Topics in Middle Eastern and African Economies
Proceedings of Middle East Economic Association
Vol. 23, Issue No. 1, May 2021

Anatolian Tigers: Then and Now

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1. Introduction

Turkish economy has experienced a policy shift from import-substitution to a widespread outward-oriented policy regime in 1980s. In this transition period, industrial sector has stood out as the leading in export-led growth policy. Trade openness coupled with export promotion strategies has reshaped business environment in Turkey and created new opportunities for local investors as well. Hence, this process had also considerable impacts in spatial distribution of industrial activities across Turkish regions[1].

In this environment, some Turkish provinces have flourished a salient economic performance since 1980s that led them to be called by a colloquial term Anatolian Tigers, by associating their success to the fast-growing East Asian Tigers. On the one hand, the success story of Anatolian Tigers popularized by politicians and the printed media, was to a large extent based on the export performance of these provinces[2]. On the other, scholarly research approached rather cautiously to this phenomenon admitting that what gives Anatolian provinces "Tiger" reputation lies behind their growth records in industrial sector and especially their increasing weight in manufacturing in 1990's[3]. As documented in Filiztekin and Tunalı (1999), the growth rate of value added and employment has been remarkable in Anatolian Tigers over the 1981-1993 period, despite constituting a very small portion of the Turkish manufacturing. However, they further show that this notable growth patterns did not translate into productivity improvements. Indeed, average productivity growth of Tigers in manufacturing was lagging not only behind the traditional industrial centers but also behind the other provinces. They relate this divergence to the fact that the Anatolian Tigers started with and specialized further in low productivity-low wage industries. This finding also corroborates the evidence in Köse and Öncü (1998) where they argue that basic motive behind the Anatolian industry best be described by low wage and low productivity locus. In a more recent study, Bakış, Atiyas and Gürakar (2019) examine the emergence of Anatolian Tigers (and the devout industrial bourgeoisie) in the three decades following 1980, with a special focus on firm size distribution and productivity dynamics in the manufacturing industry. They claim that, during the 1980s especially the 1990s, an important part of the story in Tigers is explained by the change in the

[1] The transition period that Turkey has gone through has been discussed and documented exhaustively in the literature. See, for example, Arıcanlı and Rodrik (1990), Şenses (1994). Krueger and Aktan (1992), Köse and Yeldan (1998) and Taymaz (1999). Regarding regional impacts of these policy changes, see Doğruel and Doğruel (2005, 2006, 2011)

[2] Yet, there is no empirical evidence in favor of this claim within scholarly research, due to the lack of a reliable export data at province level for the related period, hence could at best be supported by anecdotal evidence.

[3] There are a number of studies discussing the rise of Anatolian Tigers in a political and/or social context rather than a sole economic one, to name a few; the rise of the Islamic capital (Demir et.al., (2004), Hosgör (2011)), different forms of embeddedness (Tok (2015)), Europeanization process (Tok (2008)), etc.

firm size distribution of employment. In particular, emergence of middle-sized firms, whose productivity were the highest relative to their counterparts in the West, have been pointed out in this success story[4].

This study attempts to reconsider the economic performance of Anatolian Tigers in the post-2000 era in comparison with the period until mid-1990s which granted them to be called by this title. In a descriptive setting, we consider provinces regarding their performance in manufacturing industry broadly in three main axes; namely employment growth, export performance and innovation potential. Our preliminary findings indicate that Anatolian Tigers sustained their previously achieved performance in manufacturing employment growth in the second period as well. They have also experienced modest increases in their export shares. However, a more detailed analysis reveals that manufacturing activity has widely been concentrated in industries with low technological intensity both in terms of employment and exports. Moreover, our findings further indicate that these observed outcomes might have been tightened by deteriorating creative capital in Anatolian Tigers due to their relative deficiency in both human capital and innovation potential.

The paper is organized as follows. We draw the boundaries of our research in Section 2. We start section 3 with a brief presentation of Anatolian Tigers within Turkish economy followed by a special focus on manufacturing industry where we discuss their performance with a critical scrutiny. Section 4 discusses the main findings, renders some of the shortcomings of the study and points to the trajectory of future research.

2. The Coverage: Definition, periodization and data

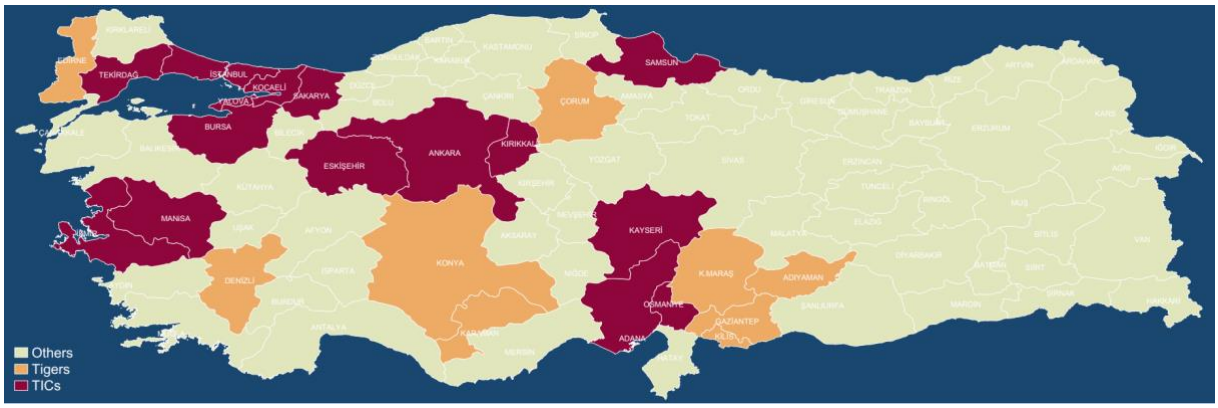
In order to assess comparative performance, we adhere to the existing designations used in previous research. We follow the grouping scheme in Filiztekin and Tunalı (1999) and classify provinces of Turkey into three groups. The first one comprises of seven provinces, Adıyaman, Çorum, Denizli, Edirne, Gaziantep, Kahramanmaraş and Konya which are labelled as Tigers. The second group, tagged as traditional industrial centers (TICs) involves twelve provinces which had an established industrial base prior to 1980. These provinces are İstanbul, Bursa, Kocaeli, Sakarya, Eskişehir and Tekirdağ in the Marmara region; İzmir and Manisa in the Aegean region, Ankara in the West Anatolia, Kayseri in the Central Anatolia; Adana in the Mediterranean and Samsun in the West Black Sea region. And the last group covers the

[4] Although the period Bakış, Atiyas and Gürakar (2019) examine pretty much coincides with our study, they are not directly comparable. The geographical classification scheme adopted by Bakış, Atiyas and Gürakar (2019) depends on the vote share of the Welfare Party in the 1991 elections where they classify a NUTS2 region as "Anatolian Tiger" if the vote share is above or equal to 20 percent. Since their data is available at NUTS2 level, they end up by selecting 27 out of 81 provinces as Tigers under this classification. In our opinion, the phenomenon of Tigers is a peculiar case which cannot be extended a large group of provinces. Hence, we adopt the definition used by Filiztekin and Tunalı (1999) (who also follow Köse and Öncü (1998)) which will be explained in section 2.

remaining provinces which we refer as the Others[5]. Figure 1 illustrates provinces labelled as the Tigers, the TICs and the others. Locational proximity of the Tigers to traditional industrial centers draws attention.

In comparing Tigers then and now, we analyze their performance in two periods; namely 1980-1993 and 2006-2018. The periodization scheme is shaped depending on the developments in Turkish and the world economy rather than a discretionary preference. During 1990s Turkey went through a rough time, facing several crises either domestic or international; 1994 and 2001 somewhat self-inflicted domestic crises, international crises that had significant impact on Turkish economy, 1996 Asian and 1998 Russian crisis, and a natural disaster, the 1999 earthquake. The World Bank (2014) also labels the period 1991-2001 as the "lost decade" for Turkish economy. Additionally, we prefer excluding 2002-2006 period as it might be perceived as the recovery period after the crisis. Hence, we attempt to avoid potential sources of external volatility that are likely to affect the performance of provinces.

Figure 1: Provinces of Turkey – Tigers, TICs and Others



We combine different datasets in conducting our analysis. For the first period, 1980-1993, we use Annual Manufacturing Statistics compiled by TurkStat. While for the second period 2006-2018 we utilize a rather new database recently made available to researchers and compiled by Turkish Ministry of Industry and Technology, called Entrepreneurship Information System (EIS). In order to assess the export performance, we use Foreign Trade Statistics compiled by Turkstat for the period 2002-2016. Unfortunately, there is no available data related to foreign trade statistics at provincial level for the first period, therefore we can analyze the export performance of Tigers relative to other provinces only within the second period.

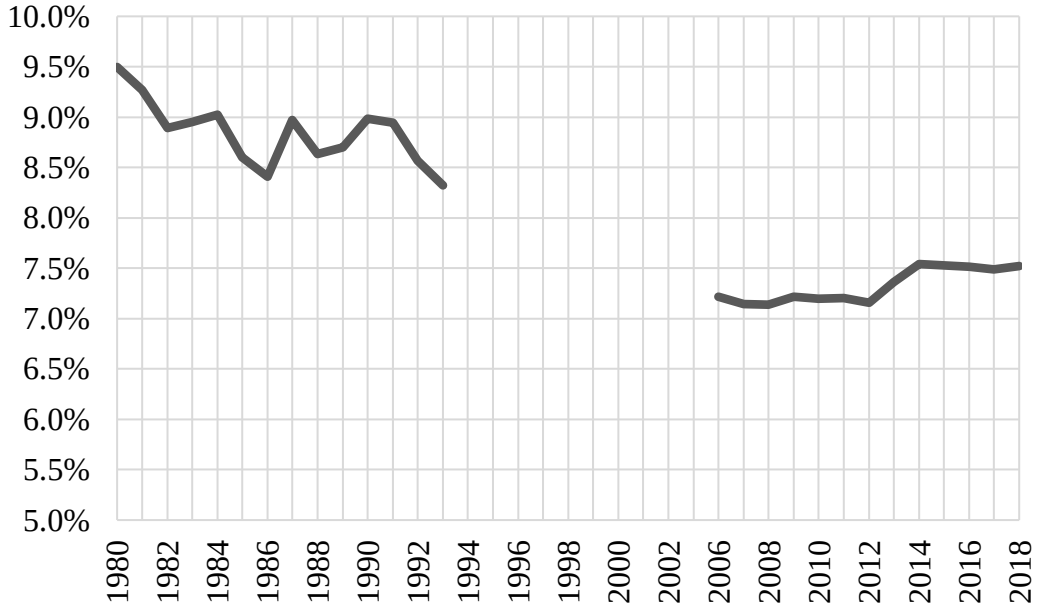
[5] Up until 1989, the number of provinces in Turkey was 67, since then, the status of 14 districts switched into provinces. In order to perform a comparative analysis between different periods, we have conducted an aggregation for the provinces related to our analysis. In this sense; for the post-2000 period we have aggregated, Kırıkkale into Ankara, Osmaniye into Adana, Yalova into İstanbul regarding TICs and Karaman into Konya, Kilis into Gaziantep regarding Tigers.

3. Performance of Tigers

3.1. General outlook

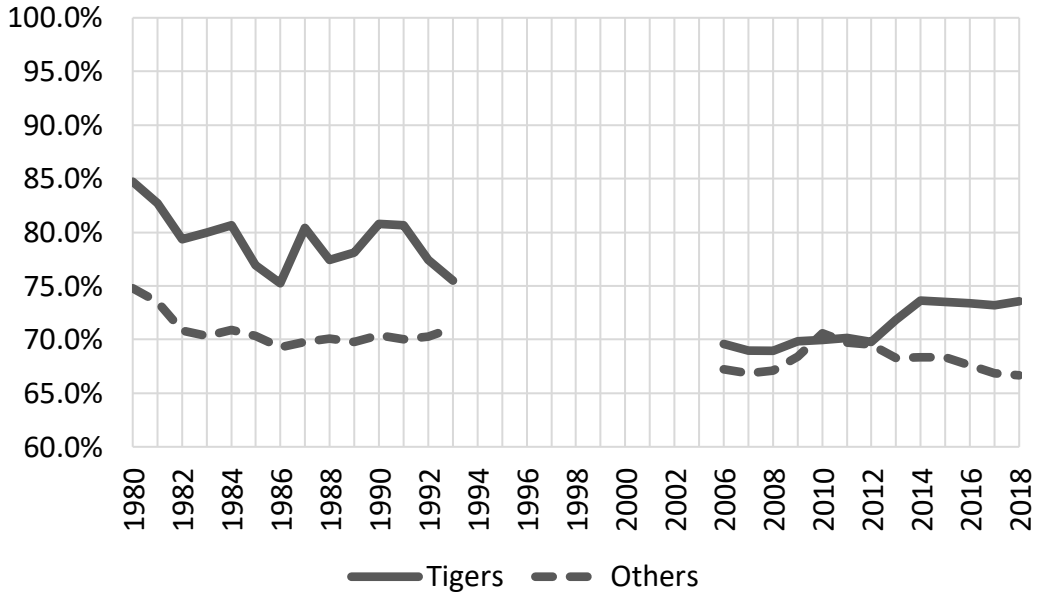
We start by discussing the significance of Tigers within overall economic activity. The share of Tigers in gross domestic product lies within the range of 8.5-9.5 per cent with a negative trend over the first period. In the second period, it's share is more stable, yet at a lower rate, around 7-7.5 per cent (Figure 2). A similar pattern is also observed in per capita terms (Figure 3). GDP per capita in Tiger provinces were 15% below national average at the beginning of 1980s and the gap has increased to 25% at the end of 2010s. Compared to Other (non-Tiger and non-TIC) provinces, Tigers' advantage in the first period seems to be eliminated in the following years.

Figure 2: Share of Tigers in GDP



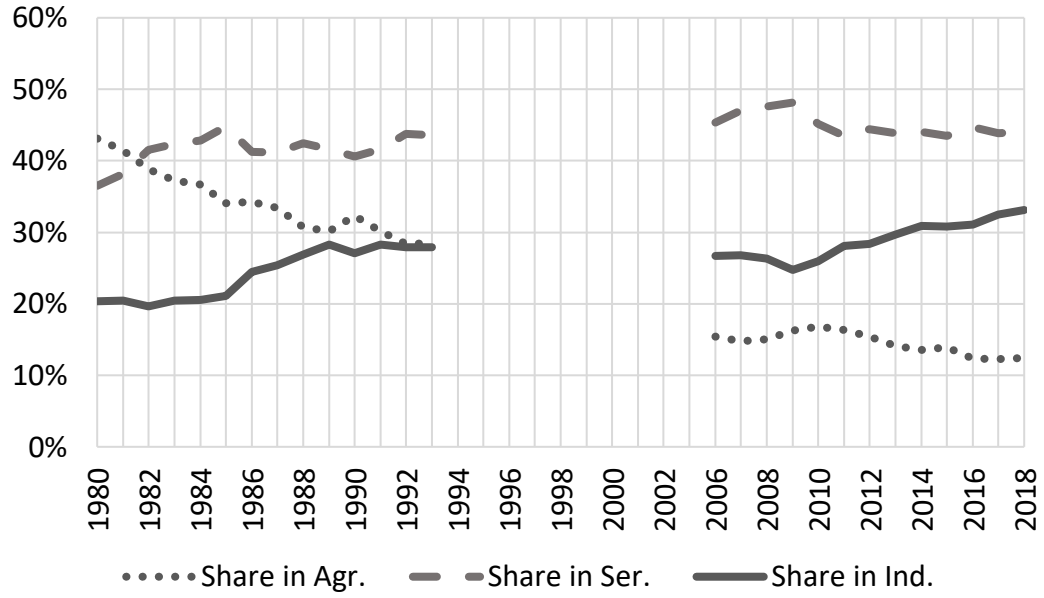
Despite their unremarkable performance in overall economic activity, and the years plagued with crises seem to hurt Tigers most, they have undergone a remarkable transformation, as depicted in Figure 4. The share of agricultural sector within the composition of GDP has decreased significantly from approximately 43% to 28% over the first period. Whereas the share of industrial sector within GDP increased from 20% to about 30%. Services sector has also followed the same uptrend with the industrial sector consistent with the structural change paradigm.

Figure 3: Relative real GDP per capita



One could possibly argue that, this fact might have been observed in TICs and in the other provinces as well, as the entire economy had undergone a transformation process over the period in question. A comparison of ratios of the share of industrial sector in each group of provinces divided by that in Turkey reveal that the ratio was 0.69 for Tigers, 1.17 for TICs and 0.83 for the others at the beginning of the sample period. The same ratios related to the end of the first period are 0.75, 1.14 and 0.82 for the Tigers, the TICS and the others respectively. Evidently, the largest change in industrial sector relative to Turkey took place in Tigers. This observation, to some extent, might give an insight why the "Tiger" label was attached to the aforementioned Anatolian provinces.

Figure 4: Composition of GDP in Tigers



In the second period, we observe a positive trend, especially after 2009, in the share of industrial sector within GDP in Tigers as well, reaching to 33% by the end of the period. Moreover, the share of industrial sector in Tigers relative to Turkey has increased from 1.02 to 1.12 over the second period. This ratio is even higher than the TICs (from 1.13 to 1.07) by the end of the period which indicates that Tigers have expanded in industry above the average, even better than the TICs. Having observed these facts, we shift our focus to manufacturing industry that is commonly analyzed as it stands as an appropriate indicator reflecting the performance of the economy through its productivity contributions.

3.2. Manufacturing sector performance

We discuss the comparative performance of Tigers broadly in three axes; namely, employment, export and innovation capability in manufacturing industry. It is important to remark that the completely different datasets we employ by necessity, and we are restrained from making comparisons between the two periods. Therefore inevitably, the comparisons will be held within each period.

In Table 1, we report average annual growth rates of manufacturing employment over two time periods. In order to alleviate the sensitivity of growth figures to the specific years chosen, we conduct our calculations over three-year averages. To begin with, between 1980 and 1993 employment in manufacturing sector in Turkey grew at an average rate of 1.36 per annum.

Employment growth in Tigers was 2.39 percent per annum, 1.2 percentage points and more than 2 percentage points above that in the TICs and the Other provinces, respectively. In the second period, manufacturing employment grew at a rate of 4.21 percent per annum which is quite above the average records of the TICs and Turkey as well. The performance of the Others in this period is also striking, but since they represent a mixed bag rather than a homogenous group, they require special treatment which we defer for another study. Nevertheless, one can evidently state that Tigers performed better than the TICs and the Others in terms of employment growth in both periods.

Table 1: Manufacturing employment growth

	1980-1993	**2006-2018**
Turkey	1.36	3.22
Tigers	2.69	4.21
TICs	1.48	2.98
Others	0.63	3.57

Given their strong growth records, in Table 2 we consider whether Tigers are homogenous in growth performance as to be called as a unified entity. In the first period, they seem to be more homogenous than TICs given the range of growth performance while the dispersion of growth is slightly higher than the TICs. However, this outlook appears to be reversed in the second period. Both the range and the dispersion of growth in Tigers are higher than the TICs between 2006 and 2018. And not surprisingly, the Others have the highest range and dispersion in growth in both periods since the provinces in this group constitute the residual category.

Table 2: Manufacturing growth descriptive statistics

	Min	**Max**	**Range**	**St.dev.**
		1980-1993		
Tigers	-0.449	7.135	7.584	2.694
TICs	-1.646	6.847	8.493	2.455
Others	-6.778	22.363	29.140	5.145
		2006-2018		
Tigers	1.082	6.353	5.271	1.856
TICs	1.929	5.514	3.585	1.081
Others	1.309	13.172	11.863	2.223

Further we assess the average growth volatility as a resilience indicator. We calculate year-to-year growth rates of the related province categories and obtain the standard deviation in each category for both periods which are reported in Table 3. As a group, Tigers experienced the most volatile growth in the first period compared to all other categories. However, Tigers are more stable in the second period, compared to TICs.

Table 3: Average growth volatility - Resilience

	1980-1993	2006-2018
Turkey	3.34	4.65
Tigers	5.78	4.74
TICs	3.43	5.27
Others	3.18	3.16

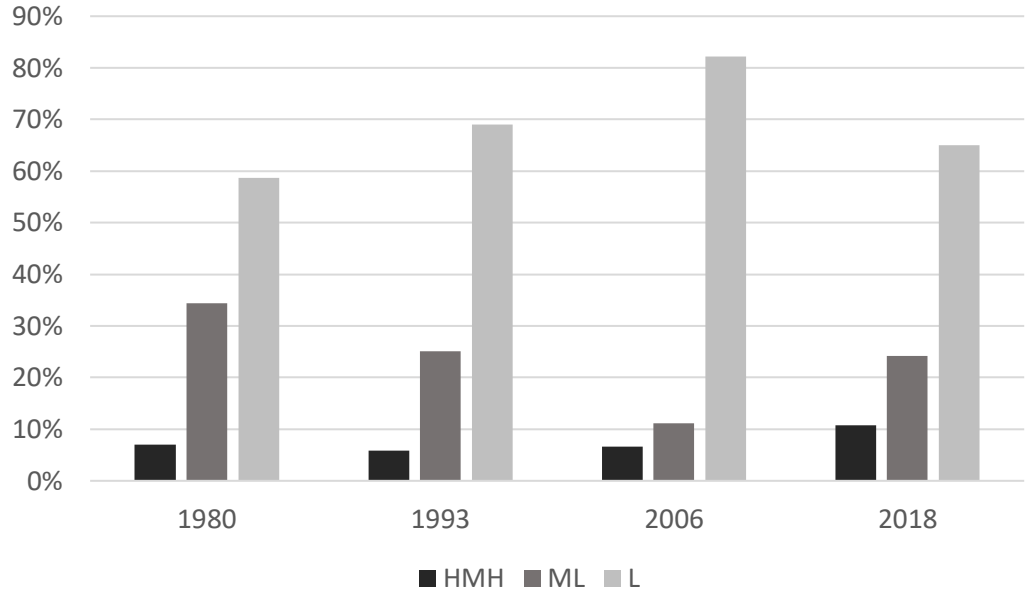
Table 4 elaborates more on the resilience. For both periods, we report minimum, maximum and range values for the standard deviation of year-to-year growth rates of provinces that falls within each category. It shows that volatility in Tigers is less homogeneous in the first but more homogeneous in the second period relative to the TICs. In a sense, Tigers might be regarded as having become more resilient over time.

Table 4: Heterogeneity in resilience

	Min	Max	Range
		1980-1993	
Tigers	5.31	22.19	16.89
TICs	3.67	15.16	11.50
Others	3.09	72.37	69.28
		2006-2018	
Tigers	3.95	7.42	3.47
TICs	3.32	6.70	3.38
Others	1.78	17.57	15.79

Next, we get more into details in manufacturing industry by considering the composition of employment according to the technological intensity. By this means, we get important clues about how the quality of the manufacturing industry has changed along with the growth. We have aggregated sectors in the manufacturing industry according to Eurostat technological intensity definitions under three categories: high and medium-high (HMH), medium-low (ML) and low (L). Figure 5depicts two facts; overwhelming dominance of low-technology sectors and marginally representation of high and medium-high sectors. By the end of the first period share of low-technology sectors in manufacturing employment reached to 70 per cent increasing by almost 10 percentage points over the period. Recalling that they are not directly comparable, at the beginning of the second period low-technology sectors accounted for more than 80 percent of employment. However, the employment share of low-technology sectors significantly decreased over the period in favor both medium-low and high and medium high sectors.

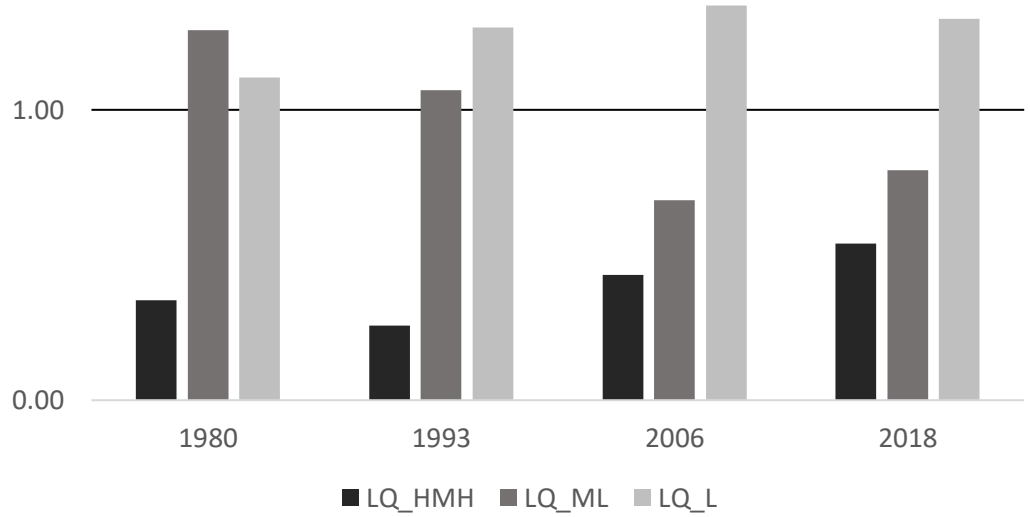
Figure 5: Composition of manufacturing by technological intensity in Tigers



One could argue that, the predominance of low-technology sectors may not be peculiar to the Tigers but hold for the TICs and the others as well. In order to reveal that, we calculate location quotients (LQ) as a measure of regional specialization. Location quotient basically helps to quantify how concentrated an industry is in a region compared to the country. It's calculated as the ratio of the employment share of a particular sector in the region to the share of that in the country. Thus, LQ taking a value greater than 1 would indicate the concentration of the relevant sector in that region. Figure 6 displays that in the first period both medium low and low technology sectors are concentrated in Tigers, though medium-low technology sectors are represented relatively more. In 1993, this fact is reversed in favor of low-technology sectors which are more concentrated relative to the medium-low technology sectors. In the second period the picture is clearer over time, only low technology sectors are concentrated in Tigers, whereas medium low and high and medium-high sectors are far below the country average.

Briefly, our findings reveal that Tigers performed comparatively better in terms of manufacturing employment growth. However, low-technology sectors took the greatest share in employment in both periods which in turn is translated into the concentration of production in low-technology sectors in Tigers.

Figure 6: Concentration of manufacturing in Tigers



Shifting the focus to exports, Figure 7 shows that the share of Tigers in total exports increased from 4.5 percent to 8 per cent over the period. It's worth noting that the TICs accounted for the lion's share in total exports, despite declining from 91 percent to 85 percent over the period. The share of manufacturing constitutes over 95 percent of total export volume in Tiger provinces. Therefore, focusing on manufacturing exports would suffice to get some insights regarding export performance.

Figure 7: Export performance of Tigers

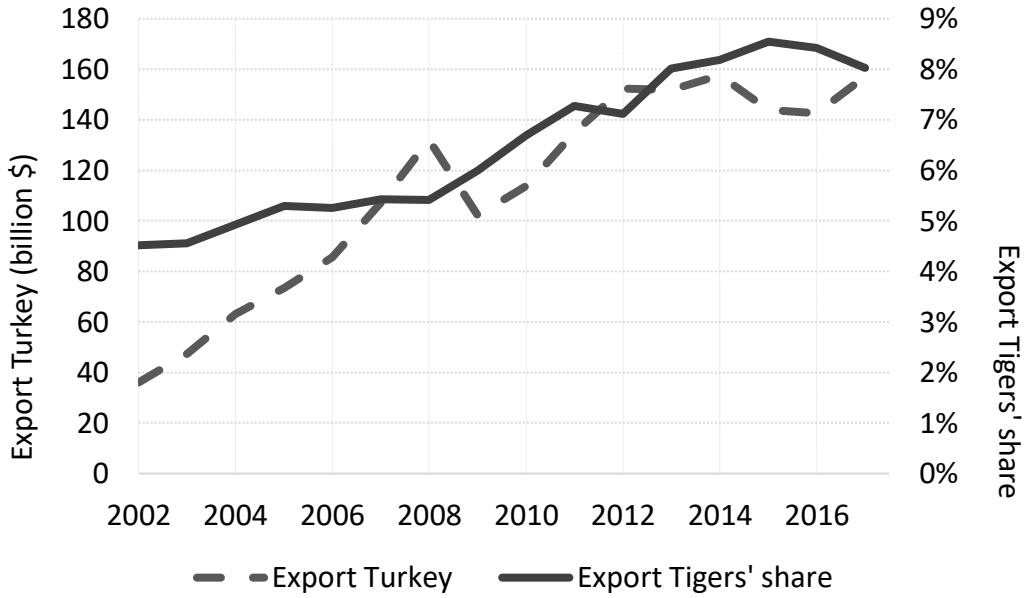
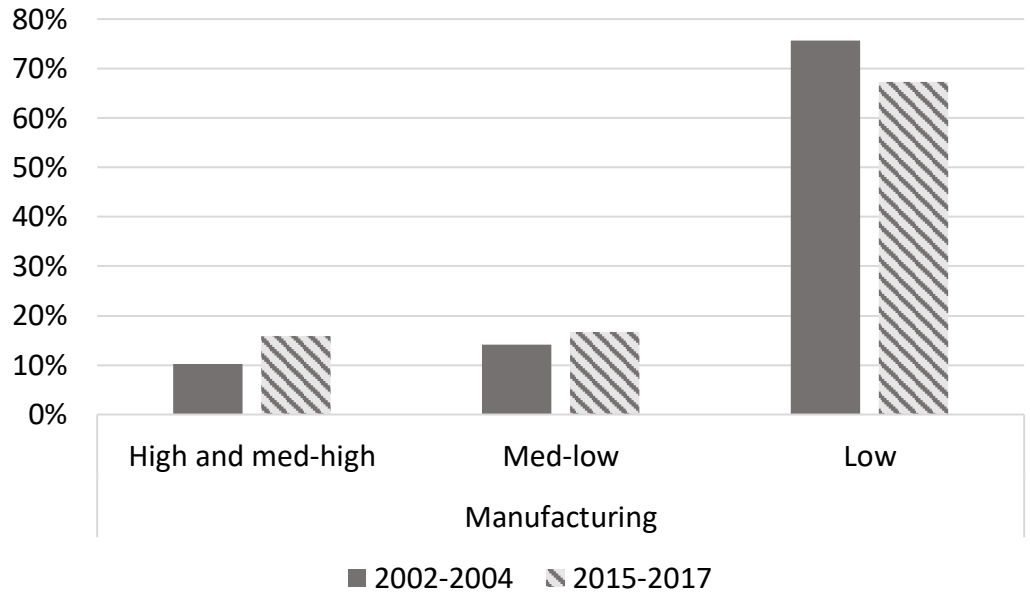


Figure 8 portrays the composition of manufacturing exports by technological intensity of sectors, as defined above. At the beginning of the period, the share of low-technology sectors in total exports of Tigers is around 75 percent, while the share of med-low technology sectors is approximately 15 and that of high and med-high ones is 10 percent. However, there is a decline in the share of low-technology sectors in favor of the others by the end of the period, despite an excessive share. Especially the share of high and med-high technology sectors has increased by almost 6 percentage points over the period.

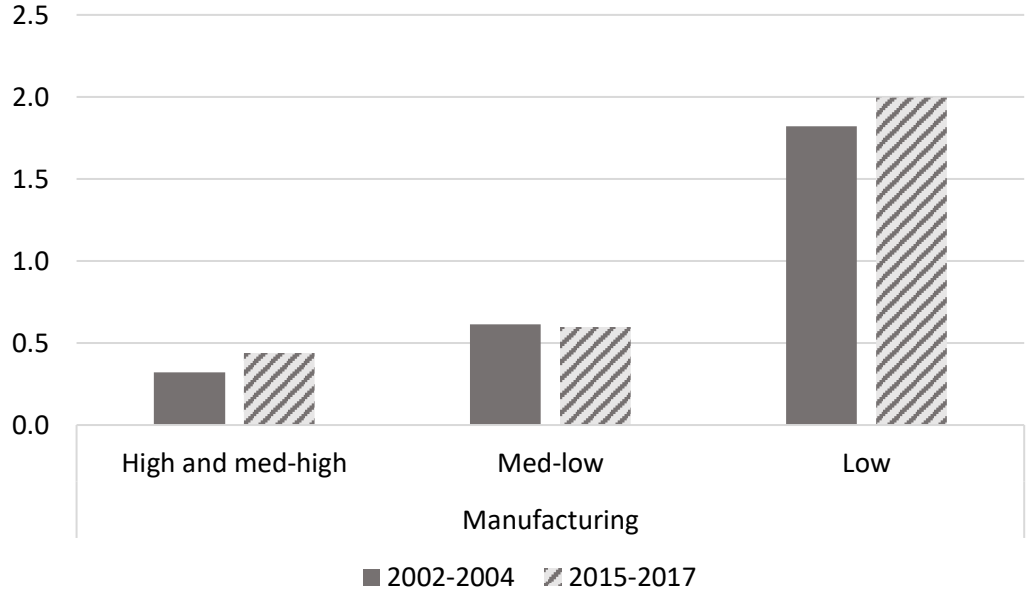
Figure 8: Export performance of Tigers by technological intensity



Based on the export data, revealed comparative advantage (RCA) index developed by Balassa (1965) can be adopted for the case of Tigers in order to identify the sectors in which they have comparative advantage, by comparing their trade profile with the country average. Based on the technological intensity classification we calculate the RCA index for Tigers, which is defined as the ratio of two shares: proportion of the Tigers' exports that are of the technology class under consideration divided by the proportion of country exports that are of that class. An RCA metric greater than unity would then indicate a revealed comparative advantage of Tigers in the technology class under consideration. Figure 9 shows the RCA values calculated using the data of the three-year averages in order to eliminate the effects specific to a certain year. According to that, Tigers are revealed to have a high comparative advantage in sectors which have low-technological intensity and this advantage has increased over time in low-technology products.

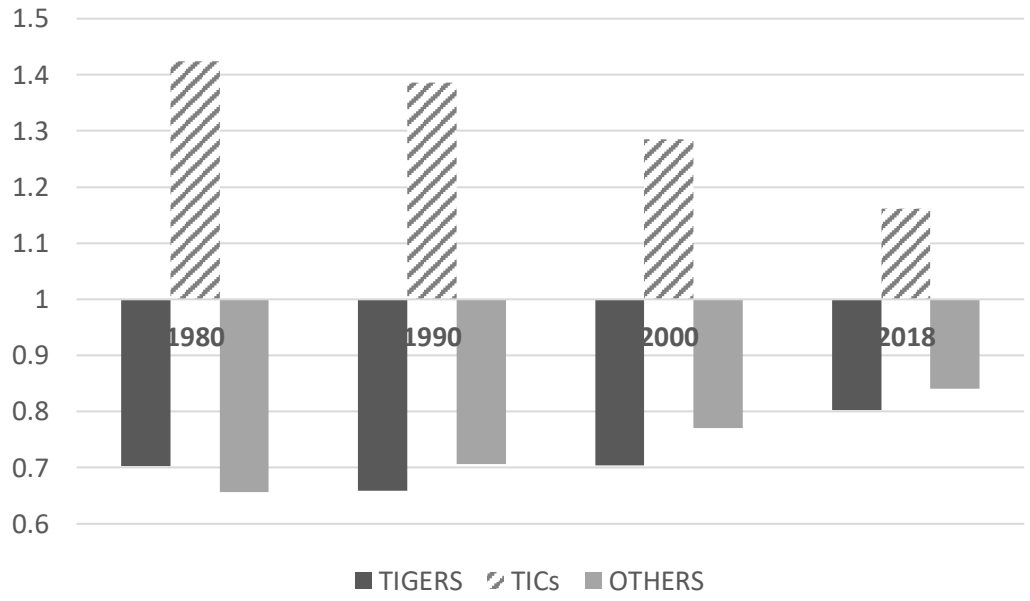
Thus, although the export performance of Tigers exhibited a modest improvement over the period, a very considerable share of their exports relies on low-technology products. Moreover, the comparative advantage they have over the low-technology products have further improved over the period. Hence interpreting this fact as a modest improvement over quantity rather than quality can hardly be debated.

Figure 9: Export performance of Tigers – RCA



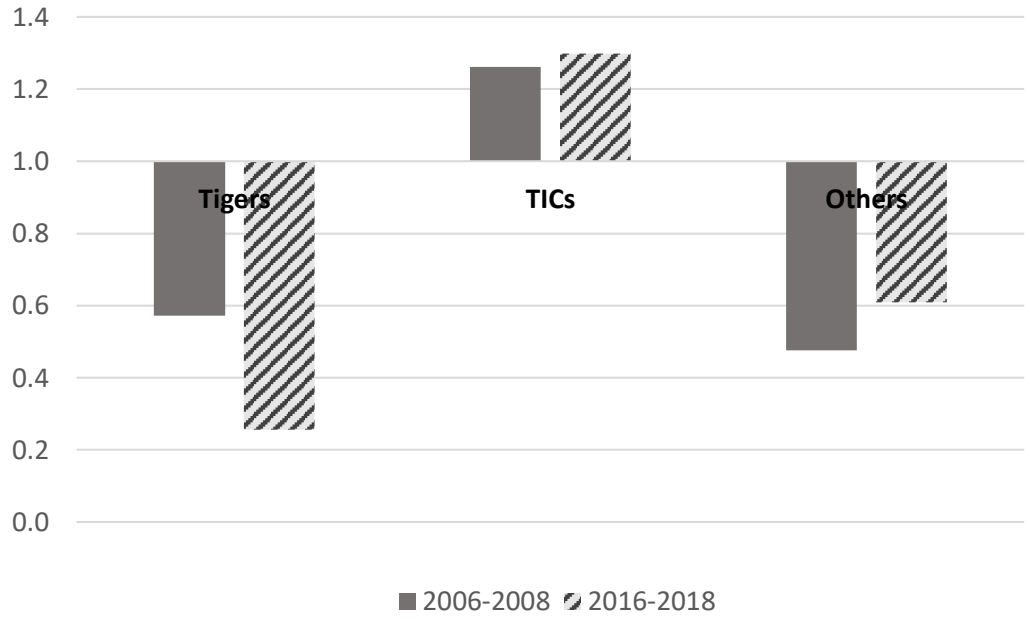
Lastly, we evaluate the innovation capability of Tigers by considering human capital developments and patent performance. We consider the share of population with higher education c as an appropriate indicator of human capital as it reflects ability to be more innovative. In 1980, the share of university graduates within population aged 25 and above was only 2.3 percent in Turkey. While this ratio was 7.8 percent in 2000, it increased by more than twofold and approached to 20 percent in 2018. Figure 10 displays the relative shares of university graduates in each province group relative to Turkey. In 1980, Tigers were lagging approximately 30 percent behind national average. From 1980 to 1990, the existing human capital gap between the Tigers and Turkey widened some more. By 2000, the picture has been the same as in 1980 while there has been a significant improvement over the period, approximately by 10 percentage points. Another striking point arising from Figure 10 is that Other provinces did even better than the Tigers over the entire period. Although it should be elaborated cautiously, the figure also hints a sign of convergence in human capital across province groups over the period.

Figure 10: Relative share of university graduates



In order to get further insight about the creative potential of the provinces, indicators in research and development activities arise as a good candidate. However, we do not have a consistent provincial level R&D expenditure data, whereas. data on total number of patents, utility model, brand and design applications on provincial basis are available. We use total number of patent applications in manufacturing industry as a surrogate measure of R&D to get an idea about the creative capital of the provinces. Figure 11 displays the ratio of total number of patent applications per 1000 firms in province groups relative to that of Turkey, based on three-year averages. The figure reveals that the performance of Tigers in creating innovation had been lagging behind Turkey at the beginning of the period and even worse the gap has further widened throughout the period. By the end of the period the Tigers were lagging 75 percent behind the Turkey average.

Figure 11: Relative patent performance



4. Concluding remarks

This study investigates the performance Anatolian Tigers then and now from a comparative view in a descriptive setting. The policy shift from import substituting industrialization to export oriented growth and liberalization in 1980s, had some significant effects not only on the aggregate economy but also on the regional distribution of production. The Anatolian Tiger provinces, have gained this title due to their prominent economic performance flourished in this environment through mid-1990s. In this paper, we attempted to revisit the Tigers phenomenon and discuss whether they still, if did back then, carry this flag. Main findings of the paper may be summed up as the following. Tigers sustained their strong growth in manufacturing employment in the post-2000 period as well. Also, their share in total exports made a progress, albeit limited. However, a more thorough analysis shows that industries with low technological intensity perpetually comprised a considerably high share in the composition of manufacturing employment and eventually manufacturing industry concentrated in producing low-technology products. Accordingly, this had reflections at exports, such that a significant share of manufacturing exports involved low-technology sectors and consequently Tigers specialized in

low-technology products of which they had revealed comparative advantage. Moreover, our findings also point out to the deterioration of creative capital in Tigers during the second period due to their relative deficiency in both human capital and innovation outcomes.

Our preliminary findings initiate a discussion ground for an important issue raised by the previous literature in conjunction with drawing the direction of future research. Köse and Öncü (1998) argue that the basic motive behind the Tigers phenomenon can be described by low productivity-low wage labor. Filiztekin and Tunalı (1999) also display corroborative evidence showing that Tigers started with and specialized further in low wage-low productivity industries. Further, they demonstrate that the share of low-technology industries, namely textiles and clothing which traditionally had been the least productive sectors, were considerably high in total manufacturing. Hence, concentration of manufacturing in low-productivity industries in Tigers led them to be lagging behind Turkey in productivity terms. This particular finding of Filiztekin and Tunalı related to the 1980-1993 period, provokes us to question whether this tradition is sustained in the post-2000 period as well. Unfortunately, at least for the time being, we cannot discuss this subject properly due to the limitations in access to data. Yet, overall productivity patterns in Turkey have some potential to provide leastwise some insight for the productivity in Tigers. Productivity figures calculated based on the Annual Industry and Service Statistics (2003-2015) show that productivity growth has been more or less the same in each technological classification (Table 5). However, strikingly there have been a significant productivity gap between low technology industries and the high and medium high ones throughout the period. This observation per se, casts doubt on the persistence of relative productivity gaps in Tigers, given their high concentration in low-technology industries.

Table 5: Insights from AISS - (Turkey)

	Productivity		
	Growth (%)	Relative Gap (HMH)	
	2003-15	**2003**	**2015**
HMH	8.31		
ML	8.00	-0.15	-0.18
L	8.85	-0.71	-0.65

Hence, our findings are shedding light on further research rather than coming to a conclusion. There arises a number of topics awaiting future research, particularly a focus on productivity is needed. Filiztekin and Tunalı (1999) question whether Anatolian Tigers are for real or they are just ‘paper Tigers. At the aftermath of a significant change, opening the economy to international trade and capital flows, set new dynamics in the country. Uncovering the productivity patterns observed in Tigers in the post-2000 period and comparing with their previous performance, could reveal whether there is path dependency.

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