILAY	1981	Yes	SELANIK STR.	HATAY STR.	

name	Preference for relocation
ÖZGÜN GİYİM	Pleased with their location
GÜNAL KONFEKSİYON	Demetevler
MODAS GİYİM	Pleased with their location
PERRY MODA	Pleased with their location
MÜTAŞ MÜH	Industrial districts for clothing
ARTI GİYİM	Pleased with their location
İZGİ BOUTIQUE	Kızılay
SULE BOUTIQUE	Industrial districts for clothing
ELEGANT GOMLEK	Outer skirts of the city and organized industrial districts
OZANADOLU	Pleased with their location
IDIL	Kızılay
BASKENT GİYİM	Pleased with their location
OZALP GIYIM	Istanbul
NADI GIYIM	Pleased with their location
UGUR GIYIM	Industrial districts for clothing
COLLECTION	Outer skirts of the city and organized industrial districts
KARMEN	Pleased with their location
TOPER SAN.	Pleased with their location
BEGUL KONFEKSIYON	Pleased with their location
TULIN GIYIM	Pleased with their location
SECIL GIYIM	Istanbul or Eskisehir Road, Industrial districts for clothing
BERGI GIYIM	Sıhhiye or Izmir Street or other industrial districts
AYGISA	Outer skirts of the city and organized industrial districts

PRODUCT TYPES

name	Products	First product or row material	where do you get them from
ÖZGÜN GİYİM	Women outer clothes	Fabric, thread, lining	İstanbul
GÜNAL KONFEKSİYON	Women outer clothes	Fabric, thread, lining	İstanbul, Kızılay
MODAS GİYİM	Women outer clothes	Fabric, thread, button	İstanbul, Kızılay
PERRY MODA	Women blouse	Fabric, thread, lining	İstanbul, Bursa, Kızılay
MÜTAŞ MÜH	Women outer clothes	Fabric, accessories	İstanbul, Bursa, Kızılay
ARTI GİYİM	Women outer clothes	Fabric, thread, lining	İstanbul, Kızılay
İZGİ BOUTIQUE	Women outer clothes	Fabric, thread, button	İstanbul
SULE BOUTIQUE	Women outer clothes	Fabric, thread, button	İstanbul, Bursa, Ankara
ELEGANT GOMLEK	Women outer clothes	Fabric, thread, button	İstanbul, Kızılay
OZANADOLU	Women outer clothes	Fabric, thread, button	İstanbul, Kızılay
IDIL	Women outer clothes, coat, light overcoat	Fabric, thread, button	İstanbul, Kızılay
BASKENT GİYİM	Women outer clothes	Fabric, thread, button	İstanbul, Bursa, Adana
OZALP GIYIM	Women outer clothes, coat, light overcoat	fabric, thread, button	İstanbul
NADI GIYIM	Women outer clothes	fabric, thread, button	İstanbul, Bursa
UGUR GIYIM	Women outer clothes	fabric, thread, button	İstanbul, Ankara
COLLECTION	Women outer clothes	fabric, thread, button	İstanbul, Ankara
KARMEN	Women outer clothes	fabric, thread, button	İstanbul, Bursa, Ankara
TOPER SAN.	Skirts	fabric, accessories	İstanbul, Bursa
BEGUL KONFEKSIYON	Skirts, trousers	fabric, accessories	İstanbul, Bursa, Kayseri
TULIN GIYIM	Women outer clothes	fabric, accessories	İstanbul, Bursa, Kayseri
SECIL GIYIM	Women skirts and trousers	fabric, thread, button, lining	İstanbul, Kızılay
BERGI GIYIM	Women outer clothes	fabric, thread, button	İstanbul, Bursa, Ankara
AYGISA	man and women outer clothes	fabric, thread, button	İstanbul, Bursa, Adana

MARKET CHARACTERISTICS

name	Market
ÖZGÜN GİYİM	Ankara and Army Market
GÜNAL KONFEKSİYON	National and foreign markets
MODAS GİYİM	National markets
PERRY MODA	National markets
MÜTAŞ MÜH	National and foreign markets(Arabian Countries)
ARTI GİYİM	Ankara
İZGİ BOUTIQUE	National markets, Ankara
SULE BOUTIQUE	National markets, Ankara
ELEGANT GOMLEK	National markets, Ankara
OZANADOLU	National markets, Ankara
IDIL	National markets and foreign market (Germany)
BASKENT GİYİM	National markets and Ankara
OZALP GIYIM	Ankara
NADI GIYIM	National markets and Ankara
UGUR GIYIM	National markets
COLLECTION	National markets
KARMEN	National markets
TOPER SAN.	National markets and Ankara
BEGUL KONFEKSIYON	Tekirdag, Mersin, Ankara
TULIN GIYIM	National markets and Ankara
SECIL GIYIM	National markets
BERGI GIYIM	National markets and Ankara
AYGISA	National markets and Ankara

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of parent firm
ÖZGÜN GİYİM	No	
GÜNAL KONFEKSİYON	Yes	Kızılay
MODAS GİYİM	No	
PERRY MODA	No	
MÜTAŞ MÜH	No	
ARTI GİYİM	No	
İZGİ BOUTIQUE	No	
SULE BOUTIQUE	No	
ELEGANT GOMLEK	No	
OZANADOLU	No	
IDIL	No	
BASKENT GİYİM	No	
OZALP GIYIM	No	
NADI GIYIM	No	

UGUR GIYIM	No	
COLLECTION	No	
KARMEN	No	
TOPER SAN.	No	
BEGUL KONFEKSIYON	No	
TULIN GIYIM	No	
SECIL GIYIM	No	
BERGI GIYIM	Yes	Ziraat Bank
AYGISA	No	

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	homebased labor
ÖZGÜN GİYİM	Sometimes	Kızılay	No
GÜNAL KONFEKSİYON	No		No
MODAS GİYİM	No		No
PERRY MODA	No		No
MÜTAŞ MÜH	Yes	Kızılay, Demetevler	No
ARTI GİYİM	Yes	Demetevler, Cebeci	No
İZGİ BOUTIQUE	Yes	Kızılay	No
SULE BOUTIQUE	No		No
ELEGANT GOMLEK	Yes	Demetevler	No
OZANADOLU	No		No
IDIL	No		No
BASKENT GİYİM	Yes	Istanbul	No
OZALP GIYIM	No		No
NADI GIYIM	No		No
UGUR GIYIM	Yes	Kızılay	No
COLLECTION	Yes (at the beginning of season)	Kızılay	No
KARMEN	No		No
TOPER SAN.	Yes	Kızılay, Sıhhiye	No
BEGUL KONFEKSIYON	No		No
TULIN GIYIM	No		No
SECIL GIYIM	No		No
BERGI GIYIM	No		No
AYGISA	Yes	Demetevler	No

CHARACTERISTICS OF LABOR DEMAND

name	Districts that workers live in
ÖZGÜN GİYİM	Squatter areas
GÜNAL KONFEKSİYON	Etlik
MODAS GİYİM	Squatter areas
PERRY MODA	Batıkent, Yıldız
MÜTAŞ MÜH	Kecioren, Demetevler, Sincan, Batıkent
ARTI GİYİM	Mamak, Demetevler, Yenimahalle, Haskoy, Dikmen
İZGİ BOUTIQUE	Kayas, Yenimahalle, Balgat, Keçiören, Mamak
SULE BOUTIQUE	Kayas, Demetevler, Kecioren
ELEGANT GOMLEK	Sincan, Cebeci, Dikmen, Demetevler, Yenimahalle
OZANADOLU	Sincan, Kecioren, Balgat, Demetevler, Yenimahalle
IDIL	Dikmen, Abidinpasa, Aydınlıkevler
BASKENT GİYİM	Kecioren, Demetevler, Kayas, Akdere, Abidinpasa
OZALP GIYIM	Incirli, Seyranbagları
NADI GIYIM	Mamak, Siteler, Seyranbagları
UGUR GIYIM	Etlik, Demetevler, Kecioren, Dikmen
COLLECTION	Etlik, Demetevler, Kecioren, Dikmen
KARMEN	Mamak, Sincan, Kayas
TOPER SAN.	Dikmen, Altındag, Aktepe, Elmadag
BEGUL KONFEKSIYON	Dikmen
TULIN GIYIM	Dikmen, Demetevler, Mamak, Siteler
SECIL GIYIM	Dikmen, Abidinpasa, Kecioren, Ayas
BERGI GIYIM	Eryaman, Yenimahalle, Keçiören
AYGISA	Demetevler, Mamak, Dikmen

ULUS

LOCATION

name	Location	Foundation	Location change	1st location	2nd location
ŞENEL	ULUS (SAN.HAN)	1980	No	(low rent)	
İKM	ULUS (SAN.HAN)	1956	No	(their own department)	
ENDER	ULUS	1987	Yes	ULUS(Cerkez street)	ULUS
KRAL GİYİM	ULUS (ANAFARTALAR)	1984	Yes	ULUS (Ada street)	ULUS (Anafartalar)
ÇELİKKAYA	ULUS	1977	No		
UĞURTEKS	ULUS (SAN.HAN)	1979	No	close to Ulus market	
ŞENEL	ULUS (SAN.HAN)	1980	No	close to Ulus market	
ALTIN	ULUS (SAN.HAN)	1980	No		
TUTKU TİC	ULUS			Ulus is central districts for knitting	
ÖRNEK TRİKO	ULUS	1989	No	suitable for knitting productions	
TOPCAN	ULUS (ANAFARTALAR)	1978	Yes	move from same street	
ERKAN GİYİM	ULUS (SAN.HAN)	1984	No	their own department	
YÜKSELİŞ GİYİM	ULUS	1966	Yes	ULUS (Cankırı cad.)	
DEMİRTAŞ	ULUS (ANAFARTALAR)		Yes	ULUS (Cıkrıkçılar Yokuşu)	ULUS (Anafartalar)
DESEN TRİKO	ULUS (ANAFARTALAR)	1967	No		
STİL GİYİM	ULUS (SAN.HAN)	1982	No		
DÖŞ GİYM	ULUS (SAN.HAN)	1975	No		
ÖZKARDEŞLER	ULUS (Çankırı cad)	1970	No	their own department	

name	Preference for relocation
ŞENEL	No change
İKM	No change
ENDER	Prefer Kızılay location
KRAL GİYİM	Prefer Ulus or industrial districts
ÇELİKKAYA	No change
UĞURTEKS	Prefer Kızılay, Fevzi Çakmak location
ŞENEL	Prefer Kızılay location
ALTIN	No change
TUTKU TİC	No change
ÖRNEK TRİKO	No change
TOPCAN	No change
ERKAN GİYİM	No change
YÜKSELİŞ GİYİM	Prefer Kızılay location
DEMİRTAŞ	No change
DESEN TRİKO	No change
STİL GİYİM	No change
DÖŞ GİYM	No change
ÖZKARDEŞLER	They bought a workshop from Piyale Han

PRODUCT TYPES

name	Products	first product or row material	where do you get them from
ŞENEL	Child dressing	Fabric	Ankara
İKM	Man, women, child dressing	fabric, thread	Istanbul, Adana, Kayseri, Malatya
ENDER	Man, child trousers	fabric, button, thread, zip	Istanbul, Denizli, Ulus
KRAL GİYİM	Trousers	fabric, button, , zip	Istanbul, Ulus
ÇELİKKAYA	Trousers	fabric, button, thread, zip	Istanbul, Ulus
UĞURTEKS	Trousers	fabric, button, thread, zip	Istanbul, Uşak, Isparta, Ulus
ŞENEL	School dressing, jeans	Fabric	Istanbul, Ulus
ALTIN	Man, women trousers	fabric, button, thread, zip	Istanbul
TUTKU TİC	knitted products	thread, button,	Istanbul
ÖRNEK TRİKO	women knitted products	thread, button,	Istanbul
TOPCAN	man trousers	fabric, lining, button, zip	Istanbul, Ulus
ERKAN GİYİM	man trousers	fabric, lining, button, zip	Istanbul, Ulus
YÜKSELİŞ GİYİM	man trousers	fabric, lining, button, zip	Istanbul, Ulus
DEMİRTAŞ	clothing	Fabric	Istanbul
DESEN TRİKO	man and women knitted products	thread, button,	Istanbul
STİL GİYİM	man, women trousers	fabric, button, thread, zip	Istanbul, Ulus
DÖŞ GİYM	man, women, child dressing	fabric, thread, button	Istanbul, Adana, Kayseri, Malatya
ÖZKARDEŞLER	worker uniform, jump suit	fabric, thread	Istanbul, Ulus

MARKET CHARACTERISTICS

name	Market
ŞENEL	Ankara
İKM	National, government institution
ENDER	Ankara
KRAL GİYİM	Ankara
ÇELİKKAYA	Around Ulus
UĞURTEKS	Ankara
ŞENEL	Ulus
ALTIN	Ankara, Ulus, Eskisehir, Zonguldak
TUTKU TİC	Ankara, Ulus
ÖRNEK TRİKO	Ankara, Kayseri
TOPCAN	Ankara, Ulus
ERKAN GİYİM	Ulus, Kızılay
YÜKSELİŞ GİYİM	Ankara
DEMİRTAŞ	Their own store (Anafartalar)
DESEN TRİKO	Ankara
STİL GİYİM	Ankara, Ulus, Kızılay
DÖŞ GİYM	National markets, government institution
ÖZKARDEŞLER	Ankara, government institutions

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of Parent firm
ŞENEL	Yes	Ulus
İKM	No	
ENDER	No	
KRAL GİYİM	Yes	Ulus
ÇELİKKAYA	No	
UĞURTEKS	No	
ŞENEL	Yes	Ulus
ALTIN	Yes	
TUTKU TİC	No	
ÖRNEK TRİKO	No	
TOPCAN	No	
ERKAN GİYİM	No	
YÜKSELİŞ GİYİM	No	
DEMİRTAŞ	No	
DESEN TRİKO	No	
STİL GİYİM	No	
DÖŞ GİYM	Yes	Government institutions
ÖZKARDEŞLER	No	

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	homebased labor
ŞENEL	No		Yes (embroidery-Kecioren, Gülveren, Gazi mah))
İKM	Yes	Demetevler, Istanbul, Malatya, Antep, Sivas, Kayseri	No
ENDER	Yes	Ulus (sewing)	No
KRAL GİYİM	No		No
ÇELİKKAYA	Yes	Sentepe (tailors)	No
UĞURTEKS	Sometimes	Ulus, Kızılay	No
ŞENEL	No		No
ALTIN	Yes		No
TUTKU TİC	Yes	Ulus	No
ÖRNEK TRİKO	No		No
TOPCAN	No		No
ERKAN GİYİM	No		No
YÜKSELİŞ GİYİM	No		No
DEMİRTAŞ	Yes	Kızılay	No
DESEN TRİKO	No		No
STİL GİYİM	No		No
DÖŞ GİYM	Yes	Istanbul, Sivas, Erzurum	No
ÖZKARDEŞLER	Yes	Demetevler	No

CHARACTERISTICS OF LABOR DEMAND

name	Districts that workers live in
ŞENEL	Abidinpasa, Natoyolu, Etlik
İKM	Kecioren, Dikmen, Siteler, Mamak
ENDER	Akdere
KRAL GİYİM	Mamak, Abidinpasa, Cebeci
CELİKKAYA	Squatter areas
UĞURTEKS	Abidinpasa, Huseyingazi
ŞENEL	Abidinpasa, Mamak, Etlik
ALTIN	Yenimahalle, Ayvalı
TUTKU TİC	Etlik, Akdere, Ulus
ÖRNEK TRİKO	Mamak, Akdere, Haskoy
TOPCAN	Kecioren
ERKAN GİYİM	Etlik, Ayvalı, Altındag, Esertepe
YÜKSELİŞ GİYİM	Mamak
DEMİRTAŞ	Kecioren
DESEN TRİKO	Kecioren, Etlik
STİL GİYİM	Kayas, Etlik, Abidinpasa
DÖŞ GİYM	Batıkent, Yenimahalle, Balgat, Sincan
ÖZKARDEŞLER	Ayvalı, Demet, Batıkent

SIHHİYE

LOCATION

name	Location	Foundation	location change	1st location	2nd location	3rd location
UYGUN	SIHHİYE	1979	yes	MALTEPE	SIHHİYE (for needing wider place)	
TEKİN	SIHHİYE	1971	yes	ULUS	KIZILAY	SIHHİYE (being near to market)
BUTİK SİSİ	SIHHİYE	1985	yes	ULUS	SIHHİYE (close to other large firms)	
URAL GİYİM	SIHHİYE	1988	no			
ALKIN GİYİM	SIHHİYE	1985	no			
BİJAN GİYİM	SIHHİYE	1986	no			
ANKARA GİYİM	SIHHİYE	1960	yes	ULUS	SIHHİYE(being close to market)	
KUPSAN GİYİM	SIHHİYE	1986	no			
PASTEL	SIHHİYE	1989	yes	İSTANBUL	SIHHİYE	
İMAJ GİYİM	SIHHİYE	1989	no			
HÜR GİYİM	SIHHİYE	1985	yes			
MEHMETCİK MODA EVİ	SIHHİYE	1974	yes	ULUS	SIHHİYE (being close to market)	
KRALLI GIYIM	SIHHİYE	1981	no			

name	Preference for relocation
UYGUN	Organized industrial districts
TEKİN	Pleased with their location
BUTİK SİSİ	Industrial districts
URAL GİYİM	No change
ALKIN GİYİM	Pleased with their location
BİJAN GİYİM	Pleased with their location
ANKARA GİYİM SAN	Organized industrial districts
KUPSAN GİYİM	Iskitler
PASTEL	No change
İMAJ GİYİM	Fevzi Cakmak
HÜR GİYİM	Kızılay or any other place in industrial districts
MEHMETCİK MODA EVİ	No change
KRALLI GIYIM	No change

PRODUCT TYPES

name	Products	First product or row material	Where do you get them from
UYGUN	man trousers	fabric, button, thread, zip	Istanbul, Ulus
TEKİN	Women trousers, skirts, blouse	Fabric	Istanbul, Bursa, Adana
BUTİK SİSİ	Women trousers	fabric, lining, button, zip	Istanbul, Kızılay
URAL GİYİM	night dress, pajamas, dressing gown	Fabric	Istanbul
ALKIN GİYİM	Skirts	Fabric	Istanbul
BİJAN GİYİM	Women shirts, blouse	fabric, thread, lining	Istanbul, Bursa, Ankara
ANKARA GİYİM SAN	Women outer clothes	fabric, thread, lining	Istanbul, Bursa, Ankara
KUPSAN GİYİM	man clothes (suit)	fabric, thread, lining	Istanbul, Ulus
PASTEL	child dressing	fabric, thread, lining	Istanbul, Ulus
İMAJ GİYİM	women outer clothes	fabric, thread, lining	Istanbul, Kızılay
HÜR GİYİM	man and women outer clothes	fabric, thread, lining	Istanbul, Bursa, Ankara
MEHMETCİK MODA EVİ	wedding dress	fabric, accessories	Istanbul, Bursa, Ankara
KRALLI GIYIM	man shirts, necktie	fabric, thread	Istanbul, Bursa, Adana

MARKET CHARACTERISTICS

name	Market
UYGUN	Ankara
TEKİN	Ankara, Eskisehir, Corum
BUTİK SİSİ	Kızılay, Tunalı, Army market
URAL GİYİM	national markets
ALKIN GİYİM	Ankara
BİJAN GİYİM	Nigde, Kırşehir, Yozgat, Ankara
ANKARA GİYİM SAN	Trabzon, Sivas, Ankara
KUPSAN GİYİM	Nevsehir, Beypazarı, Tokat, Samsun
PASTEL	Istanbul, Ankara
İMAJ GİYİM	Kızılay
HÜR GİYİM	Ankara

MEHMETCİK MODA EVİ	foreign and national markets
KRALLI GIYIM	Ankara (government institution)

INTER-FIRM RELATIONS

subcontract receiving firms

name	Subcontracting	Location of Parent firm
UYGUN	Yes	Kızılay
TEKİN	No	
BUTİK SİSİ	No	
URAL GİYİM	No	
ALKIN GİYİM	No	
BİJAN GİYİM	No	
ANKARA GİYİM SAN	Sometimes	Sıhhiye, Ulus, Kavaklıdere
KUPSAN GİYİM	No	
PASTEL	No	
İMAJ GİYİM	No	
HÜR GİYİM	Yes	Kızılay
MEHMETCİK MODA EVİ	No	
KRALLI GIYIM	Yes	Gima

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	Homebased labor
UYGUN	Yes	Kızılay	No
TEKİN	Sometimes	Kızılay	No
BUTİK SİSİ	Sometimes	Kızılay	No
URAL GİYİM	No		No
ALKIN GİYİM	No		No
BİJAN GİYİM	Sometimes	Demetevler, Sincan	No
ANKARA GİYİM SAN	Yes	Sıhhiye	No
KUPSAN GİYİM	No		No
PASTEL	Yes	Sıhhiye	No
İMAJ GİYİM	No		No
HÜR GİYİM	No		No
MEHMETCİK MODA EVİ	Yes	Kızılay	Yes (embroidery, 20 homes, Kecioren, Etlik, Kayas)
KRALLI GIYIM	Sometimes	Another city	No

CHARACTERISTICS OF LABOR DEMAND

name	districts that workers live in
UYGUN	Kayas, Mamak
TEKİN	Mamak, Dikmen, Abidinpasa
BUTİK SİSİ	Batıkent, Kayaş, Abidinpasa
URAL GİYİM	Kecioren, Mamak, Kayas
ALKIN GİYİM	Squatter areas
BİJAN GİYİM	Kecioren, Haskoy
ANKARA GİYİM SAN	Kayas, Etimesgut, Sincan
KUPSAN GİYİM	Kayas, Mamak, Sentepe, Ufuktepe
PASTEL	Siteler, Kayas, Mamak, Etlik
İMAJ GİYİM	Balgat
HÜR GİYİM	Etlik, Mamak
MEHMETCİK MODA EVİ	Kecioren, Etlik, Kayas, Sincan
KRALLI GIYIM	Mamak, Sincan

DEMETEVLER

LOCATION

name	Location	Foundation	Location change	1st location	2nd location
ÖZLEM GİYİM	DEMETEVLER	1988	No	Low cost price, close labor pool	
MERK GİYİM	DEMETEVLER	1988	No	Close labor pool	
GÖKKUŞAĞI GİYİM	DEMETEVLER	1985	Yes	KIZILAY	DEMETEVLER
LEYDİ TEKSTİL	DEMETEVLER	1986	No		

Name	Preference for relocation
ÖZLEM GİYİM	No change
MERK GİYİM	Kızılay
GÖKKUŞAĞI GİYİM	Organized industrial districts or Eskisehir, Samsun or Istanbul Road
LEYDİ TEKSTİL	No change

PRODUCT TYPES

Name	Products	First product or row material	where do you get them from
ÖZLEM GİYİM	underwear, pyjamas, track suit	Fabric, thread	Istanbul, Bursa, Denizli, Maraş
MERK GİYİM	Track suit, short, school dressing	Fabric, thread, button	Istanbul, Bursa, Adana, Izmir, Ulus, Kızılay
GÖKKUŞAĞI GİYİM	worker dressing	Fabric, thread, button	Istanbul, Ulus
LEYDİ TEKSTİL	Track suit	fabric, thread, button	Istanbul

MARKET CHARACTERISTICS

name	Market
ÖZLEM GİYİM	Black sea Region and Ankara
MERK GİYİM	National markets (sports clubs)
GÖKKUŞAĞI GİYİM	National markets and government institution
LEYDİ TEKSTİL	National markets

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of parent firm
ÖZLEM GİYİM	Yes	Yenimahalle
MERK GİYİM	Yes	Demetevler
GÖKKUSAĞI GİYİM	Yes	Kızılay, Ulus
LEYDİ TEKSTİL	No	

Subcontract offering

Name	Subcontracting	Location of Subcontractors' firm	Homebased labor
ÖZLEM GİYİM	Yes	Demetevler	No
MERK GİYİM	Yes	Demetevler	No
GÖKKUSAGI GİYİM	Yes	Kızılay, Ulus, Demetevler, Yenimahalle, Sivas, Adana	No
LEYDİ TEKSTİL	Yes	Demetevler	Yes (hand working, 7-8 homes, Demetevler)

CHARACTERISTICS OF LABOR DEMAND

Name	Districts that workers live in
ÖZLEM GİYİM	Demetevler
MERK GİYİM	Demetevler
GÖKKUŞAĞI GİYİM	Demetevler
LEYDİ TEKSTİL	Demetevler

BALGAT

LOCATION

Name	Location	Foundation	Location change	1st location	2nd location
DÖRTEL	BALGAT	1967	Yes	KIZILAY(1967)	BALGAT (1971) close to cheaper labor
TANGO	BALGAT	1985	Yes	FEVZİ ÇAKMAK	BALGAT (locate their own land, and wider area needed)

Name	Preference for relocation
DÖRTEL	No change
TANGO	No change

PRODUCT TYPES

Name	Products	First product or row material	Where do you get them from
DÖRTEL	All types of clothes	Cotton, thread, accessories (they produce thread from cotton)	Istanbul
TANGO	Women outer clothes and children dressing	Fabric	Istanbul, Bursa, Adana, Izmir, Ulus, Kızılay

MARKET CHARACTERISTICS

Name	Market
DÖRTEL	%90 foreign markets, %10 national markets
TANGO	foreign and national markets

INTER-FIRM RELATIONS

Subcontract receiving firms

Name	Subcontracting	Location of Parent firm
DÖRTEL	No	
TANGO	Yes	İskitler (Aytemizler)

Subcontract offering

Name	Subcontracting	Location of Subcontractors' firm	Homebased labor
DÖRTEL	yes	Yenimahalle, Kecioren, Demetevler(there are 14 subcontractor firms)	Yes (hand working, 5-10 homes)
TANGO	yes	Kecioren, Sıhhiye	No

CHARACTERISTICS OF LABOR DEMAND

Name	districts that workers live in
DÖRTEL	%40 workers live close vicinity, for others they have service bus)
TANGO	Balgat, Etlik, Kecioren (they have service bus)

SİTELER

LOCATION

Name	Location	Foundation	Location change	1st location	2nd location
BULVAR GİYİM	SİTELER	1960	Yes	KIZILAY	SİTELER(their own building)

Name	Preference for relocation
BULVAR GİYİM	No change

PRODUCT TYPES

Name	Products	First product or row material	Where do you get them from
BULVAR GİYİM	man dressing (suit)	fabric, lining, button	İstanbul

MARKET CHARACTERISTICS

Name	Market
BULVAR GİYİM	National (İstanbul, İzmir, Ankara, Bursa)

INTER-FIRM RELATIONS

Subcontract receiving firms

Name	Subcontracting	location of parent firm
BULVAR GİYİM	No	

Subcontract offering

Name	subcontracting	Location of Subcontractors' firm	homebased labor
BULVAR GİYİM	yes	Istanbul	no

CHARACTERISTICS OF LABOR DEMAND

	Districts that workers live in
BULVAR GİYİM	Önder, Ulubey, close vicinity

İSKİTLER

LOCATION

Name	location	Foundation	Location change	1st location	2nd location	3rd location
AYTEMIZLER	ISKITLER	1981	No	SITELER (knitting)	ISKITLER (clothing)	SINCAN(dyeing factory)

Name	preference for relocation
AYTEMIZLER	all units of the firms will locate in Sincan in the future.

PRODUCT TYPES

Name	Products	first product or row material	where do you get them from
AYTEMIZLER	knitted products, sweatshirts, T-shirts	Thread	Istanbul

MARKET CHARACTERISTICS

Name	Market
AYTEMIZLER	Foreign markets(15 million in one year)

INTER-FIRM RELATIONS

Subcontract receiving firms

Name	Subcontracting	Location of parent firm
AYTEMIZLER	No	

Subcontract offering

Name	Subcontracting	Location of Subcontractors' firm	homebased labor
AYTEMIZLER	Yes	Maltepe, Kızılay	Yes (knitting of pullover to 1000 homes)

CHARACTERISTICS OF LABOR DEMAND

Name	Districts that workers live in
AYTEMIZLER	Squatter areas of different districts

YENİMAHALLE, KEÇİÖREN AND ETLİK

LOCATION

Name	Location	Foundation	Location change	1st location	2nd location
SATTEKS	YENİMAHALLE	1985	No	Low rent price	
SATTEKS	YENİMAHALLE	1986	No		
ÜLGER	KEÇİÖREN	1987	No		
SEMATEKS	KEÇİÖREN	1989	No	Their own department	
ÖZTEKSTİL	ETLİK	1989	No	Cheaper labor price	

Name	Preference for relocation
SATTEKS	Kızılay location
SATTEKS	Iskitler
ÜLGER	No change
SEMATEKS	Sincan or other industrial districts
ÖZTEKSTİL	Industrial area

PRODUCT TYPES

Name	Products	First product or row material	Where do you get them from
SATTEKS	Women outer clothes	Fabric	Istanbul, Bursa
SATTEKS	Sports wear, sweat shirt, T-shirt	fabric, thread	Istanbul, İzmit, Bursa, Denizli
ÜLGER	Skirts	fabric, accessories	Istanbul, Ankara
SEMATEKS	Children trousers and jeans	fabric, thread, button	Istanbul, İzmir (Germany)
ÖZTEKSTİL	Cotton clothes, track suit, night dress	cotton fabric, thread, lace	Istanbul

MARKET CHARACTERISTICS

name	Market
SATTEKS	National markets(Inner Anatolia Regions, Ankara)
SATTEKS	Foreign markets (France)
ÜLGER	National markets
SEMATEKS	Foreign market (Germany)
ÖZTEKSTİL	Eskisehir, Afyon, Kayseri, Konya, Samsun, Ulus, Kızılay

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of Parent firm
SATTEKS	No	
SATTEKS	No	
ÜLGER	No	
SEMATEKS	No	
ÖZTEKSTİL	Sometimes	Ulus, Kızılay

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	Homebased labor
SATTEKS	Sometimes	Kızılay, Sıhhiye	No
SATTEKS	Yes	Demetevler	Yes (knitting, 100 homebased labor, Sentepe, Basınsitesi, Akdere, Abidinpasa)
ÜLGER	Sometimes	Kızılay	No
SEMATEKS	Yes	Kızılay	No
ÖZTEKSTİL	Yes	Demetevler	Yes (button holing, 10 homes to Etlik)

CHARACTERISTICS OF LABOR DEMAND

name	Districts that workers live in
SATTEKS	İvedik,Yenimahalle
SATTEKS	Şentepe, Basınsitesi, Akdere, Abidinpaşa
ÜLGER	Mamak, Keklipınarı, Altındağ
SEMATEKS	Keçiören
ÖZTEKSTİL	Etlik, Keçiören

MALTEPE

LOCATION

name	Location	Showroom	Foundation	Location change	1st location	2nd location
G.E TEKSTİL	MALTEPE		1987	Yes	KIZILAY	MALTEPE
STOP GİYİM	MALTEPE		1986	Yes	KIZILAY	MALTEPE
DESEN TRİKO	MALTEPE	TUNALI	1987	No		

name	Preference for relocation
G.E TEKSTİL	Locate only the place where organized industrial districts
STOP GİYİM	Istanbul or Eskisehir Road
DESEN TRİKO	Along the street

PRODUCT TYPES

name	Products	First product or row material	Where do you get them from
G.E TEKSTİL	Child dressing	Velvet, thread	Istanbul
STOP GİYİM	Women outer clothes	Fabric, thread, lining	Istanbul, Bursa, Adana, Kızılay, Ulus
DESEN TRİKO	Women outer clothes	Fabric, thread, button	Istanbul, Ankara

MARKET CHARACTERISTICS

name	Market
G.E TEKSTİL	Foreign market (Germany)
STOP GİYİM	National markets
DESEN TRİKO	Iskenderun, Mersin, Ankara

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of parent firm
G.E TEKSTİL	Yes	Iskitler (Aytemizler)
STOP GİYİM	No	
DESEN TRİKO	No	

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	homebased labor
G.E TEKSTİL	No		No
STOP GİYİM	Yes	Kızılay	No
DESEN TRİKO	No		No

CHARACTERISTICS OF LABOR DEMAND

name	Districts that workers live in
G.E TEKSTİL	Şentepe, Etlik, Siteler
STOP GİYİM	Keçioren, Dikmen, Cebeci
DESEN TRİKO	İncirli, Seyranbağları

KÜÇÜKESAT, KAVAKLIDERE, KOCATEPE

LOCATION

name	Location	Foundation	Location change	1st location	2nd location
SAMBO TEKSTİL	KÜÇÜKESAT	1988	No		
ÖZGE GİYİM	KÜÇÜKESAT	1977	No		
MUTLULAR TEKSTİL	KAVAKLIDERE	1990	No		
GENTEKS	KOCATEPE	1982	Yes	KIZILAY	KOCATEPE(wider area)

name	Preference for relocation
SAMBO TEKSTİL	Industrial districts
ÖZGE GİYİM	Industrial districts (Ostim)
MUTLULAR TEKSTİL	no change
GENTEKS	Sincan or other industrial districts

PRODUCT TYPES

name	Products	First product or row material	Where do you get them from
SAMBO TEKSTİL	Knitted pullover	Thread	İstanbul
ÖZGE GİYİM	Sweat shirt, T-shirt, track suit, night dress	cotton fabric	İstanbul
MUTLULAR TEKSTİL	Man socks, scarf, hat	thread	İstanbul (Italy, Germany)
GENTEKS	Jeans, worker dressing)	fabric, thread, lining	İstanbul, Ulus

MARKET CHARACTERISTICS

name	Market
SAMBO TEKSTİL	Kayseri, Adana, Antep, Zonguldak
ÖZGE GİYİM	Antalya, Mersin, Adana
MUTLULAR TEKSTİL	Foreign (Holland, Germany, Norway) and national (Istanbul) markets
GENTEKS	Foreign market (Holland)

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of parent firm
SAMBO TEKSTİL	No	
ÖZGE GİYİM	No	
MUTLULAR TEKSTİL	Yes	Istanbul
GENTEKS	Yes	Kızılay

Subcontract offering

name	Subcontracting	Location of Subcontractors' firm	Homebased labor
SAMBO TEKSTİL	Yes	Etlik	No
ÖZGE GİYİM	Yes	Sıhhiye	No
MUTLULAR TEKSTİL	No		Yes (hat and scarf hand working)
GENTEKS	Yes	Demetevler, Ulus	Yes (taking off stitches)

CHARACTERISTICS OF LABOR DEMAND

name	districts that workers live in
SAMBO TEKSTİL	Abidinpasa, Cebeci, Ulus
ÖZGE GİYİM	Kecioren
MUTLULAR TEKSTİL	Squatter areas
GENTEKS	Etlik, Kayas

APPENDIX III

THE FIELD SURVEY OF CLOTHING FIRMS IN ANKARA IN 1998

KIZILAY

LOCATION

Name	location	showroom	Foundation	location change	1st location	2nd location
MÜJDE ETEK	KIZILAY		1986	yes	KIZILAY (1986)	KIZILAY(1991)
GODİNA	KIZILAY		1990	no		
AHSEN GİYİM	KIZILAY		1985	yes	DEMETEVLER (1985) 25wrks	KIZILAY (1992) 50wrks
JACKET	KIZILAY		1989	no		
CEMRE GİYİM	KIZILAY		1993	no		
PELİN	KIZILAY		1983	no		
BİRBEN GİYİM	KIZILAY		1994	no		
BRANŞ MODA	KIZILAY		1988	yes	İZMİR CAD (renting)	İZMİR CAD (owner)

SCALE OF THE FIRMS

Name	no of workers	Open/closed area (m2)
MÜJDE ETEK	16	300
GODİNA	34	100
AHSEN GİYİM	50	1600
JACKET	50	650
CEMRE GİYİM	50	600
PELİN	24	300
BİRBEN GİYİM	15	110
BRANŞ MODA	15	150

PRODUCT TYPES

Name	products	production change
MÜJDE ETEK	women outer clothes	no change
GODİNA	shirts	no change
AHSEN GİYİM	skirts	no change
JACKET	man suit	no change
CEMRE GİYİM	women outer clothes	no change

PELİN TEKSTİL	women outer clothes (suit)	no change
BİRBEN GİYİM	shirts	no change
BRANŞ MODA	sports dressing	Shirts

MARKET CHARACTERISTICS

name	market
MÜJDE ETEK	national
BUTİK GODİNA	national
AHSEN GİYİM	national
JACKET TEKSTİL	national
CEMRE GİYİM	national
PELİN TEKSTİL	national
BİRBEN GİYİM	national
BRANŞ MODA	national

INTER-FIRM RELATIONS

subcontract receiving firms

name	subcontracting	location of parent firm	production Stage
MÜJDE ETEK	yes	Kızılay	from cutting to finishing
BUTİK GODİNA	no		
AHSEN GİYİM	no		
JACKET TEKSTİL	no		
CEMRE GİYİM	no		
PELİN TEKSTİL	no		
BİRBEN GİYİM	no		
BRANŞ MODA	no		

subcontract offering

name	subcontracting	location of sub firm	production Stage
MÜJDE ETEK	no		
BUTİK GODİNA	no		
AHSEN GİYİM	no		
JACKET TEKSTİL	yes	İstanbu (due to good quality)	sewing(excess demand)
CEMRE GİYİM	no		
PELİN TEKSTİL	yes	Kızılay	sewing
BİRBEN GİYİM	yes	Kızılay	sewing
BRANŞ MODA	no		

name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
MÜJDE ETEK	yes	yes	no, in the past knitting stage	furniture industry
BUTİK GODİNA	no	no	no	no
AHSEN GİYİM	no	no	no	no
JACKET TEKSTİL	no	yes	no	no
CEMRE GİYİM	no	no	no	no
PELİN TEKSTİL	no	yes	no	construction
BİRBEN GİYİM	no	no	yes	no
BRANŞ MODA	no	no	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts that workers live in
MÜJDE ETEK	%50 female	yes, 1 wrks	primary	Keçiören, Dikmen
BUTİK GODİNA	%40 female	no	primary-secondary	Keçiören, Demetevler, Yenimahalle
AHSEN GİYİM	%64 female	yes, 1 wrks	secondary	Demetevler, Keçiören
JACKET TEKSTİL	%30 female	no	primary	Keçiören, Sincan
CEMRE GİYİM	%30 female	no	primary-secondary	squatter districts of Ankara
PELİN TEKSTİL	%35 female	no	primary	squatter districts of Ankara
BİRBEN GİYİM	%25 female	yes, 3 wrks	primary	Mamak, Sincan
BRANŞ MODA	%55 female	yes,1 wrks	primary	

ULUS

LOCATION

Name	location	showroom	foundation	location change	1st location	2nd location	3rd location
ERTAN	ULUS		1958	no			
ŞERZAT	ULUS		1994	yes	ULUS (1994)	ULUS(1997)	
BARON	ULUS	OSTİM	1996	no			
KISMET	ULUS		1992	no			
FİRST ÖRME	ULUS	SIHHİYE	1990	no			

SCALE OF THE FIRMS

Name	no of workers	open/closed area (m2)
ERTAN	15	400
ŞERZAT	17	160
BARON	2	70
KISMET	10	150
FIRST ÖRME	60	600

PRODUCT TYPES

Name	products	production change
ERTAN	coat, light overcoat	no change
ŞERZAT	man trousers	no change
BARON	labor uniform	no change
KISMET	labor unform, school dressing	no change
FIRST ÖRME	women knitting	no change

MARKET CHARACTERISTICS

Name	market
ERTAN	national
ŞERZAT	national
BARON	national
KISMET	national
FIRST ÖRME	national

INTER-FIRM RELATIONS

subcontract receiving firms

Name	subcontracting	location of parent firm	production stage
ERTAN	no		
ŞERZAT	yes	Kızılay, Ulus, İstanbul(past)	from cuting to finishing
BARON	no		
KISMET	no		
FIRST ÖRME	no		

subcontract offering

Name	subcontracting	location of sub firm	production stage
ERTAN	yes	Siteler, Kızılay	sewing
ŞERZAT	yes	Ulus	sewing, quality control, finishing (under suit)
BARON	yes	Demetevler, Ostim	from cutting to finishing
KISMET	yes	Demetevler	sewing
FIRST ÖRME	no		

Name	Subcontract offering in the past	Subcontract receiving in the past	homebased labor	any other activity besides clothing
ERTAN	no	no	no	No
ŞERZAT	Yes	no	no	Food sector
BARON	No	yes	no	No
KISMET	No	yes	no	No
FIRST ÖRME	No	yes(İstanbul-knitting)	no	No

CHARACTERISTICS OF LABOR DEMAND

	Male/female ratio	family workers	education level(ave.)	districts that workers live in
ERTAN	%60 male	no	primary	close vicinity
ŞERZAT	%60 male	no	primary	Mamak, Keçiören, Abidinpaşa, Ulus, Siteler
BARON	%60 male	no	primary	close vicinity
KISMET	%70 male	no	primary	Sincan, Keçiören, Seyranbağları
FIRST ÖRME	%70 female	no	primary	close vicinity

SIHHİYE

LOCATION

name	location	showroom	Foundation	location change	1st location	2nd location	3rd location
GOLDEN GİYİM	SIHHİYE		1985	yes	A. BULVARI (1985)14 wrks	SAKARYA (1990)-18wrks	HANIMELİ SOK (1996)
PERON GİYİM	SIHHİYE		1998	no			
ENES GİYİM	SIHHİYE		1990	yes	İZMİR CAD (1990)	HANIMELİ (1991)	
POLEN TEKSTİL	SIHHİYE		1994	yes	GMK BULVARI (1994) 33wrks	HANIMELİ SOK (1998)	

SCALE OF THE FIRMS

name	no of workers	open/closed area (m2)
GOLDEN GİYİM	24	300
PERON GİYİM	2	100
ENES GİYİM	20	150
POLEN TEKSTİL	3	70

PRODUCT TYPES

Name	Products	production change
GOLDEN GİYİM	women outer clothes (suit)	shirts
PERON GİYİM	Knitting	no change
ENES GİYİM	man trousers	no change
POLEN TEKSTİL	Knitting, cotton clothes	clothing

MARKET CHARACTERISTICS

Name	Market
GOLDEN GİYİM	National
PERON GİYİM	National
ENES GİYİM	National
POLEN TEKSTİL	National

INTER-FIRM RELATIONS

subcontract receiving firms

Name	subcontracting	location of parent firm	production stage
GOLDEN GİYİM	No		
PERON GİYİM	No		
ENES GİYİM	Yes	Kızılay	from cutting to finishing
POLEN TEKSTİL	No		

Subcontract offering

Name	Subcontracting	Location of sub firm	production stage
GOLDEN GİYİM	Yes	Demetevler(12.street), Siteler(Demirhendek)	sewing,quality control,finishing (under suit)
PERON GİYİM	yes	Ostim, Demet	from cutting to finishing
ENES GİYİM	No		
POLEN TEKSTİL	Yes	Siteler(knitting),Demet(cotton clothes)	knitting,cotton sewing

name	Sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
GOLDEN GİYİM	No	yes	no	retailing
PERON GİYİM	No	yes	no	retailing
ENES GİYİM	Yes	jacket (from cutting to finishing)	no	no
POLEN TEKSTİL	Yes	yes	no	no

CHARACTERISTICS OF LABOR DEMAND

name	Male/female ratio	family workers	education level(ave.)	districts thart workers live in
GOLDEN GİYİM	%70 female	no	primary	Mamak, Yenimahalle, Demetevler
PERON GİYİM	%60 female	no	primary	Demetevler, Keçiören
ENES GİYİM	%35 female	no	primary	Siteler, Keçiören, Dikmen
POLEN TEKSTİL	%60 female	no	primary	squatter areas

name	Future plan
GOLDEN GİYİM	Relocation to Balgat or Gersan Industrial Districts in ist.Yoluthing of opening factory to Balgat or Akyurt
PERON GİYİM	no change
ENES GİYİM	Relocation to Kırıkkale or Çankırı
POLEN TEKSTİL	Relocation to Gersan Industrial District

DEMETEVLER

LOCATION

name	location	showroom	foundation	location change	1st location	2nd location	3rd location
ÖZYURT GİYİM	DEMETEVLER		1983	no			
KINGMEN PANTOLON	DEMETEVLER		1986	no			
BEYZA TESETTÜR	DEMETEVLER		1997	no			
YAMA TEKSTİL	DEMETEVLER		1994	no			

SCALE OF THE FIRMS

name	no of workers	open/closed area (m2)
ÖZYURT GİYİM	3	180
KINGMEN PANTOLON	8	50
BEYZA TESETTÜR	13	400
YAMA TEKSTİL	12	100

PRODUCT TYPES

name	products	production change
ÖZYURT GİYİM	woman,man, child clothes, school dressing	skirts
KINGMEN PANTOLON	man clothes (suit)	no change
BEYZA TESETTÜR	women light overcoat	no change
YAMA TEKSTİL	women outer clothes (cotton clothes), pyjamas	chils dressing,man jacet

MARKET CHARACTERISTICS

name	Market
ÖZYURT GİYİM	National
KINGMEN PANTOLON	National
BEYZA TESETTÜR	National
YAMA TEKSTİL	National

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	location of parent firm	production stage
ÖZYURT GİYİM	No		
KINGMEN PANTOLON	Yes	Ulus	sewing (sometimes cutting-trousers)
BEYZA TESETTÜR	No		
YAMA TEKSTİL	Yes	Siteler	sewing

Subcontract offering

Name	Subcontracting	location of Subcontractors' firm	production stage
ÖZYURT GİYİM	Yes	Kızılay	embroidery (collar,coat of arms)
KINGMEN PANTOLON	No		
BEYZA TESETTÜR	No		
YAMA TEKSTİL	No		

name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
ÖZYURT GİYİM	no	yes, cutting and sewing (Ulus)	no	no
KINGMEN PANTOLON	yes (trousers to Ulus)	yes, sewing	no	no
BEYZA TESETTÜR	no	No	no	no
YAMA TEKSTİL	no	No	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts thart workers live in
ÖZYURT GİYİM	%100 female	yes,wife	primary	Demetevler
KINGMEN PANTOLON	%30 female	no	primary	Demetevler
BEYZA TESETTÜR	%85 female	no	primary	Demetevler
YAMA TEKSTİL	%70 female	yes	primary	Demetevler

name	future plan
ÖZYURT GİYİM	nothing
KINGMEN PANTOLON	relocate to industrial districts like Ostim, İskitler
BEYZA TESETTÜR	relocate to industrial districts like Ostim, İskitler
YAMA TEKSTİL	nothing

BALGAT

LOCATION

name	location	showroom	foundation	location change	1st location	2nd location	3rd location
EKOL	BALGAT		1974	yes	KIZILAY(1974) - 34wrks	BALGAT(1997)	
KARTON GİYİM (TANGO)	BALGAT		1985	yes	KIZILAY(1985) -50wrks	BALGAT(1990)	
İDİL KONFEKSİYON	BALGAT		1970	yes	KIZILAY(1970) 40wrks	BALGAT (1991)	

PRODUCT TYPES

Name	Products	production change
EKOL	Women outer clothes	shirts
KARTON GİYİM (TANGO)	Knitting, cotton clothes	clothing
İDİL	Women outer clothes	no change

MARKET CHARACTERISTICS

Name	Market
EKOL	National
KARTON GİYİM (TANGO)	%80 national, %20 foreign market
İDİL	National

INTER-FIRM RELATIONS

Subcontract receiving firms

Name	Subcontracting	location of parent firm	production stage
EKOL	No		
KARTON GİYİM (TANGO)	No		
İDİL	No		

Subcontract offering

Name	Subcontracting	location of subcontractors' firm	production stage
EKOL	yes	Siteler	sewing
KARTON GİYİM (TANGO)	yes	Balgat,Demetevler	knitting, sewing (cotton clothes)
İDİL	No		

Name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
EKOL	no	no	no	construction
KARTON GİYİM (TANGO)	yes	no	yes,taking off stitches	restaurant administrating
İDİL	no	no	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts thart workers live in
EKOL	% 70 female	no	primary	close vicinity
KARTON GİYİM (TANGO)	% 70 female	no	primary(experience of labor is important)	Balgat
İDİL KONFEKSİYON	%40 female	yes, 3 wrks	primary	Sincan, Batıkent, Keçiören, Kayaş (service bus)

name	future plan
EKOL	Nothing
KARTON GİYİM (TANGO)	open new factory in Balgat
İDİL	relocate to Gölbaşı

SİTELER

LOCATION

name	location	showroom	foundation	location change	1st location	2nd location	3rd location
ONYX	SİTELER		1996	no			
ŞİMŞEK GİYİM	SİTELER		1997	yes	SIHHİYE ?	BALGAT (1997)	
ALEMDAR TEKSTİL	SİTELER		1998	yes	KIZILAY(Selanik) (1973)	SİTELER (1998)	
ARI GİYİM	SİTELER		1992	yes	D.EVLER (1968)	ULUS	SİTELER(1992)
ARTI GİYİM	SİTELER		1994	yes	KIZILAY(1994) 25wrks	SİTELER (1997)	
SETRE GİYİM	SİTELER		1991	yes	ULUS (1991) 3wrks	D.EVLER (1993) 15wrks	SİTELER (1996)
BALIKÇIOĞLU TEKSTİL	SİTELER		1995	yes	KIZILAY (1994)-4wrks	SİTELER (1995)-70wrks	
KANDEMİR TEKSTİL	SİTELER		1996	no			
BURAK GİYİM	SİTELER		1996	no			
KATRE	SİTELER		1994	yes	KIZILAY (1994)-60wrks	SİTELER (1996)-100wrks	
CEMRE GİYİM	SİTELER		1993	yes	KIZILAY (1993) 30wrks	SİTELER (1996)-100wrks	
BEZEK GİYİM	SİTELER		1994	yes	KIZILAY (1993) 31wrks	SİTELER (1996)-101wrks	
BULVAR TEKSTİL	SİTELER		1963	yes	KIZILAY (1963)-130wrks	SİTELER (1994)-80wrks	

SCALE OF THE FIRMS

name	no of workers	Open/closed area (m2)
ONYX	105	1000
ŞİMŞEK GİYİM	20	500
ALEMDAR TEKSTİL	20	3200
ARI GİYİM	112	6000
ARTI GİYİM	50	2500
SETRE GİYİM	30	500
BALIKÇIOĞLU TEKSTİL	45	500
KANDEMİR TEKSTİL	20	400
BURAK GİYİM	36	900
KATRE	100	1000
CEMRE GİYİM	100	1000
BEZEK GİYİM	100	1000
BULVAR TEKSTİL	80	500m2 (in the past 2500m2)

PRODUCT TYPES

name	Products	production change
ONYX	sports wear, jeans,shirts,hoaded overcoat	no change
ŞİMŞEK GİYİM	women outer clothes (suit)	no change
ALEMDAR TEKSTİL	women outer clothes, child dressing (newly started)	women outer clothes
ARI GİYİM	women outer clothes	no change
ARTI GİYİM	women suits, cotton clothes, knitted dressings	women outer clothes
SETRE GİYİM	women light overcoat	no change
BALIKÇIOĞLU TEKSTİL	women outer clothes	skirts, shirts
KANDEMİR TEKSTİL	jeans	no change
BURAK GİYİM	women outer clothes	no change
KATRE	women outer clothes	no change
CEMRE GİYİM	Women outer clothes	no change
BEZEK GİYİM	Women outer clothes	no change
BULVAR TEKSTİL	Man clothes	no change

MARKET CHARACTERISTICS

name	Market
ONYX	National
ŞİMŞEK GİYİM	National
ALEMDAR TEKSTİL	National
ARI GİYİM	% 90 national, %10 foreign market
ARTI GİYİM	National
SETRE GİYİM	%94 national, %6 foreign market (Germany)
BALIKÇIOĞLU TEKSTİL	National
KANDEMİR TEKSTİL	national (mainly inner market of Ankara)
BURAK GİYİM	national (for subcontractors)
KATRE	National
CEMRE GİYİM	National
BEZEK GİYİM	National
BULVAR TEKSTİL	national (mainly inner market of Ankara) in the past foreign market

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	Location of parent firm	production stage
ONYX	No		
ŞİMŞEK GİYİM	No		
ALEMDAR TEKSTİL	No		
ARI GİYİM	No		
ARTI GİYİM	No		
SETRE GİYİM	No		
BALIKÇIOĞLU TEKSTİL	No		

KANDEMİR TEKSTİL	No		
BURAK GİYİM	Yes	Kızılay,Ostim	sewing, quality control, finishing sometimes cutting
KATRE	No		
CEMRE GİYİM	no		
BEZEK GİYİM	no		
BULVAR TEKSTİL	no		

subcontract offering

name	subcontracting	Location of Subcontractors' firm	production stage
ONYX	yes	İstanbul	knitting, sewing (cotton clothes)
ŞİMŞEK GİYİM	no		
ALEMDAR TEKSTİL	no		
ARI GİYİM	no		
ARTI GİYİM	yes	Yenimahalle	sewing,quality control,finishing (under suit)
SETRE GİYİM	yes (if there is excess order or infufficient machinery)	Kızılay, Demetevler	sewing, quality control, finishing
BALIKÇIOĞLU TEKSTİL	sometimes	Siteler,Kızılay	sewing, quality control, finishing
KANDEMİR TEKSTİL	no		
BURAK GİYİM	no		
KATRE	no		
CEMRE GİYİM	no		
BEZEK GİYİM	no		
BULVAR TEKSTİL	yes	İstanbul (in man clothes there is no qualified workers in Ankara)	sewing, quality control, finishing

name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
ONYX	No	no	no	no
ŞİMŞEK GİYİM	No		no	no
ALEMDAR TEKSTİL	yes (from cutting to finishing)	no	no	no
ARI GİYİM	yes, sewing stages of shirts and overcoat in 1992 and 1993	no	no	no
ARTI GİYİM	No	yes	no	no
SETRE GİYİM	No	yes	no, in the past, handwork, pad and button work	no
BALIKÇIOĞLU TEKSTİL	No	yes	no	furniture
KANDEMİR TEKSTİL	no (no trusted in quality)	no	yes, taking off stitches	commerce
BURAK GİYİM	Yes	no	no	no
KATRE	No	no	no	no
CEMRE GİYİM	No	no	no	no
BEZEK GİYİM	No	no	no	no
BULVAR TEKSTİL	Yes (international firs)	yes	no	no

CHARACTERISTICS OF LABOR DEMAND

	Male/female ratio	Family workers	education level(ave.)	districts that workers live in
ONYX	% 30 female	No	primary	same districts
ŞİMŞEK GİYİM	%60 female	No	primary	close vicinity, Siteler, Hasköy, Mamak
ALEMDAR TEKSTİL	%40 female	No	primary, a few secondary	close vicinity, Siteler, Hasköy, Mamak
ARI GİYİM	%70 female	No	primary	close vicinity, Siteler, Hasköy, Mamak
ARTI GİYİM	%50 female	Yes, 4 wrks	secondary	Etlik, Keçiören, Kayaş, Cebeci(service bus)
SETRE GİYİM	%23 female	Yes, 6 wrks	primary	Demetevler, Keçiören, Dikmen, (service bus))
BALIKÇIOĞLU TEKSTİL	%34 female	No	primary	Siteler, Hasköy, Demetevler (service bus)
KANDEMİR TEKSTİL	%60 female	Yes	primary	close vicinity
BURAK GİYİM	%70 female	Yes	primary	Önder, Hasköy, Polatlı
KATRE	%35 female	No	primary	there is service bus to some districts
CEMRE GİYİM	%40 female	No	primary	there is service bus to some districts
BEZEK GİYİM	% 41 female	No	primary	there is service bus to some districts
BULVAR TEKSTİL	% 20 female	No	primary(experience is important)	close vicinity

name	future plan
ONYX	Nothing
ŞİMŞEK GİYİM	Nothing
ALEMDAR TEKSTİL	Nothing
ARI GİYİM	moving to the location to Akyurt
ARTI GİYİM	moving to the location to Balgat
SETRE GİYİM	having land in Akyurt districts, in the future, they open factory there
BALIKÇIOĞLU TEKSTİL	Nothing
KANDEMİR TEKSTİL	relocating to İstanbul Road
BURAK GİYİM	Nothing
KATRE	having land in Balgat, so they move to this place
CEMRE GİYİM	prefer to locate in Esenboğa, Eskişehir Road, Çankırı Road, Akyurt, Pursaklar, or Çayyolu
BEZEK GİYİM	prefer to locate in Esenboğa, Eskişehir Road, Çankırı Road, Akyurt, Pursaklar, or Çayyolu
BULVAR TEKSTİL	Nothing

ERYAMAN

LOCATION

name	location	showroom	foundation	location change	1st location	2nd location	3rd location
HOSTA	ERYAMAN		1980	no			

SCALE OF THE FIRMS

name	no of workers	open/closed area (m2)
HOSTA	169	6500

PRODUCT TYPES

name	products	production change
HOSTA	labor and military uniform, sleeping bag, waist coat, slopet, trousers, mont	military dressing

MARKET CHARACTERISTICS

name	market
HOSTA	% 100 foreign market, subcontractors' products %90 for national market

INTER-FIRM RELATIONS

subcontract receiving firms

name	subcontracting	location of parent firm	production stage
HOSTA	no		

subcontract offering

name	subcontracting	location of Subcontractors' firm	production stage
HOSTA	yes	Tokat, Sivas, Samsun, Adana, İstanbul, Eskişehir, Kastamonu, Karabük, Manisa, Ankara (Siteler, Demetevler)	sewing (in military dressing)

name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
HOSTA	no	yes	no, in the past taking off stitches (D.evler)	food industry, hypermarket

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts thart workers live in
HOSTA	%90 female	no	secondary-high level, special lecture in special private room	close vicinity

name	future plan
HOSTA	opening a new factory in Gerede

İSKİTLER

LOCATION

Name	location	showroom	foundation	Location change	1st location	2nd location	3rd location
ERCİYES TEKSTİL	İSKİTLER		1998	no			
PANEL TEKSTİL	İSKİTLER		1969	yes	ULUS (1969) 6wrks	İSKİTLER (1991) 60wrks	
FLAŞ TRİKO	İSKİTLER		1988	yes	ULUS (1988) 15wrks	İSKİTLER (1990) 50wrks	
VİZYON	İSKİTLER	KIZILAY	1984	no			
TEMSA KONFEKSİYON	İSKİTLER		1989	no			
DENKO GİYİM	İSKİTLER		1989	no			
ERAY TEKSTİL	İSKİTLER	SIHHİYE	1989	no			
DİLMEN ÖRME SANAYİ	İSKİTLER	SIHHİYE	1993	no			
AYTEMİZLER	İSKİTLER		1970	yes	SİTELER	İSKİTLER	SİNCAN

SCALE OF THE FIRMS

name	no of workers	open/closed area (m2)
ERCİYES TEKSTİL	40	750
PANEL TEKSTİL	60	1250
FLAŞ TRİKO	50	800
VİZYON	60	1400
TEMSA KONFEKSİYON	45	1400
DENKO GİYİM	45	1400
ERAY TEKSTİL	30	250
DİLMEN ÖRME SANAYİ	50	1500
AYTEMİZLER	322	7000(total area)

PRODUCT TYPES

name	products	production change
ERCİYES TEKSTİL	women knitting clothes	No change
PANEL TEKSTİL	women knitting clothes	No change
FLAŞ TRİKO	women knitting clothes	No change
VİZYON	shirts	No change
TEMSA KONFEKSİYON	labor uniform (Camel, Efes Pilsen brand name)	No change
DENKO GİYİM	labor uniform	No change
ERAY TEKSTİL	jeans	Cotton clothes
DİLMEN ÖRME SANAYİ	women knitting clothes	man and women knitting
AYTEMİZLER	knitting	No change

MARKET CHARACTERISTICS

name	market
ERCİYES TEKSTİL	national
PANEL TEKSTİL	national
FLAŞ TRİKO	national
VİZYON	%80 national and %20 foreign market(Arabian country)
TEMSA KONFEKSİYON	%80 national, %20 foreign market
DENKO GİYİM	%80 national, %20 foreign market
ERAY TEKSTİL	National
DİLMEN ÖRME SANAYİ	National
AYTEMİZLER	%90 foreign , %10 national market

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	location of parent firm	production stage
ERCİYES TEKSTİL	No		
PANEL TEKSTİL	No		
FLAŞ TRİKO	No		
VİZYON	No		
TEMSA KONFEKSİYON	Yes	international firms	from cutting to finishing
DENKO GİYİM	Yes	international firms	from cutting to finishing
ERAY TEKSTİL	No		
DİLMEN ÖRME SANAYİ	No		
AYTEMİZLER	No		

subcontract offering

name	Subcontracting	location of subcontractors' firm	production stage
ERCİYES TEKSTİL	Yes	Demetevler	knitting
PANEL TEKSTİL	Yes	Demetevler	knitting
FLAŞ TRİKO	Yes	Demetevler	sewing
VİZYON	No		
TEMSA KONFEKSİYON	Yes	Karabük, Sivas,Afyon	sewing (sometimes quality control and fnishing)
DENKO GİYİM	Yes	Karabük, Sivas,Afyon	sewing (sometimes quality control and fnishing)
ERAY TEKSTİL	Yes	Sincan,Siteler, Demetevler	sewing (cotton clothes)
DİLMEN ÖRME SANAYİ	Yes	İskitler, Sincan, Demet	embroidery or other repetetive works
AYTEMİZLER	Yes	Sincan,Siteler,Maltepe ,İstanbul	sewing (Ankara), knitting, dyeing, printing (İstanbul)

name	sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
ERCİYES TEKSTİL	yes (foundation period)	yes	yes, embroidery, printing,taking off stitches	no
PANEL TEKSTİL	yes (foundation period)	yes	yes, embroidery, printing,taking off stitches	no
FLAŞ TRİKO	Yes	yes	handwork (in the past)	no
VİZYON	No	no	no	no
TEMSA KONFEKSİYON	Yes	yes	no	no
DENKO GİYİM	Yes	yes	no	no
ERAY TEKSTİL	Yes, sewing	yes	no	no
DİLMEN ÖRME SANAYİ	No	yes	yes, handwork	no
AYTEMİZLER	No	yes (all dyeing stages)	btw 1989-95 handworks and taking off stitches	mechanical industry

CHARACTERISTICS OF LABOR DEMAND

	Male/female ratio	family workers	education level(ave.)	districts thart workers live in
ERCİYES TEKSTİL	%75 female	yes, 1 wrks	primary	İskitler, Keçiören, Demetevler, Natoyolu
PANEL TEKSTİL	%75 female	yes, 2 wrks	primary	İskitler, Keçiören, Demetevler, Natoyolu
FLAŞ TRİKO	%70 female	No	primary-secondary	İskitler, Keçiören, Kayaş, Seyranbağları,
VİZYON	%50 female	yes, 2 wrks	primary-secondary	Keçiören, Sincan,Abidinpaşa, Kayaş
TEMSA KONFEKSİYON	%65 female	No	secondary	Keçiören, İskitler
DENKO GİYİM	%65 female	No	secondary	Keçiören, İskitler
ERAY TEKSTİL	%75 female	No	primary	close vicinity
DİLMEN ÖRME SANAYİ	%female	yes, 3 wrks	primary	İskitler
AYTEMİZLER	%35 female (İskitler), %60 female (Sincan)	No	prefer high-school	close vicinity (service bus)

name	future plan
ERCİYES TEKSTİL	having land in Akyurt (difficulty in labor supplying, transportation problem)
PANEL TEKSTİL	having land in Akyurt (difficulty in labor supplying, transportation problem)
FLAŞ TRİKO	Nothing
VİZYON	Nothing
TEMSA KONFEKSİYON	if find partners relocate to any place in Anatolia
DENKO GİYİM	if find partners relocate to any place in Anatolia
ERAY TEKSTİL	enlarge the market
DİLMEN ÖRME SANAYİ	Nothing
AYTEMİZLER	Nothing

İSTANBUL ROAD

LOCATION

name	location	Showroom	Foundation	location change	1st location	2nd location	3rd location
ESKORT GİYİM	İSTANBUL ROAD	SIHHİYE	1996	No			
FİYİTA COLLECTION	İSTANBUL ROAD	SIHHİYE	1995	Yes	GMK BULV (1995) 30wrks	İSTANBUL YOLU(1996) 60wrks	
MERİÇ TEKSTİL	İSTANBUL ROAD		1997	No			
ÖNER TEKSTİL	İSTANBUL ROAD		1990	Yes	ETLİK (1990) 4wrks	İSTANBUL YOLU (1999) 12wrks	
ÖZUMUT	İSTANBUL ROAD		1996	Yes	İSKİTLER (1996) 4wrks	İSTANBUL YOLU (1998) 20wrks	
ENAS TEKSTİL	İSTANBUL ROAD		1975	Yes	ULUS (1975) 20wrks	İSKİTLER (1997) 20wrks	İSTANBUL YOLU (1998) 25wrks
ÇALIŞKANLAR	İSTANBUL ROAD		1998	No			

SCALE OF THE FIRMS

Name	no of workers	open/closed area (m2)
ESKORT GİYİM	50	550
FİYİTA COLLECTION	60	1000
MERİÇ TEKSTİL	25	900
ÖNER TEKSTİL	12	750
ÖZUMUT	20	750
ENAS TEKSTİL	25	700
ÇALIŞKANLAR	20	600

PRODUCT TYPES

Name	products	Production change
ESKORT GİYİM	Women knitted pullover	No change
FİYİTA COLLECTION	Women outer clothes	No change
MERİÇ TEKSTİL	shirts, T-shirt	Shirts
ÖNER TEKSTİL	Women knitted products	T-shirts
ÖZUMUT	Women knitted products	no change
ENAS TEKSTİL	Women knitted products	no change
ÇALIŞKANLAR	Cotton clothes, blouse, sweet-shirts	no change

MARKET CHARACTERISTICS

Name	Market
ESKORT GİYİM	National
FİYİTA COLLECTION	National
MERİÇ TEKSTİL	National
ÖNER TEKSTİL	National
ÖZUMUT	National
ENAS TEKSTİL	National
ÇALIŞKANLAR	Foreign (subcontractor)

INTER-FIRM RELATIONS

Subcontract receiving firms

Name	Subcontracting	location of parent firm	Production Stage
ESKORT GİYİM	No		
FİYİTA COLLECTION	No		
MERİÇ TEKSTİL	No		
ÖNER TEKSTİL	No		
ÖZUMUT	No		
ENAS TEKSTİL	No		
ÇALIŞKANLAR	Yes	Sincan Aytemizler	Cutting and sewing

Subcontract offering

Name	Subcontracting	location of Sub. firm	Production Stage
ESKORT GİYİM	Yes	İskitler, Demetevler	knitting, cutting, sewing
FİYİTA COLLECTION	Yes	Demetevler,Sincan,İskitler	sewing, quality control, finishing (under suit)
MERİÇ TEKSTİL	No		
ÖNER TEKSTİL	No		
ÖZUMUT TEKSTİL	No		
ENAS TEKSTİL	No		
ÇALIŞKANLAR	No		

Name	Sub.offering in the past	sub.receiving in the past	homebased labor	any other activity besides clothing
ESKORT GİYİM	No	Yes	yes, taking off stitches	the real estate business
FİYİTA COLLECTION	No	Yes	no	transport
MERİÇ TEKSTİL	No	No	no	no
ÖNER TEKSTİL	yes, T-shirt and knitting (Aytemizler)	No	yes taking off stitches, buttonhole (to Batıkent) in the past knitting	no
ÖZUMUT	yes, child pullover (sewing- K.esat)	No	taking off stitches (Batıkent)	no
ENAS TEKSTİL	no	yes(knitting)	taking off stitches (Batıkent)	no
ÇALIŞKANLAR	yes	No	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level (ave.)	districts that workers live in
ESKORT GİYİM	%60 female	no	primary	Sincan, Keçiören
FİYİTA COLLECTION	%70 female	yes, 4 wrks	primary	Demetevler, Sincan, Abidinpaşa
MERİÇ TEKSTİL	%60 female	no	primary	Dikmen, K.ören, Sincan, Batıkent (service bus)
ÖNER TEKSTİL	%60 female	yes, 2 wrks	primary	Esertepe,Ayvalı (suatter areas)
ÖZUMUT	%65 female	yes, 8 wrks	primary	Ufuktepe, Keçiören, Ulus,
ENAS TEKSTİL	%72 female	yes, 1 wrks	primary	Abidinpaşa
ÇALIŞKANLAR	%80 female	no	primary	Keçiören, Etlik, İskitler, Sincan

Name	future plan
ESKORT GİYİM	prefer to relocate to Çankırı (low production cost, cheaper labor, energy, rent and taking encouragement)
FİYİTA COLLECTION	Open to foreign market
MERİÇ TEKSTİL	produce products in world market standarts and create their own fashion
ÖNER TEKSTİL	nothing
ÖZUMUT	increase the capacity
ENAS TEKSTİL	open to international market
ÇALIŞKANLAR	produce their own products

KEÇİÖREN

LOCATION

name	location	showroom	foundation	location change	1st location	2nd location	3rd location
KARİYER GİYİM	KEÇİÖREN	SIHHİYE	1980	yes	ULUS (1980) 35wrks	SÜMER SOK (1993) 25wrks	K.ÖREN (1999) 60wrks

SCALE OF THE FIRMS

Name	no of workers	open/closed area (m2)
KARİYER GİYİM	40	300

PRODUCT TYPES

Name	products	production change
KARİYER GİYİM	women cotton clothes	no change

MARKET CHARACTERISTICS

Name	market
KARİYER GİYİM	national

INTER-FIRM RELATIONS

subcontract receiving firms

name	subcontracting	location of parent firm	production stage
KARİYER GİYİM	yes	Kızılay	from sewing to finishing (cotton clothes)

subcontract offering

name	subcontracting	location of Subcontractors' firm	production stage
KARİYER GİYİM	no		

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Name	sub.offering in the past	sub.receiving in the past	homebased labor
KARİYER GİYİM	Yes	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts that workers live in
KARİYER GİYİM	%63 female	no	primary	Etlik, Keçiören

Name	Future plan		
KARİYER GİYİM	the firm is member of the İvedik Industrial Districts		

SİNCAN

LOCATION

Name	Location	showroom	Foundation	location change	1st location	2nd location	3rd location
AYTEMİZLER	SİNCAN			Yes	SİTELER	İSKİTLER	SİNCAN
OPAL GİYİM	SİNCAN		1988	Yes	DİKMEN (1988)-40wrks	SİNCAN (1995)	
KOTONTEKS	SİNCAN		1993	yes	SİTELER(1993)-50wrks	SİNCAN(1996)	

SCALE OF THE FIRMS

Name	No of workers	open/closed area (m2)
AYTEMİZLER	308 (Sincan), 20 (İskitler)	7000
OPAL GİYİM	230	6000
KOTONTEKS	140	4000

PRODUCT TYPES

name	Products	production change
AYTEMİZLER	knitting	no change
OPAL GİYİM	women outer clothes	women-man clothes
KOTONTEKS	child clothes,track suit,sweatshirt	no change

MARKET CHARACTERISTICS

name	Market
AYTEMİZLER	%90 foreign market, %10 national market
OPAL GİYİM	%95 foreign market, %5 national market
KOTONTEKS	%100 foreign market

INTER-FIRM RELATIONS

subcontract receiving firms

name	Subcontracting	location of parent firm	production stage
AYTEMİZLER	No		
OPAL GİYİM	Yes	foreign firms	from cuting to finishing
KOTONTEKS	No		

subcontract offering

name	Subcontracting	location of subcontractors' firm	production stage
AYTEMİZLER	Yes	Sincan,Siteler,Maltepe,İstanbul	sewing (Ankara),knitting, printing, dyeing (İstanbul)
OPAL GİYİM	No		
KOTONTEKS	Yes	Ulus,Demetevler,Sincan	Sewing

name	Subcontract offering in the past	Subcontract receiving in the past	homebased labor	any other activity besides clothing
AYTEMİZLER	no	yes (before 6 months all dyeing stage in İstanbul).	btw 1989-95 taking off stitches	mechanical industry
OPAL GİYİM	yes (sewing-foreign and national firms)	yes (Sincan and Siteler)	no (in the past)	tourism, export-import
KOTONTEKS	yes(from cutting to finishing)	yes	no	no

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level(ave.)	districts that workers live in
AYTEMİZLER	%55 female (Sincan), %35 female (İskitler)	no(administrative level)	preffer high school	close vicinity (Sincan, Keçiören, Y.mah)
OPAL GİYİM	%75 female	no	prefere high school	close vicinity
KOTONTEKS	%75 female	no	primary	close vicinity

KAYAŞ

LOCATION

Name	location	showroom	foundation	location change	1st location	2nd location	3rd location
YILMAZ ÖRME	KAYAŞ	SIHHİYE	1976	yes	ULUS (1976) 4wrks	ETLİK (1983) 25wrks	KAYAŞ (1994) 100wrks

SCALE OF THE FIRMS

name	no of workers	open/closed area (m2)
YILMAZ ÖRME	100	1500

PRODUCT TYPES

name	products	production change
YILMAZ ÖRME	women knitted clothes	no change

MARKET CHARACTERISTICS

name	market
YILMAZ ÖRME	%95 national, %5 foreign market

INTER-FIRM RELATIONS

Subcontract receiving firms

name	Subcontracting	location of parent firm	production stage
YILMAZ ÖRME	no		

subcontract offering

Name	subcontracting	location of subcontractors' firm	production stage
YILMAZ ÖRME	yes	Demetevler ve Çankırı (cheaper labor force)	sewing (cotton clothes)

CHARACTERISTICS OF LABOR DEMAND

	male/female ratio	family workers	education level (ave.)	districts that workers live in
YILMAZ ÖRME	%70 female	yes, 5 wrks	primary	Kayaş

Name	future plan
YILMAZ ÖRME	nothing

AKYURT

LOCATION

Name	location	showroom	Foundation	location change	1st location	2nd location	3rd location
GULECLER	AKYURT		1996	yes	SİTELER (25 wrks)	AKYURT	
ONCU GRUP	AKYURT		1997	yes	SİTELER	AKYURT	

Name	preference for relocation
GULECLER	no, because they have been located their own land
ONCU GRUP	planing enter the international market, sending representative to different countries

SCALE OF THE FIRMS

Name	no of workers	open/closed area (m2)
GULECLER	85	11000
ONCU GRUP	116	5000

PRODUCT TYPES

Name	products	production change	first product or row material	where do you get them from
GULECLER	women, man, children socks	no change	thread, nylon, rubber, lycra,	Istanbul, Kayseri, Bursa, Denizli, Usak, Antep
ONCU GRUP	fabric and military uniform dyeing stage subcontracted out to subcontractors	no change	thread	Antep

MARKET CHARACTERISTICS

Name	Market
GULECLER	%25 foreign (Greece, France) and %75 national market
ONCU GRUP	national markets, military

INTER-FIRM RELATIONS

subcontract receiving firms

Name	subcontracting	location of parent firm	production stage
GULECLER	yes	foreign market	except styling all other stages are performed
ONCU GRUP	no		

subcontract offering

Name	subcontracting	location of subcontractors' firm	production stage
GULECLER	no		
ONCU GRUP	yes	Bursa, İstanbul, Denizli, Akyurt, Elazıg, Erzincan, Cankırı,Corum, Siteler	dyeing and sewing, quality control, finishing

Name	sub. offering in the past	sub. receiving in the past	homebased labor	any other activity besides clothing
GULECLER	no	No	no (in the past handwork, now all this stages done by machine)	construction
ONCU GRUP	no	Yes	no	no

CHARACTERISTICS OF LABOR DEMAND

Name	male/female ratio	family workers	education level (ave.)	districts that workers live in
GULECLER	%60 female	No	secondary	Akyurt, Haskoy, Mamak, Tuzlucayır
ONCU GRUP	%50 female	No	primary	Kalecik, Çubuk, Akyurt

APPENDIX IV

QUESTIONNAIRE FOR FIELDWORK IN ANKARA IN 1998

* Name of the firm:
* Location:
* When was this company found?
* Has the firm ever moved anywhere else in Ankara? Is there any location change of the firm in Ankara?
* If yes, please list previous location: Why did the firm choose current location?
* How many people are working in this firm, in foundation period and now ?
* How many of them women
* What are your products, please list: Can you list the variations in these products, in time period?
* What are the first products of the firm?
* What is the raw material you use for your product?
* Where do you get your input/raw material from?
* Does the firm produce for domestic or foreign market? What is its ratio?
* If for foreign market, does the firm market their products directly or indirectly to the foreign markets?
* What is the brand-name of their product?
* For domestic market, what are the name and addresses of the customer firms?
* Does the firm subcontract out?
* If yes, please list the subcontractors' addresses:

* If yes, in which parts of the work are subcontracted out ?
* Does the firm do subcontracting for others?
* If yes, please list the parent firms' addresses:
* If yes, which part of the work is done subcontracting for?
* Did the firm subcontract out before?
* Did the firm do subcontracting for others before?
* Does the firm subcontract out to homes?
* Does the firm work on another sector or plan to produce for different sector?
* Please list the districts that the majority of your workers live in:
* Do you plan to move in recent future? If yes, please indicate the preferred location?

What is your recent project about?