

ISLAM IN ECONOMIC ORGANIZATIONS

AYŞE BUĞRA

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Özet

Bu çalışma, Türkiye toplumunda İslam'ın yükselişini bir politik iktisat çerçevesi içinde ele almak üzere çeşitli ekonomik örgütler içinde dinin oynadığı rolü incelemektedir. Bu bağlamda, iş dünyasında, tüketim kalıplarını etkileyen faaliyetlerde ve işçi sendikaları arasında, yapılanmalarında İslami referansların belirli bir rol oynadığı düşünülen bazı örgütler ele alınmıştır: İlk bölüm, siyasi İslamı içinde yer aldığı ulusal ve uluslararası çerçeve içinde incelemek ve Türkiye'de İslami hareketin yükselişinde, hareketin bu çerçeve içinde ortaya çıkan sorunlara anlamlı bir biçimde yaklaşabilmesinin önemli bir rol oynadığını öne sürmektedir. İkinci bölümde, İslamın iş dünyasındaki yerini incelemektedir. Bu bölümde a) Finans dünyasında “özel finans kuruluşları” veya “İslami bankacılık” alanındaki gelişmelerle, güven ve dayanışma temelinde faaliyet gösteren daha esnek ve enformel yapıdaki ilişki ağlarıyla ilgili bir tartışma ve b) Ülkenin farklı bölgelerindeki farklı büyüklükteki çok sayıda işletmeyi yalnızca ekonomik çıkarlar değil, aynı zamanda tutarlı bir toplum projesi çerçevesinde bir araya getirmeyi başaran MÜSİAD (Müstakil Sanayiciler ve İşadamları) üzerine toplanan ve-

rilerin deęerlendirilmesi yer almaktadır. Üçüncü bölümde, tarikat bağlantıları veya RP/FP çizgisine yakınlıklarıyla tanınan bazı medya kuruluşları ve televizyon kanallarının faaliyetleri temelinde, İslamın tüketim alanındaki rolü tartışılmaktadır. Dördüncü bölümde, RP/FP tabanının önemli öğelerinden biri olan Hak-İş işçi sendikalarını konfederasyonu ele alınmaktadır. Çalışma, verilerin genel bir deęerlendirmesinin sunulduğu bir sonuç bölümüyle tanımlanmaktadır. Veriler, genel olarak, tutarlı ve kapalı bir bütün oluşturan bir İslami ekonomi alanının varlığından çok, varolan düzen içinde kendilerini dışlanmış, haksızlığa uğramış veya gelişme şansı kısıtlanmış hissedilen grupların, yatırım fonları sağlamak, özel nitelikli tüketim piyasalarına ulaşmak veya bu tür piyasalar oluşturmak, örgütlü çıkar temsili mekanizmaları geliştirmek için kullandıkları İslami referanslar temelinde tanımlanan esnek ilişki ağlarının önemine işaret etmektedir.

Abstract

This project approaches the political economy of Islamic resurgence in Turkey by exploring different uses of Islam as a strategic resource. The study is organized in five parts: The first section situates Islamic resurgence in its international and domestic context and shows that Political Islam in Turkey derives its strength largely from its ability to respond to the challenges of the current environment. The second section looks at the manifestations of Islam in business life through an analysis of a) MÜSİAD (The Association of Independent Industrialists and Businessmen) that could successfully bring together a large number of enterprises of different sizes located in different geographical regions of the country, and b) special financial institutions as well as other, more informal arrangements used to generate investment funds on the basis of "relations of trust among the believers". In the third section, marketing strategies directed to Muslim consumers are explored through an analysis of certain advertising agencies and TV channels either owned by sect affiliated groups or known by their closeness to Political Islam represented by RP/FP. In the fourth section, the development of the labor

union confederation Hak-İş, an important element in the RP/FP constituency, is discussed. Finally, the conclusion presents a summary of the findings.

The findings of the study in these areas suggest that what could be called the economic world of Islam in Turkey is formed by networks of social relations which do not constitute a coherent whole, but appear as separate power blocs which try to reach those groups that feel alienated from the secular westernized political and economic establishment for the generation of investment of funds, for the marketing of specialized products, or in organized interest articulation and representation by business associations and labor unions.

INTRODUCTION

During the last decade, islamic resurgence has become a central issue in Turkish politics. While the academic interest in political and cultural impact of Islam in society have in many ways preceded and dominated concerns for its role in economic life, the latter, too, has recently begun to attract some attention in studies on political economy.¹ The present research project constitutes a contribution to this newly emerging area of inquiry by looking at the role of Islam in the formation of networks that are mobilized in different areas of economic life. As such the project explores the uses of Islam as a strategic resource in the activities of special financial institutions (or so-called "islamic banks"), in marketing activities directed at special market niches as well as in interest group activities of business associations and labor unions. The organizations that are studied in this context are qualified as "islamic" to the extent that a) they are affiliated with religious sects or communities, b) Islam appears as a significant point of reference in their activities, and/or c) they have close ties with political Islam mainly represented in Turkey by the MSP (National Salvation Party), RP (Welfare Party) and, recently, FP (Virtue Party) that are different incarnations of the same political movement.

The study is organized in five parts: The first section presents the study and situates islamic resurgence in Turkey in its international and domestic context. The second section looks at different manifestations of Islam in business life through an analysis of islamic business associations (MÜSİAD in particular) and special financial institutions. In the third section, we look at marketing strategies directed at islamic consumers by analysing a) the position of three advertising agencies with islamic affiliations within the sector, and b) the characteristics of advertisements given to three TV channels, STV, TGRT and Kanal 7. The first two of these channels are owned by two important sect affiliated groups and the third is known for its closeness to RP circles. In the fourth section, an analysis of the labor union confederation Hak-İş, an important element of the RP constituency, is presented. Finally, the conclusion presents a summary of the findings.

The sources of data used in the study include a) open-ended interviews with people involved in the organizations covered by the project as well as with other individuals situated in similar, "non-islamic" organizations in the same sector; b) periodicals and reports published by associations and enterprises; c) official statistics. Somewhat unfortunately, the timing of this research project coincided with the collapse of the RP-led coalition government and the study was conducted in an atmosphere of serious state repression of most manifestations of islamic identity in political and economic life. Thus, our interviews often reflect the fear and reluctance of adhering to an islamic identity as much as they show the uses of Islam in organizational life and economic activity. Nevertheless, accompanied by the statistical data and information based an extensive survey of periodicals and reports published by associations and individual companies shed some light on the advantages and problems of using Islam as a strategic resource in economic life.

INTERNATIONAL AND DOMESTIC CONTEXT OF ISLAMIC RESURGENCE IN TURKEY

The activities of the organizations under study are shaped against the background of contemporary international and domestic developments. It appears necessary, therefore, to situate the study of the political economy of Islam in Turkey in a framework of analysis constituted by the current changes at the international level and their society-specific manifestation within the historical development of Turkish economic and political scene. In this regard, it should be recognized that political Islam in Turkey is in no way cut-off from the developments within the global economy, but reflects often well-articulated strategies of adapting to these developments evaluated in a manner which highlights their congruity with "islamic ways of going about the daily business of life". A brief survey of global trends could, in fact, show that such an evaluation does not appear to be far-fetched. Moreover, the islamic movement in Turkey also appears to be justified in its emphasis of the necessity of a radical transformation of the basic political and economic coordinates of the strategies of development pursued in republican era for successful adaptation to the challenges of international environment. Islamic movement is, therefore, in a meaningful dialogue with the trends characterizing its international and domestic environment. The fact that the characteristics of the latter render the emergence of alternative responses to contemporary challenges quite difficult constitutes another factor which explains the upsurge of political Islam.

It is generally recognized that, starting with the late 1970's, the logic of production characterizing the post-Second World War era has given way to a new logic of production. "Post-Fordism", "post-industrial society", "postmodernity" or "unorganized capitalism" are some of the terms used to describe the nature of the transformation in question. At the economic level, "globalization" and "flexible

production" constitute the most commonly used terms to depict the main characteristics of the contemporary setting. Together these terms define a new economic order different from the former "Fordist" one mainly characterized by the mass production of standardized commodities in large, vertically-integrated and hierarchically-managed enterprises in a highly regulated economy. Economic regulation in the Fordist order pertains not only to state regulation but also to organized interest representation by capital and labor in their close relationship with the political authority. It is argued that this particular system of production could not adapt to the novel changes in productive technology and consumer demand. The forces of globalization, which some writers associate with a cyclic shift from the domination of material to financial capital, too, appear to be of a nature to undermine the past logic of a regulated economy.²

The new logic of "flexible production" defines, consequently, an economic order characterized by: a) decreasing role of the nation-state in economic life; b) decreasing role of interest associations of corporatist and neo-corporatist type with, in particular, the declining significance of labor unions and collective bargaining practices; c) the advent of more individualized and fluid consumption patterns replacing mass consumption of standardized goods; d) trends toward descaling, downsizing and decentralization of business firms and increasing significance of small and medium enterprises which are no longer regarded as less efficient and technologically backward forms; e) the advent of "industrial districts", which are formed by regionally located small and medium enterprises, with relations of both competition and collaboration among them, and supported by local institutions f) increasing significance of international forces of competition implying the emphasis of export production and opening up to the world market.

The above mentioned characteristics of the logic of flexible production lead to another new development in economic life where

social relations of reciprocity, or "networks" of reciprocity have begun to play an increasingly significant role. With the decline of formal and impersonal mechanisms of state regulations and organized interest representation, the protection of the vulnerable, of the unemployed, disabled, elderly or simply the poor, have increasingly begun to fall upon organic forms of belonging in networks of solidarity defined on the basis of kinship, neighborhood, ethnicity or religion. In labor markets where formal social security mechanisms and collective bargaining practices have come to be regarded as elements of rigidity, such networks appear as a means of assuring the flexibility of the wage relation. The role of reciprocity networks in economic life does not, however, seem to be limited to the protection of the vulnerable. It is also observed that diverse relations of subcontracting, outsourcing, information sharing and collaboration in matters of technology and marketing, as well as between the latter and larger firms, effectively relies on personal relations of trust and loyalty. As Piore and Sable write in their influential account of the new economic order, somewhat ironically, the logic of flexible production, in its similarities with the craft paradigm, can accommodate modern technology to the extent that it can reinvigorate social affiliations that are associated with the pre-industrial past.³ Such affiliations are also observed to play an important role in the generation of "relational capital" by not only smaller but also by large-scale enterprises.

In parallel to such observations concerning the role of reciprocity networks in the current system of flexible production, students of East Asian economies draw attention to the "successful network structure of Asian capitalism" and argue that Asian economies are rooted in institutions that encourage and maintain social ties in their cultural specificity. Hence, the East Asian economic success is often explained with reference to the "strategic fit" between the requirements of global markets and the institutions which define the indi-

vidual's place in society around traditional relations of authority that shape both entitlements and commitments.⁴

It is not at all surprising to find an intense questioning of the basic socioeconomic and political tenets of Turkish modernization experience in such an international environment, characterized both by the challenges of a new system of production and by the successful response of the East Asian model of development to these challenges. This questioning does not, of course, merely reflect the transformations of the world economy, but also stems from the internal dynamics of Turkish society. What we currently observe in Turkey reflects, therefore, the mutually supporting influence of the internal contradictions of a state-led socioeconomic strategy and the changing economic and institutional parameters of relations of production on a world scale.

The former, the internal contradictions of Turkish development experience, could hardly be reduced to those of the Fordist system. Perhaps most significantly, the economy and society shaping role of the state in Turkey has been much more significant than in any western country. Moreover, while the state has extensively intervened in economic life, it has not done so, first, in a rule based manner via formal institutional arrangements but via particularist relations between political authorities and individual businessmen. Second, extensive state intervention in economic and social life was not successful in assuring social integration and large segments of the population have been remained excluded from economic benefits of modernization and no significant uniformization of life styles could materialize.

Since the 1980s, problems of the highly protected and heavily regulated economy and the ensuing fiscal crisis of the state has generated a quasi consensus on the necessity of measures implemented to liberalize and to deregulate the economy. In this new environment, small and medium enterprises located in certain provincial

towns were observed to display a significant dynamism and have come to be favorably compared with large scale, diversified companies that had hitherto dominated the economic scene. These so-called "Anatolian tigers" have come to be regarded as the most significant actors of the new economic scene. This has required a new role for the state to accommodate the flexibility of their operations via new approaches to financial institutions, external economic relations and labor market regulations. In conformity with the widespread recognition of the significance of cultural determinants of economic activity in the contemporary era of flexible production, the RP politicians and their supporters have convincingly argued that Islam should be an important point of reference in this restructuring of the economy.

Islamic politics of the RP has been significantly characterized by a "language of social disadvantage" which has made it possible to incorporate diverse segments of the population such as the newly emerging entrepreneurs, other segments of the middle class that include Islamic intellectuals and professionals, marginalized masses largely consisting in new immigrants in urban centers, as well as the organized labor that feels threatened by the imperatives of flexible production inimical to organized interest representation.⁵ The ability of Islamic politics to undermine the significance of economic and social differences of interest and mentality was instrumental in the electoral victories of the RP both in the municipal elections of 1994 and in the general elections of 1995 which have culminated in the formation of the RP-DYP (True Path Party) coalition government. Yet, political Islam in Turkey is not free of internal contradictions and cleavages. First, sweeping generalizations about "Islamic capital" which imply the existence of a coherent community of Muslim businessmen overlook the differences that pertain to the relative positions of these business groups vis-a-vis both each other and RP-

led islamic politics. While there is indeed a close relationship between the latter and the very influential MÜSİAD (The Association of Independent Industrialists and Businessmen), some very strong sect-affiliated business groups and their ventures in the financial sector and in the media are neither MÜSİAD members nor very sympathetic to the RP. Second, there are important differences in the way in which Islam and islamic politics figure in the organizational strategies pursued by MÜSİAD and Hak-İş, notwithstanding the close ties of both class organizations with the RP.

The RP-led coalition government has not remained in power long enough to enable these inherent contradictions of islamic politics to surface and the socioeconomic cleavages within the movement to become visible. We believe, nevertheless, that the following presentation of our research results sheds some light on the advantages and problems of using Islam as a strategic resource in economic life.

II. ISLAM IN BUSINESS LIFE

2.1. Introduction

"Islamic business" is a rather slippery term which is not very easy to define for several reasons. First and foremost, there is not a set of generally accepted rules of conduct which guide the activities of so-called islamic capital. Even the very clear prohibition against paying and receiving of interest on credit is far from being observed by all businessmen that are considered or considered themselves to belong in the community of islamic businessmen. The latter rarely operate in closed circuits that are not integrated in rest of the national economy. Under these circumstances, systematic research on islamic business mostly remains limited to three areas: a) the exploration of the economic activities that mobilize relationships developed within and around religious sects; b) the analysis of the activities of business

associations where islam appears as a significant component of organizational strategy, and c) the study of islamic financial institutions.

Macro level studies on the economic activities of religious sects are faced with important difficulties not only because of the obvious difficulties of access to information, but also because of the wide differences of outlook and behavior that make it impossible to bring them together around common themes and questions of research. There are, nevertheless, several, largely journalistic, attempts that provide certain clues about the significance of wealth controlled by some of the most visible sects and their leaders.⁶ In this regard, different branches of the Nakşibendi sect appear to have been highly successful not only in generating and mobilizing "relational capital", but also in institutionalizing wealth in the organizational form of financial institutions and holding companies. Hence, the affiliations of the Özal family with the "İskenderpaşa" branch of this sect seem to have significantly contributed to the wealth and fortune of Özal and Topbaş families that have important ventures in sectors such as finance, trade, construction and in the petroleum industry. The wealth directly controlled by this branch of the Nakşibendi sect also appears to substantial and business activities of the community in different branches of the economy are organized under the umbrella of the Server Holding Company.

The religious community under the leadership of Fethullah Gülen appears to be one of the richest as indicated by hundreds of schools all over the world, but mainly in different areas of the former Soviet Union and in the Balkans, established and run, in many ways as missionary schools, by the sect. The latter also owns the television channel Samanyolu TV and its affiliate Işık Advertising Agency, a radio channel, as well as the daily Zaman. The special financial institution, Asya Finans, and Işık insurance company are known to be affiliated with Fethullah Gülen community. The community care-

fully maintains a distance with the RP movement. The most significant business group with religious sect affiliations is İhlas Holding of Enverören's community of "Işıkçılar". Among many different ventures of this group, given by Table VII that presents the activity diversification chart of İhlas Holding, we find the very widely distributed daily Türkiye and the television channel TGRT with the in-house advertising agency Öncü. Both Türkiye and TGRT reflect an ideological orientation which is clearly distinct from the islamist ideology of the RP in its nationalistic and etatist outlook. While the Türkiye/TGRT type conservatism lacks the radical elements of the RP movement which can accomodate ethnic identity politics and egalitarian political sentivities against the inherent injustice and inequality of western capitalism, one of its most significant components remains as the islamic identity of Turkish people. This particular positioning of Islam within the ideological orientation of the İhlas group makes the latter extremely well situated in the current political environment in Turkey and enables it to remain immune to the political repression faced by other islamist groups by allowing it, at the same time, to take advantage of the sentiments of those groups alienated by the state imposed measures for the protection of the secularist order.

A detailed exploration of the economic activities of religious sects lies outside the scope of this project. We incorporate, nevertheless, Fethullah Gülen's Samanyolu TV and TGRT with the affiliated agencies Işık and Öncü in our analysis of marketing/advertising activities that both benefit from and contribute to the advent of "islamic" consumption patterns. (See section III of the report).

The second level at which "islamic business" can be defined and described pertains to the activities of business associations that have claims to an islamic world view. MÜSİAD (The Association of Independent Industrialists and Businessmen) appears by far the most influential organization bringing its members together in a

coherent community of interests and values. However, Islam being an ascending value in society, it is also used as a network resource in other organizational attempts albeit in a much more limited way than in the case of MÜSİAD. Among these attempts, one can mention İŞHAD (The Association for Solidarity in Business Life) which is said to bring together the businessmen within the Fethullah Gülen community and SESİAD (The Association of Free Industrialists and Businessmen). Unlike the case of MÜSİAD, there is very little information available on the activities of these two associations. During our research, we have learned, through informal channels, that the news editor of MESAJ TV and the editor in chief of the affiliated daily YENİ MESAJ was among the founders of SESİAD and managed to have an interview with him. The fact that we could not even obtain a list of the association's members (let alone systematic information on its activities) seems to reflect less a reluctance to disclose information than the absence of a formal institutional framework. When we were asked for publications, we were given two books by a certain Prof. Haydar Baş, apparently an important figure in the foundation of the organization but also one of the founding partners of MESAJ TV as wells of the periodicals İCMAL, ÖĞÜT and MESAJ. These books, published by Icmal Publishing Company, are on religious themes with little direct or even indirect relationship to business and economic life (*Veda Hutbesinde İnsan Hakları*, 1995, 3rd edition and *İslam ve Mevlana*, 1996, 4th edition).

There is, therefore, a very clear contrast with the social position of the MÜSİAD and these other associations that operate, if they operate at all, in very limited circles. The ideological mission of MÜSİAD is defined at the level of the national economy and the association has what can be called a class strategy presented as an alternative to the one that TÜSİAD administration attempts to propagate. It is mainly the nature of this class strategy that will be discussed in this section through an analysis of the membership structure and activities of MÜSİAD.

The section will also present, however, a brief discussion of the "special" financial institutions as the third level at which the notion of islamic business can be explored. This discussion incorporates the analysis of the data gathered on the relative importance and the likely future role of the institutions in question within the political economy of Islam in Turkey. We believe, however, that these institutions constitute a separate area of research situated within the analysis of Turkish financial system at large.

2.2. MÜSİAD as a class organization

By identifying MÜSİAD as a class organization, we wish to highlight two types of organizational activities that accompany interest articulation and representation: first, the activities which seek to bind the "bearers of interest" or "members of class" into a coherent community and, second, those aimed at the promotion of a particular macro-level social project. In this sub-section, we will explore the ways in which MÜSİAD assumes this double role a) by looking at its membership structure and the services it provides for its members and b) by exploring the relationship between the association's interest representation role and its wider social transformation project.

Tables I-V present a comprehensive picture of MÜSİAD's membership structure. Table I shows that in 1995 MÜSİAD had 1717 members and in 1997 this number reached 2896. Although the largest number of MÜSİAD's members are located in İstanbul, the table also reveals that the activities of MÜSİAD are spread over the country and are not concentrated in large, economically advanced cities. Hence, the association appears by far the largest voluntary business association at the national level. As it is mentioned in the explanatory note to the tables on MÜSİAD's membership structure, the number of individual members is less than the number of enterprises represented. Hence, for 1995 a total of 1895 enterprises are included in Table II, which presents the distribution of these enterprises accord-

ing to sector, size and date of entry into business. On the basis of the information given from this table, we can conclude that:

- 1) The majority of the enterprises represented by MÜSIAD are smaller ones employing less than 50 workers, with the very small ones employing less than 10 workers constituting the largest group in the five-fold classification according to size. This does not mean, however, that large enterprises are absent, or even insignificant, among the constituency. As the table shows, MÜSIAD's members were affiliated, in 1995, with 318 enterprises employing more than 50 workers, with, among them, 169 employing over 100 workers.
- 2) The trend concerning the date of entry into business is much clearer than the one concerning size distribution of these enterprises. Overwhelming majority of the latter appear as newly founded ones. 1,318 of them were founded after 1980 of which 579 established between 1990 and 1995. The number of enterprises founded before 1950 is only 28.
- 3) These enterprises are located in many different sectors, but the largest groups are constituted by those in two sectors: construction and construction materials, and textile and leather.

Table III, which presents the distribution of the enterprises represented by MÜSIAD according to sector and date of entry into business, indicates that food and beverages appear to be the sector with the largest number of older companies (8 founded before the 1950's and another 8 in the 1950's).

Table IV, on the sectoral distribution of the enterprises according to size, indicates that there are not significant variations among different sectors in terms of enterprise size, except, to a certain extent, the cases of foreign trade and automotive sectors where large enter-

prises are less well represented. On the other hand, the latter seem to have a somewhat greater weight among the enterprises in heavy industry and in machinery.

Finally, Table V, which shows the regional distribution of the enterprises represented by MÜSİAD according to sectors complements and confirms the trends presented in Table I. We see, in this table, that the enterprises represented by MÜSİAD are not only located in the 19 cities where the association has branch offices but also in 11 other cities of the country as well as in Özbekistan and Kiev.

These numerous, geographically dispersed enterprises among which smaller ones have an important place are unlikely to possess effective channels of communicating, collaborating, acquiring and sharing information, and presenting their demands to policy makers than the ones provided by their association. It is also highly unlikely that MÜSİAD's members form a spontaneous network created by a common educational background and maintained in social activities of daily life as it would case of larger and more geographically concentrated businesses represented by voluntary associations like TÜSİAD. Under these circumstances, MÜSİAD's 11 special commissions and 10 professional committees, conferences it organizes around economic and political issues, and other social activities acquire a crucial significance both for providing technology and marketing related information and for enhancing group cohesion and solidarity. The organization of international fairs in Turkey or the arrangement of foreign trips to fairs organized in other countries also constitute a very important aspect of MÜSİAD's activities and they enable the association's members to have information about and to participate in international developments likely to affect their business opportunities.

Our interviews with MÜSİAD members in İstanbul, Ankara, Denizli and Adana have confirmed the practical significance of

these activities for the association's members. These interviews have also shown that the association plays a very important role in network formation by fostering feelings of trust and solidarity not only among the businessmen located in a particular city but also at a national level. For example, there were references to periodic regional meetings bringing together the members located in different cities in the same geographical region as well as those where businessmen based in different regions could get together and meet each other. The association seems to mediate in business relations that involve input supply, outsourcing, subcontracting, retailing and distribution of representative agencies. This intermediation of the association appears to be very useful in reducing uncertainty and preventing the breaching of contracts and, consequently, in minimizing costs of information gathering and monitoring.

The attempts of the association to foster cooperation and solidarity among its constituency are also carried out through social activities that range from the Friday conferences on socioeconomic issues organized by the İstanbul branch to "sharing of hobbies" that were mentioned in the course of our interview at the Ankara branch. As a member of the administrative board of the latter has told us, some 20 members that participate in the meetings of the Board are each responsible for six members with whom they form social contacts and engage in activities such as weekly hiking tours or occasional picnics.

These networking activities, which MÜSIAD appears to be really successful in organizing, constitute, however, an issue which all our interviewees, without any exception, have tried to downplay for fear of being seen as part of a closed circuit of Islamic interests benefitting from and contributing to the rise of the RP movement. This downplaying of the networking function was typically expressed through a process of circular reasoning which took the following form:

- Step 1: Business is business and no one would pay more or sell for less because the opposite party is a MÜSIAD member. Money has no religion and islamic identity cannot play a role in business matters.
- Step 2: In any event, this is a muslim country and we are all muslims. References to islamic capital or muslim businessmen do not make any sense. In a muslim country, the current attempts to stigmatize a particular segment of the business community with reference to religion are extremely harmful. Is it fair, for example, to keep referring to MÜSIAD as the Association of Muslim Industrialists and Businessmen when it is repeatedly stressed that "M" stands for "müstakil" (independent)?
- Step 3: In any event, are we not all muslims? What if the "M" stands for "muslim"? This wouldn't bother me, but it bothers some people who want to exclude us from economic life, who want to prevent us from entering the fields controlled by the privileged. Chambers do not defend our interests, there is no place in TÜSIAD for us and when MÜSIAD does what no one else does, it comes under attack.

This reasoning clearly presents a typical case where the language of social disadvantage plays a dual role by appealing to universal citizenship rights on the one hand and by fostering feelings of trust and solidarity that facilitate network formation. The use of Islam as an organizational resource finds its place precisely in such a two-sided rhetoric that characterizes, for example, the official MÜSIAD narrative on the foundation of the association. The founders often refer to a particular episode that took place in 1990 when they, as a group of muslim businessmen, were not allowed to participate a meeting organized in the former Soviet Union by DEİK (The Association of Foreign Economic Relations), which is an umbrella

organization bringing together both the chambers and TÜSİAD, as the decisive event which triggered the foundation of MÜSİAD.⁷

Whether the muslim businessmen represented by MÜSİAD have faced systematic discrimination or not, the association could effectively use the islamic identity of the disadvantaged in ways which can be analysed with reference to certain observations made by Light and Karageorgis on "ethnic capitalism".⁸ These writers challenge the standard approaches to "ethnic capitalism" which claim that discriminatory attitudes prevailing in the society at large would constitute a disadvantage for minorities that seek a place in business life and, relatedly, economic success would accelerate the process of assimilation for ethnic entrepreneurs. Against these hitherto widely shared views, Light and Karageorgis argue that ethnic entrepreneurs might enjoy advantages that others do not not in spite of but thanks to their minory status in society. Apart from culturally shared values both sustained within and helping to sustain multiplex social solidarity networks, "reactive solidarities" that are enhanced by "relative satisfaction arising from nonacculturation to prevailing labor and living standards" might balance whatever initial disadvantages minority ethnic identity could entail and render nonassimilation more lucrative than assimilation.

In the particular case of MÜSİAD, the use of Islam has also contributed to a successful bridging of the association's narrow interest representation role and its wider class mission of social transformation. MÜSİAD challenges the existing sociopolitical order in Turkey on the basis of its both cultural and economic nonviability. In this process, it amply draws on the East Asian model of development which it presents as a more viable alternative to the European one. As it was mentioned in section I, the success of the East Asian model is often attributed to the "strategic fit" between the traditional institutions that regulate social relations and the requirements of global markets. This particular interpretation of the East Asian model is

explicitly discussed by Erol Yarar, the first president of MÜSİAD, who writes that "... at the threshold of the twenty-first century, once again the western side of the Pacific, that is the East of China is becoming the dominant center of the world economy".⁹ According to Yarar, this shift of the center of the global economy has coincided with the advent of an information society that has many characteristics of "pre-industrial, agricultural societies". Increasingly significant economic role of "small and medium sized enterprises" and, on the cultural plan, "family values" and "religion", appear to be the salient features of this information society which is contrasted with industrial society characterized by "large scale, "capital intensive enterprises", "social state" (sic.), and "rationalism/positivism".¹⁰ In Yarar's approach, an important factor behind the successful adaptation of the Asian model of development to the requirements of the contemporary information society is the Asian nations' faithfulness to their cultural identity and their resistance to the "civilization of the West" with its "so-called rationalist, Cartesian philosophy (that) has drawn individual and social life into chaos by rejecting the value and existence of what cannot be measured or calculated. This overturning of religious values, and their replacement by a secular 'morality', transformed *homo sapiens* into *homo brutalis*".¹¹

It is, thus, with the successful response of East Asian capitalism to global challenges at the background that MÜSİAD sets out to present a "homo islamicus" centered socioeconomic order as an alternative to the "homo brutalis" centered one. In spite of their clear stand against western rationalism, mysticism in no way forms a component of the socioeconomic strategy advocated by Yarar or other ideologues of MÜSİAD. The latter, in fact, also take issue with a certain idea of "proper islamic attitude" internalized by muslims who associate Islam with a mystical unworldliness. This is explicitly mentioned by Erol Yarar who, in his discussion of the causes of the economic backwardness of the muslim world, writes that "The

mystical motto, 'one mouthful food, one short coat', was misconceived and opened the way to sluggishness. As a result, motivation towards the world was lost completely" (sic.).¹² According to the founding director of MÜSİAD's Konya office and the current chairmen of Konya Chamber of Commerce put it, such mistaken views about Islam's being against wealth are created and disseminated precisely by the enemies of Islam.¹³ In fact, if one of the ideas repeatedly emphasized and propagated by MÜSİAD is the need for Islamic solidarity against a basically hostile sociopolitical environment, the other is the necessity of getting rid of misconceptions about the incompatibility of Islam with entrepreneurial activity. As remarked mockingly by the mayor of Çorum, a Welfare Party run municipality, "everyone nowadays is busy searching Koranic verses compatible with capitalism".¹⁴

Given the fact that Mohammed was himself a merchant, such verses do not seem to be very difficult to find. S. Zaim and Akpınar, for example, provide a large collection of them in his attempt to provide ethical guidelines to muslim businessmen.¹⁵ As to Mohammed's professional background, it is explicitly mentioned in the lead article to a collection on "Islamic Man in Business Life" edited by MÜSİAD, with the interesting subtitle "Homo Islamicus".¹⁶ In this article M.Özel, refers to the rules set out by the prophet himself to guide the exchange activity in the Medina Market, rules which, according to Özal, clearly define a competitive system with minimum state intervention. The extent to which the latter is limited is revealed, in fact, by the rule against imposing taxes on the Medina market merchants and is reflected in the statements of some of the other contributors to the MÜSİAD's "Homo Islamicus" who refer to payment of *zekat*, given "either to the state or directly to the poor", but not of taxes as a requirement of ethical business behavior.¹⁷

Notwithstanding the centrality of this non-interventionist rhetoric that emphasizes the merits of competition, the relations of MÜSİAD

and its members with the political authority appear to be hardly in conformity with the formal, impersonal and rule-based character of a typical market economy. First, the unhidden closeness of RP-led coalition government with MÜSİAD circles¹⁸ is of a nature to reflect less the latter than the traditional nature of particularist state-business relations in the country. In fact, the spectacular growth of MÜSİAD's membership between 1995 and 1997, shown in Table I, could be interpreted to reflect the links between the association and the RP that had a significant electoral success at the municipal elections of 1994 and at the following national ones.¹⁹ The activities of one of the advertising agencies surveyed in section III of this report presents a good example of the way political relations with the RP authorities could be mobilized in business life.

Perhaps more significantly, the role attributed to Islamic economic life, as reflected both in the publications of MÜSİAD and in the activities of some of its member companies, seems to define an economic system which requires a particular type of state involvement whose defining feature would be an attitude of leniency and flexibility in the application of rules. For example, as it will be discussed in the following section 2.2., generation of enormous investment funds entirely on the basis of trust by MÜSİAD's member companies Yimpaş and Kombassan could only take place within a financial system dominated by "relational capital" rather than a formally regulated capital market. Similarly, in the economic system propagated by MÜSİAD as part of its strategic class vision, formal labor market regulations are replaced by ties that bind the community of believers as the assurance of stable and productive industrial relations. In section IV, this system of industrial relations, where the mutual trust between the employer who is affectionate and just to his employers and the worker who is respectful and hard working excludes the need for a formal labor code and, especially, labor

unions is contrasted with the strategic vision of the "muslim" union confederation Hak-İş. For the purposes of this sub-section, these issues that will be discussed in more detail in the following are important to clarify the nature of the role attributed to the state in the islamic world view of MÜSİAD and to show how Islam is used as a resource in MÜSİAD's class strategy as a basis for cooperation and solidarity between producers as well as a device used to create secure market niches or sources of investment finance, and as a means of containing social unrest and labor militancy.

2.3. Islam in the financial system

Given the very explicit Koranic prohibition against the receiving and paying of interest, financial institutions constitute an area where one could define "islamic business" in more concrete terms than elsewhere. However, the role of Islam in this sector seems to be less associated with "special financial institutions", that do not charge interest but operate on the basis of different mechanisms of profit sharing, than with other forms of investment fund raising based on the use of Islam in mobilizing "relational capital". In general, special financial institutions, or so-called "islamic banks" appear to have served more to attracting Gulf capital to the country and benefitting a few individuals or groups through the few advantages that they have over standard banking operations than presenting a genuine islamic alternative to the latter. In this section, we will present a brief overview of these institutions and mention other types of islamic capital raising practices which we consider to be more significant.

Special financial institutions made their appearance in Turkey with a governmental decision taken in 1983 with late Turgut Özal's initiative, an initiative which is said to have significantly contributed to the wealth and fortune of his brother Korkut Özal.²⁰ This decision forms the basis of Central Bank decrees defining the activities of

these institutions. Al Baraka, and shortly following it, Kuveyt Türk and Faysal Finans were the first such institutions founded by foreign capital. Anadolu Finans, İhlas Finans and Asya Finans (the last one to be established), on the other hand, are national ventures. We would like to note that among these, only Faysal Finans and Anadolu Finans are members of MÜSİAD.

There are two mechanisms of fund generation by special financial institutions: current accounts which do not entail any interest payment under any name or form and participation accounts that operate on the basis of profit sharing. The terms of the latter are not predetermined at the time of deposit but are periodically announced. Table VI presents a ranking of the special financial institutions and the relative weight of two types of deposits in their liabilities.

Special financial institutions do not give credits in the strict sense of the term and their assets are mainly defined by four types of activities: *Murabaha*, where the lending institution buys the investment good desired by the customer and sells it to the latter by adding a sum said to represent the lender's share of the profit in the partnership replacing the standard relationship between the banker and the customer; *müşaraka*, which constitutes a partnership in the investment project to be financed; *mudaraba*, a type of labor-capital partnership where the customer only puts his labor; *icara*, which constitutes a type of leasing operation. The activities of special financial institutions do not, however, seem to be strictly limited to these areas. They can also provide letters of guarantee (although these are not accepted in government contracts), deal in checks and promissory notes and, more significantly, İhlas Finans also issues credit cards, albeit through a special deal with a bank which was (but not any longer) controlled by the İhlas Group (Egebank).²¹

The advantages of their special status to these institutions lie, first, in their being subject to less strict procedures of regulation and

control than regular banking institutions. The fact that they do not have to have official reserve requirements and contribute to deposit insurance funds also allow more flexibility in the use of funds. The restriction on real estate acquisitions or partnerships with non-financial enterprises of banks are not binding for them. More significantly, banks are not allowed to engage in transactions involving the exchange of commodities while the latter significantly figure in the activities of special financial institutions. With the changes of the banking law currently under way, these special institutions are expected to lose some of these distinct advantages and become less attractive for potential investors. Even today, after more than a decade of their first appearance in the Turkish financial scene, their share in total deposits is barely three %.

"Islamic banking" had an important place in the agenda of the RP.²² Yet, the significance of this type of banking for muslim businessmen does not seem to be substantial. In the specific case of MÜSİAD's constituency, one could explain this on the basis of two factors. First, the use of bank credit by smaller members of the association might be very limited. The lack of significance of bank credit for smaller enterprises is, in fact, a general feature of the Turkish economy and this tendency is confirmed by our interviewees. One MÜSİAD member in Denizli was strongly critical of the islamic banks which he said were nothing but instruments of exploitation. Yet, he seemed to take the prohibition of paying interest very seriously and thought that the state should develop institutional mechanisms of credit at zero real interest to support muslim businessmen whose competitive potential is now limited by the moral difficulties they face in the financial sector. He also said, however, that he was, like many other muslim businessmen that he knows, ready to be convinced against his belief concerning the sinfulness of interest. He told us that a couple of years he attended a conference organized by

Işık Insurance Company (associated with the Fethullah Gülen community) where the speaker referred to the absence of a comprehensive system of insurance as an important cause of the economic decline of the Ottoman Empire and the development of western powers on the basis of their successful overseas trade ventures. As he put it: "Faced with the choice between accepting the economic decline of my country and the uneasiness caused by my doubts about the legitimacy of insurance, I would surely chose the latter. Similarly, if someone convinces me that credit institutions that charge interest are necessary for our country's development, I would leave aside my other concerns about them". One can not be sure, of course, the sincerity of these remarks that might reflect, as many other statements of our interviewees, the fear and insecurity generated by the current, anti-fundamentalist political atmosphere prevailing in the country. For the larger members of MÜSİAD, the importance of special financial institutions might be less than other ways of mobilizing islamic networks for generating investment funds. Such alternatives are in fact used in a highly impressive manner by two of the enterprise groups represented by MÜSİAD: Kombassan (based in Konya, employing 1725 workers) and Yimpaş (based in Yozgat, employing 85 workers). Last year, these companies, whose shares are not quoted on the stock market, got into serious trouble with the Capital Market Board authorities for collecting millions of dollars from thousands of individuals in an entirely trust-based system which eliminates the sinfulness of interest income but confers no legally valid guarantees.²³ Throughout the discussions around their trouble with the Capital Market Board authorities, the presidents of Kombassan and Yimpaş often claimed that they were victims to a conspiracy of economic interests against the recent successes of the "Anatolian capital" which have started to challenge the monopoly of the state-protected İstanbul bourgeoisie.²⁴ The same argument was also taken up by the founding president of MÜSİAD,

Erol Yerar,²⁵ Whether the recent troubles of these companies, which are not unrelated to the power struggle between secularist and Islamist political forces, will halt the spectacular rise of the economic power of these companies is still uncertain. (See the activity diversification chart of Kombassan Holding given in Table VIII). As things are, Kombassan, Yimpaş and similar groups continue to launch extensive advertising campaigns mainly designed to generate funds especially by mobilizing the savings of Turkish guest workers in Germany and in other European countries.

While in the recent environment where Islam had ceased to be an asset and become an obstacle to lucrative business, the founding president of MÜSİAD, the president of Kombassan, as well as the RP authorities echoed each other in their statements to the effect that "money has no religion, no faith, and no ideology"²⁶, the growth and diversification of the groups such as Kombassan and Yimpaş indicate the importance of the "relational" capital that Islamic networks generate. The mobilization of this type of capital is significantly based on personal, informal relations largely built on cultural identities that are defined to exclude the non-religious as well as to include the religious.

III. ISLAM IN THE FIELD OF CONSUMPTION: ADVERTISING AGENCIES AND TELEVISION CHANNELS

One aspect of the current economic order, defined with terms such as "post-Fordism", "post-modern", "flexible accumulation" or "post-industrial", is the difference of characteristic consumption patterns from those characterizing the previous economic order. Hence, more individualized and specialized goods designed for different groups of consumers distinguished from each other not only by their income differences but also by their cultural identities.²⁷ This implies that

consumption now appears as an important aspect of identity politics defining multilayered forms of group belonging and identification. In Turkey, this prepares the ground for the advent of "muslim consumer" in search of commodities appropriate for his/her islamic identity. As Saktanber underlines in a her interesting study of an "islamic" middle class residential complex in Ankara, Islam cannot be solely perceived as a means of promoting economic self-interest or a medium of expressing social discontent. Islamic faith, or faith in general, also assumes a function similar to what Bourdieu calls taste, "to inform choices people make to differentiate their life-style from those similarly situated in social stratification categories".²⁸

In the realm of consumption as another area where politics of recognition led by the RP manifests itself, one can often see that Islam indeed plays all these divers roles that include self-seeking marketing strategies of commodity producers, expression of social disadvantage and affirmation of identity. In this area, too, the double rhetoric of the politics of recognition can be observed. Hence, as the target group of certain marketing activities, muslim consumers appear as both those that need something special and those that form the majority of the population who, like the privileged minority that had hitherto enjoyed higher standards of consumption, "deserve to live well".²⁹

The objective of this section is not so much to examine this double-sided rhetoric as to look at its manifestation at the level of advertising/media activities where islamic affiliations or references figure play more significant role than in other, similar activities with a view a) to explore the demand structure of their target consumers; b) to investigate whether there is an intra-sectoral differentiation among different brands in terms of their target consumers located in what can be called "islamic" or "secularist" market niches, and c) to see whether what we, for the moment, loosely call the "islamist

niche" forms an undifferentiated entity but is divided in itself along finer lines that reflect differences of ideology or economic interest.

In this section, three television channels and three advertising agencies are examined. STV of the Gülen community and its affiliated Işık advertising agency; TGRT of the İhlas group and the group's in-house agency Öncü; Kanal 7 and Panel Ajans that are both close to RP circles. Among the agencies in question, Panel Ajans is the only one that appears as an independent commercial venture in the strict sense of the term, although Işık seems to be much more open to the market than Öncü. (See the sectoral distribution of the customers of Işık Reklam and Panel Ajans given by Table X).

The choice of STV/Işık and TGRT/Öncü is related to their sect affiliations described in the previous section and Kanal 7 was chosen for its obvious closeness to political islam represented by RP. Our interviewees affiliated with different advertising agencies mentioned Panel Ajans, a member of the Association of Advertising Agencies, as an organization with a "modern" outlook, but also active in the islamic segment of the market. Through its affiliate Magic Co., Panel distributes the advertising space on billboards and on municipal buses both contracted out by the RP municipal government. Among these advertising agencies, only Panel Ajans is a member of MÜSİAD.

One factor which clearly distinguishes the advertising agencies under study from other enterprises in the sector is the absence of foreign shareholders. This constitutes an interesting difference in a sector which is overwhelmingly dominated by partnerships with foreign capital.³⁰

In the course of our interviews with the managers of the three agencies in question, the target consumers of their advertising activities were described with their reference to their "conservative" character. Using different terms, but trying to make the same point,

they have told us that the majority of the Turkish population are conservative people who are alienated by most agencies' approach which takes western values and life styles as its point of reference. "Appealing to the majority" and not "accomodating the islamic identity" was, therefore, the objective emphasized. In this regard, it is interesting that in these interviews, as well as in the one conducted with a MÜSİAD member active in the sector, the name of Ali Taran, well-known for his TV advertisements whose protagonists are popular characters that use a coarse language with a lot of slang, was often mentioned as someone "who knows the people of this country". This admiration expressed by Ali Taran is interesting because the products of the latter are not at all characterized by an islamic outlook.

Table X gives the sectoral distribution of the customers of Işık Reklam and Panel Ajans. It shows that the best represented sectors are "food" and "consumer durables" that basically includes household furniture but excludes electrical appliances. They also have customers in tourism, construction and retail outlets. Their customers in the financial sector only include special financial institutions and, in the case of Işık, the customers in media and education are affiliated with the Gülen community. Not surprisingly, alcoholic beverages, tobacco products and the entertainment sector are not represented at all.

We have tried to analyse the advertisements given to STV, TGRT and Kanal 7 by distinguishing between three product groups: a) products that are *not advertised* on these channels, b) products for which *over 50 % of the advertising budget* is spent on the advertisements given to these three channels, and c) products for which *less than 50 % of the advertising budget* is spent on advertisements given to these three channels.

The distribution of the advertisements given to private TV channels among these channels in 1997 and 1998 given by tables XI a

and b shows that there is a non-negligible number of brands in most sectors that are *not* at all advertised in TGRT, STV and Kanal 7. The share of these brands in the total advertising budget of all sectors is about 36 % in 1997 and about 30 % in 1998. When we look at the share of these brands not advertised in the three channels in the advertising budget of the sector, we see that this share reaches 100 % in the entertainment industry, 70,4 in the media, nearly 50 % in the financial sector and in electronics and over 30 % in electrical household appliances and retail outlets. This might be interpreted to suggest that in these sectors, there is a considerable number of producers that find those who watch these channels uninteresting as consumers. This interpretation is confirmed by the data on those brands that spend *less than half of their advertising budget* on advertisements given to the channels in questions. For all sectors, the share of advertising expenditures on the advertisements given to the three channels in the total advertising budget for these products is less than 10 %. It is over 30 % of the sector's advertising budget only for food and for household furniture (excluding electrical appliances). We could suggest, then, that these producers advertise in these channels in a very limited way with the exception of some food and furniture producers. Along with the data on the customer portfolios of Işık Reklam and Panel Ajans, this might be interpreted to suggest that the conservative or islamic followers of these channels, constitute a group that are of some importance for all producers as consumers of food products and furniture. One could also interpret the findings so far discussed with the reluctance of certain producers to do business with these channels because of ideological reasons, which would still point at a certain market segmentation.

The data on products for which *over half of the advertising budget* is spent on the advertisements given to the three channels under study appears to be more interesting in showing the existence of such a market segmentation. For all sectors, the share of the three

channels in the advertising budget for these products exceeds 80 %. For individual sectors, the share of the three channels reaches 100 % for finance, electrical household appliances, electronics, upholstery, as well as organizational publicity for enterprise groups. It is almost 99 % for clothing and media and not less than 67 % for any sector. This suggests that there are certain products that are mainly marketed with a view to reach a particular group of consumers that watch the three channels under study. The share of the advertising budgets of these products in total advertising expenditures of their sectors, too, appears to be important. For all sectors, it is slightly above 46 % in 1997 and 47 % in 1998. But it is much more than that in certain sectors such as construction and real estate, automotive, household durables excluding electrical appliances, and clothing. One can think of several possible interpretations of these findings. First, political/ideological position of producers might be dominating a real differentiation in the structure of demand. Second, for these products "conservative" consumers that watch the three channels might be considered to constitute a very important target group. Third, the findings might be pointing at a particular type of market segmentation whereby television advertisements do *not* constitute a significant marketing device for similar products destined for the consumers whose consumption patterns are different from those of the people who watch the three channels under study. These findings can not be interpreted to mean, however, that the latter form a homogenous market. When we look at Tables XII a and b which give the shares of three channels in the advertising budgets of individual products that spend over half of their advertising budgets on the advertisements given to these channels, we often find a very uneven distribution. At the sectoral level, too, we find an uneven distribution of advertising expenditures among the three channels, at least for some sectors. For example, in 1997, Kanal 7 appears to receive a much smaller portion of the advertising expenditures of

producers of cosmetics and detergents that mainly advertise in the three channels, but much more of the advertisements of retail outlets. Almost all of the advertisements by private (i.e. holding companies that seek to attract investment funds) and public organizations (i.e. municipalities and providers of public utilities affiliated with municipalities) are given to Kanal 7, which clearly reflects the special relationship of the channel to political Islam represented by the RP.

This closeness is also revealed by the comparison of Tables XII a (for 1997) and b (for 1998) that clearly shows the impact of the changes in the political atmosphere following the collapse of the RP-led coalition government. Between 1997 and 1998, the share of Kanal 7 in the advertising expenditures for products mainly advertised in the three channels seems to have fallen considerably. In fact, in 1998, it appears to be less than 10 % in all sectors except for electronics, clothing, and two products classified under the category "other". It continues, however, to receive advertisements from holding companies that seek to attract investment funds, mainly from the expatriates in Europe, by mobilizing "relational capital".

Tables XIII a and b show the distribution of the advertising spending by products that spend *less than half of their advertising budgets* on advertisements given to TGRT, STV and Kanal 7 among these channels. In Table XIII a, we see that in most sectors these products are advertised in TGRT and STV, mostly in the former. This might be interpreted as an indication of the greater distance of Kanal 7 to "non-Islamic" circles. In 1998, the shares of TGRT and STV in the advertising budgets of these products become more equal in most sectors while Kanal 7's share is reduced to nil in most of them.

IV. ISLAM AND ORGANIZED LABOR: THE CASE OF UNION LABOR CONFEDERATION HAK-İŞ

Recent developments of the world economy that we have described in section I of this report are accompanied by a generally recognized decline of labor unions. Through the recent developments, where the requirements of "flexible production" have limited the scope of policies designed to guarantee stability of employment and income, public opinion has in general become less favorable to organized interest representation by labor unions which have often come to be regarded as elements of rigidity inimical to efficiency and international competitiveness.³¹ In this new atmosphere, even those socialist parties that have remained important in many European countries have found it necessary to modify their traditional position in favor of pro-market policies that involve a much more limited role for state in the ownership of economic assets, regulation of economic activity, and provision of social services. As a result, the ties between social democratic parties and labor unions have become looser than they have been in most societies for most of the post-Second World era, with the parties less willing or able to accommodate union demands in many areas. In general, the pursuit of "welfare" in developed countries and "development and modernization" in developing ones have ceased to form the background of union movement and its diverse political affiliations.³²

Labor unions across the world have, consequently, found themselves in an environment of enhanced international competition and diminished state intervention in their favor in the collective bargaining process. This state of affairs has, in theory, the potential to foster a more internationalist consciousness among the workers of the world. However, as Arrighi has argued, it is more likely to lead to a "tribalist" disposition rather than an internationalist one. "The

invention of new, or the consolidation of old 'imagined communities' along ethnic or religious lines is no doubt an easier response to the intensification of world market competition and state breakdowns than the formation of class solidarity across borders or cultural divides".³³ This affirmation of non-class identity can, however, play highly different roles. Hence, religion can indeed act as the "opium of the masses" by making them tolerate exploitation or it may constitute an organizational resource against the fragmenting impact of the global market.³⁴ We believe that these problems that today characterize the international labor movement are also those that define the position of Hak-İş as a "muslim" confederation.

Students of islamic resurgence in Turkey often mention upwardly mobile middle classes, which sometimes include the professionals and intelligentsia as well as the new entrepreneurs, and marginalized segments of the population that are economically and socially threatened by the increasing marketization and globalization of the Turkish economy. What is almost always absent in these approaches is the presence, within the RP constituency, of an important labor union confederation, Hak-İş, which appears as a social actor quite different in nature from either the marginalized masses for whom Islam constitutes a medium for the expression of discontentment or the new bourgeoisie that both for economic and cultural reasons could not yet find a place among the established elites of the society. Since the ties between Hak-İş and the RP appear, in many ways, at least as close as those between the latter and MÜSİAD, the general tendency to overlook the place of Hak-İş within the contemporary political economy of Islamic resurgence constitutes a rather significant gap in the latter.

Hak-İş was founded in 1976 when a coalition government between Bülent Ecevit's "left of center" CHP (Republican People's Party) and the MSP (predecessor of the RP) was in power. The min-

ister of labor and social security was Şevket Kazan, an important figure both within the MSP and RP.³⁵ Necati Çelik, the founding leader of the confederation was the secretary of Şevket Kazan at the ministry and he remained the president of the confederation until he became, himself, first a member of the parliament and then the minister of labor and social security in the RP-led coalition government founded in 1996.

Neither Necati Çelik nor the other leaders of the union deny the role of their affiliation with political Islam in the foundation and during the formative years of the organization. This relationship is explained either with reference to the fact that it is not unusual to find organic links between unions and political parties in Turkey and in the west or, in more ambiguous terms, by evoking "the special circumstances prevailing in those years". Yet, they also feel that this close relationship with MSP of their formative years has been detrimental for the public image of the organization which has remained handicapped by the stigma of the "confederation of the fundamentalists".³⁶

In general, the period between 1978 and 1984 is seen to constitute some sort of a "pre-historic" era preceding the glorious history of the union. A more precise periodization involves: a) 1976-1980 as the founding years; b) 1980-1984 as the intermediate period marked by the military coup and the political repression faced by the union movement; c) the period after 1984 as a period of growth and development. After 1984, Hak-İş has indeed managed to establish itself as a national actor whose significance could not be limited to strictly defined islamic segments of the labor movement. Tables XIV and XV show the place of Hak-İş in the Turkish labor union scene in comparison with Türk-İş, DİSK, and the much smaller MİSK close to the ultra-nationalist MHP (National Action Party). As we were told by all our interviewees affiliated with different unions

as well as by a former high ranking bureaucrat at the Ministry of Labor and Industry, the membership figures for all confederations are grossly overestimated which, nevertheless, does not significantly change the relative ranking.

In the 1980s, the constituency of Hak-İş has come to include a non-negligible number of workers formerly affiliated with the radical leftist confederation DİSK closed after the coup like Hak-İş but, unlike the latter that was allowed to resume its functions after six months, could come back only in 1992 after a long series of legal and political struggles. The impact of DİSK's troubles on the development of Hak-İş appears to be a difficult subject for leaders of the latter confederation. In this regard, there is, on the one hand, a strong reaction against implicit or explicit suggestions that Hak-İş owes whatever organizational success that it has to the forced absence of DİSK from the union scene. On the other hand, the leaders of Hak-İş often accept, albeit unwillingly, that this absence has an undeniable role in the history of the confederation. This role is mainly explained, however, with reference to the passivity of Türk-İş, the largest and oldest labor union confederation known for its closeness to the state authority as its permanent defining character, in the face of the political repression of the labor movement in Turkey during the 1980s. Hence, it is suggested that Hak-İş's membership has mainly increased not so much through the recruitment of workers formerly affiliated with DİSK, but because many workers have left Türk-İş to join Hak-İş.³⁷ In general, in the organizing rhetoric of the latter confederation, Türk-İş appears as the main opponent described as one of the social forces behind repressive state policies that are seen as the main source of socioeconomic and political problems of Turkey in republican era.³⁸

This particular diagnosis of the problems of Turkey in general and of the labor movement in particular appears to be central to the

ideological position of Hak-İş in its difference not only from Türk-İş but also from DİSK which has always emphasized class conflict along classical marxian lines. This position is one, therefore, where class conflict appears less important than state-society cleavages which also have a central place within the resurgence of political Islam in Turkey. Hence, it constitutes an element of harmony not only between the social role assumed by Hak-İş and the political strategy of the RP, but also between the former and the class strategy pursued by MÜSİAD. Nevertheless, it would be totally wrong to reduce Hak-İş to a mere instrument of political Islam and overlook its significance as a labor union organization.

The leadership of Hak-İş recognizes the fact that the contemporary setting of the international economy calls for a reorientation of labor union movement. In their diagnosis of the current problems faced by the labor movement, the latter address many of the common themes found in the literature in this area. Some of these themes pertain to the necessity of a) changing oppositional unionism based on the emphasis of class conflict in favor of approaches emphasizing harmony and cooperation; b) replacing the standard wage and fringe benefit bargaining for more innovative approaches where the multiple identities of workers are recognized and attempts are made to help them fulfill their diverse needs that emerge in relation to these identities; c) being more sensitive to and involved in socioeconomic issues that concern not only workers but society at large. This implies the need to revise former, sometimes quite sectarian opposition of labor unions with regards to market oriented reforms in general, to the question of privatization in particular.³⁹

These issues, which are frequently addressed in different Hak-İş publications, also came up repeatedly in the course of the interviews that I had with Salim Uslu, the president of the confederation, and Halil Akçay, the president of the İstanbul regional branch. They

were especially proud of the support they could give to their members to facilitate their access to state-provided health services which, in Turkey, might often be problematic because of the shortage and low quality of supply. Other interviewees affiliated with Türk-İş in different capacities have also told me that in these types of relations with its constituency Hak-İş has definite advantages over other confederations.

Hak-İş's position vis-a-vis the privatization of State Economic Enterprises has also been quite different and more sophisticated than that of Türk-İş and DİSK. While the latter, especially Türk-İş that has a very strong position in the public sector, have in general categorically opposed to privatization, Hak-İş has adopted a more nuanced approach. It has argued for the necessity of opting for a case by case approach and placed the emphasis on the methods of privatization rather than dwelling on a straightforward public versus private sector dichotomy. The confederation has also developed a model of employee ownership and management which was put in application by Öz Çelik-İş, the union of metal workers affiliated with Hak-İş, which participated in and won the bid for the iron and steel complex Kardemir. A similar attempt was made by Öz Gıda-İş, the Hak-İş affiliated union in food production, during the privatization of the public organizations in Meat and Fish Products and Milk Products (EBK and SEK). According to the leadership of the confederation, this second attempt has failed because of the legally dubious procedures followed through the privatization of the two companies in question.⁴⁰

It is not clear whether the Kardemir case is really a success story as claimed by the leadership of Hak-İş or whether the privatization processes of EBK and SEK were really of dubious legality. Yet the position adopted by Hak-İş in these particular cases is clearly different both from the general approach to privatization of the other

two confederations and from the position of MÜSİAD with regards to the question of privatization. The latter is described by Erol Yarar in his contribution to a Hak-İş survey conducted on the question of privatization.⁴¹ Here, Yarar opts for a privatization that would transfer the SEE's not to the established big business concerns, but to highly dynamic, medium-sized enterprises with easy, long-term payment conditions. The possibility of rising unemployment is regarded, in this context, as an unavoidable condition of long-term efficiency and eventually rising employment opportunities. This model, which conforms MÜSİAD's general emphasis of the conflict of interest between established big business and newly emerging entrepreneurs has no room for employee ownership and management that is central to Hak-İş's position on the issue.

In the contemporary political atmosphere prevailing in Turkey, Hak-İş, like MÜSİAD, uses islam to bind its members against the repressive forces of the secularist state and other labor movements portrayed as either acting like a state organ (Türk-İş) or fostering class conflict and disrupting harmony by adhering to an alien and now everywhere bankrupt ideology (DİSK). The leaders of the confederation often refer to the inevitable collapse of all ideologies that are defined to include fascism, communism and capitalism. According to them, this inevitable collapse is now clearly recognized everywhere and has produced a general tendency to return to traditional values. They argue, consequently, that the affirmation of cultural identity constitutes the basic characteristic of most contemporary social movements, including the labor union movement. Under these circumstances, the latter is in a position to replace the materialistic values of the technology centered, mass consumption society with approaches where "the human being" appears as a central value.⁴² Such an approach, which emphasizes social cohesion rather than individual self-interest or social harmony rather than class conflict, is

seen to be in full conformity with Islam. Yet, as Salim Uslu, the present leader of the confederation, is extremely cautious to underline, Islam is not an ideology. What is now on the agenda for Hak-İş is, therefore, not to try to replace the now defunct ideologies with Islam. While Islam presents a path to salvation for the humanity in general, it does not provide specific institutional arrangements for the solution of specific problems such as the ones currently faced with the labor union movement. What is necessary, therefore, is to form modern institutions and reform the existing ones in ways which are compatible with the values inherent in Islam and its traditional institutions.⁴³

It is, in general, "traditional cultural values" and not Islam per se that is central to its leaders' attempts to define the unique characteristics of Hak-İş. One finds similar references to the conformity between the ideological orientation of the confederation and "our" moral values as an important factor in the decisions of certain independent unions to join Hak-İş. Although Islam undoubtedly forms an important component of these values, it nevertheless remains implicit in the references to the latter.⁴⁴ In fact, it is possible to discern, in the history of the confederation, a subtle change whereby its class identity gradually begins to surface and becomes at least as visible as its religious character. In this regard, a particular episode is of crucial symbolic significance. In 1989, the old badge of the confederation, on which there was the design of a factory and a mosque, was changed for a new one very quietly, without any publicity.⁴⁵ It is only in the September 1991 issue of the *Hak-İş* journal that we find a very brief explanation of this change where the design on the new badge is described in these terms: "The crescent symbolizes our national unity and freedom, the olive branch stands for peace and life, and the red background is there to remind us of the blood spilled in struggles consciously pursued". While these new symbols could also be interpreted in religious terms, they are clear-

ly more in line with common symbols of the national and international labor movement than the picture of a mosque in its much more straightforward and narrow sociopolitical significance. The way Islam appears in the organizational rhetoric of Hak-İş contrasts with the centrality of religious identity for MÜSİAD where references to Koran or to Mohammed's words and deeds as well as different manifestations of faith and ritual figure almost invariably in all publications and activities. This difference, which any thorough survey of the two organizations' publications would easily reveal, can also be seen in the speeches made in joint meetings.⁴⁶ What is at issue here does not seem to be limited to a mere question of rhetoric. The position of MÜSİAD with regards to the place of labor unions in the desired islamic order is fundamentally different from that of Hak-İş, where the current problems of the union movement as well as the necessity of more conciliatory and "innovative" approaches are clearly recognized without, nevertheless, ever undermining the faith in the organized labor movement and its ability to overcome its present difficulties.⁴⁷ Even when certain zealous leaders of individual unions affiliated with Hak-İş go further than Çelik or Uslu in their affirmations of islamic identity, traditional islamic institutions are never presented as viable alternatives to modern labor union organizations, the *sine qua non* of just and equitable industrial relations in the contemporary world economy.⁴⁸

In MÜSİAD publications, on the other hand, ties that bind the community of believers are often evoked as an assurance of stable and productive industrial relations. Just remuneration of employees appears as a frequently emphasized attribute of Islamic business ethics.⁴⁹ Several members of MÜSİAD also add to this the necessity of being close to one's workers, of treating them as family members.⁵⁰ The counterparts to this appear in Mohammed's frequently quoted statements that "the income that is the most highly regarded

by God is the income of the worker who is respectful to his employer" or "whoever goes to sleep exhausted by hard work for daily bread sleeps with all his sins forgiven".⁵¹ Hence the relationship of mutual trust between the employer who is affectionate and just to his employees and the worker who is respectful and hard working characterizes the functioning of "islamic" labor markets which, consequently, do not really need a formal labor code and, especially, labor unions. This is quite explicitly stated by Balcı, an expert on Islamic labor relations, who argues that harmony and peace as opposed to conflict and controversy is what Islam preaches and, hence, while the presence of labor unions as voluntarily appointed representatives of workers can be accepted, strikes are clearly not to be permitted.⁵²

In our interviews with Salim Uslu, the president of Hak-İş, and Halil Akçay, the president of the İstanbul branch of the confederation, such "islamic principles" endorsed by certain MÜSİAD members, who would not allow unions to organize in their establishments, frequently appeared as a source of complaint. Both interviewees made statements to the effect that "some so-called muslim employers act in ways which are not at all compatible with Islam whenever there is an industrial conflict that threatens their economic self interest". They both said that foreign enterprises are clearly the ones where labor organizations have the least difficulty to protect the rights of their members and MÜSİAD's members do not at all have good records in that area. The fact that religion can fail to undermine class conflict is, in fact, seen very clearly in certain episodes such as the one that took place in a MÜSİAD-affiliated textile company in Bursa in 1993. In this particular episode, the owner of the company was accused by the leader of the Hak-İş affiliated union of textile workers (Öz İplik-İş) by employing body guards close to ultra nationalist MHP and BBP (The Great Union Party) to intimidate unionized workers and to chase the union from the estab-

ishment. Interestingly, the boss in question, while denying the use of physical force against union members, has never denied that he tried to discourage unionization in his enterprise.⁵³

The dilemmas of Hak-İş are clearly manifested in this episode. At the level of domestic politics, it reveals the problems of the confederation's uneasy position within the RP constituency where MÜSİAD has a central position. In fact, the closeness of the ties between the party and the business community represented by MÜSİAD is, at times, evaluated quite critically by the leaders of Hak-İş. For example, the fact that hundreds of MÜSİAD affiliated businessmen and not one union leader accompanied prime minister Erbakan during his official visits to the Middle East and Far East was bitterly observed by Hak-İş representatives who have warned RP politicians to be careful about such attitudes that are reminiscent of the unbalanced pro-business stand of late Turgut Özal.⁵⁴

Hak-İş leadership was also critical of the RP government for using Islam in ways which have unnecessarily contributed to the mounting tension of the political environment during the coalition government. Hence, the official reception that Erbakan gave to sect leaders, the speeches of high ranking government officials announcing projects such as the construction of a mosque in Çankaya, the very core of the secular state, were considered to constitute useless shows of muscle disruptive of social harmony. What Hak-İş leadership found to be especially troublesome was that such symbolic acts and declarations designed to impress the radical muslim constituency were accompanied by an extremely meek attitude that the government has adopted vis-a-vis military authorities in matters of real significance for the democratization and de-militarization of the society.⁵⁵ We believe that these criticisms are significant in highlighting the differences between the role of Islam in Hak-İş's political agenda and the religious politics of the RP. Also significant are

the expressions of discontent by Hak-İş leaders who find the coalition governments's economic program inadequate in addressing certain crucial problems of Turkish economy. Among the problems that they feel are inadequately addressed the growth of the unground economy has a central significance.⁵⁶

In fact, the emphasis of the increasing significance of informality as a crucial problem of Turkish economy and the call for rule-based relations among different actors in an organized and regulated economic order constitutes an important difference between Hak-İş's general outlook and MÜSİAD's position dominated by "flexibility" as the central value. We have discussed the manifestation of this difference in the attitudes of two organizations *via-a-vis* organized interest representation by labor. Not surprisingly, it is also observed in the strategic visions of these organizations concerning the future of Turkey's position in the international economy. As we have seen before, MÜSİAD clearly has an Eastern looking outlook where a closer relationship with muslim countries is desired not only for its own sake but also for its potential to contribute to the formation of a bridge between Turkey and the successful economies of East Asia which constitute the model to be emulated. The leadership of Hak-İş, on the other hand, adopts a much more nuanced position in this regard. While the commitment to a one-dimensional, western-looking strategy is criticized in favor of a more versatile and flexible orientation in foreign policy, it is nevertheless clearly stated that Turkey has made a definite choice by adhering to the European Customs Union and pursuing its application for full membership in the European Community. Given this choice, the politicians should act in conformity with this clear commitment.⁵⁷ What is interesting in this regard is that the leaders of the confederation, notwithstanding their adherence to traditional social values, seem to be quite content with the western orientation in foreign policy. In a

similar vein, they do not at all share MÜSIAD's enthusiasm for East Asian model of development, which, according to them, is based on an authoritarian, undemocratic political system.⁵⁸

International relations in general have a very important place in the activities of the confederation. While visits to Islamic countries or Turkic republics also figure among these activities, the priorities are very clearly elsewhere, in the attempts to develop close ties with western national and international labor organizations. According to the leaders of the confederation, Hak-İş has a responsibility to support the labor movement in islamic countries and Turkic republics in the attempts for the establishment of the norms and institutions of organized interest representation that are found in developed countries.⁵⁹ Yet, it is with close collaboration with its western counterparts that the confederation could contribute to the development of these norms and institutions in Turkey. In this regard, Hak-İş's determination in the pursuit of its application for membership in ETUC and ICFTU is a clear indication of the leadership's evaluation of the confederation's place in the international labor movement.

Hak-İş's decision to apply for membership in these organizations was taken in 1992, but the confederation had to wait for over five years until it was finally accepted in 1997. One reason for the delay was the attitude of the leadership of Türk-İş that has systematically tried to prevent Hak-İş's membership in the ICFTU after having supported it at the initial stages of the procedures in 1993.⁶⁰ Through the period between the initial application and its acceptance, the leadership, Salim Uslu in particular, has maintained close contact with these organizations and their individual members and pursued an active policy of lobbying which, in many ways, appears to be much more systematic, coherent and effective than the activities undertaken by those who conduct Turkey's relations with the EU.

Salim Uslu has once clearly stated that "the East is where our roots are, but the West is our direction".⁶¹ This statement summa-

rizes, in many ways, the strategic orientation of Hak-İş as a modern labor union movement which effectively uses religion both as a major source of values that bind its members into a coherent community and as an element of its harmonious relations with islamic party politics. While Islam is very useful as an organizational resource, the organization's very existence as a labor union depends on the acceptance of primarily western institutional and political principles of organized interest representation.

CONCLUSION

The findings of this study could be summarized in the following points:

- 1) Political Islam in derives its strength to a large extent from its ability to respond to the challenges of the current international and domestic economic order. It is in this context that Islam is used in the formation of networks which are characterized by their "embeddedness" in social and political relations.
- 2) What could be called the economic world of Islam is formed by such networks of social relations rather than formal institutional arrangements such as "islamic banks". In fact the significance of the latter in the financial sector appears to be very limited and is likely decline even further with the recently planned changes in the banking regulation. On the other hand, islamic references appear to be very effective in the generation of massive investment funds through informal arrangements almost entirely based on trust.
- 3) Economic networks where Islam is mobilized as a source of relational capital do not seem to constitute a coherent whole, but appear as separate power blocs which try to reach those

groups that feel alienated from the secular, westernized political and economic establishment for the generation of investment funds, marketing of specialized products, or the formation and development of interest group organizations.

- 4) Our research in the realm of marketing reveals a very clear market segmentation where certain brands a) are not at all advertised in the private TV channels STV, TGRT and Kanal 7 and b) those that are advertised in those channels are not advertised on other private channels or advertised there in a very limited way. There are, in other words, certain products clearly destined for consumers that are described by our interviewees in the islamic segment of the sector as being conservative or traditional in their outlook.
- 5) These products are mainly found in sectors such as food, real estate and household furniture, which are advertised much more extensively in TGRT, STV and Kanal 7 than in other channels. Although further research is needed to make well founded statements in this regard, this might be indicative of certain changes in the life styles of the people who watch the three channels in question. These people, who might have hitherto had traditional housing arrangements and eating habits limited to home-made food items, might now be emerging as purchasers of apartments in residential complexes, consumers of modern furniture or of ready-made food items. In other words, one could interpret our findings in these area as suggesting a certain generalization of modern consumption habits to conservative segments of the population, which leads to the formation of new types of markets for some consumer goods.
- 6) While advertisements in TGRT, STV and Kanal 7 seem to aim these new markets, they do not so in an even and uni-

form way. There are differences both at the level of sectors and brands. These differences might reflect more ideological and political positions of producers or advertising agencies than real or perceived differences in consumption patterns of target groups who watch these channels. The distribution of items mainly advertised in these three channels among them also shows that Kanal 7 is more distant to non-islamic segments than the other two which seem to receive more advertisements of brands also advertised in private TV channels other than the three under study. The clear decline of advertisements given to Kanal 7 after the collapse of the RP-led coalition government, too, has not affected other channels in the same way.

- 7) Among several business associations that claim to have an islamic identity MÜSİAD is by far the most important one as a genuine class organization. MÜSİAD has played a significant role both in promoting the interests of its members and developing a macro-level social project. In these areas, the administration has used a double rhetoric which both emphasizes the discrimination faced by muslims in demands for equal citizenship rights and highlights differences stemming from islamic identity as a basis for the formation of networks of trust and solidarity. The second part of this rhetoric now seems to be abandoned in the current political atmosphere where political Islam is severely repressed and where the association's closeness with political Islam represented by the RP/FP appears as a liability. While our interviews with MÜSİAD members are too limited to form an adequate basis for in-depth analyses of likely future trends, they nevertheless suggest that we might expect a) a certain strategic reorientation where the emphasis of islamic identity would be replaced by a more nationalistic rhetoric and b) in this

process, groups or individuals closer to an ANAP or even MHP type of nationalism than to the islamic politics of RP/FP might acquire more say in the administration. This seems to have already occurred in the Ankara branch of the association.

- 8) The position of Hak-İş in the economic world of Islam is of a nature to reveal that in spite of its very close relationship of with islamic party politics, the class identity of the association clearly dominates its islamic identity. Notwithstanding the tendency of the confederation leaders to abstain from putting too much emphasis on class conflict, Hak-İş remains a modern working class organization and, as such, its relationship with the RP has a different character than the much more easy-going relationship between the latter and MÜSİAD. As to the relationship between Hak-İş and MÜSİAD, it is characterized by a certain tension which has to be carefully managed to remain behind the surface, but is not very difficult to discern in the divergences of opinion expressed on different issues. The most important one of these divergences probably concerns the western-looking strategic orientation of Hak-İş which contrasts with the emulation of the East Asian model of development within the socioeconomic model that MÜSİAD seeks to promote.

Notes

1. See, for example, Timur Kuran, "Islamic Economics and the Islamic Subeconomy", *Journal of Economic Perspectives*, v.9, #4 (fall 1995), pp. 155-177; Ziya Öniş, "The Political Economy of Islamic Resurgence in Turkey: The Rise of the Welfare Party in Perspective", *Third World Quarterly*, v.18, #4 (1997), pp. 743-766; Ayşe Buğra, "Class, Culture and State: An Analysis of Two Turkish Business Associations", forthcoming in *International Journal of Middle East Studies*, (November 1998).
2. M.J.Piore and C.Sabel, *The Second Industrial Divide*, New York: Basic Books, 1984; D.Harvey, *The Condition of Postmodernity*, Oxford: Blackwell, 1989; S.Lash and J.Urry, *The End of Organized Capitalism*, Cambridge: Polity, 1987; G.Arrighi, *The Long Twentieth Century*, London: Verso, 1995.
3. Piore and Sabel (1984).
4. See, for example, N. Woolsey Biggart and M.Orru, "Societal Strategic Advantage: Institutional Structure and Path Dependency in the Automotive and Electronic Industries of East Asia" in A.Buğra and B.Üsdiken (eds.), *State, Market and Organizational Form*, New York and Berlin: Walter de Gruyter, 1997: 201-240 and N.Woolsey Biggart and G. Hamilton, "On the Limits of a Firm-Based Theory to Explain Business Networks: The Western Bias of Neo-Classical Economics" in N.Nohria and R.G.Eccles (eds.), *Networks and Organizations: Structure,*

- Form, Action*", Cambridge, M.A.: Harvard Business School Press, 1992: 471-490.
5. Öniş (1997); Faruk Birttek and B.Toprak, "The Conflictual Agendas of Neo-Liberal Reconstruction and the Rise of Islamic Politics in Turkey", *Praxis International*, v.13, #: 2 (July 1993); Hakan Yavuz, "Political Islam and the Welfare (Refah) Party in Turkey", *Comparative Politics*, October 1997, pp. 63-82. It is interesting than organized labor is almost never mentioned as part of the RP constituency.
 6. See, for example, Ruşen çakır, *Ayet ve Slogan*, İstanbul: Metis, 1990; Faik Bulut, *Tarikat Sermayesinin Yükselişi*, İstanbul: Öteki Yayınevi, 1995; Kemal Can, "Tekkeden Holdinge Yeşil Sermaye", *Milliyet*, 11-18 March 1997a and Kemal Can, "Yeşil Sermaye Laik Sisteme Ne Yaptı?", *Birikim*, # 99 (July 1997b),pp.59-65.
 7. See the interviews in a series of newspaper articles on "Green Capital" by Kemal Can (1997a). See also Can (1997b). When I asked the general secretary of DEİK about the episode concerning the exclusion of MÜSİAD members from the meeting organized in the former Soviet Union, she told me an entirely different story where the muslim businessmen in question applied for participation so late that there was no way to officially include them in the group. They nevertheless showed up in the meetings and created several scenes whenever it has proven to be impossible to include them in pre-arranged activities such as formal dinners with statesmen.
 8. I. Light and G. Karageorgis, "The Ethnic Economy" in N.J.Smelser and R.Swedberg (eds.), *The Handbook of Economic Sociology*, Princeton, N.J.: Princeton University Press, 1994, pp. 647-671.
 9. Erol Yazar, *A New Perspective of the World at the Threshold of the 21st Century*, İstanbul: MÜSİAD, no date of publication given (npg),pp. 3.
 10. Yazar (npg), p.8.
 11. Yazar (npg), pp. 50-1.
 12. Yazar (npg), p. 39.
 13. Can (1997a).
 14. Can (1997a9).
 15. Ali Akpınar, "Kur'an-ı Kerim'in Emtia'ya Bakışı", *Çerçeve*, v.4, # 15 (August-October 1995),pp. 120-124 and Sabahattin Zaim, "Ekonomik Hayatta Müslüman İnsanın Tutum ve Davranışları" in MÜSİAD, *İş Hayatında İslam İnsanı (Homo Islamicus)*, İstanbul, 1994; pp. 101-112.

16. Mustafa Özel, "Adam Zengin Olur mu?" in MÜSİAD, *İş Hayatında İslam İnsanı (Homo Islamicus)*, İstanbul, 1994, pp. 3-14.
17. Zaim (1994) and Yusuf Balcı, "İslam'da Çalışma İlişkileri" in MÜSİAD, *İş Hayatında İslam İnsanı (Homo Islamicus)*, İstanbul, 1994, pp. 113-127.
18. This closeness between the government and the MÜSİAD was clearly seen, especially, in their co-operation in the attempts to change the traditional pro-western orientation of Turkish foreign policy. In the MÜSİAD published accounts of these very explicit attempts, prime minister Erbakan's efforts to foster and to enhance Turkey's economic and political relations with Islamic countries are discussed both in relation to their significance for the country and with regards to the opportunities they represent for MÜSİAD's members (see, for example, MÜSİAD, *Başbakan Necmettin Erbakan'ın Doğu Asya Gezisi ve MÜSİAD'ın Bosna-Hersek Gezisi Raporu*, İstanbul 1996 and MÜSİAD, *MÜSİAD'ın Afrika ve İngiltere İş Gezileri Raporu*, İstanbul, 1997). Similarly, Erbakan's speeches at MÜSİAD sponsored international meetings make explicit references to the opportunities his government will open to islamic business networks (See, especially, Erbakan's speech at the Second International Business Forum organized by MÜSİAD: MÜSİAD *Bülten*, v. 5, # 18, 1997, pp. 50-61).
19. It should be noted, however, that Table VII, which presents a comparative ranking of different cities according to the ratio of RP votes and the number of MÜSİAD members to population, fails to present a close correspondance between the two.
20. Ayşe Öncü, "The Interaction of Politics, Religion, and Finance: Islamic Banking in Turkey" paper presented at the Symposium on Muslims, Migrants and Metropolis, Berlin Institute for Comparative Social Research, Berlin, 1989.
21. Abdullah Taşcıoğlu, "Bankalar ile Özel Finans Kurumları Arasındaki Farklar", *Bankacılar Dergisi*, #.20 (1997), pp. 58-65. Also personal interviews with A.Taşcıoğlu and Halime Miske (İhlas Finans).
22. See the comments of the minister of finance of the Welfare Party -led coalition government on this subject in *Radikal*, 7 June 1997.
23. See *Radikal*, 6 June 1997 and 7 June 1997.
24. See *Radikal*, 7 June 1997.
25. *Yeni Yüzyıl*, 31 August 1997.

26. See *Yeni Yüzyıl*, 31 August 1997; *Radikal*, 10 June 1997; Ümit Kıvanç, "İslamcılar & Para-pul: Bir Dönüşüm Hikayesi", *Birikim*, # 99 (July 1997), pp. 39-58.
27. See, especially, Martyn Lee, *Consumer Culture Reborn*, New York: Routledge, 1993.
28. Ayşe Saktanber, "Formation of a Middle-Class Ethic and its Quotidian: Revitalizing Islam in Urban Turkey" in A.Öncü and P. Weyland, *Space, Culture and Power: New Identities in Globalizing Cities*, London: Zed Books, 1997, pp. 140-156.
29. Ü.Kıvanç (1997).
30. See the series of articles on the advertising sector in Turkey published in *Milliyet*, 5-19 March 1998.
31. C.S.Allen, "Trade Unions, Worker Participation and Flexibility: Linking the Micro and the Macro", *Comparative Politics*, v.22, #:3 (April 1990).
32. G.Arrighi, "Workers of the World at the Century's End", *Review*, v.19, #:3 (Summer 1996), pp. 335-51.
33. Arrighi(1996, p. 350)
34. See B.J.Silver, "Labor Unrest and World Systems Analysis: Premises, Concepts, and Measurement", *Review*, v.18, #.1 (Winter 1995, pp.7-34, p.18.
35. Kazan became the minister of justice in the RP-led coalition government in 1996.
36. See, in particular, "Necati Çelik on Hak-İş", *Hak-İş*, #: 33 (November 1995), pp. 24-27; the "Interview with Necati Çelik" in the *Report presented to the 6th General Assembly of Hak-İş*, Ankara, December 1989, pp.254-255, and the interview with Salim Uslu in *Makro*, December 1996, pp. 36-37.
37. See "Necati Çelik on Hak-İş", *Hak-İş*, #: 33 (December 1995), pp. 26-27.
38. See, in particular, Salim Uslu, *Hak-İş 21 Yaşında/21. Yüzyıla Do'ru Çı'ar'da'ş Sendikal Anlayış*, Hak-İş, Ankara, 1996.
39. For the global nature of these themes see, for example, John Godard "Beliefs about Unions and What They Should Do: A Survey of Employed Canadians", *Journal of Labor Research*, v.18, #:4 (Fall 1997), pp. 621-39.
40. See, in particular, Salim Uslu, *Hak-İş 21 Yaşında/21. Yüzyıla Do'ru Çı'ar'da'ş Sendikal Anlayış*, Hak-İş, Ankara, 1996, pp. 34-36.

41. See *Hak-İş*, #.18, April 1992, p.53.
42. See, among many declarations to the same effect, the opening speech of Necati Çelik at the 7th General assembly of Hak-İş, *Hak-İş*, #: 21 (March 1993), especially pp.5-6 and p.23; Necati Çelik, "Some Thoughts on the 3rd Izmir Economic Congress", *Hak-İş*, #: 19 (May-June July 1992), p.1, and Salim Uslu's speech at ISAV Conference on "Industrial relations in Islam", the *Report of the 6th General Assembly of Hak-İş*, Ankara, 1989, pp. 197-201.
43. Salim Uslu, *ibid.* and the interview with Salim Uslu in *Hak-İş*, #:19 (July 1992), pp. 66-69.
44. See, for example, the leader of the independent labor union in forest products (Orman-İs) explaining their decision to join Hak-İş in *Hak-İş*, #: 17 (January 1992), p.50.
45. See the covers of *Hak-İş*, #:11, March 1988 and #:12, March 1989.
46. Compare, for example, the speeches of Erol Yarar, then the president of MÜSİAD, with that of Salim Uslu, the leader of Hak-İş at the 6th Meeting of the Foundation of Voluntary Cultural Associations (Gönüllü Kültür. Teşekkülleri Vakfı) held in Ankara in 1996: *Hak-İş*, #: 37 (July 1996), pp. 30-31.
47. See, in particular, the speech of Necati Çelik at the 7th General Assembly of Hak-İş held in Ankara in December 1992, *Hak-İş*, # 21 (March 1993), pp.7-8 and Salim Uslu's presentation at the European Conference on the "Criticisms of and the Alternatives to the Union Movement" organized by CGT/ISERES in Paris in November 1992, *Hak-İş*, # 21 (March 1993), pp.109-115.
48. See the paper presented by Mahmut Aslan, the secretary general of the Hak-İş affiliated union Hizmet-İs, at the International Conference on "The Islamic Model for the Labor Movement" held in Pakistan in April 1993, *Hak-İş*, #: 22 (May 1993), pp. 65-67.
49. See Zaim (1994) and Balcı (1994).
50. Can (1997a).
51. Balcı (1994).
52. Balcı (1994), pp. 124-5.
53. See "Yeşil Bayraklı Sınıf Mücadelesi", *Tempo*, 4 January 1994.
54. See the speech of Yusuf Engin, the Hak-İş secretary of workers' education,

- on Turkey and the European Union at the meetings organized for the 21st Anniversary of Hak-İş: *Hak-İş*, #: 39, December 1996, pp.64-67.
55. See *Hak-İş*, #40, February 1997, p.13.
56. Salim Uslu, *Hak-İş 21 Yaşında/21. Yüzyıla Do^{er}ru Ça^odaş Sendikal Anlayış*, *Hak-İş*, Ankara, 1996, p. 34.
57. Salim Uslu, *Hak-İş 21 Yaşında/21. Yüzyıla Do^{er}ru Ça^odaş Sendikal Anlayış*, *Hak-İş*, Ankara, 1996, pp. 7-8.
58. See the interview with Salim Uslu published with the title "Turkey is not South Korea", *Hak-İş*, #23, August 1993, pp.52-55.
59. See, for example, Salim Uslu, "We have no choice but to carry Hak-İş to the future", *Hak-İş*, #: 34, January 1996, p. 34.
60. See, *Hak-İş*, #: 33, November 1995, p.29; #: 37, July 1996, p.83; #: 45, May 1998, pp.6-7.
61. See the interview with Salim Uslu in *Makro*, December 1996.

APPENDIX I

LIST OF INTERVIEWS (*)

I. Business Associations

- 1) Member of the board of directors, MÜSİAD Denizli branch
- 2) Enterprise manager in a MÜSİAD member company, metal sector, Denizli
- 3) Member of the board of directors, MÜSİAD Ankara branch
- 4) Administrative secretary, MÜSİAD Ankara branch
- 5) Member of the board of directors, MÜSİAD İstanbul branch
- 6) MÜSİAD member, insurance company, İstanbul
- 7) MÜSİAD member, law firm, İstanbul
- 8) MÜSİAD member, advertising agency, İstanbul
- 9) MÜSİAD member, computer marketing, İstanbul
- 10) MÜSİAD member, metal furniture marketing, İstanbul
- 11) MÜSİAD member, retail outlet in clothing, İstanbul

- 12) MÜSİAD member, food products, Adana
- 13) Mehmet Emin Koç, editor of the daily Yeni Mesaj, the former director of SESIAD
- 14) Süleyman İlgeri, chairman of the board of the Denizli chamber of industry
- 15) Ramazan Sözgen, administrative secretary of the Denizli chamber of trade

II. LABOR UNIONS

- 16) Salim Uslu, the president of Hak-İş
- 17) Aydın Ünal, Hak-İş, publications department
- 18) Halil Akçay, Hak-İş, president of the İstanbul branch
- 19) İsmail Bayar, Ministry of Labor, the former director of labor department
- 20) Oğuz Oyan, Türk-İş, director of the research department
- 21) Aziz Konukman, Türk-İş, director of the Harb-İş union research department
- 22) Hakan Arslan, Türk-İş, the Harb-İş union research department
- 23) Ahmet Erdaş, Türk-İş, president of the Teksif union Denizli branch

III. ADVERTISEMENT AGENCIES

- 24) Ömer Şengüler, Panel Ajans, owner manager
- 25) Remzi Ceylan, Işık Reklamevi, manager
- 26) Mehmet Doğar, Öncü Ajans, manager
- 27) Mehmet Ural, partner/manager
- 28) Muhsin Kızılkaya, Manajans
- 29) Ayşen Cem, Bileşim, marketing research agency

(*) NOTE to the List of Interviews

Given the political circumstances under which the research was carried out, MÜSİAD members that we have interviewed were often nervous about the possible misuse of their statements. We have, therefore, assured them that their identities would not be disclosed, which has made them, to a certain extent, more willing to share their experiences and sentiments with us.

We have tried to complement the interviews with people involved in organizations of an islamic character (see the clarification of this term given in the introduction to the main text) with interviews with people in the same sector both to be able to put the statements of the former in perspective and to obtain additional information on relevant issues. Hence, the interviews at Denizli chambers of trade and industry, Ministry of Labor, unions and research departments of Türk-İş, advertisement agencies Yorum and Manajans, and Bileşim marketing research agency.

APPENDIX II

LIST OF TABLES

Table I: Geographical distribution of MÜSİAD members: 1995 and 1997

Table II: Sectoral distribution of MÜSİAD member companies according to the date of foundation and enterprise size

Table III: Sectoral distribution of MÜSİAD member companies according to the date of foundation Table IV: Sectoral distribution of MÜSİAD members according to enterprise size

Table V: Geographical distribution of MÜSİAD member companies in different sectors

Table VI: Comparative ranking of different provinces according to the RP votes in 1995 general elections and the ratio of the number of MÜSİAD members to the population of the province

Table VII: İhlas Holding activity diversification chart

Table VIII: Kombassan Holding activity diversification chart

Table IX: Ranking of special financial institutions according to the size of current account and profit participation deposits

Table X: Sectoral distribution of the customers of three advertisement agencies

Table XIa: Sectoral distribution of the advertisement expenditures for the products advertised in private TV channels and the positions of TGRT, STV and Kanal 7 in this distribution: January 1997

Table XIb: Sectoral distribution of the advertisement expenditures for the products advertised in private TV channels and the positions of TGRT, STV and Kanal 7 in this distribution: January 1998

Table XIIa: Sectoral distribution of the advertisement expenditures for the products for which more than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1997

Table XIIb: Sectoral distribution of the advertisement expenditures for the products for which more than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1998

Table XIIIa: Sectoral distribution of the advertisement expenditures for the products for which less than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1997

Table XIIIb: Sectoral distribution of the advertisement expenditures for the products for which less than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1998

Table XIV: Sectoral distribution of labor unions affiliated with different confederations

Table XV: Membership in different labor union confederations: January 1985-January 1998

TABLES

Table I Geographical Distribution of MÜSİAD members: 1995 and 1997

	1995	1997	Change in membership 1995-1997
Adana	28	89	61
Amasya	0	7	7
Ankara	175	149	-26
Antalya	0	43	43
Aydın	0	3	3
Balıkesir	83	41	-42
Bandırma	0	33	33
Bartın	0	23	23
Biga	0	3	3
Bolu	1	5	4
Burdur	1	0	-1
Bursa	99	353	254
Çanakkale	0	12	12
Çankırı	28	25	-3
Çorlu	0	1	1
Çorum	17	13	-4
Denizli	75	52	-23
Diyarbakır	0	41	41
Edirne	0	1	1
Elazığ	0	39	39
Erzurum	1	0	-1
Eskişehir	1	5	4
Gaziantep	61	95	34
Gebze	0	87	87
Gönen	0	1	1
Hatay	0	3	3
Isparta	1	1	0
İçel	0	6	6
İnegöl	0	7	7

İskenderun	2	1	-1
İstanbul	488	851	363
İzmir	114	174	60
Kahramanmaraş	54	47	-7
Karadeniz Ereğlisi	0	35	35
Karaman	6	0	-6
Kayseri	112	152	40
Kocaeli	89	97	8
Konya	153	179	26
Malatya	35	50	15
Manisa	25	12	-13
Mardin	0	2	2
Mersin	0	51	51
Nevşehir	0	1	1
Rize	0	1	1
Samsun	22	42	20
Sinop	0	1	1
Şanlıurfa	16	42	26
Tarsus	0	3	3
Tekirdağ	2	6	4
Tokat	1	0	-1
Trabzon	0	1	1
Uşak	0	4	4
Van	0	1	1
Yalova	0	2	2
Yalvaç	0	1	1
Yozgat	2	0	-2
Zonguldak	25	2	-23
Total	1717	2896	1179

Source: MÜSİAD Firm Presentation Catalogue 1995 and MÜSİAD Agenda 1997

Table II Sectoral distribution of MÜSIAD member companies according to the date of foundation and enterprise size

Food and Beverages

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		3	2	7	21	18	1	52
10-24	3	2	1	6	15	23	2	52
25-49	1		1	3	17	11	1	34
50-99	2		1	2	7	5	1	18
>100	2	2	1	2	7			14
na		1	1	1	4		8	15
sub-total	8	8	7	21	71	57	13	185

Foreign Trade

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10			1		16	13	1	31
10-24					8	6		14
25-49					2	1		3
50-99					1			1
>100				1	1			2
na					2		3	5
sub-total	0	0	1	1	30	20	4	56

Construction and Construction Materials

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10	2	2	6	22	50	45	10	137
10-24		1	2	12	38	29	4	86
25-49			1	7	19	28	3	58
50-99			1	3	22	7		33
>100	1	1	2	6	10	4	1	25
na			2	3	11	14	18	48
sub-total	3	4	14	53	150	127	36	387

Textile, leather and carpet

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		1	8	19	40	34	8	110
10-24	1	4	3	8	27	24	1	68
25-49		1	2	5	30	16	2	56
50-99			4	3	20	8	2	37
>100	1	2	1	11	21	6	2	44
na		1		2	6	7	10	26
sub-total	2	9	18	48	144	95	25	341

Electrics and electronic

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		1	2	2	10	8		23
10-24	2			3	7	10	2	24
25-49					6	5		11
50-99				1	5	1		7
>100				1	3			4
na					1	1	5	7
sub-total	2	1	2	7	32	25	7	76

Services

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10			2	8	26	39	8	83
10-24			1	2	13	15	3	34
25-49		1		2	3	9		15
50-99		2		1	4	2		9
>100			1		5	3		9
na				1	2	5	8	16
sub-total	0	3	4	14	53	73	19	166

Chemicals, mining, iron and steel

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		3	2	10	28	21	2	67
10-24		1		5	18	12	1	38
25-49			1	8	8	4	1	24
50-99				5	2	2		13
>100		1	4	5	8	1		9
na				3	2	5	6	19
sub-total		5	7	36	66	45	10	173

Machinery and spare parts

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10	1			8	9	7	1	26
10-24	2	1	5	19	14	14		5
25-49	2		2	10	12	4		30
50-99			4	6	6	2		18
>100			3	2	5	1		11
na		1		1	5	1	3	11
sub-total	5	2	14	46	51	29	4	151

Forest products and Furniture

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		1	4	3	9	4	1	22
10-24		1	1	6	11	7		26
25-49			1	4	7	5		17
50-99			1		3	4		8
>100		1	2		3	1		7
na				1	3		5	9
sub-total	0	3	9	14	36	21	6	89

Automotive and spare parts

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10		1		4	18	23	1	47
10-24			2	8	19	12		41
25-49				2	8	5	1	16
50-99			1		8	3	1	13
>100				3				3
na			1			3	3	7
sub-total	0	1	4	17	53	46	6	127

Consumer products, packaging, paper and furniture

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10	2	1	2	11	24	17	3	60
10-24	1	1	4	5	14	11	1	37
25-49		1	1	3	6	10		21
50-99		1	1		3		1	6
>100				5	5	1		11
na				2	1	2	4	9
sub-total	3	4	8	26	53	41	9	144

All Sectors

	<1950	1950-59	1960-69	1970-79	1980-89	1990-	na	Sub-total
<10	8	12	28	94	251	229	36	658
10-24	10	10	20	74	184	163	14	475
25-49	3	4	10	44	118	98	8	285
50-99	2	3	13	21	81	34	5	159
>100	5	10	10	36	68	17	3	149
na	0	3	4	14	37	38	73	169
sub-total	28	42	85	283	739	579	139	1895

Table III Sectoral distribution of MÜSİAD member companies according to the date of foundation

	<1950	1950-59	1960-69	1970-79	1980-89	>1990	na
Food and Beverages	8	8	7	21	71	57	13
Foreign Trade	0	0	1	1	30	20	4
Construction and construction materials	3	4	14	53	150	127	36
Textile, leather and carpet	2	9	18	48	144	95	25
Electrics and electronics	2	1	2	7	32	25	7
Services	0	3	4	14	53	73	19
Chemicals, mining, iron and steel	5	7	4	36	66	45	10
Machinery and spare parts	5	2	14	46	51	29	4
Forest products and furniture	0	3	9	14	36	21	6
Automotive and spare parts	0	1	4	17	53	46	6
Consumer goods, packaging, paper and furniture	3	4	8	26	53	41	9

Notes:

- In cases where data in English and Turkish are not the same, the data given in Turkish is taken into account.
- In cases where there are two dates of foundation for the same enterprise, the earlier date is taken into account.
- In cases where the same member's name is given for a group of companies, the oldest company's date of foundation is taken into account.

Source: MÜSİAD Catalogue 1995

Table IV
Sectoral distribution of MÜSİAD members according to enterprise size

	<10	10-24	25-49	50-99	>100	na
Food and Beverages	52	52	34	18	14	15
Foreign Trade	31	24	3	1	2	5
Construction and Construction Material	137	86	58	33	25	48
Textile, leather and carpet	110	68	56	37	44	26
Electrics and electronics	23	24	11	7	4	7
Services	83	34	15	9	9	16
Chemicals, mining, iron and steel	67	38	24	9	19	16
Machinery and steel parts	26	55	30	18	11	11
Forest products and furniture	22	26	17	8	7	9
Automotive and spare parts	47	41	16	13	3	7
Consumer goods, packaging, paper and furniture	60	37	21	6	11	9

Notes:

In cases where data in English and Turkish are not the same, the data given in Turkish is taken into account.

Employment level is taken as the measure of size. Employment figures represents the averages of figures given for different seasons.

Source: MÜSİAD Catalogue 1995

Table V Geographical distribution of MÜSIAD member companies in different sectors

	Food	Construction and Construction material	Foreign Trade	Textiles	Electrics and Electronics	Services	Chemicals	Machinery	Foreign Products	Adoptive	Consumer Products
Adana	9	4	0	4	1	1	5	1	1	1	3
Ankara	25	57	3	26	3	17	7	9	10	16	14
Balıkesir	16	22	0	14	0	0	11	3	9	6	8
Bursa	2	23	1	43	3	13	9	6	20	9	3
Çankırı	3	4	0	5	0	1	0	0	1	1	5
Çorum	5	3	0	2	0	1	2	3	1	2	0
Denizli	4	15	1	21	1	8	15	5	2	2	2
Gaziantep	12	12	4	15	4	2	5	3	1	5	3
İstanbul	29	97	35	116	47	48	50	58	10	48	42
İzmir	11	30	2	37	2	7	8	10	2	5	9
Manisa	2	11	0	1	0	0	5	2	1	4	0
Kahramanmaraş	7	7	0	17	0	4	9	1	0	2	8
Karadöniz Ereğlisi	1	8	1	0	1	1	0	3	0	1	1
Kayseri	9	25	1	19	5	8	12	10	14	6	18
Kocaeli	7	22	1	3	4	15	12	2	5	10	5
Konya	25	22	0	15	3	16	12	31	10	17	16
Malatya	7	15	1	3	1	6	4	1	0	2	0
Samsun	5	5	0	2	0	1	4	1	0	0	3
Samsunfa	2	3	2	1	0	7	2	1	0	1	2
İskenderun	1	0	0	0	0	0	1	0	0	0	0
Uzбекistan	0	0	1	0	0	0	0	0	0	0	0
Tekirdağ	0	0	0	1	0	0	0	1	0	0	0
Tatlızon	1	0	0	0	0	0	0	0	0	0	0
Uşak	1	0	0	1	0	0	0	0	0	0	0
Kiev	0	0	1	0	0	0	0	0	0	0	0
Ordu	1	0	0	0	0	0	0	0	0	0	0
Yozgat	0	0	0	2	0	0	0	0	0	0	0
Erzurum	0	0	0	0	0	0	1	0	0	0	0
Eskişehir	0	0	0	0	0	0	0	1	0	0	0
Bolu	0	0	0	0	0	0	1	0	0	0	0
Burdur	0	0	0	0	0	0	0	0	0	0	0
İsparta	0	0	0	0	0	0	0	0	0	0	1

Source: MÜSIAD Catalogue 1995

Table VI Comparative ranking of different provinces according to the RP votes in 1995 general elections and the ratio of the number of MÜSİAD members to the population of the province

Ranking of different provinces according to the RP votes in 1995 general elections		Ranking of different provinces according to the ratio of the number of MÜSİAD members to the population of the province	
1	Elazığ	Bursa+Yalova+İnegöl	1
2	Konya	Kocaeli+Gebze+Kayseri	2
3	Erzurum	Kayseri	3
4	Malatya	Bartın	4
5	Kahramanmaraş	İstanbul	5
6	Yozgat	Konya	6
7	Karaman	Çankırı	7
8	Kayseri	Elazığ	8
9	Kocaeli	Balıkesir+Bandırma+Gönen	9
10	Tokat	Gaziantep	10
11	Çorum	Malatya	11
12	Nevşehir	Denizli	12
13	Çankırı	İzmir	13
14	Bolu	Kahramanmaraş	14
15	Trabzon	Ankara	15
16	Şanlıurfa	Zonguldak+Karadeniz Ereğlisi	16
17	İstanbul	Adana	17
18	Rize	İçel+Mersin+Tarsus	18
19	Gaziantep	Samsun	19
20	Van	Şanlıurfa	20
21	Amasya	Çanakkale+Biga	21
22	Samsun	Diyarbakır	22
23	Ankara	Antalya	23
24	Mardin	Çorum	24
25	Diyarbakır	Amasya	25
26	Bursa+Yalova	Tekirdağ+Çorlu	26
27	Hatay	Uşak	27
28	Sinop	Manisa	28
29	Adana	Bolu	29
30	Isparta	Eskişehir	30
31	Balıkesir	Sinop	31
32	Eskişehir	Nevşehir	32
33	Zonguldak	Aydın	33
34	Uşak	Hatay+İskenderun	34
35	Burdur	Mardin	35
36	Antalya	Rize	36
37	Manisa	Edirne	37
38	Bartın	Isparta	38
39	İçel	Van	39
40	Denizli	Trabzon	40
41	Çanakkale+Biga	Burdur	41
42	Aydın	Erzurum	42
43	İzmir	Karaman	43
44	Tekirdağ	Tokat	44
45	Edirne	Yozgat	45

Notes:

- The ratio of the number of MÜSİAD members to the population of the province is calculated on the basis of 1995 census data.
- The number of MÜSİAD members in different towns is added to the number of MÜSİAD members in city centers.

Table VII Ihlaz Holding activity diversification chart

Date of Foundation: 1970

Media/Press	
daily newspaper	1970
periodicals	1971-1996
publishing	1976
broadcasting	1993
technical services	1993
news agency	1993
Finance & Insurance	
special financial institutions	1995
insurance services	1995
financial intermediation	1995
life insurance	1996
bank (minority share)	na (1928)
Marketing	
bicycle marketing	1975
PC distribution	1995
organisation of fairs and exhibitions	na
newspaper-magasin distribution	na
Automotive	
spare parts production and assembly operations	1974
marketing and after sale services	1990
2 marketing companies	na
Electrical Appliances and Electronics	
electronic devices	1990
kitchen equipment	1993
Machinery and Spare Parts	
bicycle production	1990
rim&fender production (?)	1993
Food	
water bottling	1990
beverage production	1994
Construction & Contracting	
construction & contracting	na
construction of holiday resorts	na
Foreign Trade	
importation and overseas transportation	1993

Notes:

- The dates of foundation of the already existing companies that were acquired by the holding are given in parentheses.
- Foundations (Vakıf) of the holding are not listed.

Source: Ihlaz Holding Annual Report 1997

Table VIII Kombassan Holding activity diversification chart

Date of Foundation: 1989

Foreign Trade	
commercial representative in germany	1990
ready-wear marketing company in new york	1996
paper export, import, marketing	na
commercial representative in malaysia	na
marble, food, textile marketing in us tennessee	na
commercial representative in new york	na
Machinery and Spare Parts	
hydraulic machinery production	1994 (1985)
agricultural machinery production	na (1966)
sensitive connection parts production	na
steel material production	na
r&d departments	na
electro-mechanical systems	na
Construction and Contracting	
micro mining	1996
project services	1997
3 marble quarries	na-1997
construction and contracting	na
pre-fabricated building materials	na
pvc building material	na
Paper and Packaging	
printing and packaging	1989
6 integrated paper factories	na
cartoon factory	na
printing and packaging	na
Food	
integrated food production	na
biscuits etc. production	na
2 bread factories in kazakistan	na
production of dairy products in bosnia	na
Marketing	
wholesale food marketing	1994
retail food marketing	1996
2 gas stations	na
Leather and Leather Products	
production of leather products in kazakistan and construction of leather firms	na
production of leather products	na
production of rubber products	na
Petro-Chemicals	
LPG filling stations	1993
tyres	na
Media/Press	
film production	1993
advertisement agency	na
Tourism	
air transport	1996
agency	1997
Wood Products and Furniture	
furniture, wood, timber	na
furniture production and decoration services in kazakistan	na
Automotive	
motorcycle production	1994
Textile	
cotton textile production	1996 (1967)
Ready-wear	
ready wear production	1996
Data Processing Center	
software production, electronic products marketing	na

Note: the dates of foundation of the already existing companies that were acquired by the holding are given in parentheses.
Source: Kombassan Holding Annual Report 1997

Table IX Ranking of special financial institutions according to the size of current account and profit participation deposits

	Fund Position April 1998	Rate of Change (March-April 1998)	Current Accounts	Participation Accounts	Current Account/Participation Account Ratio
İtilas Finans Kurumu A.Ş.	142.164.510,180,628	8.9%	4,045.121.376,820	138.119.388.803,808	2.9%
Al Baraka Türk A.Ş.	127.067,861,380,000	9.2%	7,677.904,900,000	119.389.956,380,000	6.4%
Kuvvet Türk A.Ş.	76.676.774,000,000	10.4%	6,200,273,000,000	70,476,501,000,000	8.8%
Faisal Finans Kurumu A.Ş.	41.250.000,000,000	-12.2%	1,290.000,000,000	36,960,000,000,000	3.2%
Anadolu Finans Kurumu A.Ş.	38,057,000,000,000	4.9%	1,427,000,000,000	36,630,000,000,000	3.9%
Asya Finans Kurumu A.Ş.	32,765,000,000,000	10.6%	2,917,000,000,000	29,848,000,000,000	9.8%
Total	260,374,000,000,000	10.1%	195,121,779,000,000	296,304,457,380,000	65.9%

Source: Union of Banks

Table X
Sectoral distribution of the customers of three advertisement agencies

	İşik Reklamcisi	Panel Reklamcılık of the agency with customers within the sector	Number of customers maximum number of of the agency with	Number of customers minimum number of customers within the sector
Food	3	4	7	0
Garment	0	0	3	0
Home Textile	0	1	1	0
Other Textile	0	0	1	0
Construction	2	1	5	0
Finance	2	2	5	0
Durables (except "white" durables)*	4	2	1	0
"White" durables	2	1	4	0
Electronics	1	1	2	0
Cosmetic Chemistry	1	0	10	0
Non-chemical cleaning products	0	0	2	0
Retail Shop	1	1	3	0
Media	1	0	4	0
Automotive	0	0	4	0
Real Estate	0	1	1	0
Tourism	2	2	1	0
Education	1	0	2	0
Consultancy	0	1	0	0
Entertainment	0	0	3	0
Holding (Institutional)	0	0	4	0
Alcoholic Beverages	0	0	3	0
Tobacco	0	0	1	0
Stationary	0	0	2	0
Public Enterprises	0	0	1	0
Unknown	8	1	7	1
Other	1	1	4	0

* Mainly includes household furniture

Sources:

- Panel Advertisement Agency Annual Report, 1997
- İşik Advertisement Agency Presentation Catalogue
- Zehra Güngör, "Hayatı Renklerinden Sektör Reklamcılar", Milliyet 5-19 March 1998.

Table XI.a. Sectoral distribution of the advertisement expenditures for the products advertised in private TV channels and the positions of TGRT, STV and Kanal 7 in this distribution: January 1997

Sector	Total		Products not advertised in TGRT, STV ve Kanal 7		Products for which expenditures on advertisements on TGRT, STV ve Kanal 7 form more than half of the advertisement expenditures		Products for which expenditures on advertisements on TGRT, STV ve Kanal 7 form less than half of the advertisement expenditures	
	Total advertisement expenditures within the sector	Sector's share within total expenditures on advertisements on private TV channels	Number of products	The share of these products' advertisement expenditures in total advertisement expenditures of the sector	Number of products	The share of these products' advertisement expenditures in total advertisement expenditures of the sector	Number of products	The share of these products' advertisement expenditures of the sector
Cosmetics/Cleaning	6,076,850,443	23.6%	30	21.4%	14	47.0%	26	43.1%
Meat	6,115,932,651	23.7%	53	70.4%	13	18.7%	4	9.8%
Food	4,367,694,974	16.9%	10	6.7%	30	48.2%	20	30.9%
Finance	1,689,508,822	6.6%	9	47.8%	3	10.7%	5	15.6%
Construction/Real Estate	629,243,522	2.4%	1	2.3%	8	97.7%	0	0.0%
"White" dummies	591,236,209	2.3%	4	30.9%	5	29.9%	4	6.9%
Ship	557,669,369	2.2%	8	35.7%	7	53.1%	1	46.2%
Automotive	544,377,925	2.1%	2	3.2%	5	96.8%	0	0.0%
Electronics	1,045,683,223	4.1%	10	48.4%	2	2.1%	3	13.3%
Dummies (except "white" dummies)	489,047,530	1.9%	2	16.2%	12	80.6%	1	3.1%
Entertainment	480,763,420	1.9%	20	100.0%	0	0.0%	0	0.0%
Garment and Accessories	666,200,312	2.6%	0	0.0%	16	100.0%	0	0.0%
Holding Company	686,138,688	2.7%	0	0.0%	3	100.0%	0	0.0%
Home Textiles	117,702,826	0.5%	0	0.0%	2	18.0%	1	0.4%
Tourism	171,345,274	0.7%	2	100.0%	0	0.0%	0	0.0%
Other	1,020,115,386	4.0%	15	52.4%	12	47.6%	0	0.0%
Unknown sectors	522,296,713	2.0%	9	33.0%	4	27.0%	0	0.0%
Total	25,772,063,199	9.100.0%	175	433.7%	136	46.6%	65	18.1%

*Mainly includes household furniture

Source: Bileşim Market Research Center

Table XI.b Sectoral distribution of the advertisement expenditures for the products advertised in private TV channels and the positions of TGRT, STV and Kanal 7 in this distribution: January 1998

Sector	Total		Products not advertised in TGRT, STV ve Kanal 7		Products for which expenditures on advertisements on TGRT, STV ve Kanal 7 form more than half of the advertisement expenditures			Products for which expenditures on advertisements on TGRT, STV ve Kanal 7 form less than half of the advertisement expenditures		
	Total advertisement expenditures within the sector	Sector's share within total expenditures on advertisements on private TV channels	Number of products	The share of these products' advertisement expenditures in total advertisement expenditures of the sector	Number of products	The share of these products' advertisement expenditures in total advertisement expenditures of the sector	The share of expenditures on advertisements on TGRT, STV and Kanal 7 in total advertisement expenditures of these products	Number of products	The share of these products' advertisement expenditures in total advertisement expenditures of the sector	The share of expenditures on advertisements on TGRT, STV and Kanal 7 in total advertisement expenditures of these products
Cleaning	17,591,364,063	920,04	17	911,91	7	7,39	972,28	43	980,09	920,05
Media	14,905,056,312	925,45	57	992,81	13	7,19	993,58	0	90,00	90,00
Food	8,099,936,127	913,83	11	914,69	23	23,00	983,95	27	963,31	924,93
Finance	4,986,433,166	98,51	12	947,35	1	15,69	963,55	2	936,95	98,06
Construction/Real Estate	3,710,736,838	96,34	1	91,54	6	72,76	970,27	2	925,76	915,37
"White" identities	1,592,896,172	92,72	14	960,94	4	11,14	989,43	5	927,92	919,88
Automotive	1,582,048,436	92,70	5	917,43	10	36,37	995,84	0	90,00	90,00
Ship	1,566,694,487	92,68	8	919,76	2	37,06	951,28	3	943,19	930,13
Electronics	1,375,759,346	92,35	4	942,60	5	22,34	993,78	2	935,06	917,36
Ducables (except "white" jumbies)*	1,090,218,730	92,03	2	918,04	12	81,96	987,87	0	90,00	90,00
Entertainment	942,649,400	91,61	18	910,00	0	0,00	90,00	0	90,00	90,00
Garment and Accessories	548,799,859	60,94	2	918,08	10	81,92	998,82	0	90,00	90,00
Holding/Company	281,463,890	60,48	0	90,00	5	100,00	9100,00	0	90,00	90,00
Home Textiles	120,590,894	90,21	0	90,00	2	100,00	9100,00	0	90,00	90,00
Tuition	72,388,087	90,12	0	90,00	1	100,00	9100,00	0	90,00	90,00
Other	981,746,341	91,54	7	938,04	2	4,61	9100,00	4	967,35	924,93
Unknown sectors	870,749,111	91,49	2	937,22	6	51,88	9100,00	1	910,90	927,13
Total	38,566,629,807	91,00,00	151	930,39	101	47,25	982,39	84	922,36	911,07

* Mainly includes household furniture
Source: Bilgiye, Market Research Center

Table X11a Sectoral distribution of the advertisement expenditures for the products for which more than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1997

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements
COSMETICS/CLEANING						
Bingönünlük öz deterjan	671.914,941	28.2%	27.7%	19.4%	75.3%	
Cağınon Tablet	377,912,101	5.4%	69.3%	0.0%	74.7%	
Kosla Sivi	364,257,799	31.4%	30.9%	0.0%	62.3%	
Cağınon-Arçelik Bul.Mak.	327,597,218	16.5%	65.5%	0.0%	82.1%	
Marc Maifak	325,016,185	6.6%	61.5%	0.0%	70.1%	
Cağınon Tablet	195,872,634	15.6%	56.8%	0.0%	72.4%	
Hes Deterjan	173,535,850	49.2%	0.0%	50.8%	100.0%	
Marc Kireç Çözücü	127,049,050	17.5%	85.8%	0.0%	87.2%	
Arko Krem	99,314,905	17.5%	28.9%	8.5%	54.9%	
Marc Banyo Sivi	79,356,437	24.7%	65.8%	0.0%	90.5%	
Bacı - Sil	44,766,232	30.8%	79.3%	20.7%	130.8%	
Suzs Sivi Bulutluk Deterjanı	28,882,438	70.2%	0.0%	0.0%	70.2%	
Sanex Saç ve Vücut Şampuanı	21,785,624	53.9%	0.0%	0.0%	53.9%	
Nel Şampuan	20,000,303	103.5%	0.0%	0.5%	104.0%	47.0%
Total	2,857,261,717	21.7%	46.1%	8.3%	76.1%	11.1%
MEDIA						
Türkiye Gazetesi	470,593,523	100.0%	0.0%	0.0%	100.0%	
Zaman Gazetesi	179,003,396	0.0%	96.3%	0.0%	96.3%	
Tinaş Yayıncılık	123,025,717	0.0%	0.0%	100.0%	100.0%	
Nil Yayınları	78,066,783	0.0%	100.0%	0.0%	100.0%	
Milli Gazete	62,873,237	0.0%	0.0%	100.0%	100.0%	
Yeni Şafak Gazetesi	37,885,786	0.0%	0.0%	100.0%	100.0%	
Sızntı Dergi	36,420,272	0.0%	100.0%	0.0%	100.0%	
Sağlığımız Dergi	34,784,086	0.0%	0.0%	0.0%	0.0%	
Raks Kur'an Seti	31,860,643	19.9%	33.9%	36.7%	90.5%	
Nehir Yayınları	30,084,432	0.0%	0.0%	100.0%	100.0%	
Faunların Kitap	25,735,682	0.0%	100.0%	0.0%	100.0%	
Ajans Pres	21,388,752	18.5%	70.3%	0.0%	88.8%	
Aksiyon Dergi	13,920,552	0.0%	100.0%	0.0%	100.0%	18.7%
Total	1,145,642,861	42.0%	30.8%	26.2%	98.9%	4.4%

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%
FOOD					
Kristal (Genel)	389.334,924	100.0%	0.0%	0.0%	100.0%
Eti Ürünleri (Genel)	243,150,910	17.8%	20.5%	20.6%	58.9%
Tuna& Çorba	216,271,027	27.4%	0.0%	25.6%	53.0%
Oben Çay	167,476,272	0.0%	100.0%	0.0%	100.0%
Eti Cici Bebe	121,070,031	15.0%	20.9%	25.3%	61.2%
Tamnet Et Ürünleri	98,808,343	0.0%	75.9%	24.1%	100.0%
Özleni Sucukları	72,023,135	0.0%	36.7%	52.1%	88.8%
Ona Açıkçak Yağı + Margarın	64,309,621	62.7%	0.0%	0.0%	62.7%
Reis Bakliyesi	58,663,755	10.2%	43.8%	40.9%	95.0%
Asya Pirinç	57,071,716	19.6%	52.3%	28.1%	100.0%
Bifa Genel	55,502,436	0.0%	32.2%	45.2%	77.4%
Sana Margarın	54,431,062	0.0%	100.0%	0.0%	100.0%
Seyidoğlu Gıda Ürünleri	43,445,177	0.0%	29.6%	70.4%	100.0%
Eti Top Kek	41,895,010	11.3%	22.4%	23.8%	57.5%
Pekos+Pates	35,938,749	79.3%	0.0%	20.7%	100.0%
Mucips	35,786,281	76.7%	0.0%	23.3%	100.0%
Özleni Sosis	34,032,214	0.0%	42.6%	52.0%	94.7%
Cipso Çerez	34,024,935	73.7%	0.0%	26.3%	100.0%
Panguen Gıda Ürünleri	32,130,051	27.6%	12.8%	14.8%	55.2%
Üker Alpetta Çikolata	32,041,047	14.6%	39.2%	0.0%	53.8%
Neba Margarın	31,902,214	35.6%	35.6%	0.0%	71.3%
Özleni Salam	29,846,855	49.2%	42.2%	0.0%	91.4%
Üker Peki	28,318,092	23.5%	28.5%	0.0%	52.0%
Mama& Birlik Zeytinleri	27,078,310	100.0%	0.0%	0.0%	100.0%
Sunny Gold Gofret	24,200,989	0.0%	63.9%	36.1%	100.0%
Gazli Peynir	20,729,271	75.2%	0.0%	24.8%	100.0%
Alınçiftlik Tavukçuluk	18,888,732	0.0%	0.0%	100.0%	100.0%
Ikran A.Ş.	14,796,674	0.0%	0.0%	100.0%	100.0%
Tikveçit Sni Ürünleri	13,694,808	0.0%	100.0%	0.0%	100.0%
Bifa Sfer Bebe Bisküvi	10,369,186	0.0%	59.1%	40.5%	99.6%
Total	2,107,231,827	34.5%	28.2%	19.7%	82.4%
					Share in sector's total Share in total private TV 48.2%
					8.2%

	Private TV*	TGRTr%	STV%	Kumal %	TGRTr+STV+ Kumal %	Share in sector's total Share in total private TV advertisements
FINANCE						
Anadolu Finans Kurumu	107.203.183	0,0%	100,0%	0,0%	100,0%	
Kuveyt-Türk Eviyat Finans	48.225.389	0,0%	65,6%	34,4%	100,0%	10,7%
Albaraka-Türk	25.129.906	0,0%	0,0%	100,0%	100,0%	
Total	180.558.478	0,0%	76,9%	23,1%	100,0%	%0,70
CONSTRUCTION/REAL ESTATE						
Firat Grt Boru	325.799.006	3,7%	22,3%	29,2%	55,2%	
Yeni Dünya Konut Yapı Ko.	91.160.368	0,0%	0,0%	100,0%	100,0%	
Mineflo Yer Değmeleri	58.349.717	100,0%	0,0%	0,0%	100,0%	
Doğanay Arsa Ofisi	31.517.176	0,0%	27,5%	72,5%	100,0%	
Asya İnşaat	30.687.477	17,5%	40,4%	42,2%	100,0%	
İhlas Kaplica Evleri	28.861.958	100,0%	0,0%	0,0%	100,0%	
Seramiksun Stranik	24.463.598	38,0%	27,4%	34,6%	100,0%	
Nurvit Lavabo Klozet	24.180.964	100,0%	0,0%	0,0%	100,0%	
Total	615.020.264	22,4%	16,3%	37,5%	76,3%	97,7% Share in sector's total Share in total private TV advertisements
"WHITE" DURABLES						
İhlas Ev Aletleri	75.844.396	100,0%	0,0%	0,0%	100,0%	
Termikel Genel	40.749.908	0,0%	0,0%	100,0%	100,0%	
Termikel Firm	24.539.605	0,0%	0,0%	100,0%	100,0%	
Ekmanım İsi Mak. A.Ş.	18.480.027	0,0%	100,0%	0,0%	100,0%	
Termikel Katalitik Soba	17.265.290	0,0%	0,0%	100,0%	100,0%	
Total	176.879.226	42,9%	10,4%	46,7%	100,0%	29,9% Share in sector's total Share in total private TV advertisements
SHOPS						
Yınpaş Süpermarket	195.105.288	0,0%	0,0%	100,0%	100,0%	
Yınpaş Mağaza	38.061.920	0,0%	0,0%	100,0%	100,0%	
Yöre Alışveriş Merkezi	28.588.425	20,5%	44,1%	35,4%	100,0%	
Semena Mağaza	23.666.669	100,0%	0,0%	0,0%	100,0%	
Ayakkkabı Dünyası	17.423.219	0,0%	0,0%	100,0%	100,0%	
Kaaplar Gıda Pazarı	16.465.174	0,0%	0,0%	100,0%	100,0%	
İCS Metropol Alışveriş Merkezi	4.676.902	100,0%	0,0%	0,0%	100,0%	
Total	323.987.597	10,6%	3,9%	85,6%	100,0%	58,1% Share in sector's total Share in total private TV advertisements

	Private TV*	TGRT%	STV%	Kumal 7%	TGRT+STV+ Kumal 7%	
AUTOMOTIVE						
Jet Pa Otomotiv	416.867.455	0.0%	30.0%	28.4%	58.3%	
Emis Otomotiv	46.346.164	0.0%	0.0%	100.0%	100.0%	
Ayın Otomotiv	29.383.534	18.2%	42.2%	39.6%	100.0%	
Zaman Pazarlama (Spectra)	24.717.105	0.0%	100.0%	0.0%	100.0%	
Kia Sportage	9.832.135	100.0%	0.0%	0.0%	100.0%	96.8%
Total	527.146.393	2.9%	30.7%	33.4%	67.0%	Share in sector's total Share in total private TV advertisements 2.0%
ELECTRONICS						
Erişyon Cep Telefonu	13.817.693	28.0%	72.0%	0.0%	100.0%	
İhlas Tansan Elektronik Turti	8.040.750	100.0%	0.0%	0.0%	100.0%	2.1%
Total	21.858.443	54.5%	45.5%	0.0%	100.0%	Share in sector's total Share in total private TV advertisements 0.1%
DURABLES (except "white durables")						
İpek Mobilya	82.159.296	0.0%	63.2%	0.0%	63.2%	
Tefal Tava	62.795.865	42.2%	19.4%	0.0%	61.6%	
Aksu Çelik Tencere	48.746.691	89.6%	6.5%	0.0%	96.1%	
Mert Çelik Tencere	46.841.344	40.3%	0.0%	59.7%	100.0%	
Zafer Mobilya	35.821.324	0.0%	0.0%	100.0%	100.0%	
Korkmaz Çelik Ürünleri	23.587.476	25.9%	0.0%	74.1%	100.0%	
İhlas Mobilya	22.974.875	100.0%	0.0%	0.0%	100.0%	
Hisar Tencere Seti	20.983.687	53.1%	46.9%	0.0%	100.0%	
Sarıy Peyker	17.032.719	0.0%	69.5%	30.5%	100.0%	
Hisar Çatal Kaşık	12.381.770	83.9%	0.0%	0.0%	83.9%	
Mert Döğekli Tencere	10.952.206	100.0%	0.0%	0.0%	100.0%	
Ar-Yıldız Çatal Bıçak	10.136.616	100.0%	0.0%	0.0%	100.0%	
Total	394.413.869	40.8%	22.5%	21.9%	85.2%	Share in sector's total Share in total private TV advertisements 80.6%
ENTERTAINMENT						
Total	0					1.5%
WEAR and ACCESSORIES						
M. Pollice Ayakkabı	108.023.801	95.9%	0.0%	0.0%	95.9%	
Pen Çanuşur ve Pijamaları	79.319.296	0.0%	0.0%	100.0%	100.0%	
Mıray Eşarp	68.209.160	0.0%	0.0%	100.0%	100.0%	
Nurşah Eşarpırları	64.792.603	8.2%	41.9%	49.9%	100.0%	
Belli Eşarp	54.042.383	0.0%	0.0%	100.0%	100.0%	
Cisil Eşarp	46.456.827	0.0%	20.7%	79.3%	100.0%	

	Private TV*	TGRIT%	STV%	Kamul 7%	TGRIT+STV+ Kamul 7%	Share in sector's total Share in total private TV advertisements
Dicle Televizör	45.935.184	0.0%	94.3%	5.7%	100.0%	100.0%
Canabis Jeans	44.781.889	30.8%	0.0%	69.2%	100.0%	100.0%
Oman Jeans	33.007.721	0.0%	0.0%	100.0%	100.0%	100.0%
Sironi Jeans	24.637.912	100.0%	0.0%	0.0%	100.0%	100.0%
Wall Street Jeans	24.596.952	86.4%	0.0%	0.0%	86.4%	86.4%
Ahven Eşarp	21.008.720	0.0%	44.2%	55.8%	100.0%	100.0%
Tuğra Eşarp	17.187.008	20.6%	0.0%	79.4%	100.0%	100.0%
Mezmenet Giyim	14.210.469	0.0%	0.0%	100.0%	100.0%	100.0%
Candino Sual	10.395.129	2.2%	0.0%	97.8%	100.0%	100.0%
Empire Sual	9.785.257	100.0%	0.0%	0.0%	100.0%	100.0%
Total	666.390.311	27.3%	13.4%	58.1%	98.8%	Share in sector's total Share in total private TV advertisements 2.6%
HOLDING/COMPANY						
Kombasın St. Grubu	323,349,052	0.0%	0.0%	100.0%	100.0%	100.0%
Büyük Anadolu Şirket Grubu	244,286,902	7.2%	12.9%	79.9%	100.0%	100.0%
Silim Holding	118,502,653	0.0%	0.0%	100.0%	100.0%	Share in sector's total Share in total private TV advertisements 100.0%
Total	686,138,607	2.6%	4.6%	92.8%	100.0%	Share in sector's total Share in total private TV advertisements 2.6%
HOME TEXTILE PRODUCTS						
Boynalı Elektrikli Battaniye	10,751,494	0.0%	100.0%	0.0%	100.0%	Share in sector's total Share in total private TV advertisements 18.0%
Sesli Battaniye	10,468,677	0.0%	100.0%	0.0%	100.0%	Share in sector's total Share in total private TV advertisements 0.1%
Total	21,220,171	0.0%	100.0%	0.0%	100.0%	Share in sector's total Share in total private TV advertisements 17.6%
TOURISM						
OTHERS						
İğdeş	114,685,037	0.0%	0.0%	100.0%	100.0%	100.0%
Sarı Zerrin Sebzeciler Tohum	62,898,724	0.0%	100.0%	0.0%	100.0%	100.0%
Bamaik Karı Yakıt San.	51,649,774	0.0%	0.0%	100.0%	100.0%	100.0%
İpragaz Tıp	49,539,783	32.6%	17.1%	5.1%	54.8%	54.8%
Mil-Ten Kömür	44,729,549	0.0%	0.0%	100.0%	100.0%	100.0%
Ankara Belediyesi	35,328,875	0.0%	0.0%	100.0%	100.0%	100.0%
İstanbul Belediyesi	31,728,810	0.0%	0.0%	100.0%	100.0%	100.0%
Merve Kömür	27,026,880	0.0%	0.0%	100.0%	100.0%	100.0%
Elektrikler Büro Makinaları	20,603,655	0.0%	0.0%	100.0%	100.0%	100.0%
Ergaz Tıp	18,742,181	0.0%	0.0%	100.0%	100.0%	100.0%
Düğünkarat Havva Kompresör	16,134,296	0.0%	0.0%	100.0%	100.0%	100.0%
Air Afi	12,794,565	0.0%	0.0%	94.0%	94.0%	Share in sector's total 17.6%

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in total private TV advertisements
Total	485,862,129	3.3%	14.7%	77.2%	95.2%	1.9%
UNKNOWN SECTORS						
Özsan Örne Tekstil	47,462,595	0.0%	0.0%	100.0%	100.0%	
Turkish Exports 97	41,917,312	100.0%	0.0%	0.0%	100.0%	
Saygımar	27,451,060	100.0%	0.0%	0.0%	100.0%	
Naksan Plastik San.	24,154,566	0.0%	0.0%	100.0%	100.0%	27.0%
Total	140,985,533	49.2%	0.0%	50.8%	100.0%	Share in total private TV advertisements 0.5%
GENERAL TOTAL	10,350,597,426					

* Milyon TL

* Mainly includes household furniture

Notes:

- Listing within the sector is made according to the private TV advertisement expenditures
- Advertisement expenditures are calculated on the basis of standard media price listings without taking into account special rates given to affiliated organisations or set by special bilateral agreements.

Source: Bileşim Market Research Center

Table X:11b Sectoral distribution of the advertisement expenditures for the products for which more than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1998

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements
COSMETICS/CLEANING						
Molfix Bebek Bezi	352,929,484	50.5%	38.4%	3.5%	92.3%	
Arko Krem	262,587,907	12.2%	45.5%	0.6%	58.4%	
Arko Baby Ürünleri Genel	250,928,743	12.9%	45.0%	0.0%	57.9%	
Hes Mark Deterjan	241,517,640	22.3%	62.6%	1.1%	85.9%	
Derby Tek Jilet	123,245,538	0.0%	41.3%	9.2%	50.5%	
Suzs Sivi Hijyenik Deterjanı	48,371,597	14.1%	37.6%	0.0%	51.7%	7.39
Arkadaş Kolonyası	20,588,626	100.0%	0.0%	0.0%	100.0%	
Total	1,300,169,535	24.9%	45.2%	2.1%	72.3%	7.22
MEDIA						
Zaman Gazetesi	318,523,252	0.0%	80.0%	3.1%	83.1%	
Aksiyon Dergi	221,355,832	0.0%	100.0%	0.0%	100.0%	
Türkiye Gazete	122,339,338	100.0%	0.0%	0.0%	100.0%	
Haber Ekstra Dergi	95,223,216	0.0%	100.0%	0.0%	100.0%	
Yeni Şafak Gazetesi	63,410,876	0.0%	68.5%	31.5%	100.0%	
İhlas Dergi Grubu	57,690,350	100.0%	0.0%	0.0%	100.0%	
Ajanus Press	45,653,829	15.4%	51.5%	0.0%	66.9%	
Sızın Dergi	42,422,427	0.0%	100.0%	0.0%	100.0%	
Sığılmaz Dergisi	29,887,836	0.0%	0.0%	100.0%	100.0%	
Yemek Zevki Dergi	24,369,981	100.0%	0.0%	0.0%	100.0%	
Kültür Dünyası Dergisi	23,472,936	0.0%	0.0%	100.0%	100.0%	
Türkiye Çocuk Dergisi	19,857,950	100.0%	0.0%	0.0%	100.0%	7.19
Aktaş Basım Yayımları	7,949,924	0.0%	0.0%	100.0%	100.0%	
Total	1,072,157,737	21.6%	63.5%	8.5%	93.6%	
FOOD						
Kristal (Genel)	397,006,818	100.0%	0.0%	0.0%	100.0%	
Yayla Margarın	248,852,587	16.8%	39.3%	0.0%	56.1%	
Durdanel Ton Balığı	235,940,812	65.0%	0.0%	0.0%	65.0%	
Seydiğün Gıda Ürünleri	118,212,091	90.3%	9.7%	0.0%	100.0%	
Ulker Bayram Çikoladaları	111,594,503	16.9%	38.3%	4.2%	59.5%	
Gülşan Reçel Helva	98,528,811	54.2%	45.8%	0.0%	100.0%	

Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%
Kırsangöç Müstahzû	0.0%	60.3%	6.8%	67.1%
Reis Daklıyıt	20.1%	79.9%	0.0%	100.0%
Birna Yarg-Biryat Sıvı	24.6%	52.6%	6.1%	83.2%
Saray Çikolata	10.7%	51.4%	4.2%	66.2%
Ece Zeytin	0.0%	0.0%	28.8%	100.0%
Kırsal Çolu	100.0%	20.5%	0.0%	100.0%
Karsın Ürünleri (genel)	36.5%	0.0%	0.0%	86.2%
Seyidođlu Tahin-Pekmez-İtleva	0.0%	100.0%	24.5%	100.0%
Bıfı Harika Çikolata	0.0%	20.9%	0.0%	100.0%
Seğmen reçelileri	48.7%	75.9%	0.0%	100.0%
Çıpsa Çerez	0.0%	36.7%	0.0%	90.0%
Kafeden Kahve	0.0%	0.0%	0.0%	100.0%
Kauner Un	43.8%	43.8%	0.0%	100.0%
Ayrat Et Ürünleri Genel	0.0%	52.3%	97.5%	100.0%
Bıfı Wild Golfret	0.0%	32.2%	0.0%	100.0%
Emek Bal	100.0%	100.0%	0.0%	100.0%
Seyidođlu Tadı	0.0%	29.6%	0.0%	100.0%
Total	49.4%	22.4%	3.3%	84.0%
FINANCE				
İhlas Finans Vesa	45.1%	17.0%	1.4%	63.6%
Total	45.1%	17.0%	1.4%	63.6%
CONSTRUCTION/REAL ESTATE				
Altaylar Ziffo	21.8%	41.2%	0.0%	63.0%
Mineflo Yer Döşemeleri	49.7%	50.3%	0.0%	100.0%
Fırat Çift Roru	0.0%	60.4%	4.4%	64.8%
Tuna İnşaat	0.0%	100.0%	0.0%	100.0%
Aysın İnşaat	89.9%	89.3%	10.8%	100.0%
Kompan Plastik Kapı ve Pencere	51.9%	52.6%	3.6%	100.0%
Total	21.6%	47.9%	0.7%	70.3%
"WHITE" DURABLES				
Eca Middle Firm	0.0%	100.0%	0.0%	100.0%
Toshiba TV	100.0%	0.0%	0.0%	100.0%
Profile TV	38.4%	19.8%	0.7%	58.9%
Sony Music	0.0%	100.0%	0.0%	100.0%
Total	55.3%	34.0%	0.2%	89.4%
Share in sector's total Share in total private TV advertisements				9%23.11
Share in sector's total Share in total private TV advertisements				9%3.18
Share in sector's total Share in total private TV advertisements				15.69%
Share in sector's total Share in total private TV advertisements				9%1.34
Share in sector's total Share in total private TV advertisements				9%72.76
Share in sector's total Share in total private TV advertisements				9%4.61
Share in sector's total Share in total private TV advertisements				9%6.35
Share in sector's total Share in total private TV advertisements				9%0.30

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements	
SHOPS							
İhlas Mağazaları	374.364.517	100,0%	0,0%	0,0%	100,0%	86,37% Share in total private TV advertisements %2,33	
Ramsay Mağ.	280.892.501	100,0%	0,0%	0,0%	100,0%		
Özdilek Alışveriş Merkezi	215.882.250	100,0%	0,0%	0,0%	100,0%		
Fabri Kuz Optik	162.271.715	16,7%	70,4%	12,9%	100,0%		
Yimpaş Toplu Tüketim Merk.	142.057.369	34,0%	52,4%	13,6%	100,0%		
Genççiler Mağ.	105.600.506	0,0%	62,1%	9,7%	71,9%		
Yöre Alışveriş Mer.	26.996.090	0,0%	95,8%	4,2%	100,0%		
Textil E. ve Kebabevi	22.361.271	0,0%	100,0%	0,0%	100,0%		
Sultan Sofrası	19.609.779	0,0%	100,0%	0,0%	100,0%		
Dinuba Restaurant	16.360.218	0,0%	100,0%	0,0%	100,0%		
Total	1.366.396.216	48,7%	43,4%	3,8%	95,8%		
AUTOMOTIVE							
Jet Pa Oto 2	580.227.344	0,0%	45,4%	5,8%	51,3%		37,06% Share in total private TV advertisements 0,99
Jet Pa Oto Proton 5*5	337.753	0,0%	0,0%	100,0%	100,0%		
Total	580.565.097	0,0%	45,4%	5,9%	51,3%		
ELECTRONICS							
Desti Oto Alarm Sistem	200.101.384	29,3%	47,3%	13,9%	90,4%	98,637 Share in total private TV advertisements %2,33	
Orionu computer	81.835.681	0,0%	100,0%	0,0%	100,0%		
KRN Bilişayur	23.799.828	0,0%	0,0%	100,0%	100,0%		
Songüller GSM Center	1.348.939	100,0%	0,0%	0,0%	100,0%		
Eriçsson Cep Telefon Genel	193.693	0,0%	100,0%	0,0%	100,0%		
Total	307.279.525	19,5%	57,5%	16,8%	93,8%		
DURABLES (except "white durables")							
Nurmus Mobilya	249.731.300	55,2%	40,0%	4,7%	100,0%		81,96 Share in total private TV advertisements %1,67
İdaş Ürünleri Genel	170.424.708	0,0%	59,6%	0,0%	59,6%		
Mehrup Mutluk Alatlari	107.525.029	0,0%	54,5%	4,7%	59,2%		
Modoko Mobilya	105.106.622	98,3%	0,0%	0,0%	98,3%		
Atilantik Halk	85.491.653	100,0%	0,0%	0,0%	100,0%		
Yuvam Lazer 2001 Sobası	69.604.947	100,0%	0,0%	0,0%	100,0%		
İnanın Çatal-Kaşık-Bıçak	43.406.461	0,0%	100,0%	0,0%	100,0%		
Yüğmur Mobilya	36.449.909	0,0%	100,0%	0,0%	100,0%		
Aksu Çelik Tencere	33.491.787	0,0%	100,0%	0,0%	100,0%		
OMS Tencere Seti	29.925.710	0,0%	100,0%	0,0%	100,0%		
Meşe Mobilya	23.454.839	0,0%	69,4%	15,7%	85,1%		
Grammer Koltuk	18.838.463	100,0%	0,0%	0,0%	100,0%		
Total	975.451.428	42,6%	43,2%	2,1%	87,9%		

	Private TV*	TGR%	STV%	Kanal %	TGR+STV+ Kanal %
ENTERTAINMENT					
Total	0	0.0%	0.0%	0.0%	0.0%
WEAR and ACCESSORIES					
Nurşah Eşarphan	100,305,261	21.1%	60.1%	18.8%	100.0%
Dicle Teşettür	69,909,496	84.5%	7.4%	8.2%	100.0%
Venturo Jeans	63,113,088	100.0%	0.0%	0.0%	100.0%
Birdem Erek	43,406,461	0.0%	100.0%	0.0%	100.0%
Ahsen Eşarp	41,421,098	0.0%	86.0%	14.0%	100.0%
Taşvanlı Konf.	39,551,606	86.6%	0.0%	0.0%	86.6%
Meymenet Giyim	27,066,995	0.0%	84.7%	15.3%	100.0%
Clark Jeans	24,903,504	100.0%	0.0%	0.0%	100.0%
As Eşarp	20,021,379	100.0%	0.0%	0.0%	100.0%
Momentus Saat	19,895,962	0.0%	0.0%	100.0%	100.0%
Total	449,594,850	49.5%	37.2%	12.1%	98.8%
					Share in sector's total advertisements %81.92
					Share in total private TV advertisements %0.77
HOLDING/COMPANY					
Endüstri Holding	95,989,684	26.1%	0.0%	73.9%	100.0%
Slim Holding A.Ş.	56,496,711	0.0%	0.0%	100.0%	100.0%
Kombassan St.Gmbu	48,272,848	0.0%	2.9%	97.1%	100.0%
Sayma Holding	40,558,988	0.0%	0.0%	100.0%	100.0%
İnoksan (şirket)	40,145,659	100.0%	0.0%	0.0%	100.0%
Total	281,463,890	23.1%	0.5%	76.4%	100.0%
					Share in sector's total advertisements %20.46
					Share in total private TV advertisements %0.48
HOME TEXTILE PRODUCTS					
Özadlık Havlu	77,496,591	100.0%	0.0%	0.0%	100.0%
Dilhan Perdelik	43,094,303	100.0%	0.0%	0.0%	100.0%
Total	120,590,894	100.0%	0.0%	0.0%	100.0%
					Share in sector's total advertisements %8.77
					Share in total private TV advertisements %0.21
TOURISM					
İhlas Turizm	72,388,087	100.0%	0.0%	0.0%	100.0%
Total	72,388,087	100.0%	0.0%	0.0%	100.0%
					Share in sector's total advertisements %5.26
					Share in total private TV advertisements %0.12
OTHERS					
Kuşkar Briket Kömür	19,137,651	100.0%	0.0%	0.0%	100.0%
Ergaz Tüp	22,473,682	0.0%	0.0%	100.0%	100.0%
Total	41,611,333	-6.0%	0.0%	54.0%	100.0%
					Share in sector's total advertisements %4.61
					Share in total private TV advertisements %0.07

	Private TV*	TGRt%	STV%	Kanal 7%	TGRt+STV+ Kanal 7%
UNKNOWN SECTORS					
Oğuzlar	190,882,764	27.4%	72.6%	0.0%	100.0%
Kare Pazarcımsa	92,428,317	100.0%	0.0%	0.0%	100.0%
Karzen Tek Üri/G.Paz.	77,693,571	91.1%	0.0%	8.9%	100.0%
Alfipen	37,943,255	0.0%	100.0%	0.0%	100.0%
Jet Pz	33,395,771	0.0%	100.0%	0.0%	100.0%
Hexxer Aqwallıkc	19,437,703	0.0%	100.0%	0.0%	100.0%
Total	451,781,381	47.7%	50.8%	1.5%	100.0%
GENERAL TOTAL	12,364,493,341				

* Milyon TL

† Mainly includes household furniture

Notes:

- Listing within the sector is made according to the private TV advertisement expenditures
- Advertisement expenditures are calculated on the basis of standard media price listings without taking into account special rates given to affiliated organisations or set by special bilateral agreements.

Source: Bileşim Market Research Center

Share in sector's total
Share in total private TV
advertisements

40.77
92.11

Table XIIIa Sectoral distribution of the advertisement expenditures for the products for which less than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1997

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%
COSMETICS/CLEANING					
Pantene Pro-V Şampuan	163.878,943	3,9%	0,0%	0,0%	3,9%
Akzo Tnaş Kolonyası	152.677,327	13,5%	20,1%	12,5%	46,1
Rinsomatik Toz Deterjan	136.173,462	6,4%	0,0%	0,0%	6,4
Primu Baby Dry Çocuk Bezi	126.839,237	3,1%	0,0%	0,0%	3,1
Libresse Hijyenik Ped	121.424,576	10,5%	9,1%	0,0%	19,6
Blerdax Şampuan	119.789,209	4,8%	0,0%	0,0%	4,8
Orkid	104.637,352	6,3%	0,0%	0,0%	6,3
Orkid Ultra Plus	98.703,572	7,3%	0,0%	0,0%	7,3
ACE Çamaşır Suyu	97.903,548	10,4%	0,0%	0,0%	10,4
Duru Sabun	92.413,336	13,5%	28,1%	5,2%	46,7
Primu Çocuk Bezi	88.612,105	6,3%	0,0%	0,0%	6,3
Rejoice Şampuan	87.168,438	6,2%	0,0%	0,0%	6,2
Ariel Matik	65.870,711	6,4%	0,0%	0,0%	6,4
İpama Diş Macunu	63.323,085	4,1%	0,0%	0,0%	4,1
Ardınmatik -Arçelik	55.463,749	6,0%	0,0%	0,0%	6,0
Cleasil Krem Lesyon	54.497,967	4,6%	0,0%	0,0%	4,6
Ace Gentile - Ace Çamaşır Suyu	48.330,524	14,3%	0,0%	0,0%	14,3
Mare Deo Floril	42.540,383	45,0%	0,0%	0,0%	45,0
Sesipak Aqua Tuvalet Kağıdı	37.924,471	7,0%	0,0%	0,0%	7,0
Ultra Prima Plus	35.110,413	11,9%	0,0%	0,0%	11,9
Solo Peçete	32.134,530	11,0%	0,0%	0,0%	11,0
Pril Sıvı	26.114,348	14,4%	0,0%	0,0%	14,4
Omonatik Tez Deterjan	22.797,829	18,8%	0,0%	0,0%	18,8
Ace Gentile-Ace Çamaşır Suyu	18.456,816	5,6%	0,0%	0,0%	5,6
Sponnex Parlatıcı Sünger	11.948,026	8,5%	0,0%	0,0%	8,5
Sponnex Temizlik Topu	11.935,283	4,3%	0,0%	0,0%	4,3
Total	1.916.669,040	8,6%	3,5%	1,2%	13,4
					Share in sector's total Share in total private TV advertisements
					9,31,54 7,4%
MEDIA					
Akşam Gazetesi	392.246,366	0,0%	0,0%	28,9%	28,9%
Spor Gazetesi	216.825,068	2,0%	0,0%	0,0%	2,0%
Nokta Dergi	42.420,683	5,1%	0,0%	0,0%	5,1%
İzmir Mıç Dergi	11.657,665	0,0%	0,0%	48,3%	48,3%
Total	663.149,772	1,0%	0,0%	17,9%	18,9%
					Share in sector's total Share in total private TV advertisements
					9,10,84 2,6%

	Private TV*	TGR%	STV%	Kanal %	TGR+STV+ Kanal %	
FOOD						
Coca Cola	648.029.855	11,7%	18,9%	9,0%	39,6%	
Fanta Meynibut	359.136.696	13,0%	0,0%	0,0%	13,0%	
Tünekk Kuleçip	173.046.138	31,1%	0,0%	0,0%	31,1%	
Sana Promesyon	138.722.635	21,9%	2,1%	5,6%	29,6%	
Komili Yüdem: Ayrıçek Yağı	71.153.385	18,6%	0,0%	0,0%	18,6%	
Sağra Special	64.846.673	19,1%	15,6%	14,7%	49,4%	
Yayla Margarin	61.756.807	43,6%	0,0%	0,0%	43,6%	
Sağra Goffy Çikolata	61.597.512	31,8%	0,0%	4,3%	36,1%	
Ona Ayrıçek Yağı	59.297.294	18,4%	0,0%	0,0%	18,4%	
Luna Margarin	48.216.286	36,9%	0,0%	0,0%	36,9%	
Superton	43.345.871	9,0%	0,0%	0,0%	9,0%	
Milka Çikolatalı Gofret	39.306.696	39,8%	0,0%	0,0%	39,8%	
Bifarella	38.121.548	0,0%	5,5%	33,8%	39,3%	
Maret Sucuk	37.469.343	34,9%	0,0%	0,0%	34,9%	
Bifa Susamlı Çubuk Kraker	35.110.870	0,0%	16,7%	26,7%	43,5%	
Komili Srma Mısırozu Yağı	23.173.309	11,4%	0,0%	0,0%	11,4%	
Bifa Pretty Peynir Bisküvi	19.787.611	0,0%	22,8%	25,6%	48,3%	
Knorr Çorba	18.925.598	32,3%	0,0%	0,0%	32,3%	
Knorr Bulyon Tablet	15.551.732	28,5%	0,0%	0,0%	28,5%	Share in sector's total %41,49
Karsa Ürünleri Genel	9.964.122	4,9%	0,0%	0,0%	4,9%	Share in total private TV advertisements 7,6%
Total	1.966.539.981	18,0%	7,5%	5,4%	30,9%	
FINANCE						
İş Bankası	377.266.273	15,5%	0,0%	0,0%	15,5%	
Yapı Kredi Telekom	123.220.538	20,7%	0,0%	0,0%	20,7%	
Pamuk Bank 24	106.024.401	13,9%	0,0%	0,0%	13,9%	
Şekerbank	54.332.353	8,1%	0,0%	0,0%	8,1%	Share in sector's total %41,49
Emlak Bankası	40.232.882	15,3%	0,0%	0,0%	15,3%	Share in total private TV advertisements 2,7%
Total	701.076.447	15,6%	0,0%	0,0%	15,6%	
CONSTRUCTION/REAL ESTATE						
Total	0					
"WHITE" DURABLES						
Arçelik Küçük Ev Aletleri	137.927.526	8,1%	0,0%	0,0%	8,1%	Share in sector's total %39,18
Arçelik Tüskit	47.733.850	11,2%	0,0%	0,0%	11,2%	Share in total private TV advertisements 0,9%
Arçelik Fırın	39.937.959	12,6%	0,0%	0,0%	12,6%	
Arçelik Genel	6.065.039	23,7%	0,0%	0,0%	23,7%	
Total	231.664.374	9,9%	0,0%	0,0%	9,9%	

	Private TV*	TGR%	STV%	Kanal 7%	TGR+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements
SHOPS						%6.25
Marketen	34,847,531	24.0%	0.0%	0.0%	24.0%	
Total	34,847,531	24.0%	0.0%	0.0%	24.0%	0.1%
AUTOMOTIVE						
Total	0					
ELECTRONICS						
Telşim Kart	399,038,686	4.1	0.0%	0.0%	4.1%	
Erişson Cup Telefonu	111,652,085	22.8	22.5%	0.0%	45.3%	%49.47
Telefunken TV	6,635,769	0.0	0.0%	29.1%	29.1%	
Total	517,326,540	8.1	4.9	0.4%	13.3%	2.0%
DURABLES (except "white durables")						
Singer Dikir Makinasi	15,461,798	31.7%	0.0%	0.0%	31.7%	%3.16
Total	15,461,798	31.7%	0.0%	0.0%	31.7%	0.1%
ENTERTAINMENT						
Total	0					
WEAR and ACCESSORIES						
Total	0					
HOLDING/COMPANY						
Total	0					
HOME TEXTILE PRODUCTS						
Dünya Fih	96,482,655	0.4%	0.0%	0.0%	0.4%	
Total	96,482,655	0.4%	0.0%	0.0%	0.4%	%0.21
TOURISM						
Total	0					
OTHERS						
Total	0					
UNKNOWN SECTORS						
Total	0					
GENERAL TOTAL	6,143,238,138					

* Milyon TL

* Mainly includes household furniture

Notes:

- Listings within the sector is made according to the private TV advertisement expenditures.

- Advertisement expenditures are calculated on the basis of standard media price listings without taking into account special rates given to affiliated organisations or set by special bilateral agreements.

Source: Bileşim Market Research Center

Table XIIIb Sectoral distribution of the advertisement expenditures for the products for which less than half of the private TV advertisement budget is spent on the advertisements on TGRT, STV and Kanal 7 and the shares of these three channels in this distribution: January 1998

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%
COSMETICS/CLEANING					
Lovela Matik	1.539.740,417	7,2%	11,0%	0,0%	18,1%
Pantene Pro V	847.131,600	2,3%	16,6%	0,0%	18,9%
Omamatik - Bosh	710.717,468	10,1%	2,4%	0,0%	12,5%
Kosla Sivi	636.609,656	13,8%	12,7%	0,0%	26,5%
Prima Baby Dry Çocuk Bezi	627.926,288	1,2%	17,0%	0,0%	18,2%
Ace Çamaşır Suyu	611.301,470	2,1%	37,8%	0,0%	39,8%
Kiwi Ayakkabı Boyutisi	589.510,904	4,6%	21,8%	0,0%	26,4%
Calgonit Genel	490.739,975	11,0%	6,6%	0,0%	17,5%
Calgon Camaşır Mak.Temizleme	480.232,080	12,7%	12,2%	0,0%	24,8%
Rinsomatik Kloro Sistem	475.192,579	14,8%	2,8%	0,0%	17,6%
Rejotece Şampuan	469.425,862	1,7%	7,3%	0,0%	8,9%
Ariel Matik	462.777,145	6,2%	11,2%	0,0%	17,5%
Orkid Ultra	446.417,791	1,6%	17,2%	0,0%	18,8%
Marc Deo Floral	414.311,294	14,3%	0,0%	0,0%	14,3%
Omamatik Toz Deterjan	392.667,728	14,1%	2,4%	0,0%	16,4%
Eldor Şampuan	379.067,648	13,0%	0,0%	0,0%	13,0%
Cif Kireç Çözücü	371.580,167	11,6%	0,0%	0,0%	11,6%
Organics Şampuan	346.016,029	7,5%	0,0%	0,0%	7,5%
Vim Butek Deniz Limon	323.868,340	12,2%	5,8%	0,0%	18,0%
Ace Gentle	293.366,735	5,9%	41,4%	0,0%	47,3%
Kosla Hali Şampuan	284.735,250	13,8%	20,9%	0,0%	34,7%
Cif Krem	276.169,482	11,6%	0,0%	0,0%	11,6%
Blendax Şampuan	269.651,356	1,3%	18,4%	0,0%	19,7%
Dixi Profesyonel	233.126,197	12,5%	19,6%	0,0%	32,1%
Yumoş Yumayıcı	214.572,222	11,4%	0,0%	0,0%	11,4%
Alomatik Toz Deterjan	212.341,283	4,6%	19,0%	0,0%	23,6%
Duru Sabun	210.261,667	14,2%	0,0%	0,0%	14,2%
İpana Diş Macunu	189.741,353	0,5%	20,2%	0,0%	20,7%
Pemmatik 1! Platin	150.902,263	31,8%	0,0%	0,0%	31,8%
Signal Plus Karbonat	150.224,334	10,2%	0,0%	0,0%	10,2%
İpana Fluoristat Diş Macunu	149.387,300	0,2%	40,6%	0,0%	40,8%
Matk Mutfak	141.765,790	9,4%	9,7%	0,0%	19,1%
Pantene Pro V Jöle	122.916,086	4,3%	15,5%	0,0%	19,8%

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements
Çalgamli Tablet	121.803.211	15,8%	17,9%	0,0%	33,7%	
Solo Ultra Tuvalet Kağıdı	101.181.726	11,8%	0,0%	0,0%	11,8%	
Nivea Baby Temizlik	82.344.127	3,3%	0,0%	0,0%	3,3%	
Vemal Sivi	72.093.914	13,2%	0,0%	0,0%	13,2%	
Pril Losyon Sivi	72.063.649	24,7%	0,0%	0,0%	24,7%	
Pril Buluşık Mak. Deterjanı	69.698.469	17,5%	0,0%	0,0%	17,5%	
Çalgamli - Arçelik Buluşık Mak.	66.377.349	13,6%	1,1%	0,0%	14,7%	
Selpak Cep Mendili	40.923.893	21,1%	0,0%	0,0%	21,1%	
Signal Contact Diş Fırça	28.878.552	13,3%	0,0%	0,0%	13,3%	
Acc Gentle - Acc Çam.Suyu	25.318.562	0,0%	20,9%	0,0%	20,9%	
Total	14.195.079.191	8,5%	11,6%	0,0%	20,1%	%80,69
MEDIA						
Total	0					%24,24
FOOD						
Coca Cola	777.105.714	12,0%	29,3%	1,1%	42,4%	
Pepsi-Yediğün	576.889.670	10,1%	0,0%	0,0%	10,1%	
Fanta Meşrubat	401.223.984	9,7%	0,0%	0,0%	9,7%	
Avmiz Margarin	370.797.609	13,0%	8,3%	0,0%	21,4%	
Mauxton Silit Çikolata	295.576.921	7,6%	13,7%	0,0%	21,4%	
Suna Promosyon	293.340.794	14,3%	3,2%	0,0%	17,4%	
Konilli Tadımlı Sivi	183.806.938	13,8%	0,0%	0,0%	13,8%	
Rama Margarin	201.142.488	11,1%	0,0%	0,0%	11,1%	
Tamel Genel	195.034.212	15,9%	17,1%	0,0%	33,0%	
Sprite Meşrubat	173.876.783	0,0%	12,2%	0,4%	12,6%	
Konilli Yudum Açıççek Yağı	152.474.297	13,6%	0,0%	0,0%	13,6%	
Oba Açıççek Yağı	153.488.596	40,2%	0,0%	0,0%	40,2%	
Suna Margarin (Kuru)	143.084.465	8,0%	4,4%	0,0%	12,4%	
Evin Margarin	142.716.101	43,7%	0,0%	0,0%	43,7%	
Ladex Tavuk	71.667.615	48,9%	0,0%	0,0%	48,9%	
Pepsi Music	122.239.022	15,7%	17,0%	0,0%	32,7%	
Tang Meyve Suyu	121.592.222	49,0%	0,0%	0,0%	49,0%	
Kirlangiz Zeytinyağı	118.626.805	0,0%	35,1%	4,1%	39,2%	
Kirlangiz Açıççek	104.316.454	0,0%	20,7%	2,5%	23,2%	
Neba Margarin	85.968.106	16,4%	17,5%	0,0%	33,9%	
Pepsi Cella	81.322.046	2,4%	0,0%	0,0%	2,4%	
Green Island Çay	71.676.772	46,8%	0,0%	0,0%	46,8%	
Köyür Piliç	56.761.830	47,9%	0,0%	0,0%	47,9%	
Maret Sosis	51.776.805	6,8%	0,0%	0,0%	6,8%	

	Private TV*	TGRT%	STV%	Kanal 7%	TGRT+STV+ Kanal 7%	Share in sector's total Share in total private TV advertisements
Maret Sıcak	44.523,660	9.8%	0.0%	0.0%	9.8%	%62.31
Knorr Çorba	30,435,021	27.3%	0.0%	0.0%	27.3%	
Knorr Bulyon Tablet	25,843,438	30.6%	0.0%	0.0%	30.6%	
Total	5,047,308,366	15.3%	9.3%	0.3%	24.9%	%8.82
FINANCE						
Akbank	1,592,475,316	7.1	0.0%	0.0%	7.1%	%36.95
Pamukkale Dinişog	250,164,344	14.1	0.0%	0.0%	14.1%	
Total	1,842,639,660	8.1	0.0%	0.0%	8.1%	%3.15
CONSTRUCTION/REAL ESTATE						
Yeni Geceer Arsa Ofisi	514,713,403	0.0%	0.0%	3.0%	3.0%	%25.70
Başbakanlık Toplu Konut İdaresi	438,923,393	13.1%	16.8%	0.0%	29.8%	
Total	953,636,796	6.0%	7.7%	1.6%	15.4%	%1.63
“WHITE” DURABLES						
Beko Genel	196,416,876	0.0%	3.0%	0.0%	3.0%	3.0%
Ariston Otomatik Çamaşır Mak.	141,219,297	0.0%	24.8%	0.0%	24.8%	
Fakir Elit Yıkama Süpürgeci	58,674,419	0.0%	36.8%	4.1%	40.9%	40.9%
Profilo Tam Otomatik Çam.Mak.	24,927,888	17.6%	18.4%	2.2%	38.2%	
Profilo Fırın	23,471,379	18.7%	27.6%	1.8%	48.2%	48.2%
Total	444,709,859	2.0%	16.5%	0.8%	19.3%	
SHOPS						
Total	0					
AUTOMOTIVE						
Ford Kargo 2520 Kamyon	402,441,489	22.2%	14.9%	0.0%	37.1%	%43.19
Ford Transit Kamyonet	142,847,536	26.0%	0.0%	0.0%	26.0%	
Ford Transit Minibus	131,333,124	13.3%	0.0%	0.0%	13.3%	13.3%
Total	676,622,149	21.3%	8.9%	0.0%	30.1%	
ELECTRONICS						
Nokia 6110 Cep Telefonu	325,431,726	11.7%	0.0%	0.0%	11.7%	%35.06
Ericsson GH 688 Cep Telefonu	156,926,663	17.8%	11.3%	0.0%	29.1%	
Total	482,358,389	13.7%	3.7%	0.0%	17.4%	%0.82
DURABLES (except “white durables”)						
Total	0	0.0%	0.0%	0.0%	0.0%	
ENTERTAINMENT						
Total	0	0.0%	0.0%	0.0%	0.0%	
WEAR and ACCESSORIES						
Total	0	0.0%	0.0%	0.0%	0.0%	
HOLDING/COMPANY						
Total	0	0.0%	0.0%	0.0%	0.0%	

	Private TV*	TGRT%	STV%	Kamul %	TGRT+STV+ Kamul %
HOME TEXTILE PRODUCTS					
Total	0	0.0%	0.0%	0.0%	0.0%
TOURISM					
Total	0	0.0%	0.0%	0.0%	0.0%
OTHERS					
İnegaz Tüp	195,113,098	14.1%	11.3%	2.0%	27.4%
Şişe Camı (Cam Şişe)	161,288,235	6.7%	0.0%	0.0%	6.7%
Tokai Çakmak	124,725,222	0.0%	38.9%	6.8%	45.7%
BP Süpürge	35,986,036	20.8%	0.0%	0.0%	20.8%
Total	517,112,591	8.9%	13.7%	2.4%	24.9%
UNKNOWN SECTORS					
TASEAD	94,913,479	27.1%	0.0%	0.0%	27.1%
GENERAL TOTAL	24,254,380,480				
					Share in total private TV advertisements 0.573457
					Share in total private TV advertisements %0.88
					Share in total private TV advertisements %0.16
					Share in total private TV advertisements %41.4;

* Milyon TL

* Mainly includes household furniture

Notes:

- Listing within the sector is made according to the private TV advertisement expenditures

- Advertisement expenditures are calculated on the basis of standard media price listings without taking into account special rates given to affiliated organisations or set by special bilateral agreements.

Source: Bileşim Market Research Center

Table XIV Sectoral Distribution of Labor Unions Affiliated with Different Confederations January 1998

ECONOMIC ACTIVITY	LABOR UNIONS						TOTAL
	TÜRK-İŞ	DISK	HAK-İŞ	MISK	INDEPENDENT	TOTAL	
Agriculture and Forestry, Hunting and Fishing	2	1	1	1	1	6	
Mining	2	2	-	-	-	4	
Petroleum, Chemicals and Rubber	1	2	-	-	1	4	
Food Industry	1	1	1	-	2	5	
Sugar	1	-	-	-	-	1	
Textile	1	1	1	1	5	9	
Leather	1	1	-	1	-	3	
Wood	1	1	-	-	1	4	
Paper	1	1	-	-	-	2	
Printing and Publishing	1	1	-	-	1	3	
Banking and Insurance	2	1	-	-	3	6	
Ceramics, Clay and Glass	2	1	-	-	-	3	
Metal	1	1	1	-	4	7	
Ship Building	1	1	-	-	-	2	
Construction	1	1	-	1	5	8	
Energy	1	1	1	1	1	6	
Commerce, Office, Education and Fine Arts	2	2	-	-	3	7	
Highway Transport	1	1	-	-	-	2	
Railway Transport	1	-	-	-	-	1	
Sea Transport	1	-	-	-	-	1	
Air Transport	1	-	-	-	3	4	
Storage and Warehousing	1	-	-	-	1	2	
Communication	1	1	-	-	1	3	
Health	1	1	1	-	1	4	
Accommodation and entertainment	1	1	-	-	2	4	
National Defense	1	-	-	-	-	1	
Journalism	1	1	-	-	1	3	
General Services	1	1	1	1	3	7	
TOTAL	33	25	7	6	39	110	

Source: Labour Statistics 1997, Ministry of Labour and Social Security

Table XV Membership on Different Trade Union Confederations January 1985 – January 1998

PUBLICATION PERIOD	TURK-İŞ		TURK-İŞ		HAK-İŞ		MISK		INDEPENDENT		OTHER		TOTAL	
	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers	Trade Union Notified Member	Member Workers
JANUARY 1985	32	1.274.429	-	-	7	117.022	-	-	46	192.176	15	10.950	100	1.594.577
JULY 1985	32	1.355.528	-	-	6	129.206	-	-	37	204.064	10	139.673	85	1.828.471
JANUARY 1986	32	1.439.037	-	-	6	145.737	-	-	37	210.428	10	141.918	85	1.937.120
JULY 1986	32	1.438.475	-	-	6	149.158	-	-	36	223.519	10	142.740	84	1.953.892
JANUARY 1987	32	1.457.604	-	-	6	155.810	-	-	36	223.906	9	139.746	83	1.977.066
JULY 1987	32	1.513.317	-	-	6	162.313	-	-	33	228.997	9	140.170	80	2.044.797
JANUARY 1988	32	1.584.577	-	-	6	172.240	-	-	31	247.921	6	115.929	75	2.120.667
JULY 1988	32	1.670.897	-	-	6	180.557	-	-	28	259.841	6	115.734	72	2.237.029
JANUARY 1989	32	1.726.009	-	-	6	205.852	-	-	29	294.233	4	51.804	71	2.227.898
JULY 1989	32	1.421.257	-	-	7	166.597	-	-	32	245.088	4	2.027	75	1.834.969
JANUARY 1990	32	1.493.143	-	-	7	186.280	-	-	33	241.288	4	730	76	1.921.441
JULY 1990	32	1.567.501	-	-	7	189.090	-	-	33	240.253	4	720	76	1.997.564
JANUARY 1991	32	1.636.297	-	-	7	199.072	-	-	30	241.310	-	-	69	2.076.679
JULY 1991	32	1.675.501	-	-	8	249.637	-	-	30	205.873	-	-	69	2.130.811
JANUARY 1992	32	1.723.988	-	-	7	330.579	-	-	28	138.225	-	-	68	2.192.792
JULY 1992	32	1.766.535	2	19.378	7	268.035	-	-	32	200.323	-	-	73	2.254.271
JANUARY 1993	32	1.784.642	28	81.020	7	269.153	-	-	33	207.164	-	-	100	2.341.979
JULY 1993	32	1.815.271	28	208.266	7	272.338	-	-	32	189.806	-	-	99	2.485.681
JANUARY 1994	32	1.862.095	28	330.179	7	278.751	-	-	34	138.944	-	-	101	2.609.969
JULY 1994	33	1.967.360	26	334.765	7	283.292	2	5.959	29	53.141	-	-	97	2.644.417
JANUARY 1995	33	1.978.350	26	329.895	7	286.733	2	7.488	29	58.158	-	-	97	2.660.624
JULY 1995	33	1.978.035	26	329.337	7	295.729	2	4.209	27	59.704	-	-	95	2.667.014
JANUARY 1996	33	2.002.913	25	317.125	7	309.361	2	4.206	25	62.022	-	-	92	2.095.627
JULY 1996	33	2.014.452	25	313.046	7	317.265	2	3.923	25	60.098	-	-	92	2.708.784
JANUARY 1997	33	2.011.466	26	312.027	7	322.987	2	3.925	26	63.434	-	-	94	2.713.859
JULY 1997	33	2.047.708	26	325.404	7	335.577	2	1.805	27	64.128	-	-	95	2.774.622
JANUARY 1998	33	2.091.391	26	347.432	7	345.523	2	2.408	29	69.076	-	-	97	2.856.330

Source: Labour Statistics 1997, Ministry of Labour and Social Security, Ankara

