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If Globalizm is Dead Long Live What?

Edited by
Halit Sağlam & Cemre Peker

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ABSTRACTS & PROCEEDINGS

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10. ICOPEC 2019:
International Conference of Political Economy
June 25-28, 2019, İstanbul, Turkey
| www.icopec.org |

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Cemre Peker (Marmara University)

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Rise of protectionism: Is it Permanent or Temporary?

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Following modest recovery of 2008 Financial Crisis, world trade volume displays a declining trend during the last decade. Overall openness ratio of the world also decreased. Data shows that the main reason behind the trade shrink is the decrease in the imports of the high-income countries. The scope of the study is to discuss to what extent this observation implies a permanent change in the trade policies of the rich countries to protect their national economies. To answer the research question, I employed a simple projection of world output. The results show that the risk of rising protectionism cannot be ignored.

JEL codes: F13, O40

Key words: Trade Policy, Economic Growth, Protectionism

Cognitive Capability And Cooperation In Public Goods Experiment.

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The study examines the link between cognitive capability and the level of cooperation in public goods experiment. We employed a three-question Cognitive Reflection Test (CRT) as a measure of cognitive capability and assessed how it relates to contributions in a public good experiment. The study investigates (i) the association of CRT-scores and contributions in a multiple-round public good game (PGG); (ii) whether cooperation is enhanced within a PGG with punishment compared with when there is no punishment opportunity, and (iii) the link between cognitive capabilities and risk preference of participants of a PPG. The findings suggest that there is a negative relationship between CRT-scores and contributions in PGG. Hence, the existence of strong cognitive capabilities motivates selfishness PGG. Moreover, the existence of punishment enhances cooperation among participants than in PGG without punishment. Finally, the link between smartness and risk tolerance of participants suggests that, being smart tends to make men take more risk and makes women patient.

Global Impact of Artificial Intelligence: Macroeconomics and Flows of International Capital in the World of Smart Machines

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Paper presents the specific impact of Artificial Intelligence (AI) on global macroeconomic indicators and the influence this novel, but already ubiquitous technology has on flows of international capital around the world. As the general importance of AI in industries and economies rise, some technologically determined aspects of AI, such as data, are becoming important for analyzing contemporary macroeconomics. Data sharing and data availability are highlighted as new macroeconomic vectors defining broader economic frameworks both globally and locally. Impact of AI is presented across various industries, but also related to specifics of geography and spatial disposition of certain national economies presented in the paper. While strongly influencing macroeconomics and consequently broad field of macroeconomic analysis AI is at the same time a game changer for foreign direct investment both in first world and developing countries. Paper further discuss some aspects of economic forecasting, international trade and financial services that are important for comprehending overarching influence of AI on macroeconomics and particularities of flows of international capital.

Home-Based Working Women as Cheap Labour in the Process of Neoliberal Globalization: A Qualitative Field Study in Aksaray Province

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The main demand of the transformation that emerged with the wave of neoliberal globalization in the 1980s is to keep the competitiveness of the companies at the highest level to ensure the sustainability of capital accumulation. On behalf of the establishment of sustainable competitiveness, firstly, labor costs which were seen as the main cost element have been reduced as much as possible. In line with the demands of the capital, labor markets were deregulated by rearranging. Precarious flexible labor contracts have been adopted, job security has been weakened, informal work has been tolerated as much as possible and the struggle power of the unions has been limited. In this new structure, one of the most important working groups responding to the cheap labor needs of capital is women. Especially home-based work has been seen as a very attractive form of work by the firms with its low paid, informal, non-union and flexible working hours. On the other hand, home-based working makes it possible to carry out the household chores which are imposed by gender based division of labor. Hereby, it conceals the problems created by this form of working and turns it into an attractive way of working for women. The main purpose of this paper is to reveal the problems created by home-based work that includes almost all of the negativities created by the search for cheap labor of capital and to determine how women look at home-based work in the context of gender-based division of labor. The paper will benefit from the results of the field research conducted for the master's thesis. The findings of the study were compiled by in-depth interview technique.

Keywords: Home-Based Work, Globalization, Neoliberalism, Gender

The Ottoman Pious Foundations and Employability

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Apart from serving society the pious foundations were also an employment institution during Ottoman period. The purpose of this presentation is to attract attention this aspect of the waqfs. As an Islamic institution waqf is simply an individual charity initiative.. Although the pious foundations were practiced by different Islamic countries for centuries, it could be said that the institution was reached its highest level during Ottoman era. Particularly Ottoman sultans by their massive foundations had created new institutional identity. They had turned foundations from charity to an official organization which support almost all public needs. It is the main reason why costly investments such as mosques, soup-kitchens, schools or hospitals were financed by waqfs. As a result they needed to employ hundreds of people sometime just for a foundation. This made the waqfs one of the main employment institutions during Ottoman time. Although studies in the related literature mention this side of the waqfs they do not usually give detailed information. For instance one of the remarkable studies Ömer L. Barkan published in 1962 was about accounting registers belong to soup-kitchens. Regarding to the records Barkan found that there were 1.026 people who worked in seven different soup-kitchen in an year. Moreover he calcuted that their their wages %52.5 of all the wafs' spendings. The main sources in this presentation are accounting registers belong to the Ottoman pious foundations. I'd like to give information about waqf employers and the waqfs as an employment institution. The responsibilities of the employers, their gender and religion will be mentioned.

Environmental Justice, Climate Justice and the Green Economy

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This paper comments on the role that environmental justice considerations can potentially play in a green economy, by pointing out the possibilities and challenges facing the world in the environmental policy domain. It explains how differences in the way environmental justice is framed—based on different empirical and theoretical approaches—could impact how green and just an economy is in practice. Insights from environmental justice movements and climate justice discussions are introduced to open up a platform for dialogue between the proponents and critiques of green economy. Overall, the chapter argues that focusing on environmental justice would be highly beneficial in shaping the type of economics to adopt for just sustainabilities.

An Alternative To Public Social Welfare Expenditures: The Universal Basic Income

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When the literature on universal basic income is examined, it is seen that the last 30 years have been emphasized and taken seriously. One of the first to propose universal basic income is Thomas More, the author of the famous work “Utopia”. Referring to his work, this idea isn’t utopia today. On the contrary, universal basic income can replace mixed and conditional public social welfare expenditures in almost every country. Many public social assistance and services (public social welfare expenditures) such as child benefits, unemployment insurance, elderly and disability benefits are important in terms of combating poverty and equality. In addition, such expenditures of the public should be the responsibility of the social welfare states. A significant portion of these expenditures are financed from the budgets of local and central public institutions as well as various local or central foundations, charities and non-governmental organizations. These foundations and charities have resources such as donations. However, expenditures of local and central public institutions are financed by taxes of public budgets. Universal basic income, which can replace all these expenditures, can eliminate the complexity of aid. However, it is possible for financing to be reflected in other segments of society as tax increases.

Active Policies and Employment Measures in the Republic of North Macedonia

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In many European countries the unemployment rate ranges from 7.3% to 11.3%. The same problem occurs in the Republic of Macedonia, where the indicator is relatively high (22.8%). Under these conditions the focus of unemployment policies in all countries is based on increasing employment opportunities. To make the unemployed active in the market, various employment programs are being applied, as well as, expenses for their financing. Much of the facts and data on the use and composition of active labor market belong to developed countries. Over the past few years, some data has been available for analyzing the progress of these policies in the transition countries. Practically, there is still no systematic data for developing countries. In this paper, we will present the empirical analysis of the relationship between the expenditure of active labor market policies along with the reduction of the unemployment rate. The analysis will be carried out through multiple linear regression. As parameters and indicators of the model, we will have the following: the number of employees, the number of policy makers and the policy budget active in the Republic of Macedonia.

Strategic Planning, Governance and Information Technology Funding in Public and Private Universities: Evidence from Survey Data

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Higher Education Institutions (HEI) face the challenge of keeping up with the technology developments and coping with the competitive environment to counteract the external pressures that require acquiring competitive advantages through continuous efforts for being distinctive and visible over other institutions. In this context, the focus of this research is on the investments in the technology by HEIs as well as the impact on strategic planning and governance. The focus of our study is the analysis of the investments and funding of the universities in IT (information technology) as an important factor in achieving a strategic alignment of technology with the education objectives. In this context, we have analyzed the response from 801 institutions, as a result from the survey data, within a range of 462 public and 315 private universities, to gain insights of the current state of IT in higher education institutions and IT governance by trying to find the similarities and differences of these institutions through maturity index.

Behavioral Obstacles in Front of Green Buildings and Possible Solutions

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According to neoclassical economic theory, people, who are called as homoeconomicus, have full knowledge and they are rational. Homoeconomicus is equipped with complete information and rationality, s/he always makes the right decisions for herself/himself and for society. However, studies from the 1960s onwards have increasingly made clear that these assumptions do not reflect reality. In this study, we will question the assumptions that people have complete knowledge and rationality within the framework of bounded rationality. In this way, we expect to understand why the spread of green buildings in Turkey was limited. About 30% to 40% of energy in Turkey is consumed in the buildings, in which the overwhelming majority of it met by fossil fuels, which have serious adverse effects on the environment and human health. The spread of energy efficient green buildings is very important for preventing environmental pollution based on fossil fuel usage. In addition, the spread of green buildings is meant to reduce Turkey's dependence on foreign energy. Some of the expenses incurred to build energy-efficient green buildings and to transform existing ones into this direction can quickly pay back itself and continue to provide energy for many years. While this is the case, the low demand for green buildings indicates that there are obstacles to the rational formation of demand for green buildings. Within the framework of this study, the source of this irrationality in demand for green buildings has been examined within the framework of four issues such as uncertainty, risk avoidance, availability heuristics, and social norms and some solutions have been proposed.

Keywords: Behavioral Economics, Green Buildings, Economics-Psychology Relationship

JEL Code: D91, O13, Q56

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Do High Taxes on Alcohol Drive Demand for Illegal Drugs in Turkey?

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In economic theory, quantity demanded of a product is inversely related to its price. Therefore, we expect high taxes on alcohol to lower alcohol consumption and the related harmful effects. However, the rise in alcohol prices might lead to an increase in drug use when we consider the possibility of substitutional effects. In the last years, prices of alcohol beverages have risen dramatically in Turkey. Total number of people with a drug use disorder and number of deaths originating from drug use have also increased in the same period. Taxes on alcohol is an important financial source for the government. However, this study claims that excessive taxes on alcohol do not break alcohol habit but rather replace it with a more deleterious addiction.

Long-Term Unemployment and Employment Policies in the European Union

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The unemployment problem is one of the biggest economic and social problems of the European Union countries in recent years. The prolongation of the unemployment period affects people socially, economically and psychologically and brings many problems. The problem of long-term unemployment with social and economic returns became the most important problem of the European Union, especially in the 1980s. While unemployment rates has increased in EU member states, the duration of unemployment has increased dramatically. Therefore, the EU has established employment policies against the long-term unemployment problem. In this study, the structure and general characteristics of long-term unemployment in the European Union will be examined and employment policies implemented in the fight against long-term unemployment will be included.

Key Words: Long-Term Unemployment, Employment Policies, European Union

Turkey in a Global Turmoil: Populism and Flexible Alliances

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More than two decades ago, Zbigniew Brzezinski alerted us to a rising “global turmoil” steadily stifling international society’s, especially the West’s, ability to respond to major global challenges. Since then, the West has been in the grip of the multiple crises of globalization, manifested in a myriad of unprecedented and effective security, economic, humanitarian, and environmental challenges. One of the major consequences of the global turmoil has been the increasing stagnation of democracy on a global scale. This stagnation has taken various forms across the globe, including democratic backsliding, democratic disconnect, the crisis of representative democracy, delegative and majoritarian democracy, competitive authoritarianism, executive presidentialism, or illiberal democracy. What Larry Diamond has called “the global recession of democracy” has been one of the main symptoms of the present condition. While existing democracies have failed to effectively tackle with the multiple crises of globalization, the authoritarian turn has begun to shape and frame politics and governance not only in developing countries but also, more importantly, in advanced Western democracies. From the local to the national and the regional to the global context, the authoritarian turn has occurred with the justification that global challenges are so strong and effective that it is only through fast and assertive decisions that governments, as well as strong leaders, can develop responses that can strengthen the national economy, national security, and social cohesion. Rather than abiding by the traditional forms of democracy such as an effective system of checks and balances, independent rule of law, strong decentralization, and participatory democracy, many states have sought to establish a strong and fast decision-making process capable of producing and implementing the kind of measures and mechanisms necessary to deliver effective responses to the global turmoil. The need for decisionism in order to protect the security of “the people” and “the majority” has been a common denominator in countries where the authoritarian turn has occurred. Rather than mapping commonalities and differences that can be found across various cases in which the authoritarian turn is coupled with populism through strong leadership, this paper will focus on answers to more novel questions: Why now? Why we have been seeing democratic backsliding on a global scale? What has led to the emergence, or the consolidation, of the power of authoritarian and populist leaders? The Turkish case is illustrative and explanatory as it presents a case where populism and strong leadership have been successfully installed with popular support. This has given rise to the government’s attempt to initiate the process of regime change from parliamentarianism to what is known as “executive presidentialism” as well as a new foreign policy thinking based what I call “flexible alliances” to effectively respond to un precedented security challenges. I will suggest that in locating the Turkish case in a global/regional (European/comparative) context, we are able to gain insights that help us understand the systemic—rather than country-specific—nature of the authoritarian turn and the rise of populism.

Decentralization of Collective Bargaining System in Greece: Between Dismantling, Survival and Restoration

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Until the current economic crisis, the vast majority of wage labour in Greece was covered by collective bargaining and collective agreements at sectoral/occupational level. During the crisis period the collective bargaining system has been radically transformed through a process of disorganized decentralization, as a result of the policy of “internal devaluation” imposed by European Commission, European Central Bank and International Monetary Fund. The collective agreements at sectoral/occupational level have been undermined in favour of individual contracts. The latter have contained worst terms and have been concluded by over than one million salaried employees. Nevertheless, a restricted number of sectoral/occupational collective agreements have been survived during this period. In this context, the present paper aspires to contribute to the analysis of the collective bargaining system transformation. Moreover, the determinants of survival of these few collective agreements and the prospects of restoration for sectoral/occupational collective agreements at national level are examined.

Financial Inclusion, Poverty and Inequality Nexus in Transition Economies

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Over the past decades, financial inclusion is underscored as a key global priority in pursuing sustainable development goals. Enhancing financial access to banking services is likely to reduce poverty and alleviate inequality by drawing the poor unbanked adults into the formal financial system, which enables them to build up assets that could generate income in the future, elevating their state of poverty. Hence, a profound understanding of the nexus between financial inclusion, poverty and income inequality is of particular importance. Accordingly, this paper aims to analyze this relationship in the context of the transition economies of Eastern Europe and the former Soviet Union. Using alternative banking sector outreach measures, the impact of financial inclusion on poverty and income inequality is empirically investigated for the selected transition countries over the period 2004-2017. The findings of the study reveal that financial inclusion decrease poverty and income inequality.

Uncovering the Obstacles in Front of the Revolt of the Working Class

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In recent years, working life has been subject to various transformations due to discontinuity and uncertainty that encompasses different sections of the working class. In the current state of global capitalism, these transformations are adjoined by dispossession and particularly by increasing commodification in different geographies of the world. These twofold and complementary processes emerge as a major problem for broad masses and society, and are discussed in the relevant literature through their various dimensions. These dimensions include the legal and actual practices shaping working life; the impact of this process on different sections of the working class; and the pathways of the struggle against this process. This study will try to shed light onto the question why the members of the working class do not resort to resistance / struggle practices under these circumstances. The main question that will be tracked is “what are the reasons for renouncing dissent and / or accepting the process?” In this context, for the purposes of this study, in-depth interviews with working class members within the labor market have been conducted.

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Political Economy of the Artificial Intelligence

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One of the fields that technology, which has made a speedy progress in the last quarter of the 20th century, stands upon is the artificial intelligence discussions, whereas the other is that robotics studies accelerate. However, the observed developments in these two fields, on the other hand, brings the inquiries about a series of alterations predicted to emerge in the relations of production. In fact, the argumentations about that the developments in the fields of robotics and artificial intelligence could upset the balances of the labor market and cause a mass unemployment is discussed as an agenda item becoming hot with each passing day. By this study, it is aimed to handle the possibility of that the progress line of the artificial intelligence and robotics, by its very nature and structure of the capitalism, not only can formalize and dominate the daily life of humans and societies but also can emerge as an increase in exploitation to the detriment of the labor within the balance of the capital-labor dichotomy of the relations of production instead of a mass unemployment, rather than a future prediction as mentioned frequently.

Keywords: Artificial intelligence, industrialization, global capitalism, technology, relations of production, political economy.

Analysis of a Game Theory: Coordination Between Monetary Policy and Fiscal Policy

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It is of great importance to have the coordination between the policies in ensuring macroeconomic stability effectively. The coherent policies implemented under the leadership of an effective coordination established between the monetary authority and the fiscal authority have a high impact on macroeconomic stability. From this point of view, this study examines the coordination between monetary policy and fiscal policy within the framework of a repeated game.

Key Words: Monetary Policy, Fiscal Policy, Policy Coordination, Repeated Games,

Labor Migration from the Post-Soviet Countries

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The processes of migration have an active development in the modern globalized society. It is caused by political, socio-economic, demographic and other transformations. Nowadays the wave of migration reaches its peak. Studies conducted by international organizations show that more than 175 million people have migrated and are away from their homes. 19.2 million people have received refugee or asylum seeking status. The United Nations Economic and Social Affairs Department has published data on migration from post-Soviet countries. It appears that, the leader is Armenia - 31% of the population left the country after declaring its independence. The second place took economically quite strong Kazakhstan - presumably, migration from this country has not economic, but ethnical character. On the third place is Moldova. As for the Georgia it is on the fourth place with its 21% migrants. About more details: push and pull factors we are going to explain in our full paper presentation.

Educating Against the Odds: Seeking student success in St. Louis

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Demographic shifts and political missteps have shaped the educational environment in St. Louis. Educating students in the city is increasingly difficult as financial mismanagement and a shrinking tax base affect student opportunities. There are some bright spots, however, as philanthropies and collegiate partnerships seek to turn things around.

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International Trade and Gender Employment Gap in Manufacturing Sector

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There is a large body of literature on economic growth and employment effects of embodied knowledge and technology transferred via international trade. It is the fact that employment effects of trade differ significantly across countries because of different country specific factors including different policies, labor market structures and demographic features. Trade can create new opportunities for the labor market but it can also enlarge the gender-based inequalities. Indeed, many countries have gender-based inequality problems in their labor markets. This study concentrates on international trade and gender employment gap in manufacturing sector for a group of European countries. The analysis considers the technology intensity of manufacturing sector and composition of trade. The aim of the study is to investigate whether technology embodied in international trade helps to overcome gender employment gap in manufacturing sector.

New Economic Sociology and Economic Reality

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Each time the capitalist system has gone into a crisis, it dawned questions on its life-span and made people interrogate the theoretical framework that legitimized it. Mainstream economics, which is the support for this legitimization, has tried to explain these crisis and instabilities with external and conjectural elements as they confined their social and economic reality to a closed system ontology. This closed system approach is the reason why instability of social and economic systems in real life are not taken into account in the prevailing paradigm. This paper will be an analysis on the “nature” of social and economic reality. In other words, it will set out on the idea of the necessity of ontological reasoning. Its objective is to critic the social structure ontology of The New Economics Sociology which claims to answer the realist orientation that expresses the ontological tendencies in economic theories. New Economics Sociology asserts that the economic behavior is embedded in social structure and criticizes the rational human of the neoclassical economics but still the conceptualization that they are making of this social structure is confined to a “non-atomistic individual”. Following Roy Bhaskar, social reality is stratified and differentiated. The social structure has been redefined as an interrelating, dynamic and a chaotic totality, an open system. Unless the New Economics Sociology adopts such an ontology of social structure, it remains in the form of a discipline to be articulated into the mainstream.

Financialisation and the Crisis of the Crisis Management: The Turkish Experience

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This paper argues that banks have not become more distant from industrial firms during the financial liberalisation in Turkey since the 1980s. That is, it did not produce an outcome that has been highlighted as a defining feature of financialisation. Instead, a blurring of frontiers between financial and non-financial activities, in the form of 'holding companies' where productive and financial valorisation are intertwined has been its distinctive feature. These groups entailed the characteristics of both finance capital and financial capital so that the specific ways in which contradictions endemic to the components of finance capital (industrial versus financial capitalist fractions) are internalized within them. Yet, they were unable to undertake the necessary productive investments that have been deemed necessary so as to produce high value added goods, which are, in turn, deemed indispensable to reduce chronic current account deficits. Thus, the root cause of this inability has been identified as the exorbitantly high costs of borrowing in the Turkish financial system. As this has been a characteristic feature since its transition to neoliberalism, it seems to signify a crisis of crisis-management, indicating an inability to 'go on in the old way' and demanding more radical solutions.

CO2 Emissions and Economic Growth Nexus: A Wavelet Based Approach

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The nexus between environmental pollutants and economic activity has been one of the most widely investigated topic in the economic literature in the last three decades. There are large number of studies that investigate the existence of a possible causal relationship between economic output and environmental pollutants, but the empirical evidence remains controversial. In this manner, the main objective of this paper is to investigate the causal relationship between CO2 emissions and economic growth for the United States over the period 1800-2014 and to produce new evidence on the economic activity and environment literature. Continuous wavelet transform causality (CWTC) method is used to investigate this causal relationship in various time scales and to identify the evolution of causality patterns. The results indicate that there is a strong positive causality from economic growth to CO2 emissions over the period 1850-1900 and long-run causality is also seen between 1900-1950. However, reverse causality exists from CO2 emissions to economic growth over the period 1950-2014.

Keywords: CO2 Emissions, Economic Growth, Continuous Wavelet Transformation, Causality.

Income Distribution and Economic Growth, the case of Mexico

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The goal of this paper is to present the hypothesis of the causes of slow growth that the Mexican economy has experienced in the latest four decades. And then evaluate the growth capabilities of AMLO's new economic policy for the period of 2019-2024. The neoliberal model applied since 1982 in Mexico was proposed: the liberalization of markets, the reduction of the state intervention in favor of the private enterprise; the opening to the international trade, the liberalization of the labor market, the attraction of foreign investment, and in general, the privatization of all markets including the activities related with petroleum and its derivatives, etc., this policy expected would result in a sustained growth in the long term, however, the result has been slow growth. This model and its instrumentation affected negatively the distribution of income, generating a negative effect in income and in effective demand related in particular with the social groups that in the lower deciles of the social structure, but that have an important effect in the growth of the domestic market. The hypothesis that I call: "the trap of neoliberal model", stresses the impact of the liberal economic policy on the real variables of the economy, in particular on the distribution of income. The trap of neoliberal model consists in, while in the short run it has sought to favor the large national firms, this model has been operating against its own possibilities for growth (investment) in the long run. The issue is that policy generates a process of concentration of income in the higher deciles of society, and against the income and purchasing capacity of the lower deciles of society. This has created a downward trend of the effective domestic demand, which has transformed in the cause of the slow growth of the Mexican economy. If this hypothesis is correct, the economic policy of the new administration (AMLO) that seeks to redistribute the income in favor of the lower classes could have real possibilities for creating the conditions of a new period of growth in the internal market. The argument of this hypothesis is founded in the post-Keynesian and Kalecki's theories, and in statistics information, and when it has been possible, in econometric methods. Therefore, these methods are been used to estimate the effects of the new economic policy in Mexican economic growth.

What Do Developmental Central Banks Say?

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The nexus between economic development and the main functions of a central bank have been discussed nowadays by the examples of developmental central banks in Latin America and Southeast Asian countries. Therefore, it is essential to describe the main aims and functions of a central bank in this manner. The aims and tools of a central bank have been changing significantly after the financial crisis of 2008. These changes both in developed and developing countries can be better understood in the presence of international organizations, mainstream economic perspective and global economic conjuncture. Therefore, the concept of developmental central banking will be questioned through the selected countries of Latin America and Southeast Asia region whether it is a choice for The Central Bank of the Republic of Turkey.

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**Gender Issues in the Framework of Informal Relations Networks:
A Qualitative Research**

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Home services are an important area of employment for low-educated and unskilled women who cannot find other jobs in the city. Therefore, an informal employment relationship, which is largely out of legal regulations and protections, is being established to meet supply and demand. In this study, in this informal relationship with the poor women who work in the district of İstanbul in the district of Kağıthane- Sanayi neighborhood 12 babysitters living in, women's informal employment processes, their role in the workplace conflicts, employer women to share their daily sharing and the process of worker face to face in-depth interviews. According to the findings of the field, it is more important for women to provide income to the household rather than informally or formally. At this point, they provide social security through their spouses. These women who go to work with the aim of decreasing their poverty, when they compare themselves with the employer, say that women can only be a household. Processes of seeing themselves as workers seem to be a problematic issue because they work in the private sector of the employer. Key Words: Informal employment, gender, poverty.

Seçilmiş Bazı Risk ve Belirsizlik Göstergelerinin CDS Primi Üzerindeki Etkisi: Türkiye Örneği

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Son günlerde popüler bir kavram haline gelen ve makroekonomik değişkenlere karşı duyarlı olan kredi temerrüt takası (CDS -Credit Default Swap Premium) ülkelerin risk durumlarını gösteren en temel gösterge haline gelmiştir. Ülkelerin CDS priminde bir artış söz konusu olduğunda, ülkenin de risk düzeyinde artış söz konusu olmaktadır. Yerli ve yabancı yatırımcılar bir ülkeye yatırım yapma kararını CDS primlerini göz önünde bulundurarak yapmakta ve yüksek riske sahip ülkelere yatırım yapmaktan kaçınmakta ve mevcut yatırımlarını çekme kararı alabilmektedirler. Bu çalışmada Avrupa ekonomi politika belirsizliği (EPU) endeksi, küresel korku endeksi olarak kabul edilen Volatility Index (VIX) ve Türkiye'nin jeopolitik risk endeksinin Türkiye'nin CDS primi üzerindeki etkisi test edilmiştir. Araştırmada 2010:1 ile 2017:12 dönemi aylık veriler kullanılmıştır. Uygulanan Robust Regresyon Analizi sonucunda EPU endeksi ,VIX ve Türkiye'ye ait Jeopolitik risk endeksinin CDS primleri üzerinde pozitif ve anlamlı bir etkiye sahip olduğu tespit edilmiştir.

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Renewable Energies within the Framework of Social Benefits and Turkey*

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Social benefit is one of the basic subjects of public finance. However, this issue is often ignored. Energy production is closely related to the concept of social benefit. The basis of energy production in Turkey create fossil fuels. However, Turkey is a relatively poor country in terms of fossil fuels. Turkey has an advantageous position in terms of renewable energy sources. Energy production with fossil fuels becomes more costly for Turkey in the long term due to negative externalities. Energy production with fossil fuels is more costly for Turkey due to negative externalities. It is likely to bring about positive externalities of renewable energy sources will provide many socio-economic benefits to Turkey. In this study, renewable energy sources and fossil fuels for Turkey will be discussed from the perspective of externalities. For Turkey, the ideal size for investments in renewable energy will be analyzed by COPRAS of multi-criteria decision-making methods.

Key Words: Social Benefit, Renewable Energy, Externalities.

**Bu çalışma Marmara Üniversitesi Sosyal Bilimler Enstitüsü'nde Savunulacak Olan "Sosyal Fayda Çerçevesinde Yenilenebilir Enerjiler" isimli doktora tezinden derlenmiştir.*

The Impact of Turkey’s Environmental Policies on Central Government Budget

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It is possible to trace fiscal instruments including environmental taxes and public environmental expenditures in the public budget. In this context, the effects of the environmental policies on the public budget are analyzed for the central government budget for the period of 2006-2019 in Turkey. The study focus on budget allocations for environmental protection services and on environmental tax revenues as well as on the budget policy documents. First, to what extent Turkey’s environmental policies reflect to the policy documents used in the budget preparation process will be put forward. Then the relation between the environmental policy implementations and the policy objectives and priorities in these policy documents will be discussed. Main policy documents applied in the study are the Medium Term Program, the Medium Term Fiscal Plan, the Budget Preparation Guide and the Investment Program Preparation Guide.

Keywords: Environmental policy, central government budget, Turkey

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"Re-publicity" and "Re-planning" as an Alternative to "Globalization"

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The general framework of “globalization” is defined as the internationalization of production, consumption and finance processes. The period covering the last 30-35 years has brought with it radical changes in the economic and social structure. The main rationale for these transformations can be explained by neoliberal globalization trends cause to intensification of economic crisis. The economic tensions that emerged as a result of the crisis do not only lead to an increase in unemployment and poverty, but also harshened the struggle for redistribution of resources. Therefore, it causes continuity of economic, political and ecological tension lines at international level. The 2008 crisis which was characterized by unemployment and idle capacity, ecological disasters and the commodification of the environment, unmet needs and over-accumulation can be considered as an expression of contradictory processes. With this crisis, while there is a recession in production, the legitimacy of the system is also a matter of debate. Thus, in this study, alternative forms of publicity as anti-globalization tendencies will be discussed with the conceptual and theoretical framework of relations between planning approaches and models of democracy as decision-making mechanisms.

Global Governance in the 21st Century

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Notwithstanding the “end of history” argument in the wake of the end of the Cold War, the Post-Cold War world has arguably been more pronounced by disorder than order especially after the September 11th terror in the heart of New York. Individuals have become empowered in an unprecedented scale, which have unfortunately included terrorists with dangerous ideologies and access to disruptive technologies. The postwar so-called liberal international order has clearly fallen into a systemic crisis, no matter how desirable or well-functioning it may have been to different eyes of the event beholders. Against such a backdrop, this keynote speech looks into why good global governance remains still critical and important in this time and age, stressing how good global governance is both a means to global public good and an end in itself, and also considering the role of middle powers for more stable and effective global governance.

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Economic Differentiations and Varieties of Institutional Structure

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The world is in a deeper and rapid transformation than ever before. This transformation, which is characterized by the fusion of technologies that blur the lines between physical, digital and biological areas, transforms all production, management and governance systems. Moreover, personal and cultural characteristics such as privacy, consumption patterns, allocated time for work and leisure, human relations and social institutions such as, the concepts of property, democracy and freedom are also affected by this transformation. Therefore, although it is most clearly seen in this period, the changes in social structure and institutions are changing the intellectual structure of the human being and they are also affected by this change. From this point of view, the human element should be included in the analysis with an institutional perspective in terms of its motives, values, irrational nature and interactions which are determinative in economic terms while evaluating the economic structures of countries. This would be possible by the use of different instruments, which separated from traditional economics and added deeper explanations to the analyzes. In this study the relationship between institutional quality, which is required for sustainable economic development, and economic performance will be examined.

Keywords: Institutional Economics, Structural Formation, Technology

Income Mobility Revisited

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If parents' income is informative about their children's adult incomes, the apparent truth that there is no intergenerational income mobility in this society. And this is pointing out that there is less or no equal opportunity. It is widely believed that high inequalities prevent intergenerational income mobility. This paper examines interactions between intergenerational income mobility and inequality for US considering the fact that countries with high income inequality also have less intergenerational mobility. In this context data of intergenerational income elasticity developed by Lee and Solon (2009) and data of top ten wealth share (WID) are used to estimate the relationship between inequality and mobility. Results show that wealth inequalities undermine income mobility between the generations.

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The State and the Public Sector Economics

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The aim of this presentation is to demonstrate that in mainstream economics the function of the state is to establish law and order, yet it is rather vague what this function actually means. The concealed ideological function of the state can be illuminated by focusing on how the state uses taxation and public expenditures. As the subservient agent, public sector updates its character following the changing role of the state in response to the needs of the economy that arise due to changes in production factors. Such a relationship between the public sector and the economy disguises not only the genuine nature of the state but also affects the relationship between capital and labor. This, in return, has every potential to cause social and economic turmoil over time. Therefore, in order to get an exhaustive view of the aim of the state and of the function of the public sector it is necessary to take the issue seriously from a radical perspective rather than relying on mainstream methodology.

The Survival of Modern Economies - Challenges and Remedies

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The paper provides an overview of the main challenges that affect the economic systems in modern-day economies. These include major problems like poverty, unemployment climate change, resource depletion, etc. The issues discussed affect both developed and developing economies and hinder economic growth in both. Furthermore, the paper unveils the key drivers in contemporary economic environments which might act as solutions to the various problematic zones identified.

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**Reshaping Global Economic Governance:
Role of BRICS in a New International Financial Order**

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As the continuous slowdown becomes 'new normal' for the majority of the developed economies, growing influence of the emerging countries, and BRICS in particular, has an aspiration to write a new chapter of global economic governance, international cooperation and development. Specifically, in the context of the exposed weaknesses of a traditionally Western-dominated international financial regime, ever-growing foreign direct investment (FDI) in Africa and the establishment of new international financial institutions by the BRICS countries could potentially fuel its transition from regional to global power. Thus, this paper aims to analyze, firstly, the role of the BRICS countries in the current international financial regime and, secondly, their potential to reshape the existent order.

Keywords: BRICS, global economic governance, international institutions, financial institutions, foreign direct investment, FDI

The Chemical and the Second Industrial Revolution: The Birth of Steel Industry and the Role of S&T

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Scientific knowledge is crucial to opening up new possibilities for major technological advances. When did science become important for economic development? The steam engine was the earliest major science-based invention. Conversely, the role of science has not been regarded as important in the innovations leading to modern steelmaking. This paper examines the process through which modern steelmaking emerged and clarifies the role of science. This discussion is also important in determining how to view the role of science in economic development and in considering ‘the Great Divergence’ and ‘the Great Knowledge Transcendence’. When much time elapses between scientific and technological advances, the role of science is often not regarded as important and sensational innovations such as the Bessemer process are emphasized. However, this is not a proper evaluation. The role of ‘Industrial Enlightenment’ on the supply side must also be recognized as significant in the emergence of modern steelmaking technology.

Decentralization of Collective Bargaining System in Greece: Between Dismantling, Survival and Restoration

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Until the current economic crisis, the vast majority of wage labour in Greece was covered by collective bargaining and collective agreements at sectoral/occupational level. During the crisis period the collective bargaining system has been radically transformed through a process of disorganized decentralization, as a result of the policy of “internal devaluation” imposed by European Commission, European Central Bank and International Monetary Fund. The collective agreements at sectoral/occupational level have been undermined in favour of individual contracts. The latter have contained worst terms and have been concluded by over than one million salaried employees. Nevertheless, a restricted number of sectoral/occupational collective agreements have been survived during this period. In this context, the present paper aspires to contribute to the analysis of the collective bargaining system transformation. Moreover, the determinants of survival of these few collective agreements and the prospects of restoration for sectoral/occupational collective agreements at national level are examined.

Universal Basic Income and A Particular Type of Employment Guarantee As Anti-Crisis Automatic Stabilizers in the Fourth Industrial Revolution Era

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Capital movements increased dramatically since the 1970s and this led to a growing number of financial crises in the following decades, especially in developing countries. In the meantime, income inequality has increased dramatically since then and there are signs that unemployment will follow the suit in a similar fashion in the near future. It is possible to say that the first two problems are very much related to “the winner takes all” motto of neo-liberalism. The third problem, however, started to be felt quite recently in some countries as a result of the 4th Industrial Revolution (4th IR), which leads to the replacement of human labour with robots and deep neural networks. It is crucial to have automatic stabilizer mechanisms in place to reduce the negative effects of these problems on vulnerable people. This paper argues that it is both desirable and possible to design several automatic stabilizers in the shape of universal basic income and a particular type of employment guarantee to serve this purpose. Moreover, such automatic stabilizers would be instrumental to cope with the social and economic problems of the coming 4th IR era. Key Words: Universal basic income, anti-crisis automatic stabilizers, unemployment, poverty alleviation, the fourth industrial revolution.

Transdisciplinary Approaches towards Sustainable Buildings and Cities of Future

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Detailed understanding of key concepts is essential in all disciplines for effective research and development. However, many global complex issues cannot be approached using the rigorous methodologies developed for fundamental studies. Climate change, sustainable development and future cities are among these issues, which need to be considered with multitudes of experts with detailed consideration of human interactions. There are no simple solutions for them and they require the development of strategies to achieve the preservation of material, financial and human resources. These complex problems are transdisciplinary in nature as they all involve intricacies, choices and ever-varying responses of individual people and the societies. Among them, sustainable buildings and the cities of future need more than the traditional integrated engineering and architecture methodologies. These future infrastructures should be designed and constructed to allow sustainable human-building and human-city interactions. By doing so, the welfare of the citizens can be achieved at the highest possible level. Towards this end, comfort and safety of residents and the effective financial and operational management of buildings and cities should be targeted. In this presentation, the research and development work carried out at CEEE will be outlined to show how multi and inter-disciplinary approaches opened the pathways to trans-disciplinary studies. Importance of coherent engineering and architecture, the development of new methodologies and materials, and the use of layers of different energy sources for buildings and cities will be summarized. These studies can be significantly enhanced if the building-user interactions are streamlined, which may require the modeling of human comfort and behavior with the help of the new technologies including machine learning, sensor networks and mobile gaming. The essence of these transdisciplinary studies will be emphasized for regions and cities of the future and their impact on the success of the sustainable development goals. Acknowledgements: This work was supported by the several EU Projects to CEEE at Ozyegin University, Istanbul, Turkey. They include FP-7 NF-RAD FP-7 NEED4B, FP-7 BRICKER and Horizon 2020 TRIBE projects.

The Impact of Globalization over International Economic Relations

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The role of individual states is somehow diminished in the global international system, but it is the fact that in modern world it is impossible to isolate any country. It is true that in order to maintain their own cultural traditions and identity and as well as to gain a proper place in the international system, small countries face certain problem. Nowadays, the world's technologies have changed; transnational organizations are closely linked to the political, social and cultural aspects of globalization. And the most important point which we want to highlight is the fact that all these have resulted digital revolution. Nowadays, the globalization Georgian society has become more argent and topical. Today's economic situation make us think about the country's future. Globalization can be considered as a chance for the country to be involved in world's economic and political processes, improving its living standards and future development.

Challenges Faced By Developing Countries Towards Adaptation Of Fourth

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Fourth Industrial Revolution is the age of digital revolution and which is characterized by the amalgamation of various technologies that are disruptive between the digital, physical and biological domains. The Fourth Industrial Revolution has the potential to synergize the global income levels and enhance the quality of life for populations around the globe. In this paper constraints and challenges faced by developing countries towards adaptation of fourth industrial revolution are studied with special focus on impact of nations economy, literacy rate, employment rate and population statistics, use of technology by skilled and unskilled population, impact of generation gap towards understanding and adaptation trend. Correlations among different research parameters are studied to assess the impact of one variable on other and the results of the study on developing countries were also compared with those of the challenges faced by developed countries who have already adapted Fourth Industrial Revolution.

Middle Income Trap in Turkey, Bulgaria, Malaysia, China and South Korea Comparison

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The middle income trap (MIT) is defined as the failure in the economy to reach a higher income group after reaching a certain level of income and the standing of gdp per capita at the same level for many years without exceeding a certain threshold. In this experiment the comparison of the selected countries (of Bulgaria, Malaysia, China, South Korea and Turkey) were performed in the frame of MIT according to the macroeconomic data and global competitiveness report index between the years of 1990-2018. What is the situations and solution offers of the selected countries against MIT by considering the growth process of them from past to present? In addition, what is the reason behind the success of the South Korean economy in the excess of the MIT barrier? Questions were sought. According to the survey, Bulgaria and Turkey for many years and will continue to wrestle with barrier, Malaysia's economic structure of Bulgaria and Turkey, which is better than the economic structure and concluded that the continuation of Malaysia's progressive economic structure has been reached. Furthermore, it is concluded that the Chinese economy is the closest country to overcome the MIT barrier and South Korea is the best in the selected countries in terms of economic structure compared to the selected countries. This thesis these days, especially after the declaration of the republic of Turkey's economy to grow adventures, with reference to case studies across the MIT takes place Turkey and Turkey's policy is to present proposals on the basis of special purpose.

Keywords: Sub-MIT, Theories of Growth, Top-MIT, Development Theories, Macro Economic Data, Middle Income Trap.

If Globalism is Dead—Long Live What?

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Abstracts & Proceedings

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A Discussion about the Necessity of Artificial Intelligence Expenditures: Turkey Case

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Many significant innovations such as the increased use of structured data in the internet, rise of computers power to data processing and growth of storage capacities caused artificial intelligence to processes data in a way that is similar to the mankind and create results. While a successfully positioned artificial intelligence can provide positive contribution in the fields of climate change, poverty, illnesses, reproductivity, and conformity, misplaced artificial intelligence brings together the problems of unemployment, wage discounts, increased inequalities, unprotected legal rights, bad use (through viruses). The aim of this study is to discuss from different perspectives why artificial intelligence spending are necessary in various countries and then to generate projections for Turkey case. Many countries in the world have growth rates in the amounts of spending for artificial intelligence development activities and this arises the question as to why Turkey allocate necessary funding on this area.

The Share of the Investments in the Central Government Budget in Turkey, and the Necessity of Reviving Investments in the Context of Global Trends

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After the 2008 global economic crisis, a recession was experienced in the world economy and its impact was also seen in the field of international trade. While the foreign trade volume of many industrialized countries narrowed, the investments had also declined, especially due to the decrease in growth rates, the increase in private sector debts, and some risks in politics and economics of the developing countries. The protectionist policies have been brought to the agenda by many countries regardless of the welfare-enhancing effects of the international agreements and the free market economy upon the worsening of economic indicators after the crisis and being felt its effects by the economics managers. Trade restrictions starting between the U.S. and China have evolved into a global trade war affecting the entire world economy and also Turkey's economy. The aim of this study is to investigate the general economic effects of trade wars on the global economy, particularly the U.S. and Chinese economy. In this context, it has been examined that how the direct capital flows to developing countries, especially to Turkey changed, and the share allocated for the investment outlays from the central government budget; and it has been put forward what needs to be done to stimulate investments.

Key Words: International Trade, Investments, Protectionism, Trade Wars

Beguiled Indian Agricultural Sector for a Black Hole Tragedy: Interpreting the new Indian Agrarian Unrest

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Econophysics analysis has come with an interpretation to the new budding Indian agrarian unrest. The never ending process of reforms in this sector is not just because of its cultural indebtedness to the people rather than its economic significance. The 2011 Socio-Economic Caste Census shows 73% families still lives in rural areas and the majority of these families are directly or indirectly employed in agricultural sector. Increasing cost of production, untraceable fluctuations in the price level especially food inflation and water scarcity can be considered as roots of new challenges of this lifeline sector. This agrarian rural India is in making of a black hole. Black hole is one the stages in death of a star; its presence is traced by the darkness it creates, as it has an ability to absorb even lights around it by its unlimited gravitation force. In 2008, the gambling of Loan waiver was first tried by then UPA led Government, which is believed to a helping factor is 2009 General Election. Now newly elected Chief Minister of one of the largest producing state of the country, Uttar Pradesh announced Loan waiver, following the agricultural unrest crept, Maharashtra and Madhya Pradesh governments are also going to have this show. This paper will discuss the outcome of having this policy on a larger scale. As a moral hazard for the credibility of Indian banking sector, and moreover direct weakening of foundations of cooperative banking system which will take farmers back to Kerb markets for credit needs. Thus he current cry for the loan waiver by farmers will be the first stone laid for the future destruction of Indian agricultural and rural sector. The Indian history has a chapter of Black hole tragedy. In 1756 the Nawab of Bengal province killed 129 British soldiers by putting them in air tight room. If black hole in physics is a natural process, this incident in Indian history was an intentional act. This paper will study analyze the theoretical and statistical base to detach whether populist loan waiver policy of governments or cry of farmers will makes Indian agriculture sector a black hole naturally or intentionally.

Loyalty in Sports Marketing

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This article reviews the existing literature on the Loyalty in sports which is the one of the main topics that create challenge in sports marketing. As the continuation of previous findingsresearchs done by the author, this paper reviews the term loyalty from a broader prospect. The author used review method and tried to formulate a theoretical framework as a result of research. However, limitations about shortage of proper researchs on the context made obstacles on the way of this research. Based on the findings it should be noted that properer researchs should be done on the topic in future as sports marketing is one of the fastest growing sectors in the modern business environment.

The Impact of Globalization on Health Systems

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The place and role of the state in the general economic structure has been a field of intense debate over a long time. Especially since the 1980s, neo-liberal policies, which have increased in effectiveness, have created great pressures on the public sector and its activities and have been a guide in almost all countries about how the public sector can be operated in a more limited manner. With the globalization process, national economic and fiscal policies have gained a transnational nature and have to take into consideration the preferences of global actors and global supply and demand. This fragile structure, especially for developing countries, gained more depth with the accelerated fiscal liberalization process in the 1990s. In this study, first of all, the effects of globalization on public economy and public finance will be evaluated. Turkey and selected public health and the development of public health indicators over the 1970-2017 period with the development of private health expenditure in the country will be examined after the comparison. In this context, it will be demonstrated that the process of globalization, which is claimed to make developing countries as passive as possible, can achieve this passivity in the health sector and what kind of results it creates.

The Crisis of Globalization: The Problem of Economic Identification

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The trend of globalization, technology transfer, policies for attracting global investments and policies implemented by international financial institutions are spreading in countries. The trend of globalization which has been going on for years, causes 'the economic identity problem' The problem of economic identity can be defined as "the similarity of countries due to globalization in a given period and the same problems that this similarity brings about." Countries participate to identity process both voluntarily to take advantage of capital inflows from the financial markets of developed countries and also to take advantage of the capital inflows necessary to overcome the economic crisis and crisis, by forcing international financial institutions and large states to take part in this process. The article analyses the crisis of the balance of payments and debt that states have experienced, which is why the process of globalisation causes routine economic processes or economic structures that are subject to the crisis due to the policies that are the same in the countries. Globalization climate is effective in extension of these politics. The "identity problem" is to cause the countries poverty, high debt levels, moral deprecation and financial crisis.

Key Words: Globalization, Economic crisis and problem of identity

**State Capacity, Industrial Policy and Policy Space:
A Comparative Study of Automotive Development
in Southeast Asia and Central Europe**

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This study analyses the development of the automotive industry in Southeast Asia and Central Eastern Europe in comparative perspective in terms of state capacities, industrial policies, and policy space. The automotive industry in both regions has grown rapidly in the last two decades. The neo-developmental states of Southeast Asia introduced a series of hard (directive), vertical (sector-specific) industrial policies, pursuing a proactive industrial development strategy with state intervention, relying heavily on foreign investment. Such policies have been restricted since the 2000s by the WTO's rules on trade-related industrial measures. The embedded liberal states of Central Eastern Europe – within EU policy space in recent years - have employed mostly horizontal (non-sector-specific) industrial policy with less state intervention though still using foreign direct investment. Both regions have employed soft (non-directive) as well as hard industrial policies. We examine how, and with what success, each group have used the policy options available.

Gender Discrimination During the Hiring Process: An Example from Turkey

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The inadequate representation of women in employment is a universal issue, but when comparing Turkish case with OECD countries; in Turkey, women's representation is far behind than OECD average which brings a huge potential loss to the economy. At this point, one needs to ask this question: What constitute gender discrimination that prevents women to have equal opportunities in working life? This paper investigates the reasons of this inequality, analyzing discrimination against women in hiring process based on following variables; differences in applications made, vacancies taken and filled, presentations made to the employer, registered unemployed and contemplates about the solutions. To reach appropriate set of information, "Annual Data" published by İŞKUR (Turkish Employment Organization) is used. The gender discrimination is investigated through public institutions, integrated with comprehensive data of education levels and age compared to the more general studies.

Gender-Based Discrimination in Hiring Process: An Example of Turkish Employment Agency

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In 2019, women are still hindered and get discriminated in working life. Problems encountered by women in working life are; participation gap, the wage gap, horizontal gender segregation in vocational and sectoral distribution, vertical gap, the wealth and property gap, motherhood gap, unpaid domestic labor and care services, the feminization of labor. When comparing Turkey with the OECD countries; in Turkey, women's representation is far behind than the OECD average which brings a huge potential loss to the economy. At this point, one needs to ask this question: What constitutes gender discrimination that prevents women to have equal opportunities in working life? This study investigates gender discrimination in the hiring process based on the Turkish Employment Agency's annual data. The gender discrimination is analyzed through public institutions, integrated with a comprehensive data of education levels and age compared to the more general studies.

Keywords: gender gap, wage gap, hiring discrimination, labor economics

JEL Classification : E24, J16, J13

Globalization Versus Public Interest with Specific Reference to Nazilli Case

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Globalization movement put into effect since 1980s heavily eroded public interest. Firstly, globalization in the form of privatization and deregulation violated equilibrium conditions of classical economic understanding. Accordingly, socially optimum output and price is set when the marginal cost is equal average cost. However, privatization and deregulation policies result in equilibrium condition as marginal cost equal marginal revenue giving rise to monopolistic tendencies. Thus, as the result of globalization as it witnessed in many countries, there have been heavy decreases in the quantity produced and increases in the prices resulting in complete elimination of public interest. Secondly, deregulation of public services decreased the quantity and quality of public services such as health, education, transportation, housing and social security services. Thus, the worldwide equity in income distribution and poverty increased in many countries as shown by the Gini Coefficients between the 1980s and 2010s. Indeed, Gini coefficients increased all over the countries where privatization and deregulation policies were applied. Privatization of state economic enterprises and deregulations of public services also resulted in increase in poverty, inflation, unemployment and foreign trade deficit in Turkey as I employ the example of Nazilli Sümerbank Case.

Commodification of the Education in Universities: The Case of Continuing Education Service Örneği

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The services such as public administration, national security, health and education are the means for the reproduction of the social order. And, the cost of those are usually covered by public income (Karahanoğulları, 2008). Therefore, the employees in the above-mentioned services, as long as the workplace belongs to the public sector, produce use value but not exchange value (Savran ve Tonak, 2007). However, if these workplaces are privatized then the service becomes a commodity, too. This means that not only the use value, but also the exchange value is henceforth produced in those workplaces. Furthermore, privatization, which refers to the direct transfer of the ownership of the means of production to the capitalist classes, is not the unique way for the service employees to produce exchange value in the reproduction of social order (Durmaz, 2014). *Continuing education centers* which have rapidly progressed in recent years are also instruments of the creating exchange value. They are market-oriented academic units under the command of the public universities. *Continuing education centers*, through accelerated and paid training programs on many different subjects, commodify the education service, transform use value of the academic labor into the exchange value of that, and moreover deepen the class conflicts between the academicians.

Key words: Continuing Education Service, commodization, exchange value, use value.

Cryptocurrencies in the 4. Industrial Revolution Process

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The latest revolution in industrial history is called “Industry 4.0. Industry 4.0 also known as the 4th Industrial Revolution that is the basis of increasing technological networks has emerged as a digital revolution based on digital technologies. This revolution is based on a process that effects many sectors of the economy and/or causes significant changes in the sectors and reshapes economic systems and creates new business models in many areas. In the 4. Industrial Revolution process, digitalization has reflected on the currency unit and cryptocurrencies gain currency in today's world. This transformation of money and the process of digitization takes an important place in the 4th Industrial Revolution. Blockchain technology, which is the basis of cryptocurrencies, is one of the leading technologies developed especially within the scope of the 4th Industrial Revolution and increases its area of influence rapidly day by day. In this context, the aim of the study is to examine cryptocurrencies having an increasing transaction volume during the 4th Industrial Revolution.

Keywords: 4. Industrial Revolution, Cryptocurrencies, Digitalization

**Is “Globalization” of the “Fourth Industrial Revolution” Possible?
A Discussion on the Possible Results of Conflict Between the Wage Labour
in Capitalist Production Relations and Unmanned Production**

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In the 4th Industrial Revolution debates, it is claimed that production in the world will gradually become unmanned in the medium and long term and a production system based entirely on robots will inevitably be implemented. In order to analyze the validity of this claim, first it is necessary to compare the main motivations of paid work and unmanned production, and then compare the basic theses of the 4th Industrial Revolution report with current employment statistics and trends. On the other hand, the results of the changes in the geography of production with globalization in terms of both capital and labor have been tried to be determined based on the wage-price-profit relation in capitalist production. Thus, in this study, the question of whether it is possible for the 4th industrial revolution to be globalized within the framework of capitalist relations of production. The question includes a discussion of whether the goal of unmanned production in the world in the future is a real economic base or is a portrait of a utopia or dystopia.

Liberalization, Privatization and De-Regulation

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This presentation aims to determine the link between liberalization, privatization and de-regulation. The goals of these three concepts are examined and analyzed in order to see whether they serve for the maximization of social welfare. In each case, there are political dimensions alongside economic targets. Some aims of privatization, such as efficiency, were also emphasized while establishing state economic enterprises. At this stage an important question should arise: is it the ownership of the enterprise or the management that counts for the efficiency of the production? The answer will be derived through the discussion of various examples from different sectors and from different countries.

Analyses of the Social Component of Public Expenditures in the Republic of North Macedonia

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Fiscal policy and public expenditure represent state instruments for regulation of economic and social development to the achievement of economic, social, political, cultural or similar goals. Improving the social structure in the Republic of North Macedonia (RNM) is dependent on funds allocated to catering to such matters within the budget and the structure of public expenditures. The paper analyses public expenditure in the RNM; focusing in particular on public expenditures with a social component such as public expenditure in relation to unemployment, education, health and social protection. The study is executed using official data released by various relevant governmental institutions in the RNM for the period 2006-2014. Findings show that the financing of social expenditures does not positively affect the social structure in the RNM, since citizens still face the challenge of poverty and social exclusion.

Keywords: public expenditure, social policy

The Economic Analysis of the Use of Historical Water Mills for Electricity Production in Zonguldak Province

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Thanks to the rising environmental awareness in recent years, the harmful effects of electricity production facilities on the local climate conditions and vegetation cover are more clearly revealed. Hydroelectric systems are one of the indispensable components of energy generation with their relatively lesser amount of adverse environmental effects. On the other hand, the impact of micro hydroelectric facilities on environment is minimal when it serves for local production and consumption. In recent years, micro-hydroelectric power facilities have been designed and preferred as alternative clean and cheaper electricity generation systems in scarcely populated areas and the places that are far away from city centers especially in Europe. The electricity generation of such kind is not only cheap and green in micro scale but also socially and economically development triggering issue that could be utilized for improving the lives of local people in the region in the mezzo and macro scales. In this paper we focus on the mills as micro, green, sustainable and economic designs of electricity production with the example of Zonguldak Region where there are many water mills that were built during the Ottoman period and in the first years of the Republic of Turkey to grind wheats. These mills have become unusable with the proliferation of large factories and the widespread use of packaged flour. However, the hydraulic power facilities of the mills have a convertible potential for micro electricity generation. Energy availability and security is another important issue within the electricity production and these mills could be an answer for such issues as well in the region. Within the scope of this study, 10 of the many historic water mills in Çaycuma district of Zonguldak province were selected. The annual production capacity of these mills for electricity production in case of adding turbine and generator systems are calculated as good enough for cheaper, sustainable green energy production. It is aimed to meet the energy needs of the people in the region sustainably, environmental friendly and economically through the electricity maintained from these mills after converted to micro-hydroelectric power facilities. In the selection of the mills, the mills whose power structures and water transmission channels are in the best condition and the ones that can be converted at the lowest costs are determined, and the economic analyzes are made by calculating the electricity production income to demonstrate the usability and efficiency of such micro power generator systems highlighting the importance of local, micro, sustainable green energy production designs hoping them to take more parts in the sustainable development architecture of Turkish economy. Also, it is expected that reissuing the historical mills in the new green energy development plans will increase the environmental awareness of the people in the region.

Keywords: sustainable development, renewable energy, watermills, micro hydroelectric power plant, energy availability and security, economic analysis, environmental awareness.

Blokchain Technology and The Technology Policies in Turkey Blokzincir Teknolojisi ve Türkiye'nin Teknoloji Politikaları

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The digital transformation of the Industry 4.0 revolution, in which the national and global impacts of the Industry 4.0 will be evident; The largest decline in labor costs, in Turkey's economy, growth is expected to affect employment and business life. Industrial revolution is gradually evolving the systems of block chain technology, which affects the social-based development of micro and macroeconomics. In this study, the current employment structure in Turkey, management information systems and the production standard; In line with the new conditions, it is assumed that the needs of qualified employees, data security and production - consumption models will change in the course of the industrial revolution. technology policies and sectors which will affect the digital transformation in Turkey were examined. The aim of study is determine the efficiency of labor and the criteria of the production inputs in block chain technology based on human technology.

Key words: Industrial Revolution, blockchain, digital transformation, active labor.

Consensus and Dissension among Turkish Economists on the Economics, the Government and the Market

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This study examines the degree of consensus among Turkish economists on basic assumptions and methods of economics, the relative role of the government and the market, and contemporary economic policies. The data used in the study were collected through survey implemented to academic economists employed in Turkish universities. The results reveal that Turkish economists have some degree of consensus in most of the propositions on the basic precepts and methodology of mainstream economics. The direction of consensus implies a critical position on the approach and method of mainstream economics. There is no consensus in most of the propositions regarding the market-government relationship. Average weighted opinions are in favor of redistribution, but in favor of the private sector in the economy and competitiveness. In propositions questioning governmental or individual responsibility on some welfare services, there is a strong consensus on more role for the government in basic education and health services. Considering the trade-offs between economic growth and other policies, a consensus emerges in favor of 'other' policies. In comparison with previous studies based on samples from developed nations, Turkish economists seem to be more supportive of government intervention and redistribution. A broad consensus has emerged, in particular on government interventions related to income distribution. Among propositions on macroeconomic policies, there is a consensus on the implementation of an effective fiscal policy in the macroeconomic policies and the independence of the central bank. Concisely, Turkish economists have averagely consensus opinions on skeptic position about neoclassic economic approaches and assumptions and in favor of redistributive role for the government.

Izmir First Economics Congress Economic Policies Applied within the Framework of the Decisions Taken Adaptability to Today's Turkey

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With the economic policies applied in the Republic of Turkey in the period of 1923 and then the first economic policies of Izmir, the decisions were taken in that direction in the form of liberal and mixed economy when this economic policy has been applied. With these applications, significant developments have been achieved in the agricultural and industrial sector. At the same time, these policies and public economy and monetary markets have been improved. In this study, the economic policies applied in the framework of the decisions taken at the first Izmir Economics Congress; Modern Turkey's economic structure, technological change, social and cultural change, considering a new economic policy model proposal being made. As a working purpose; rereviewing the content of these policies that have succeeded in the past, it proposes a new model of economic policy considering the current dynamics of today's Turkish economy. With the adaptability of this model, it is aimed to redesign its past success and ensure that Turkey is in the top ten economies of the world within the next decade.

The Legislative Budget Process in Turkey: The Struggle with Time

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The government budget proposal prepared by the executive branch must be submitted to the assembly before the beginning of the fiscal year. The assembly which has a limited time to examine the budget proposal has some disadvantages. A failure to submit the budget proposal to the assembly on time may result in the assembly not being able to investigate sufficiently on the budget. This failure damages the power of the purse. In addition, the delay in the legislative budgetary process causes the assembly to fail fulfilling its fiscal responsibility and adversely affects the budget transparency. This study tries to determine when should assembly be included in the budget cycle. The aim of this study is to compare and to evaluate the legislative budget process schedule in Turkey and OECD countries.

Keywords: Legislature, Budget Process, Timeliness

The Role of Turkey's FDI Towards Improving the Competitiveness of Republic of North Macedonia's Economy

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In the literature there is a strong evidence on the positive and substantial economic influence that FDI have on the economic development of a country. Since FDI facilitates growth, transfers know-how and promotes technical innovation from the home to the host country, attracting FDI is a fundamental element of the strategies that aim to achieve sustainable growth and development. Therefore, the role of the state is vital towards building the sustainable basis, by creating the appropriate framework for attracting FDI which is given with a strong economic and institutional regime. The objective of this paper is to analyze the competitiveness of the North Macedonia's economy and the impact of the Turkey's FDI towards its improvement. According to the official data during the last decade the Republic of Turkey has invested round 252.3 million of euros in the North Macedonia's economy, being on the 6th place on the list of FDI.

Key words: foreign direct investment, competitiveness, Republic of North Macedonia, Republic of Turkey

De-globalisation and the Return of the Theory of Imperialism

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The globalisation hypothesis (i.e. the argument that modern capitalism has once and for all discard the nation state and modern capitalism became a truly unified ‘global village’) was overwhelmingly popular since the 1990s. This was coupled with the expansion of a multifaceted theoretical trend that rejected previous analytical tools and purported that it ushered new ones, tailor-made to the new ‘globalisation era’. Especially within Political Economy, the globalization discourse rejected the theory of Imperialism (that emphasized antagonisms and the role of the national economy) for a theory of global interconnectedness (emphasizing co-operation and deterritorialization). However, the course of events of the real world radically diverged from the stylized beliefs of the globalization discourse. Particularly, before and increasingly after the 2008 capitalist crisis, antagonisms along national lines and military conflicts proliferated. These developments signify the necessity of a return to the classical Marxist theory of Imperialism as the appropriate analytical framework to grasp the political economy of the international system.

Endüstri 4.0'ın Almanya ve Türkiye Ekonomisine Etkileri: Türkiye İçin Beklentiler ve Öneriler

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Dördüncü Sanayi Devrimi olarak nitelendirilen Endüstri 4.0, üretimde kullanılan makine ve ekipmanların sensorlar ve internet aracılığı ile birbiriyle konuştuğu yepyeni bir üretim anlayışıdır. Üretim için gerekli verinin bulutta depolandığı bu yeni sistemde makineler, gerekli veriyi internet üzerinden kendisi çekerek üretimde kullanmaktadır. Bu da fiziksel dünya ile siber dünyanın güçlerini birleştirmesi anlamına gelmektedir ki endüstri 4.0'ın temel mantığı da budur. Bu çalışmada, Endüstri 4.0 ile ortaya çıkan, Siber-Fiziksel Sistemler, Nesnelerin İnterneti, Büyük Veri, Akıllı Üretim ve Akıllı Fabrikalar gibi temel kavramların anlaşılması için açıklamalarda bulunulmuştur. Endüstri 4.0'ın uygulanmasının üretim süreçlerine etkisi, Türkiye ve Almanya da yapılan araştırmalar çerçevesinde incelenmiştir. Türkiye'nin Endüstri 4.0 sürecine uyum sağlaması yönünde önerilerde bulunulmuştur.

Anahtar Kelimeler: Üretim, Endüstriyel Devrim, Nesnelerin İnterneti, Siber-Fiziksel, Endüstri 4.0

Effect of Service Quality on Customer Satisfaction on a Commercial Bank: The Case of the Republic of North Macedonia

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The quality of products and services is undoubtedly one of the key factors and key impact on the successful functioning of contemporary business organizations. In parallel with the economic and financial development of the country, the banking system is constantly being expanded. Although there is a high level of awareness of the importance of customer satisfaction for banks' success, there are very few scientific studies aimed at measuring the degree of customer satisfaction with banking services and how they function. Therefore, the present study assesses the status of customers' satisfaction with respect to select dimensions of service quality in a commercial bank operating in Republic of North Macedonia. Consequently, the quality of service provided will largely depend on customer loyalty, i.e. their readiness to return to re-utilize the relevant service. A survey using stratified random sampling was conducted, with 100 customers in the period March-April 2018. For customer satisfaction, it was found that dimensions of service quality such as tangibility, assurance and empathy having positive and significant impact. So, factors like location, outlook, comfort, and bank work schedule are of great importance for customer satisfaction.

Keywords: quality, services, bank, customer satisfaction, loyalty of clients

Secular Stagnation and Demographic Factors: Theory and Empirical Evidence

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The purpose of this paper is to examine one of the factors that have been put forward in the recent literature within the Secular Stagnation framework: the adverse demographic effects. There are many theories that emphasize on the negative effects of the slow population growth and aging on economic growth, because of a lower productivity growth of the elderly population or because of excess saving over investment, a fact that leads to Secular Stagnation. Hence, this paper focuses on estimating the demographic-transition-driven age structure effects or the so called “demographic dividend” and on investigating the existence of a demographic tax, or else the gap between the GDP per capita of each country and its highest level if the effects of the demographics factors are fully efficient, in selected developed and developing countries. The methods applied for these purposes are Panel Stochastic Frontier Analysis and Quantile Regressions.

Public-Private Cooperation Practices in Natural Disaster Insurance

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Doğal afetlerin kısa, orta ve uzun vadede yaratacağı olumsuz etkileri azaltmak için kullanılabilecek ön önemli araçlardan biri afet sigortalarıdır. Bununla birlikte piyasa başarısızlıkları, davranışsal yanlılıklar ve gelir dağılımındaki sorunlar nedeniyle doğal afet sigortalarının kapsamı optimalin altında kalmaktadır. Bu nedenle birçok ülkede kamu özel sektör işbirlikleri kurulmaktadır. Kamu kesimi, garantör rolü üstlenerek, eğitim araştırma faaliyetleri yürüterek, risk modelleri sağlayarak, ölçek ekonomisinin avantajlarından yararlanarak, afet sigortasına katılımı zorunlu tutarak, vergi ve sübvansiyonlar aracılığıyla katılımı teşvik ederek vb. uygulamalar aracılığıyla afet sigortalarındaki başarısızlıklara müdahale edebilmektedir. Bununla birlikte kamu kesiminin afet sigortalarında yaptığı düzenlemeler her zaman ekonomik etkinlik açısından arzu edilen sonuçları doğurmamaktadır. Aynı zamanda devletin koşullu yükümlülüklerini artırabilmekte, kaynakları yeniden dağıtarak adaletsizliğe neden olabilmekte ve kamu maliyesinin sürdürülebilirliği üzerinde risk oluşturabilmektedir. Bu çalışmada, seçilmiş ülkeler örneğinde, dünyada ve Türkiye’de doğal afet sigortalarında, kamu-özel sektör işbirliği uygulamalarının karşılaştırmalı bir analizi yapılmaktadır. Temel olarak aşağıdaki sorulara cevap aranmaktadır:

- Hangi afet türleri için işbirliği yapıldığı
- İşbirliğinin kapsamının ne olduğu
- Ne tür regülasyonların yapıldığı
- Hangi mali araçların kullanıldığı
- Uygulamaların başarılı ve başarısız yönlerinin neler olduğu
- Mevcut kamu-özel sigorta işbirliklerinde ne tür iyileştirmeler yapılabileceği

The Effect of Tax Education on Tax Awareness of University Students: A Comparative Analysis

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Tax consciousness is an important concept which is associated with tax compliance. Without tax consciousness, it is not possible to talk about tax compliance of individuals. One of the most effective arguments for raising tax consciousness is tax education. In particular, the school and family environments are known as the places where tax education is provided. The university environment is one of the places where tax education is given. On the other hand, the raising of tax consciousness is particularly important for developing countries. In light of all this information, this study aims to reveal the impact of tax education on university students from the perspective of developing countries. The students of 3. and 4. grade Department of Accounting who study in Faculty of Business Administration at Macau University situated in China and the students of 3. and 4. grade Department of Public Finance who study in Faculty of Economics at Marmara University situated in Turkey generate the population of this study. The number of samples formed on the basis of this population is 70 people selected from both department students. The data for the students were obtained through the questionnaire method. According to the frequency analysis results, compared to students studying at university level in China, the students studying at the university level in Turkey support tax education more.

Keywords: Tax Compliance, Tax Consciousness, University Students, Attitudes

Analysis of a Game Theory: Beveridge Curve

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The relationship between price changes, employment and production level maintains its importance. The Beveridge curve basically reveals the existence of an inverse relationship between vacant employment rates and unemployment rates. From this point of view, this study shows the relationship between government, employers and workers. The study will examine the number of optimal staff to be opened by the government.

Keywords: Beveridge Curve, Game Theory, Unemployment, Labor, Monetary Policy, Use of Labor.

Turkey-UK Relations in the light of BREXIT

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Both the British and Turkish journey on the way to European Union (EU) membership has been rough, when it is compared to the accession experiences of the other EU countries. The United Kingdom (UK) became an EU member in 1973 only as a result of UK's third application for membership. On the other hand, Turkey's EU journey has been even more challenging. Although the cooperation between the two parties started with the Ankara agreement of 1963 and was developed further with the Customs Union (CU) agreement, Turkey has still been negotiating its EU accession since 2005. On 23rd June 2016, in the UK's EU membership referendum, 51.9% of voters were in favour of the UK's exit of the EU, hence the BREXIT. Following the BREXIT vote, in the trade meeting between the trade ministers of both parties in January 2018, British Trade Minister Liam Fox announced that maintaining existing relations with Turkey during and after the BREXIT period is of great importance for Britain, highlighting that Turkey has been one of the UK's strategic political and economic partners. The aim of this paper is to analyse the major patterns in bilateral trade and investment flows between Turkey and the UK as well as the major political developments in the last few decades in order to shed some light to the ways of maximising mutual benefits by exploiting the existing economic and political potential between the two parties.

Can Fiscal Rules Function as a Base to Meet the Public Needs?

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In the study, present fiscal rule executions are planned to be discussed with a critical approach regarding their mentioned function and a new way of fiscal rule method is aimed to be suggested by setting suchlike rules as a base for public expenditures. Keywords: Fiscal rules, constitutional economics, public expenditures, public needs, public services

The Impact of Based Market Accounting Curriculum in the Development of Accounting Profession: Evidence from Jordan

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Accounting education is of great importance, along with many other scientific specializations, and this importance is due to the specificity of the outlook for accounting and the constant and continuous need to professional accounting career in business organizations. Universities are one of the most important educational institutions that play an active role in preparing the specialized working power in various fields of life. The current research paper attempts to analyze the accounting techniques and methodologies adopted by the Accounting departments in the Jordanian universities' faculties, and to what extent it matches with the requirements of market, and finally recommending and suggesting some points which may enhance and bridge the current position of accounting profession and accounting curriculum in the Jordanian environment.

Keywords: Accounting Curriculum, Accounting Career, Accounting Profession, Accounting education.

Decentralization of Collective Bargaining System in Greece: Between Dismantling, Survival and Restoration

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Until the current economic crisis, the vast majority of wage labour in Greece was covered by collective bargaining and collective agreements at sectoral/occupational level. During the crisis period the collective bargaining system has been radically transformed through a process of disorganized decentralization, as a result of the policy of “internal devaluation” imposed by European Commission, European Central Bank and International Monetary Fund. The collective agreements at sectoral/occupational level have been undermined in favour of individual contracts. The latter have contained worst terms and have been concluded by over than one million salaried employees. Nevertheless, a restricted number of sectoral/occupational collective agreements have been survived during this period. In this context, the present paper aspires to contribute to the analysis of the collective bargaining system transformation. Moreover, the determinants of survival of these few collective agreements and the prospects of restoration for sectoral/occupational collective agreements at national level are examined.

**The Age of Hybridity:
China, BRICS and Challenges of Global Governance
in a Post-liberal International Order**

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This paper sketches out an analytical framework to account for emerging patterns of global governance. We characterize the emergent post-liberal international order as a new ‘age of hybridity,’ which signifies that no overriding set of paradigms shape global governance. Instead we have a complex web of competing norms, which creates new opportunities as well as unprecedented challenges, generating major elements of instability, uncertainty and anxiety. In the age of hybridity, we argue that emerging great powers led by China play an increasingly counter-hegemonic role in shaping a new style multilateralism – which is ontologically fragmented, normatively diluted, and institutionally incoherent. This paper argues that democracy paradox constitutes the fundamental issue at stake in this new age of hybridity. On the one hand, power transitions in international affairs seem to enable democratization of globalization by opening more space to the hitherto excluded non-Western states in making their voices heard. On the other hand, emerging pluralism in global governance is accompanied by the regression of liberal democracy and spread of illiberalism as a global phenomenon that enfeeble the globalization of democratization.

Keywords: age of hybridity, post-liberal international order, BRICS, global financial crisis

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ANALYSES OF THE SOCIAL COMPONENT OF PUBLIC EXPENDITURES IN THE REPUBLIC OF NORTH MACEDONIA

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Shenaj Hadzimustafa (South East European University)

Shpresa Alija (South East European University)

Abstract

Fiscal policy and public expenditure represent state instruments for regulation of economic and social development to the achievement of economic, social, political, cultural or similar goals. Improving the social structure in the Republic of North Macedonia (RNM) is dependent on funds allocated to catering to such matters within the budget and the structure of public expenditures. The paper analyses public expenditure in the RNM; focusing in particular on public expenditures with a social component such as public expenditure in relation to unemployment, education, health and social protection. The study is executed using official data released by various relevant governmental institutions in the RNM for the period 2006-2014. Findings show that the financing of social expenditures does not positively affect the social structure in the RNM, since citizens still face the challenge of poverty and social exclusion.

Keywords: public expenditure, social policy

Introduction

Fiscal policy and public expenditure, especially after Second World War, represent specific instruments of state for the regulation of economic and social development for achieving certain economic, social, political, cultural or similar goals. Improving the social structure of the country, reduction of poverty, unemployment, better health and education in the Republic of North Macedonia are dependent on the funding allocated to catering to such matters within the budget and the structure of public expenditures. The paper analyses public expenditure in the Republic of North Macedonia; focusing in particular on public expenditures with a social component such as public expenditure in relation to unemployment, education, health and social protection.

The development of public finances is predominately related to the evolution of the understanding of the character, size and role of public expenditure. In modern theory and practice, public expenditures are the expenditures of the state and public institutions to finance the supply of public goods, as well as for achieving other economic and social policy goals. Modern public finance studies advocate toward greater attention to the quality and effectiveness of public expenditures rather than to the volume. This especially since the quality of public expenditure is associated with the institutional capacity for "good governance" with public funds and resources. In recent years, along with the studies of the growth of public expenditures, social policy and social cohesion have also become in central place of discussions. Social policy covers activities that affect the well-being of members of society through the distribution of, and access to, goods and resources in the society. Often, social policy tackles problems that are difficult to solve.

Literature Review

Public expenditures are closely related to public revenues, which are collected for financing and performing state activities. According to Kennedy (2012), public expenditures occur by public institutions, that is, by central and local authorities, in order to meet the collective needs that individuals cannot meet effectively. The modern approach to public finances begins by considering public expenditures as a productive spending of public incomes to finance productive goals. They are considered to be a very effective tool for the economic and social policies of the modern state (Atanasovski, 2004). In recent years' modern governments are based on a social agreement between the citizens and the state in which rights and duties are agreed by everyone for the fulfillment of common interests. Citizens contribute to the Government through taxes and efforts for the good of the country, and in return, Governments gain legitimacy to protect people's rights through their public policies that benefit everyone (Ortiz, 2007). Hence, decisions on public expenditures are not only economic decisions, but also social policy decisions.

In the context of social policy activities and according to Baldock et al. (2012), the classic role of social policy is to enable Governments to acquire funds to provide their citizens access to benefits and services in five main areas: Social Protection (often referred to as social security); Health; Education; Housing; and Personal Social services. Funding, or the money spent on social policy, is considered as the most effective way to measure the scope of social policy in a society. In this context, Sweden and Denmark represent countries with the highest public social expenditures and as such with the most generous social policies. While, the United States, Korea and Australia are on the other hand portrayed as ungenerous in terms of social benefits. If considering private social costs in this context as well, a somewhat different picture would appear. Countries such as France, Finland, Belgium and Denmark represent countries with the highest social costs, spending about a third of their GDP or 32%. In comparison, the average public social spending across the whole OECD is around one fifth or 22% of GDP. Countries like Italy, Austria, Sweden, Spain and Germany spend a quarter of their GDP on public social expenditures. Non-European countries such as Turkey, Korea, Chile and Mexico spend less than 15% of their GDP for social support, similar to those that were in the 1960s in Europe (OECD, 2014).

Methodology

The applied methodology is of both theoretical and empirical character using official data released by various relevant governmental institutions in the Republic of North Macedonia for the period 2006-2014. Official budgets published by the Ministry of Finance serve as the primary basis for the analyses.

DATA ANALYSIS

After its independence in 1990s, the Republic of North Macedonia began restructuring its economic and political system and in the period from 1995 to 1998, the country made significant advances in the area of macroeconomic stabilization and structural reforms. The share of public revenues and expenditures on GDP are over 30% over the whole period of study, while the share of public expenditures on GDP remain still over 30% at the end of the study period. Consequently, leading to the growth of the public deficit. The study shows that the country is experiencing a permanent increase of public expenditures. The increase is mainly attributed to the increase of social transfers, which represent the largest share of public expenditures in the country. In 2014, social transfers accounted for 45% of the total public expenditures. According to data presented in the

table 1, the average spending on social transfers over the study period was 42%, of which 55.5% were spent on pensions and the remaining 45.5% allocated to unemployment benefits for the unemployed, Active Labor Market Measures, healthcare, and social protection. Indicating as such, that the social policy of the Government of the Republic of North Macedonia is prioritizing or oriented more towards supporting of pension receivers and other social assistance beneficiaries.

Table 1: Social transfers in the Republic of North Macedonia for the period from 2006 to 2014

	2006	2007	2008	2009	2010	2011	2012	2013	2014
Social transfers (mil. MKD)	49550	50586	57717	48257	64578	67546	70430	75053	78769
Share of social transfers on total expenditures (%)	44.4	42.3	38.4	32.3	43.3	42.2	43.6	44.5	45.0
Total social transfers as % of GDP	14.8	13.6	13.9	11.6	14.8	14.6	15.1	15.0	15.0

Source: Authors own compilation based data from the Ministry of Finance and the Pension and Disability Insurance Fund.

Social transfers increased by 58.9% over the study period. Public spending on social transfers increased from 49550 mil. MKD in 2006 to 78769 mil. MKD in 2014. As a percentage of GDP, the highest share was registered in 2012 with 15.1% followed by 2013 with 15.0%, with 2009 representing the year in the study period registering the lowest share at 11.6%.

Observing the distribution of public expenditures in the country as a percentage of GDP, table 2 shows that social protection accounts for the highest share of the GDP with 6.6% in 2014. Education and Health, which are of relevance in this context, account for 4.2% and 1.1%, respectively in the same year.

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Table 2: Public expenditures as % of GDP in the Republic of North Macedonia 2006-2014

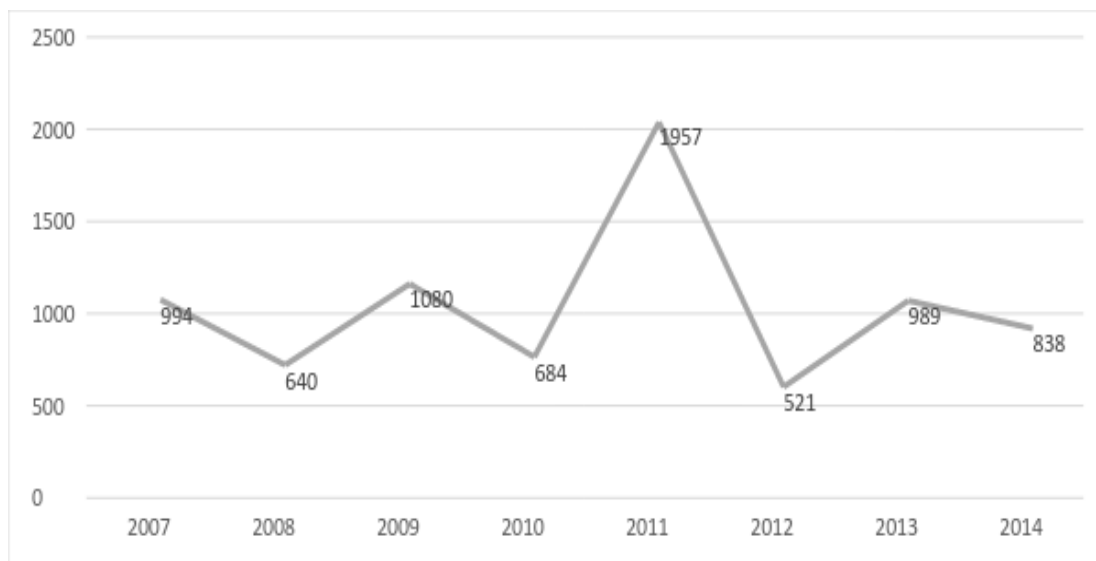
Year	General public services	Defence	Public order and safety	Economic affairs	Environmental protection	Housing and community amenities	Health	Recreation, culture and religion	Education	Social protection	Total budget expenditures	GDP (mil. MKD)
2006	3.9	1.8	3.0	9.3	0.2	1.0	0.4	0.6	4.4	5.4	29.9	334,840
2007	2.5	2.0	2.9	9.3	0.1	0.5	0.4	0.6	4.4	5.0	27.9	372,889
2008	5.1	1.9	3.9	5.2	0.1	0.5	0.5	1.0	5.2	3.8	27.2	414,890
2009	3.0	1.8	3.2	6.8	0.2	0.4	0.5	0.9	5.2	5.3	27.3	414,622
2010	2.5	1.4	3.0	6.9	0.2	0.4	0.5	0.8	4.6	5.3	25.6	437,296
2011	3.6	1.2	2.9	6.6	0.2	0.3	0.6	0.8	4.7	4.9	25.9	464,187
2012	2.8	1.2	2.8	5.6	0.2	0.5	1.1	0.8	4.6	6.0	25.7	466,703
2013	3.4	1.2	2.6	7.1	0.2	0.5	1.3	0.8	4.4	6.4	27.9	501,891
2014	3.7	1.1	2.5	6.0	0.2	0.4	1.1	0.8	4.2	6.6	26.9	525,620

Source: Authors own compilation based on data from the Ministry of Finance.

Public expenditure on unemployment benefits through the Employment Agency

Unemployment is a historical and serious problem in the Republic of North Macedonia, and although the unemployment rate has been constantly decreasing in the study period, spending on unemployment benefits have witnessed a fluctuating trend with only a marginal difference comparing the level of spending at the beginning and the end of the study period. As shown in figure 1, 2011 represents the year with the most spending on unemployment benefits.

Figure 1: Spending on benefits for the unemployed through the Employment Agency of Republic of North Macedonia, 2007-2014 (mil. MKD)



Source: Budget of the RNM, from 2007 to 2014, Ministry of Finance (<http://www.finance.gov.mk>)

The unemployment rate in the Republic of North Macedonia has until 2012 been above 30%, but decreased to 28% in 2014. Unemployment remains a challenge for policy makers in the country and characterized especially by high youth unemployment and long-term unemployment. Poverty is another struggle of the country with the unemployed living in poverty (40.4% in 2014) and most likely to be at risk of poverty. The country has witness a reduction of poverty in the study period, but the poverty rate remains high. The poverty rate was 22.1% in 2014, which in absolute terms means that approximately 400,000 people live in poverty considering the approximately 2 million population in the Republic of North Macedonia. The most vulnerable groups are multi-member households given the fact that 51.1% of the poor live in households composed of two adults with three or more dependent children (Rakipi & Hadzimustafa, 2017).

Public expenditure on education

In modern states, public expenditure on education is considered of great importance in the structure of expenditures in the budget as these are not non-returning cost and thus likely to be viewed as an investment. Investing in education today represents an investment in the most important factor of production, namely human resources.

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Table 3: Share of public expenditure of education on GDP in RNM, 2006-2014

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Public expenditure on education as % of GDP	4.4	4.4	5.2	5.2	4.6	4.7	4.6	4.4	4.2

Source: Authors own compilation based on data from the Ministry of Finance.

According to table 3, public spending on education as a percentage of GDP has been fluctuating in the study period with the highest percentage registered in 2008 and 2009 (5.2%), and the lowest in 2014 at 4.2 % (0.2 percentage points lower in comparison to 2007). According to data from the Ministry of Finance, in the structure of public expenditures for education in 2014, the highest expenditures are for pre-school and primary education (47.5%), followed by higher education (28.5%) and secondary education (24%).

Access to higher education and enrollment in higher education has been increasing over the past decade and especially around 2008 with the beginning of the expansion of study programs in several private universities and the opening of dispensed studies from public educational institutions. However, despite the increasing availability of higher education, more than 50% of unemployed with higher education are persons aged 20 to 34, and almost 40% of these fall into the group aged 25 to 29. This is quite alarming as this age group ought to be the most effective and productive (CRPM, 2009). According to Janeska (2013), in the last decade, especially since 2005, the phenomenon of intellectual emigration from the Republic of North Macedonia has emerged and registered increasing trends. This especially due to poverty and unemployment, and mostly witnessed among unemployed young people with a high level of education.

According to the European Commission report for the Republic of North Macedonia (2016), the country continues to have several weaknesses in education and needs to substantially increase investment in education. Weaknesses highlighted include amongst other poor educational curricula and low growth rates of innovation.

Public expenditures on health

In the transition period from 1991 to the present, significant reforms have been made in the health system with changes to both legislation and ownership of health institutions. As shown in table 4, the share of public expenditure on health as a percentage of GDP is quite low and well below by comparison with public spending on education and social protection as a share of GDP. Public expenditure on health in the country has in the study period increase by 0.7 percentage points reaching 1.1% in 2014. Although expenditures in health have increase, the quality of the health care remains very poor with a number of challenges including old infrastructure, emigrating medical staff, and lack of sufficient and quality medical equipment.

Table 4: Share of public expenditure of health on GDP in RNM, 2006-2014

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Health (% of GDP)	0.4	0.4	0.5	0.5	0.5	0.6	1.1	1.3	1.1

Source: Authors own compilation based on data from the Ministry of Finance.

Public expenditures for social protection

Social protection is a broad concept that refers to the combination of social protection services and cash benefits used to help citizens who are facing different types of social needs. Social protection in the Republic of North Macedonia is based on the principles of social justice, solidarity and the provision of special care and protection for disabled and incapable citizens for work, children without parents, and parental care. According to Mitev (2007), the reason for creating the first social protection program in the country are permanent social problems, such as poverty, low standard of living and marginalization. One of the relevant indicators for the impoverishment of citizens in the country is also the number of beneficiaries of social financial assistance. Today, in most developed countries, as well as those in transition, on average about 1/3 of public expenditures are allocated for social programs, firstly because of the well-being of citizens and the state and secondly for the purpose of buying social peace and preventing social explosions (Bexheti, 2007).

Table 5: Public expenditures for social protection as % of GDP, 2006-2014

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Social protection (% of GDP)	5.4	5.0	3.8	5.3	5.3	4.9	6.0	6.4	6.6

Source: Authors own compilation based on data from the Ministry of Finance.

As can be seen in table 5, the data for the study period show that the share of expenditures on social protection as a percentage of GDP has increased from 5.4% in 2006 to 6.6% in 2014. The lowest rate was registered in 2008 with 3.8% of GDP (decreased by 1.2 pp from the previous year). This notable and temporary reduction was a result of the global economic crisis and not to a decrease in the need for social protection in the country. The Republic of North Macedonia has in 2014 spend 33625 million MKD for social protection equal to 6.6% of GDP, which is a considerable amount compared to the economic power of our country. Therefore, measures or activities should be undertaken to rationalize these funds through a good analysis of households users of social benefits, engaging users through public works, privatizing most of the services such as kindergartens or care facilities for the elderly, etc.

Conclusion

The general conclusion of the paper is that throughout the study there is a major lack of consistent social statistics. There is no institutional coherence of the statistical plan for social statistics and social indicators in the Republic of North Macedonia. Hence difficult to undertake a thorough analysis of the effectiveness and efficiency of public social spending in the country.

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Findings show that funds collected for the financing of public expenditures require a better distribution to ensure quality education, quality health care and full social coverage of socially vulnerable groups. Funds in the budget should primarily be used for quality social protection and education, and then for productive investments that will enable additional return of funds in the budget that will be used for development purposes.

Findings show that the financing of social expenditures does not positively affect the social structure in the Republic of North Macedonia, as citizens still face the challenge of poverty and social exclusion. The reduction of poverty and social exclusion, increasing employment rates, better health care and education are essential for the improvement of social welfare in the country for all its citizens. Some of the recommendations in this respect are towards the revision of the public expenditures in the budget of the Republic of North Macedonia with the aim to improve the social status and general welfare of all its citizens.

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COGNITIVE CAPABILITY AND COOPERATION IN PUBLIC GOODS EXPERIMENT

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Abstract

The study examines the link between cognitive capability and the level of cooperation in public goods experiment. We employed a three-question Cognitive Reflection Test (CRT) as a measure of cognitive capability and assessed how it relates to contributions in a public good experiment. The study investigates (i) the association of CRT-scores and contributions in a multiple-round public good game (PGG); (ii) whether cooperation is enhanced within a PGG with punishment compared with when there is no punishment opportunity, and (iii) the link between cognitive capabilities and risk preference of participants of a PPG. The findings suggest that there is a negative relationship between CRT-scores and contributions in PGG. Hence, the existence of strong cognitive capabilities motivates selfishness PGG. Moreover, the existence of punishment enhances cooperation among participants than in PGG without punishment. Finally, the link between smartness and risk tolerance of participants suggests that, being smart tends to make men take more risk and makes women patient.

Keywords: Cognitive Reflection; Public Goods Game; Cooperation; Experimental economics.

Introduction

In recent times, the Public Goods experiment has become a fashionable tool for carrying out studies on collective group decisions in which participants decide the proportion of their endowment to contribute to a common cause. Economic theory predicts non-significant levels of cooperation assuming that individuals are rational and selfish, in public goods experiments however, this prediction is observed to be much higher. This is due to the assumption that people are “conditional cooperators” (Fischbacher et al., 2001). Thus, peoples’ willingness to contribute to a public good increases if others contribute more to that good, and willingness to contribute drops if the contribution of others is low. Peoples’ fairness preferences such as ‘altruism’, ‘inequity aversion’, ‘reciprocity’ or ‘warm-glow’ are sometimes discussed in literature as a likely consequence of conditional cooperation.

On the contrary, people who cooperate in the contribution to a public good are willing to punish free riders even if it comes at a cost and does not come with any benefit. Fehr and Gächter (2000) finds that free riders are heavily punished the further they deviate from cooperation levels of the cooperators. In a game without punishment opportunity, the dominant strategy is full free riding. In a game with punishment opportunity, the decision to punish comes at a cost to the punisher. This seeks to imply that purely selfish participants will never punish in a one-shot game. If this is true as it is commonly assumed in economics that only selfish participants exist, these two treatments- without punishment and with punishment should yield the same contribution pattern. Thus, the inclusion or exclusion of punishment is irrelevant for the contribution behavior of individuals. However, our results provides sharply contrasting evidence to the above. Participants’ contributions are relatively and generally higher in the with punishment treatment compared to low average contribution rates between 20 and 35 percent of endowments in the without punishment condition. Granting

punishment opportunities in public goods experiment will bring to low the levels of free riding even though it might be the dominant strategy.

One potential determinant of economic behavior is the cognitive capabilities of the individual in question (Rustichini, 2015). Other factors such as preferences and framing effects of the situation can also influence economic decisions. In experimental economics, the application and investigation of the connections between cognitive capabilities, social preferences and the behavior of the individual will go a long way to throw more light on the heterogeneity in the behavior of people (Fredrick, 2005; and Deck & Jahedi, 2015). People with high cognitive capabilities shows low levels of small-stakes risk aversion (Dohmen et al., 2010) and they do not get affected by biases when making financial decisions (Hoppe & Kusterer, 2011; Kiss et al., 2016). This paper's contribution to the growing literature is by examining experimentally the link and if any, the effects of cognitive capabilities measured by the Cognitive Reflection Test (CRT) (Frederick, 2005) and contributions in public goods experiment. What makes the CRT especially useful as a measure of cognitive capability is that, it is designed to detect the inclination to overrule a first and instinctive answer that comes to mind with a more cognitively intuitive one. This paper also tries to see whether there is a relationship between cognitive reflection, framing effect and contributions in public goods.

Experimental Design and Procedures

Measuring cognitive capability

The Cognitive reflection Test (CRT) (Frederick, 2005) was used to assess the cognitive capabilities of participants. This test is suitable because it evaluates participant's predisposition to make their decisions based on a well thought through cognitive process rather than using instincts and intuitions. The CRT questions are as follows:

1. A tennis racket and a ball cost 1.10TL in total. The bat costs 1.00TL more than the ball. How much does the ball cost?
2. If it takes 5 machines 5 minutes to make 5 widgets, how long will it take 100 machines to make 100 widgets?
3. In a lake, there is a patch of lily pads. Every day, the patch doubles in size. If it takes 48 days for the patch to cover the entire lake, how long would it take for the patch to cover half of the lake?

For every question, there is an intuitive but incorrect answer (10Kurus, 100 minutes, 24 days). However, in order to find the correct answer (5Kurus, 5 minutes, 47 days), the participant needs sufficient reflection on each question. The correct solution is "easily understood when explained" (Frederick, 2005, p.27). In accordance with Frederick (2005), participants with an overall CRT-score of 0 correct answers are considered as lowest cognitive reflection capabilities and those with all 3 correct answers as highest cognitive reflection capabilities.

Undoubtedly, a person's cognitive reflections is not a general measure of intelligence, however it provides one specific subcategory of cognitive capabilities that could affect economic decisions (Lohse, 2016). Moreover, despite the CRT simple design, there is a higher correlation between CRT-scores and more general and sophisticated measures of cognitive capabilities like SAT, the Wanderlic Personnel Test, the Wechsler Matrix Test and other numerical ability tests (Frederick, 2005). Participants could earn extra points for each correct answer given for the test. This is to increase the precision of measured CRT-scores and to avoid the possible issue of inherent motivation to reach a good test result could vary across participants (Chen et al., 2013).

Measuring cooperation

The public good experiment used was a standard linear public goods game (see Ledyard (1995)). The experiment consisted of 12 rounds, with the first 6 rounds offering the choice to punish the lowest contributor in the group and the second 6 rounds without punishment opportunities. The study consisted of 8 groups with each group made up 4 members. The group members changes randomly after every round.

Each of the four members in the group is given an initial endowment of 20 tokens. The individual decides how much to contribute to the so-called 'group project'. The payoff for each group member that was explained to the participants is given by the function below:

$$\pi_i = 20 - g_i + 0.4 \sum_{j=1}^4 g_j$$

The size of the 'group project', i.e. the public good is the sum of all contributions g_j to the project. The marginal payoff from contributing one additional token to the public good is 0.4 and π_i is the individual's payoff for the i 'th period.

The public good problem above was explained to the participants before the start of the game. This was followed by eight control questions to test participants understanding of the public good game they are about to partake in. All control questions must be correctly answered to be able to proceed to the game screen. All subjects answered all the control questions correctly, which implied that they understood the implications and mechanics of the above payoff function.

In the first 6 rounds of the experiment (PGG with punishment opportunity), participants had to firstly decide how much of their 20 tokens to contribute to the public good, then after every group member's contribution the second decision was to choose to punish or not to punish the group member with the least contribution at a cost. Table 1 gives the distribution of the punishment levels and their corresponding costs to the punisher. In the second half of the experiment (PGG without punishment), the participants had to only decide how much to invest in the group project without any punishment threat whatsoever their level of contribution.

Table 1: Punishment levels and corresponding costs for the least contributor in the group

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Cost to punisher	0	1	2	3	4	5	6	7	8	9	10
Punishment level	0	2	4	6	8	10	12	14	16	18	20

General Procedures

The experiment was conducted at Seljuk University, Konya on May 16, 2019. All 32 participants were recruited from the faculty of Economics and Administrative Sciences Seljuk University. All participants were from the Economics discipline. The gender ratio was a balance of 50% apiece for Males and Females. Upon arrival, all participants were randomly given a unique participants code. This code was necessary to get each participant a unique credential to take part in the experiment anonymously. A general link was displayed to all participants and upon following this link, the unique participant code was required in order to join the experiment. The experiment starts with a display of the instructions for the experiment to be read by each participant followed by the 8 control questions to assess participant's understanding of the experiment. All the experiment's instructions, tasks, and post survey questionnaires were fully computerized using oTree (Chen et al., 2016). The CRT, social preference and framing effects data were collected after the PGG (with punishment and without punishment). Lastly, a questionnaire to collect some demographics on gender, age, perception of quality of life and academic grade point average was displayed and filled by participants at the end of the experiment. At the end of the whole experiment, participant's payoffs from the entire experiment were converted to academic points (points) at a conversion rate of 1 token to 0.05 points. All sessions lasted approximately 70 minutes and participants earned an average of 14 points (Minimum: 12 points; Maximum 17 points).

Results

Summary Statistics

Table 2 gives the summary of the key findings of the Cognitive Reflection Test.

Table 2: Summary of cognitive Reflection Test with results from two reference articles

	Male N = 16	Female N = 16	Overall N = 32	Lohse (2016) N = 284	Branas-Garza et al., (2015) N = 41,825
CRT1	0.156	0.094	0.250	0.51	0.32
CRT2	0.281	0.156	0.437	0.62	0.40
CRT3	0.219	0.156	0.375	0.68	0.48
Highest CRT-score _CRT(3)	0.063	0.031	0.094	0.349	
Higher CRT-score _CRT(2)	0.188	0.093	0.281	0.285	
Lower CRT-score _CRT(1)	0.094	0.125	0.219	0.201	
Lowest CRT-score _CRT(0)	0.156	0.250	0.406	0.165	

According to the results in table 2, the first question (CRT1) of the test has the lowest frequency of accurate answers. Thus only 25 percent (9 percent male and 16 percent female) of the subjects. This is a common

phenomenon in CRT. The distribution of individual CRT-scores are as follows: 9.4 percent of subjects fall in the 'Highest Cognitive Reflection' category, thus correctly answered all three CRT questions, 28.1 percent of subjects answered two questions correctly (Higher Cognitive Reflection), 21.9 percent answered one correctly (Lower Cognitive Reflection), and 40.6 percent of subjects had none correct (Lowest Cognitive Reflection). The last two columns on the right of table 2 provides reference results from two studies. Lohse (2016) employed a pool of subjects comparable to this study. He conducted the CRT to students in the University of Heidelberg. The percentages observed in this study is slightly below that of his averages. The second reference study, Branas-Garza et al. (2015), uses data from a comprehensive a meta-analysis covering a total of 41,824, which consisted 41 percent students and 59 percent non-student. The results of subjects in this experiment vary slightly from that of the participants in Branas-Garza et al., (2015).

Figures 1a and 1b: Fraction of endowment contributed with and without punishment respectively.



Relationship between CRT-scores and Contributions.

Figures 1a and 1b displays the relations existing between the number of correct answers in the CRT and the fraction of endowment contributed for the provision of the public good with punishment condition and without punishment condition respectively.

With Punishment Condition

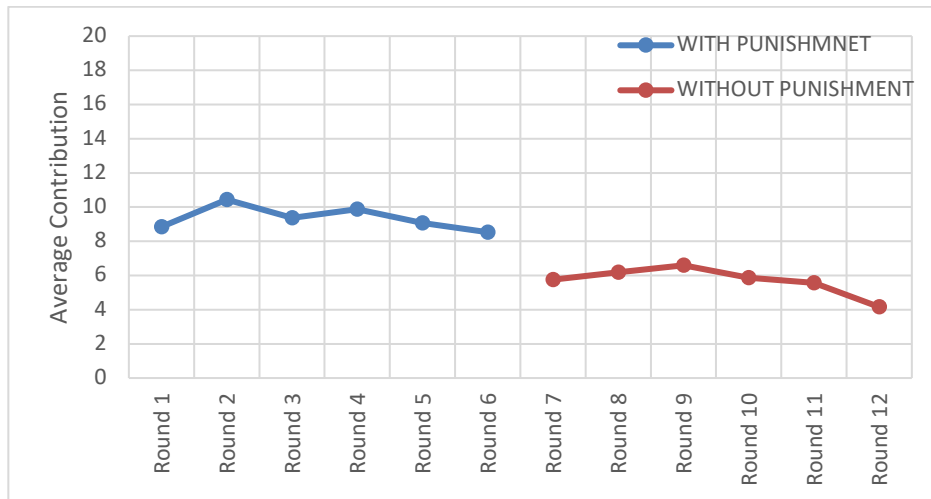
In this treatment, participants with high CRT-score (2 and 3 correct answers) averagely contributed lesser fractions, 40% of their endowment to the group project than those with low CRT-score (1 and 0 correct answers) contributing an average of half of their endowment to the same course (ANOVA: $F = 0.32$, $p = 0.81$). This suggest that, there exist a non-significant negative association between CRT-scores and contributions (Spearman's $Rho = -0.035$, $p = 0.847$). However, taking a closer look at the gender breakdown of these results, females with high CRT-score are more selfish in their contribution to the group project compared to their male counterparts with similarly high CRT-scores. Additionally, contributions by females with low CRT-scores (0-1) turns to be approximately half of the 50% average for females with high CRT-scores (2-3). Males

on the other hand do not show any clear pattern as to whether selfishness and smartness could be explained by these results from the experiment with punishment condition.

Without Punishment

In this treatment, the fraction of endowment contributed by participants sees a massive drop and thus the negative association between CRT-scores and contributions is enhanced (Spearman's $Rho = -0.230$, $p = 0.205$). Even more highlighting is the drop in the fraction of endowment contributed by females with high CRT-scores to a low of 15% when compared to an average of about 20% for their male counterpart. This can be explained by the fact that, in the absence of social norms and punishment for breaking such norms, individuals would generally be more reluctant to participate in the provision of a public good. Thus, the fear of punishment suppresses selfishness regardless of the level smartness. Moreover, the results from the without punishment condition rehearses the findings from the with punishment condition that, smarter people (measured here by 3 and 2 CRT correct answers) contribute lesser fractions of their endowments to a public good (ANOVA: $F = 1.48$, $p = 0.24$), and that it is even more significant if the person is a female as shown in figure 1b.

Figure 2: Average contributions across the two treatment conditions showing levels of cooperation.



The impact of punishment opportunity on cooperation

The availability of punishment opportunity impacts decisively on cooperation behaviour of participants. Despite the fact that identities of participants are anonymous, cooperation among group members is higher in PGG with punishment opportunities than it is in the absence of punishment opportunity. The first six rounds of the experiment had punishment opportunities for participants to punish the lowest contributor in the group at the end of each contribution decision. A large increase in cooperation level is achieved after the first round in the punishment treatment. This result is robust even when the order of the treatment conditions is reversed (Fehr & Gächter, 2000). As seen from figure 2, cooperation flourishes at the first introduction punishment

opportunities, this however sharply drops or breaks when such opportunities are removed in last six rounds (7 – 11 rounds) of the public goods experiment.

The first likely explanation for significant positive impact of the punishment opportunity on levels of cooperation is that, majority of the participants are ready to punish selfishness; thus people with the least contribution to the group project. This credible treat disciplines selfish participants there by improving their cooperation levels in subsequent rounds. Because selfish participants can be disciplined, there is certainty for the norm-abiding participants that other group members will cooperate at high levels. Thus, punishment opportunities create the belief that there will be high levels of cooperation by other group members, and this belief induces high voluntary cooperation levels from conditional cooperators (Fehr & Fischbacher, 2004).

Risk tolerance and Cognitive reflection

In an effort to further understand whether participants' risk preference has a link with their cognitive reflection, we examine two framing effect options: certainty vs. higher expected value gamble; and two different expected value gambles. Table 3 gives the breakdown of the interaction between CRT-scores and the choice of riskiness of participants.

Table 3: Risk tolerance vs Cognitive reflection level

Framing effect 1: Certain gains vs. Higher expected value gambles						
Options 1	1000 TL for certain immediately			1400TL with a probability of 80%		
CRT level	High CRT	Low CRT	Total	High CRT	Low CRT	Total
Male	4	1	5	4	7	11
Female	1	6	7	3	6	9
Total	5	7	12	7	13	20

Framing effect 2: Two different expected values gambles						
Options 2	100 TL with a probability of 20%			140 TL with a probability of 25%		
CRT level	High CRT	Low CRT	Total	High CRT	Low CRT	Total
Male	1	0	1	7	8	15
Female	1	2	3	3	10	13
Total	2	2	4	10	18	28

From the framing effect options 1: certain gains vs. higher expected value gamble; 11 male chose the higher expected value (1120TL) gamble over an immediate gain of 1000TL. More closely, 12.5% of participants, representing males with high CRT-score preferred the gamble with higher expected values to the riskless choice, whereas only 9% of participants, representing female with higher CRT-scores opt for the higher

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expected value gamble over the certain gains of 1000TL. Generally, there are more males (11 in total) choosing the uncertain higher expected value gamble over the certain gains than there are females (females) regardless of the CRT level. The lesser number of males (5 in total) in choosing the riskless certain gains of 1000TL over the higher expected value gamble than there are females (7 in total) confirms that men generally prefer higher expected value gamble to low riskless gains. This goes to suggest that, being smart tends to make men take more risk and makes women patient.

From the framing effect options number 2: two different expected value gambles; it is not surprising that 28 of the participants, representing 87.5% chose the option with the higher expected value 35TL(140TL with a probability of 25%). The remaining 12.5% who opted for the lesser of the two expected values gambles shows same number for high CRT-score and low CRT-score.

Conclusion

This paper highlight the role of cognitive reflection capabilities in behavioral economics decision-making in a public good experiment. The findings indicate that, in a multi-round PGG, a negative relationship exist between CRT-scores and contributions to a public good. Secondly, the availability of punishment opportunities affects cooperation levels among group member in subsequent rounds in a non-one shot PGG. The punishment opportunity provides a credible threat to selfish individuals who might wish to contribute less. This threat disciplines such selfish individuals, and thus making high levels of cooperation to flourish. Finally, the link between smartness and risk tolerance of participants provides evidence to conclude that, for men, being smart tends to make them take more risk and makes women patient.

One key limitation of this study is the limited number of participants used in our experiment. Yet despite this limitation, it is intriguing to find out that participants' behaviors are consistent and reflects students' choices.

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CONSOLIDATION AND SUSTAINABILITY OF THE PENSION SYSTEM OF REPUBLIC OF NORTH MACEDONIA: AN ANALYSIS OF DEMOGRAPHIC INDICATORS

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Abstract

In the demographic assumption table, except general population movement an important role in terms of the sustainability of the pension system also includes assumptions about natality and life expectancy. Natality rates are important because they reflect the number of people willing to work from where the number of insured persons depends. Further, life expectancy is an indicator of mortality tables showing on an average of how many years a person will live at a certain age, or that people will live longer, thus affecting the growth of the elderly, respectively increasing the number of pensioners and the length of retirement.

Therefore, in order to see how these demographic indicators have moved and what do the actuary projections says for these indicators, we specifically bring each of these indicators through an analysis of their trend over the period from 1994 to 2017 and their actuary projections by the year 2050.

Keywords: pension sustainability, actuary projections of natality, fertility and life expectancy

Introduction

The trend of demographic parameters presents the base for the formation of the workforce. Working population is determined by the intensity and changes in the age structure of the population by determining the potential of quantitative scale of employment in a country, which means that changes in the age structure are reflected in the level of social work productivity. The aging of the population to a considerable extent also affects the level of economic activity, i.e. the participation of employees in the social production of the general population. In Republic of North Macedonia, the impact of demographic factors is very present, because of the number of working population depends the number of insured persons, i.e. the income of the Pension and Disability Insurance Fund. According to the projections of the United Nations, the population in North Macedonia is aging. In 2000, the population aged over 65 accounted for 15% of the total working age population and until 2050, it is expected that the old-age dependency ratio will reach a record high of 42% (Petreski & Gacov, 2018).

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Thus, the impact of demographic factors on the financial sustainability of the Pension and Disability Insurance Fund of North Macedonia is especially expressed in natality and life expectancy.

Objectives of the study

This study analysis and finds out the impact that natality and life expectancy have on Pension and Disability Insurance Fund of Republic of North Macedonia' performance and success. Thus, the paper will try:

- to assess the impact of the increasing of natality, on the financial sustainability of the Pension Fund;
- to assess the impact of the increasing life expectancy, on the financial sustainability of the Pension Fund;

Research questions and Hypothesis

The study tries to answer the following research questions:

1. How do demographic factors affect the financial sustainability of the Pension Fund?
2. How do the natality and life expectancy affect the financial sustainability of the Pension and Disability Insurance Fund of the Republic of North Macedonia?

The study will also try to answer to the main hypothesis:

- Trend of demographic parameters, i.e. natality and life expectancy make the pension system of the Republic of North Macedonia to be unsustainable.

Literature Review

The financial sustainability, solvency and adequacy of pension plans are receiving wide attention from both government officials, firms, economic forums and academic scholars around the world, as population ageing is becoming a worldwide issue. The impact of demographic developments on the sustainability of existing pension plans is undeniable and putting pressure on governments and policymakers to address demographic ageing and develop more appropriate and sustainable pension systems.

The aging population and increasing life expectancy poses serious challenges to societies in general, however the problem is touching foremost developing countries with Japan, Germany and Italy having among the oldest population in the world (European Commission, 2015) and China being one of the countries experiencing a much more rapid demographic transformation (Huan W., Jianyuan H. and Qi Y., 2019).

According to the OECD (2016), life expectancy has increased by more than 10 years since 1970 and by 2030, and there will be more people over the age of 60 than children under the age of 10 globally with approximately 73% of the world's elderly living in developing countries. Consequently, the demographic trends have led to a decline in the share of the working age population relative to the elderly posing broad economic implications for countries with both fully funded and pay-as-you go (PAYG) pension systems (Employment Working Group, 2019). In countries with fully funded pension plans, the shrinking workforce can negatively influence productivity and growth, which will eventually erode pension fund assets through amongst others depressing interest rates and financial returns. In PAYG countries, an ageing population means more people leaving the labour market resulting in fewer contributions collected. This means that fewer people will have to provide sufficient income replacement for an increasing number of pension recipients and over a longer period considering increases in life expectancy. As such, public expenditures on social security are increasing and forecasted to continue increasing throughout the vast majority of developing countries in the next 40 years (OECD, 2013).

According to the European Actuarial Consultative Group (2012), the impact of demographic aging on pension systems is quite striking, with 23 of the 27 countries in the EU expected to be spending more than 10% of GDP on social security pensions by 2060.

According to Oana C. I. (2013), the accentuation of the trend of demographic aging and the alarming deterioration of the economic dependency rate significantly has seriously affected the financial sustainability of the public pension system and stressed the need for a mixed system, public and private. Oana C. I. (2013) claims that we are not sufficiently aware of the unprecedented scale of these social changes that will press very hard in the balance our future in the next 20-30 years.

In this context, she proposes reforming pension systems with consideration for two major objectives, namely: long-term financial viability of the systems and ensuring adequate pensions towards maintaining a reasonable retirement income to prevent poverty and social exclusion of older people. So far, it is widely accepted in most countries that pension systems and rules need to change over time to account for the unfavourable demographic developments. However, reforms will not be easy if both adequacy and sustainability is to be preserved and ought to vary from country to country depending on the structure of the pension systems in place.

Methodology

For the purposes of this analysis, reports of the Pension and Disability Insurance Fund of the Republic of North Macedonia, State Statistical Office and the data published in European Statistics were used. The method of *structural-functional analysis*, which is based on official documents and reports, scientific papers, articles, laws and sub-legal acts regarding the essential changes of the pension system and the establishment of a new system of the Republic of North Macedonia was used and implemented to this study. Also, during this study we also rely on *the statistical method* which identifies problems with which are already facing the Pension and Disability Insurance Fund of the Republic of North Macedonia.

Data Presentation and Analyses

This part of study includes a systematic presentation of data obtained during the research about the role and impact of natality and life expectancy on financial sustainability of the Pension and Disability Insurance Fund of the Republic of North Macedonia.

Data presentation and analyses of the natality

In Republic of North Macedonia, statistical data show that natality rate in the last thirty years has been declining steadily in both rural and urban areas. If we refer to the number of births for the period 1980-2011, we conclude that this number has decreased by 43% (from 39,784 births in 1980 to 22,770 in 2011). However, since 2006 there is a more stable period of time birth rate ranging from 11% to every 1000 inhabitants of the Republic of North Macedonia.

Table 1: The natality rate of Republic of North Macedonia for the period 2000-2017

Years	Average population over the years	Live births	The percentage of natality per 1000 inhabitants
2000	2.026.000	26.168	12.92
2001	2.035.000	24.183	11.88
2002	2.020.000	24.154	11.96
2003	2.027.000	23.596	11.64
2004	2.032.000	23.361	11.50
2005	2.037.000	22.482	11.04
2006	2.040.000	22.585	11.07
2007	2.044.000	22.688	11.10
2008	2.047.000	22.945	11.21
2009	2.051.000	23.684	11.55
2010	2.055.000	24.296	11.82
2011	2.059.000	22.770	11.06
2012	2.061.000	23.568	11.43
2013	2.064.000	23.138	11.21
2014	2.067.000	23.596	11.41
2015	2.070.000	23.075	11.15
2016	2.072.000	23.002	11.10
2017	2.075.301	21.754	10.48

Source: from the annual report of the State Statistical Office of Republic of North Macedonia, 2017

Based on the trend of natality rate for the years 2000 - 2017, we conclude that the natality rate has been decreased from 12.92% in 2000 to 10.48% in 2017. However, the natality rate in most cases is not giving us any particular analytical value because it shows the ratio between the number of live births and the general population, so for more detailed analysis often are taken other indicator, respectively the fertility rate that only takes the population into the reproductive years. Therefore, in the following table the trend of the fertility rate over the period 1994 – 2015 is presented, and the actuary projections until 2055:

Table 2: The trend of the general fertility rate of Republic of North Macedonia for the period 1994-2015 and its forecast until 2050

Years	Fertility rate
1994	2.1
1996	1.9
2000	1.7
2006	1.5
2010 - 2015**	1.38
2015 - 2020**	1.43
2020 - 2025**	1.48
2045 - 2050**	1.73
<i>Source: State Statistical Office of RM by regions for 1994 - 2004; * Statistical Office from Annual Report 2006; statistics of the Republic of North Macedonia; ** United Nations (2006) World Population Prospects The 2006 Revision</i>	

Based on the data presented in the above table, we conclude that the lowest level was marked in 2015 with 1.38 children per woman, to continue with a very slow growth trend. So the level of 2000, respectively 1.7 children per woman is expected to be reached in 2055. If fertility rates are moving along this dynamic, the drastic reduction of the population in the Republic of North Macedonia is expected to occur, which means that the fertility rate cannot be very promising, primarily because of the current state of fertility rate and impact of a large number of economic factors.

Thus, in the following table we present the three possible scenarios about the fertility rate based on the rate of fertility rate in the past, the state of the current economic factors and future forecasts of economic indicators (real wage growth, living costs, growth of Gross Domestic Product, etc.).

Table 3: The fertility rate forecast in the three potential scenarios (optimistic, basic and pessimistic) for the period 2012-2080

Years	Optimistic scenario	Basic scenario	Pessimistic scenario
2012	1.57	1.55	1.53
2020	1.80	1.70	1.60
2030	1.90	1.80	1.70
2040	2.00	1.90	1.80
2050	2.10	2.00	1.90
2060	2.10	2.00	1.90
2070	2.10	2.00	1.90
2080	2.10	2.00	1.90
<i>Source: from report of the pension system of the Republic of North Macedonia with actuary projections, 2011</i>			

Statistical data from the past show a relatively low fertility rate of 1.5% in 2006, and for this reason the fertility rate of 2.1 is more than necessary for a stable long-term population, otherwise the population will begin to decrease, so with an fertility rate of 2.1 we will have an increase in population. However, from the above forecasts a slowing rise in the fertility rate can be observed in the three scenarios. In the basic scenario the fertility rate reaches 2.0 levels in 2070, while in the optimistic scenario this rate reaches 2.10 levels and in the pessimistic scenario up to 1.95 levels.

Data presentation and analyses of life expectancy

Life expectancy as a demographic indicator refers to the number of years a person is expected to live on, based on an average age rating that members of a certain population group will be when they will die. The increase in life expectancy is mainly attributed to the growth of the standard of living as a result of the steadily improvement of a number of factors, such as: improvement of the public health system, awareness of the way of nutrition, workplace safety, etc. Taking into consideration the improvement of these factors the life expectancy from 1960 to 2017 has increased for 15 years in Republic of North Macedonia. So, the following table shows the trend of life expectancy for the period 2000 – 2017.

Table 4: The trend of life expectancy for the period 2000-2017

Years	Life expectancy for men	Life expectancy for women	Life expectancy
2000	70.80	75.20	73.00
2001	70.90	76.10	73.40
2002	70.60	75.60	73.00
2003	70.90	75.70	73.20
2004	71.50	75.80	73.60
2005	71.60	75.90	73.70
2006	71.70	76.20	73.90
2007	71.80	75.90	73.80
2008	72.40	76.50	74.40
2009	72.30	76.70	74.40
2010	72.90	77.20	75.00
2011	73.10	77.20	75.10
2012	73.00	76.90	74.90
2013	73.40	77.50	75.50
2014	73.50	77.50	75.50
2015	73.50	77.40	75.50
2016	73.40	77.50	75.40
2017	73.80	79.20	76.41

Source: (<https://countryeconomy.com>)

Based on the data presented in the table above, we note that women versus men live longer, and in the last decade this difference moves up to 5 years. Thus, in the following tables we present the results of the current life expectancy forecasts for the period 2012-2050 into three possible scenarios: optimistic, basic and pessimistic.

Table 5: The forecasts of life expectancy in the optimistic scenario for the period 2012-2050 in Republic of North Macedonia

Optimistic	During birth		During retirement	
Years	Men	Women	Men	Women
2012	71.39	75.64	15.22	19.05
2020	71.40	75.60	15.23	19.02
2030	72.00	76.10	15.62	19.39
2040	72.50	77.00	15.95	20.06
2050	73.00	78.00	16.28	20.83
2060	73.00	78.00	16.28	20.83
2070	73.00	78.00	16.28	20.83
2080	73.00	78.00	16.28	20.83

Source: from report of the pension system of Republic of North Macedonia with actuary projections, 2011

In the optimistic scenario, the growth in life expectancy of the insured is moving in constant way within the acceptable limits of expected or predictable growth (from 71.39 to 73.00 for men and from 75.64 to 78.00 for women).

Table 6: The forecasts of life expectancy in the basic scenario for the period 2012-2050 in Republic of North Macedonia

Basic	During birth		During retirement	
Years	Men	Women	Men	Women
2012	71.49	75.82	15.29	19.18
2020	71.90	76.50	15.55	19.69
2030	72.40	77.10	15.88	20.14
2040	74.00	78.80	16.96	21.45
2050	75.00	80.00	17.65	22.41
2060	75.00	80.00	17.65	22.41
2070	75.00	80.00	17.65	22.41
2080	75.00	80.00	17.65	22.41

Source: from report of the pension system of Republic of North Macedonia with actuary projections, 2011

In the basic scenario, the increase in life expectancy of the insured is growing rapidly, i.e. from 71.49 to 75.00 for men and from 75.82 to 80.00 for women, which means that men will receive pension for 17 years and women for 22 years. This situation is alarming to the Pension and Disability Insurance Fund, because these results of the actuary projections belong to the basic scenario.

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Table 7: The forecasts of life expectancy in the pessimistic scenario for the period 2012-2050 in Republic of North Macedonia

Pessimistic	During birth		During retirement	
Years	Men	Women	Men	Women
2012	71.61	76.02	15.37	19.33
2020	72.50	77.50	15.95	20.44
2030	72.90	78.10	16.21	20.90
2040	75.50	80.00	18.00	22.41
2050	77.00	81.00	19.09	23.22
2060	77.00	81.00	19.09	23.22
2070	77.00	81.00	19.09	23.22
2080	77.00	81.00	19.09	23.22

Source: from report of the pension system of Republic of North Macedonia with actuary projections, 2011

In the pessimistic scenario, the results are more sensitive as the growth of the life expectancy of the insured is faster than in the previous two scenarios. Therefore, life expectancy for men will increase from 71.61 to 77.00 and from 76.02 to 81.00 for women. So this scenario reflects the less desirable results for the Pension and Disability Insurance Fund of Republic of North Macedonia, because the financial burden is much higher than in the basic and optimistic scenario.

Testing the main hypothesis

Testing the main hypothesis	
Trend of demographic parameters, i.e. natality and life expectancy make the pension system of Republic of North Macedonia to be unsustainable.	<p>During the examination of demographic indicators we conclude that: population projections show that in the last year of the projection period, ie in 2100, the Republic of North Macedonia is expected to lose 25% of the current population number;</p> <p>natality from 1980 to 2017 decreased to 45.22% (from 39,784 to 21,754 live births);</p> <p>the fertility rate of 2.1 children per woman in 1994 reached to 1.38 children per woman in 2015 and is expected to reach up to 1.73 in 2055;</p> <p>life expectancy in the Republic of North Macedonia from 60.63 in 1960 reaches to 76.41 in 2017, and is expected to reach 78.00 in 2080;</p> <p>life expectancy from the moment of retirement for the period 2012-2050 in the three potential scenarios moved, such as:</p> <p>in the optimistic scenario, life expectancy increases from 15.22 to 16.28 for men and from 19.05 to 20.83 for women;</p> <p>in the basic scenario of 15.29 - 17.65 for men and 19.18 - 22.41 for women;</p> <p>in the pessimistic scenario from 15.37-19.09 for men and 19.33-23.22 for women;</p> <p>Concerning the testing of the main hypothesis, we conclude that: <i>trend of demographic parameters, i.e. natality and life expectancy make the pension system of the Republic of North Macedonia to be unsustainable, and consequently the main hypothesis is acceptable.</i></p>

Conclusions

The population with its existence, knowledge, skills and creativity is a necessary importer for the success of any activity. According to the Demographic Development Strategy 2008-2015 of the Ministry of Labour and Social Policy, the main strategic goal remains the sustainable demographic development of the population by improving the quality of human capital and increasing social cohesion.

The demographic development of the population of the Republic of North Macedonia requires measures and methods for creating equal opportunities for achieving the desired reproductive status and equal access to information, health care, education and other services related to the demographic development of all groups social. The latter will enable the gradual increase of natality, and thus the number of workforce that will contribute to the largest generation of the income, consequently the realization of the main objective of the pension system - payment of pensions.

Natality, fertility and life expectancy as demographic indicators have a significant negative impact on the Pension and Disability Insurance Fund of Republic of North Macedonia. Reduction in natality and fertility, increased life expectancy, causes a high financial burden for the Pension and Disability Insurance Fund of the Republic of North Macedonia, because on the one hand additional funds should be provided for the number of pensioners and on the other hand should be provided additional income as a result of the decrease in the number of insured persons.

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THE ROLE OF TURKEY'S FDI TOWARDS IMPROVING THE COMPETITIVENESS OF THE REPUBLIC OF NORTH MACEDONIA'S ECONOMY

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Remzije Rakipi (South East European University)

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Abstract

In the literature there is strong evidence on the positive and substantial the economic influence that FDI has on the economic development of a country. Since FDI facilitates growth, transfers know-how and promotes technical innovation from the home to the host country, attracting FDI is a fundamental element of the strategies that aim to achieve sustainable growth and development. Therefore, the role of the state is vital towards building the sustainable basis, by creating the appropriate framework for attracting FDI which is given with a strong economic and institutional regime. The objective of this paper is to analyze the competitiveness of the North Macedonia's economy and the impact of Turkey's FDI towards its improvement. According to the official data during the last decade the Republic of Turkey has invested around 237 million of euros in the North Macedonia's economy, being on the 6th place on the list of FDI.

Keywords: foreign direct investment, competitiveness, Republic of North Macedonia, Republic of Turkey

Introduction

Foreign direct investment (FDI) has a significant impact on the economic success of many countries that have achieved dynamic economic growth and increased employment. In the Republic of North Macedonia, domestic savings and investment rates are low and insufficient for achieving more dynamic economic growth. On the other hand, borrowing by lenders (international and domestic) is not acceptable due to the limited budgetary possibilities for servicing the external debt in the medium term. In addition to the insufficient amount of savings, there is a need in the Macedonian economy for new technologies and knowledge, as well as the acquisition of new markets, which is a special challenge for domestic economic entities. Attracting foreign direct investments as a long-term source and catalyst of the economic activity in the country becomes very logical.

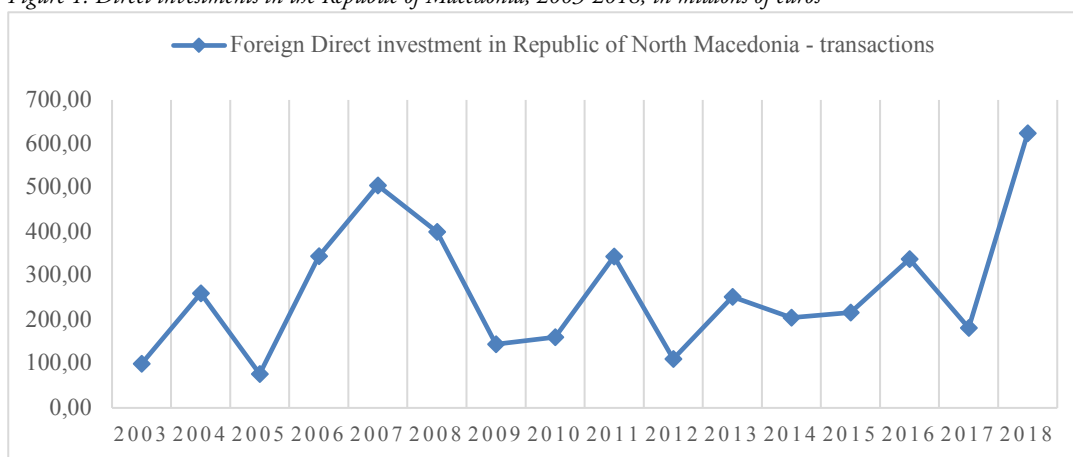
In the international economy, in the long run, the importance of the international capital movement is growing. Foreign direct investment (FDI) is seen as one of the holders of contemporary economic globalization. Also, most countries consider that FDI is a vital source for their economic development. If recent history is followed, countries around the world after the Second World War begin to understand the theory and practice of foreign direct investment. Especially since the 1960s, there has been a change in the international economy where foreign direct investment, multinationals and other models of international cooperation are starting to get more and more important. Since 1957, with the establishment of the European Economic Community (European Union - EU), there has been a very rapid increase in foreign direct investment. The growth continued in the 1980s with an emphasis on trade and new oil markets; a particular

incentive came in the nineties with the dissolution of the Soviet Union and the opening of new markets in Eastern Europe, and thus, with the accelerated technological transfer and the necessary ideological/political changes, the globalization process that brought national economies closer and closed the closed economic models (Aliji, 2019).

FDI in the Republic of North Macedonia

Data on total net foreign direct investment show that, over the period 2003 to 2018, in the Republic of North Macedonia, the foreign direct investments (FDI) have a general upward trend. Significant positive expansions in the FDI are registered during the period 2005-2007, 2011 and 2018. Only in the period from 2003 to 2018, the total entry of FDI amounts to about 4.3 billion euros. Different changes in the legislative, doing business easing etc. are evidenced in the country's economic history.

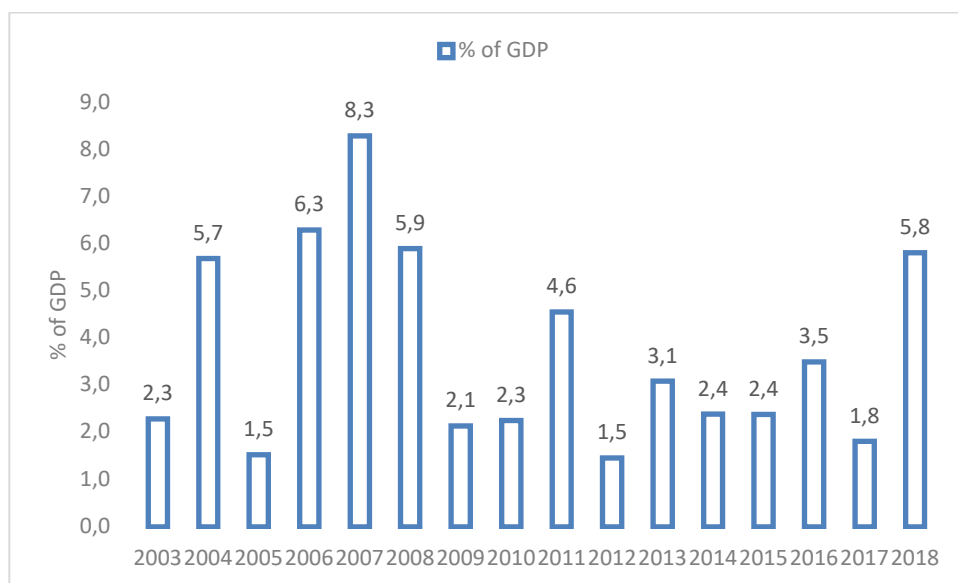
Figure 1. Direct investments in the Republic of Macedonia, 2003-2018, in millions of euros



Source: National bank of the Republic of North Macedonia

If we look at the FDI as a percentage of GDP (Figure 2) we can see that it follows the path of the FDI transaction, witnessing higher portion of GDP with 8.3% in 2007, and after one decade the country registers result which is similar to the one from 2018. The economic crises in the world and especially the political crises that existed in the country have contributed for the low and desperate results concerning the FDI.

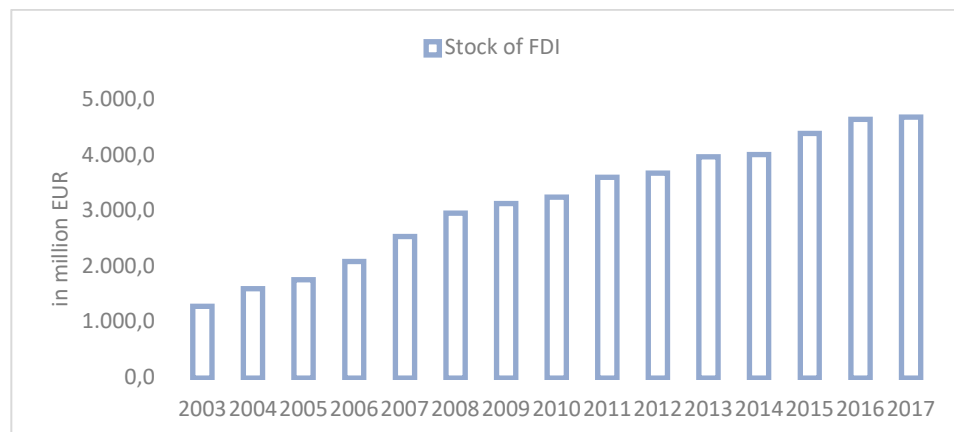
Figure 2. FDI in the Republic of North Macedonia (% of GDP)



Source: National bank of the Republic of North Macedonia

In figure 3 the stock of Republic of North Macedonia shows positive change from 1.3 Billion of euros in 2003 to 4.7 billion in 2017.

Figure 3. Stock of FDI in RNM



Source: Ministry of Finance of the Republic of North Macedonia

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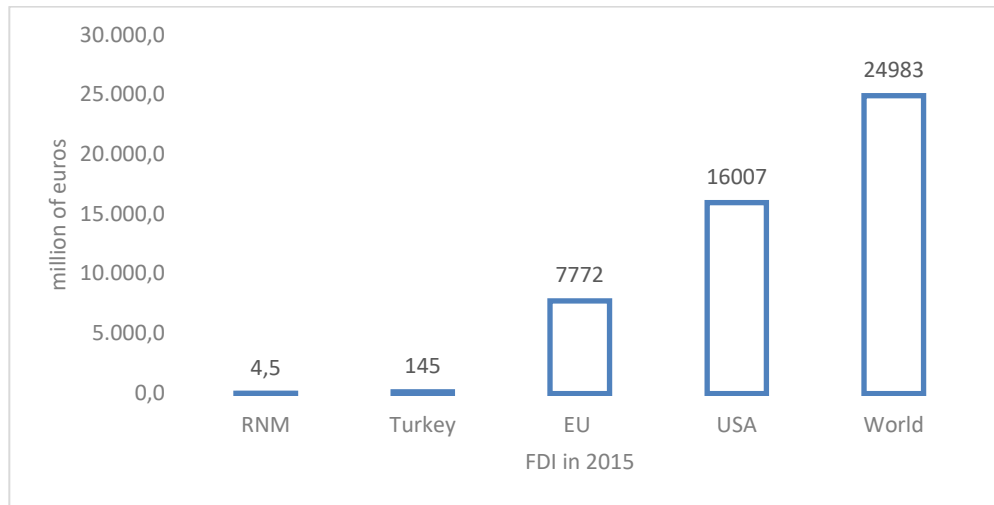
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The relative size of FDI in some selected countries are given below in Figure 4, where we can notice that Turkey in 2015 has more than 32 times more FDI than Republic of North Macedonia, whereas EU countries and USA around 1700 and 3600 times more, respectively.

Figure 4. FDI stock in 2015, some selected countries, in millions of euros



Source: UNCTAD, World Investment Report 2016

If we make an analysis of the countries with the greatest flows of FDI in RNM we will see (see Table 1) that Austria is in the first place, followed by Netherlands, Slovenia, Germany and the Republic of Turkey, that appears at the sixth place in 2017, as an important foreign direct investor in the country. In the analyzed period Austria has invested around 535 million of euros, Netherland 454 million of euros, whereas Republic of Turkey has invested 237 million of euros. The highest investments are registered during 2011, with the value of 136 million of euros made by Netherlands, followed by Turkey with 77 million of euros.

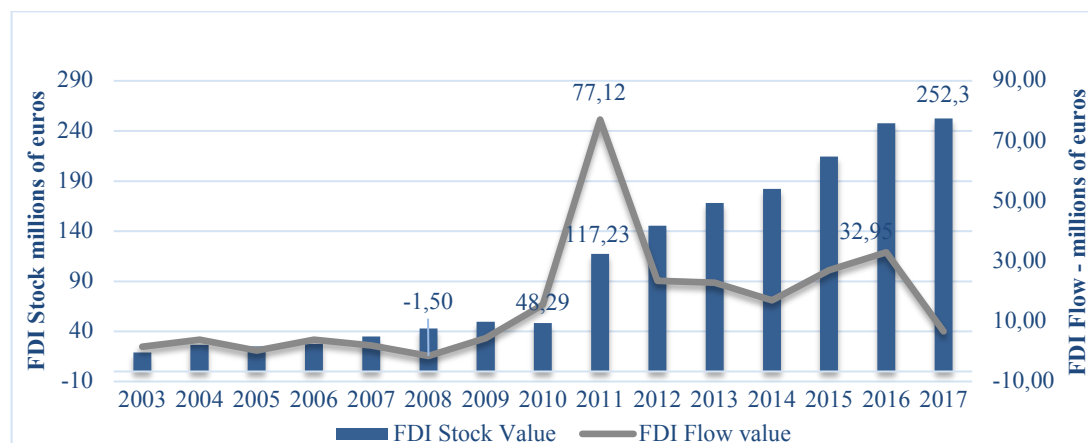
	Country	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	Total
	Total	1.292,10	1.610,20	1.769,00	2.098,60	2.545,20	2.968,80	3.141,40	3.256,00	3.615,10	3.685,50	3.980,00	4.023,60	4.023,60	4.400,10	4.657,30	4.697,80
1	AUSTRIA	7,5	16,66	-6,66	130,93	10,79	95,69	30,07	-10,64	48,12	47,71	56,26	26,19	18,01	35,21	29,47	535,3
2	NETHERLANDS	8,62	34,74	12,16	14,67	26,54	2,33	65,15	0,47	136,56	8,11	37,1	40,15	94,45	10,96	-37,58	454,43
3	SLOVENIA	18,74	5,94	8,78	10,47	59,97	79,23	134,13	19,7	19,1	8,8	37,98	-6,56	-7,68	4,57	19,36	412,52
4	GERMANY	5,16	8,05	-0,41	0,57	9,32	4,01	2,91	11,93	10,71	12,05	31,97	45,83	39,28	48,47	47,59	277,44
5	SWITZERLAND	9,99	27,38	17,42	21,27	30,86	24,78	4,64	-41,25	-5,76	-15,05	-8,5	131,68	3,46	18,19	25,06	244,18
6	TURKEY	1,51	3,95	0,33	3,9	2,01	-1,5	4,43	15,53	77,12	23,53	22,81	17,05	27,05	32,95	6,62	237,3
7	GREECE	8,76	40,32	17,56	40,68	44,58	6,72	-57,15	15,18	14,78	2,1	-0,91	-3,25	43,75	-15,69	27,14	184,55
8	UNITED KINGDOM	7,09	5,43	0,15	12,08	40,49	38,02	-45,84	31,62	-59,25	0,46	45,13	39,19	-37,63	50,26	22,74	149,91
9	SAINT VINCENT AND THE GRENADINES	0	6,35	24,8	-4,98	3	43,9	-15,73	46,91	44,68	-27,67	-9,14	26,83	-20,1	5,23	6,98	131,07
10	ITALY	0,4	13,31	10,37	4,86	6,79	4,82	3	1,64	9,63	2,06	5,73	11,47	10,4	20,01	4,2	108,88

Table 1. Top 10 FDI country in RNM, 2003-2017 (in millions of euros)

Source: National bank of the Republic of North Macedonia

Figure 5. presents the Turkey's FDI stock and flow in values in the Republic of North Macedonia for the period form 2003-2017. The FDI flows and stock increase after 2010, registering FDI flow in 2011 from 77 millions of euros and FDI stock value from 117 millions of euros. The share of Turkey's FDI stock in the total in 2003 is 1.46%, whereas in 2017 in 5.4%, with a constant increasing in the FDI share.

Figure 5. Turkey's FDI flows and stock in RNM, millions of euros



Source: National bank of the Republic of North Macedonia

Competitiveness in RNM

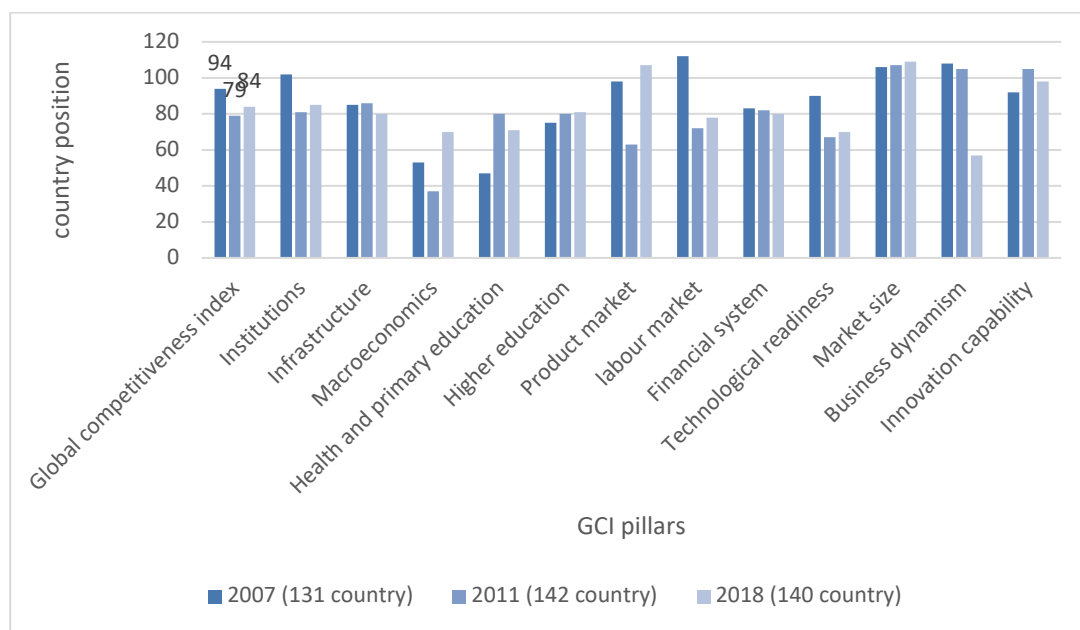
The Republic of Macedonia is a small and open economy that is vulnerable to economic developments in Europe and is dependent on regional progress and integration towards EU membership and sustained economic growth.

The economic and institutional regime of a country should be such that economic agents can have incentives for economic use and knowledge creation and, therefore, there is a need for well-founded and transparent macroeconomic, competitive and regulatory policies. The existence of an effective, responsible and uncooperative government and legal system that supports and strengthens the basic rules of trading and protection of property rights are a pillar of economic knowledge.

Creating productive jobs are linked to the ability to grow new businesses, the existence of a regulatory framework that will facilitate the opening up of new businesses, the ability to easily adapt businesses to newly emerging market conditions, and easy closing of businesses, which would enable the release of capital to its more productive use.

Starting in 2007, according to the methodology of the Global Competitiveness Report (GCI) at the World Economic Forum (WEF), the Republic of North Macedonia is in the group of countries that are in the second phase of development in terms of the competitiveness of their economies. At this stage, development is driven by factors that increase production efficiency, that is, competitiveness is based on and increased with the quality and quantity of education and training, the efficiency of the market of goods, labor market functionality, sophistication of the financial markets, the ability of market production on a large domestic or foreign market, and the ability to exploit the benefits of the latest technologies. Therefore, factors that increase efficiency have the biggest influence in calculating the Global Competitiveness Index (GCI) for The Republic of North Macedonia. Therefore, it is essential that the country has good performance in the five pillars of the subindex of efficiency enhancers (the sixth pillar referring to the size of the market cannot be directly influenced, except by increasing the market indirectly, through bilateral and multilateral free trade agreements, export diversification, etc.).

Figure 6. Global Competitiveness Index and its pillars for Republic of North Macedonia (selected years)



Source: Global Competitiveness Report 2007, 2011, 2018, World Economic Forum

Creating productive jobs is linked to the ability to grow new businesses, the existence of a regulatory framework that will facilitate the opening up of new businesses, the ability to easily adapt businesses to newly emerging market conditions, and easy closing of businesses, which would enable the release of capital to its more productive use.

The Republic of North Macedonia is positioned on the 84th place out of 140 countries in the Global Competitiveness Index in 2018 and compared to 2011 registers a 5 position drop. In 2007 the country positions on the 94th place out of 131 countries.

Although competitiveness is measured by 12 pillars, they are not independent of each other, but have inevitable interaction and should therefore be analyzed. For example, innovations (pillar 12) will not be possible if there are no strong institutions (pillar 1) that are credible and which will guarantee the right to intellectual property, whereby innovations are generally impossible without a well-educated workforce (pillar 5) and good access to finance (pillar 8).

Macedonian economy is small economy. It still relies on cheap labor and low productivity reflected at relatively low wages, while public and private institutions are still weak in 2018. To stay in the efficiency-oriented phase of competitiveness, higher quality education (in contrast to quantitative), efficient markets - both financial and labor, strong exports and the ability to benefit from existing one's technologies, and all this should be implemented in parallel with the strengthening of public and private institutions. Regarding the institutions

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in the analyzed period, the Republic of North Macedonia noted 81 position in 2011 and position 85 in 2018, with still major shortcomings in the area of judicial independence, ownership rights, protection of intellectual property, organized crime and the like.

Strong institutions are also driving productivity and long-term growth. The way individuals organize themselves and their economic transactions make up the spinal column of economic activities and the stability of societies. Weak institutions continue to hamper the competitiveness, development, and quality of life in many countries. The decisions of investors largely depend on the level of trust in society, on whether public institutions are able to provide the basic level of security and exercise of property rights and that the issues are characterized by transparency, efficiency, and accountability; on the other hand, the quality of standards for quality business management and respect for business ethics are also significant for investor decisions. In this direction the participation of the Turkish investors, which certainly will be even greater, with the improvement of the country's performance in the institutions.

Owners of capital, whether in the form of land, shares, or even intellectual property, are not willing to invest in the improvement and retention of their property if their rights as owners are not reliable. In North Macedonia, there is a strengthening of ownership rights and protection of intellectual property. Improvement is also recorded in the part of the government regulation, while the best results in the part of the institutions in the part of the institutions are realized in the protection of the rights of the investors.

A healthy and fair institutional setting is even more than necessary because of the role of the state apparatus has increased. The quality of the institutions has and will continue to play a major role in the competitiveness, and thus on the economic growth of the Republic of Macedonia.

Infrastructure is the next important pillar for the growth and development of one country, in which the Republic of North Macedonia does not notice satisfactory performance (80th place), especially not with the number of available aisles and the quality of the roads. The railroad density (31st place) is the best performing variable within this pillar. The airport connectivity registers better performance. The efficiency of the air transport services are ranked on the 85th place which is directly related to the management of the airport traffic by the Turkish investor "TAV Macedonia", as well as with the role of the service that the famous air carriers "Turkish Airlines" and "Pegasus" in the airline's landing.

Macroeconomic stability is also an important factor for competitiveness in one country, as well as the decision of investors to invest in our country. The Republic of North Macedonia is characterized by an economy that has a relatively stable macroeconomic policy. According to the GCI 2018 the country is ranked on the 70th place, holding the 1st place for the level of inflation and the 84th place for the debt dynamism.

In the area of health and education, the Republic of North Macedonia after a period of drops in terms of the quality of services and in terms of the structure of the personnel that it creates and is used by the business community, in 2018 creates better performances. Significant investments in these areas by Turkish companies and institutions, such as in the health sector (Acibadem, European Eye Hospital, Medica Istanbul, etc.), as well as in the area of primary, secondary and higher education (Balkan University, Maarif, etc.) contribute towards raising the competitiveness in these areas in The Republic of North Macedonia, which in the long run can influence in the direction of raising the quality of the services and the performance of the country.

Positioning on the 107 place in 2018, the competition in the market of goods and services is of moderate intensity and it is present only in several sectors. Corporate activity is not so high and is managed by several business groups. The very antimonopoly policy is not effective in promoting greater competition. The dominance of foreign ownership among Macedonian companies is low, while business rules that refer to attracting FDI are somewhat successful in the same. The sophistication of the buyers is low, most often being guided by the prices of products. The Republic of North Macedonia is a country with low tax rates. The role of Turkish investors is important in terms of raising the quality of products and raising the level of sophistication of Macedonian buyers with the presence of different companies in the field of agriculture, forestry and fisheries, trade, manufacturing, construction, tourism, etc. The presence of experienced Turkish companies in the Macedonian economy can also influence the level of transfer of technologies and knowledge, increasing the size of the market, the export from the country, etc., elements that fall within the reach of the country's technological readiness, as one of the pillars of a country's global competitiveness.

In the domain of the labor market of the country (rank 78 in 2018), there is a lack of cooperation of labor – employer relations, professional management and inflexible wage determination, which, in addition to the trend of brain drain, reduces the efficiency of the labor market. Financial markets in the Republic of North Macedonia offer limited financial services to the citizens, while the lack of risk capital limits the development of the entrepreneurial spirit in the country, which is a basic requirement for the development of new knowledge, and hence the opportunity for innovation and the positive effects that they can have. The insufficient development of the domestic financial market is an additional factor affecting the level of competitiveness of the country. In the improved performance of the country in the segment of the financial sector in 2018, the presence of the Turkish bank Halkbank, which is among the four largest banks in the Republic of North Macedonia since 2011, bridges and facilitates trading between the Macedonian and Turkish companies.

With the increased participation of foreign investments in different areas, both in the real sector and in the segment of services, the Republic of North Macedonia offers an opportunity to increase the quantity and quality of supply on the domestic market, greater sophistication of production, and thus a change of the nature of the competitive advantage, which would generally improve the country's business dynamism, which is on the 57th place in 2018, compared to 105th in 2011 and 108th place in 2007. Although significant progress was noted in the area of innovation, with 51st in 2016 compared to 105th in 2011, in 2018 the country is ranked on the 98th position. The greater investment in research and development of companies, the greater functional link between the state, education and training, and consequently, the previous and most innovations in the country will create a higher base for improving the economic performance of the country.

Performance in the subindex of innovation and business excellence is particularly important since they are the driving force of the country to a higher level of refinement, which would mean a country transition to a group whose development would be based on innovation, which is a level of development the caliber of the developed economies in the world.

Based on the latest data (January 2019) recorded in the Trade Registry and the Register of Annual Accounts, it is important to present the following information (Aliji, 2019):

- 1013 registered legal entities as natural persons and legal entities from the Republic of Turkey

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- 48 registered subsidiaries Republic of Turkey

- 4190 employees in legal entities whereas natural persons and legal entities from the Republic of Turkey are founders and owners (according to the data from submitted annual accounts for 2017)

- 14,860,856 euros total profit for the above entities (according to the data from submitted annual accounts for 2017)

- 391,004,396 euros total assets for the above entities (according to the data from submitted annual accounts for 2017).

Conclusion

The overall results of the research show that the economic cooperation between the Republic of North Macedonia and the Republic of Turkey is intensive and active in several segments, especially in relation to FDI. Turkish investments affect North Macedonia's competitiveness through the economic activity and employment, and indirectly strongly affect working standards, use of new technologies, human resources management, increasing efficiency and effectiveness in implementing projects, etc., that they bring with the FDI. This cooperation still has a room to enter in different sectors and segments in the Macedonian economy, where the existing potential for cooperation has not been used, which is a solid basis for further analysis and research.

In the coming period in the Republic of North Macedonia, metallurgy, construction, processing and certain service activities, which are the main bearers of the country's economic growth and gross domestic product, should receive special stimulation treatment. In order to achieve this objective, besides other policies, it is necessary to reiterate the policies for attracting foreign direct investments.

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EFFECT OF SERVICE QUALITY ON CUSTOMER SATISFACTION ON A COMMERCIAL BANK: THE CASE OF THE REPUBLIC OF NORTH MACEDONIA

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Hyrije Abazi - Alili (South East European University)

Shpresa Alija

Abstract

The quality of products and services is undoubtedly one of the key factors and key impact on the successful functioning of contemporary business organizations. In parallel with the economic and financial development of the country, the banking system is constantly being expanded. Although there is a high level of awareness of the importance of customer satisfaction for banks' success, there are very few scientific studies aimed at measuring the degree of customer satisfaction with banking services and how they function. Therefore, the present study assesses the status of customers' satisfaction with respect to select dimensions of service quality in a commercial bank operating in Republic of North Macedonia. Consequently, the quality of service provided will largely depend on customer loyalty, i.e. their readiness to return to re-utilize the relevant service. A survey using stratified random sampling was conducted, with 100 customers in the period March-April 2018. For customer satisfaction, it was found that dimensions of service quality such as tangibility, assurance and empathy having positive and significant impact. So, factors like location, outlook, comfort, and bank work schedule are of great importance for customer satisfaction.

Keywords: quality, services, bank, customer satisfaction, loyalty of clients

Introduction

Services dominate the world economy as ever and are in constant expansion, so nothing is in place. On the one hand, technology continues to develop dramatically and on the other hand, competition between firms is fierce that they often develop new strategies and tactics in response to needs, expectations, and ever-changing consumer behavior. Based on this, the skills in marketing and managing services have never been more important. (Christopher Loveloc, 2011). The first and most important task of creating a marketing strategy is to identify clients not only who they are but also where they are and how to approach them. It is important to understand what motivates them when choosing a bank, why decide to work with a bank rather than the other, what are their attitudes regarding the services provided, who influences making decisions of this nature, etc.

This paper takes into account the current state of banking services for consumers in the North Macedonia to highlight the impact of the service quality on customer satisfaction. Increasing competition in the banking industry has imposed on the attention of the leaders, the pursuit of differentiation policies and innovations in service delivery, where an important role takes the development of appropriate distribution structures. This comes in expression because differentiation is easy to apply to any product but to services is very difficult. Thus, the need to apply a special way to differentiate the supply of products is seen, considering distribution as the main and strategic element for the bank. Technology, accessibility and organization: these are the key

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elements that enable differentiation of supply, elements which, thanks to investment in service delivery systems, enable customers to use different banking services.

The structure of this paper is as follows. The following section provides literature review, and then it continues with methodology. The final sections provide results and conclusion.

Literature Review

In the literature review section, we would like to define two main terms related to this research topic: customer satisfaction and service quality.

Concerning the issue of customer satisfaction and loyalty, there are different opinions and attitudes. Customer satisfaction is the most important element in attracting and maintaining the customers, specifically in the banking sector (Ennew, Binks & Chiplin, 2015). Satisfaction is the key element in the process of creating and maintaining loyal customers. According to Philip Kotler (Kotler, 2013), the definition of customer satisfaction says that it is predetermined by how the expectations of the customer are met. So, customers compare their expectations about a specific product or services and its actual benefits. To accurately define the relationship between the bank and the customer, the feedback from customer is the key element that helps us manage their satisfaction more easily. Consumer satisfaction is a function of customer perception and expectations and can be mathematically presented as the difference between these two variables (Vunjak, 2015):

SATISFACTION = PERCEPTION- EXPECTATIONS

Consumers' expectations are generated by previous information about the service as a result of the knowledge and experience that customer has in advance with the service. To capture customer expectations and perceptions of a service the researchers use the model named SERVQUAL. When the SERVQUAL questionnaire was first published in 1988 by a team of academic researchers, A. Parasuraman, V. Zeithaml and Leonard L. Berry to measure quality in the service sector (A. Parasuraman, 1988), it represented a breakthrough in the measurement methods used for service quality research. s. Service quality in the SERVQUAL model consists of five dimensions: reliability, responsiveness, assurance, empathy, and tangibles. In addition to the advantages this model has its own weaknesses. There have been many studies about the validity of the five dimensions that this method explores. The biggest remarks are given because dimensions are not standardized and should be more specific. For example some of the industries may have one or two dimensions of services while others may have four or five dimensions. SERVQUAL cannot be applied to enterprises that do not have the five dimensions of services (A.Şahin 2006).

According to Kotler & Keller (2009, pg789), service is any intangible act or performance that one party offers to another that does not result in the ownership of anything. As a worldwide trend, service quality began in 1980 when marketers realized that only a quality product could guarantee and maintain competitive advantage (Boshoff & Gray, 2004). Quality of service is very important for any organization, and the only way to achieve competitive advantage and profitability. Having in mind that consumer attitudes are constantly changing and the quality of services should change in accordance with these attitudes. So, organizations should first identify

what the consumer perceives as service quality in order to successfully leverage service quality as a competitive edge.

Methodology

In this section we explain briefly the methodology and the data analysis of the conducted research. We know that data analysis is one of the most important parts of the research process, since it is needed to design the study and choose the appropriate instrument and technique for data collection. This research paper is raising two hypothesis, by the help of which we will try to give response to our research questions:

H1: There exists a positive impact of services quality on customer satisfaction

H2: The high level of satisfaction will have positive effect on customer loyalty

Survey using stratified random sampling was conducted, with 100 customers from randomly selected for the study. The survey questionnaire is formulated to cover key issues affecting customer satisfaction such as: bank environment, services, bank staff and trust and loyalty to the bank. The survey was conducted with 100 casual customers selected by the Tetovo Economic Bank. The questionnaire has 14 questions, most of the questions helps in collecting data through the Likert –type scale (have responses with a scale of 1 to 5) In addition to these questions, the questionnaire also contains YES or NO questions and open questions.

Results of Analysis

This section present the results of the conducted questionnaire in order to see the responses regarding the raised hypothesis of this research paper and interpret the results of each question individually. As we can see from fig.1.,in the first question "Why did you choose the Commercial Bank?", 27% of respondents answered that they have chosen the bank because of their reliability, 23% of them have said they have chosen because of security, 12% for fast services of this bank, 9% of respondents think that the bank has renowned internationally, 8% think that the bank offers quality services, 6% because of professional staff, 4% because of the comfort they feel in the bank premises, 4% due to the correctness, 4% because they think it is a serious bank and 3% of respondents have chosen the Economic Bank because they think it is a bank with a tradition.

Figure 1. Why did you choose the Commercial Bank?

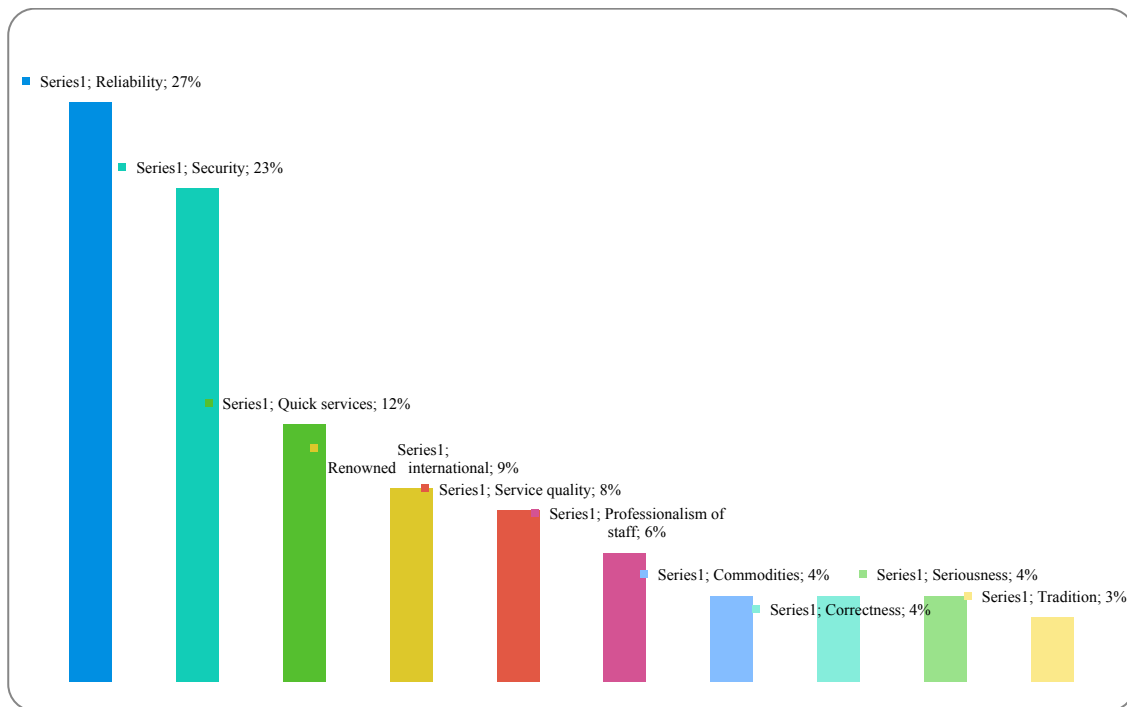
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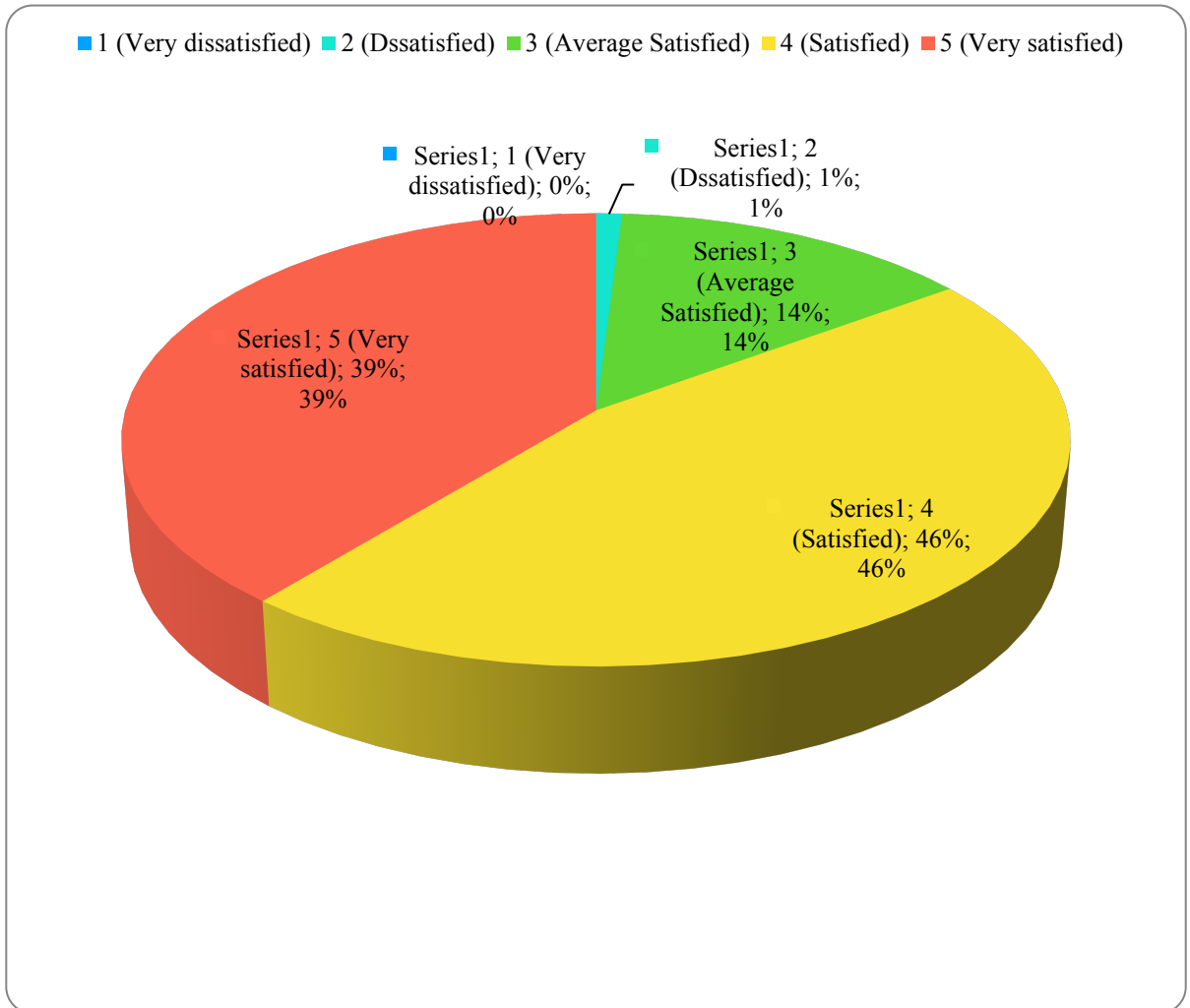


Source: Authors' work realized by the research done in Tetovo, March-April 2108

Regarding the first question which de facto is a very important question in our research respondents' responses clearly show that factors such as security and reliability play the most important role in choosing a bank that together reach a 50%.

In the question 2 about the location and external appearance of the bank, no client was dissatisfied, 1% of respondents expressed dissatisfaction, 14% were on average satisfied, 46% of clients were satisfied with the location and appearance of the bank, while 39% of respondents liked the location and appearance of the bank so they were very satisfied. The data obtained can be clearly seen in the figure2.

Figure 2. Location and appearance



Source: Authors' work realized by the research done in Tetovo, March-April 2108

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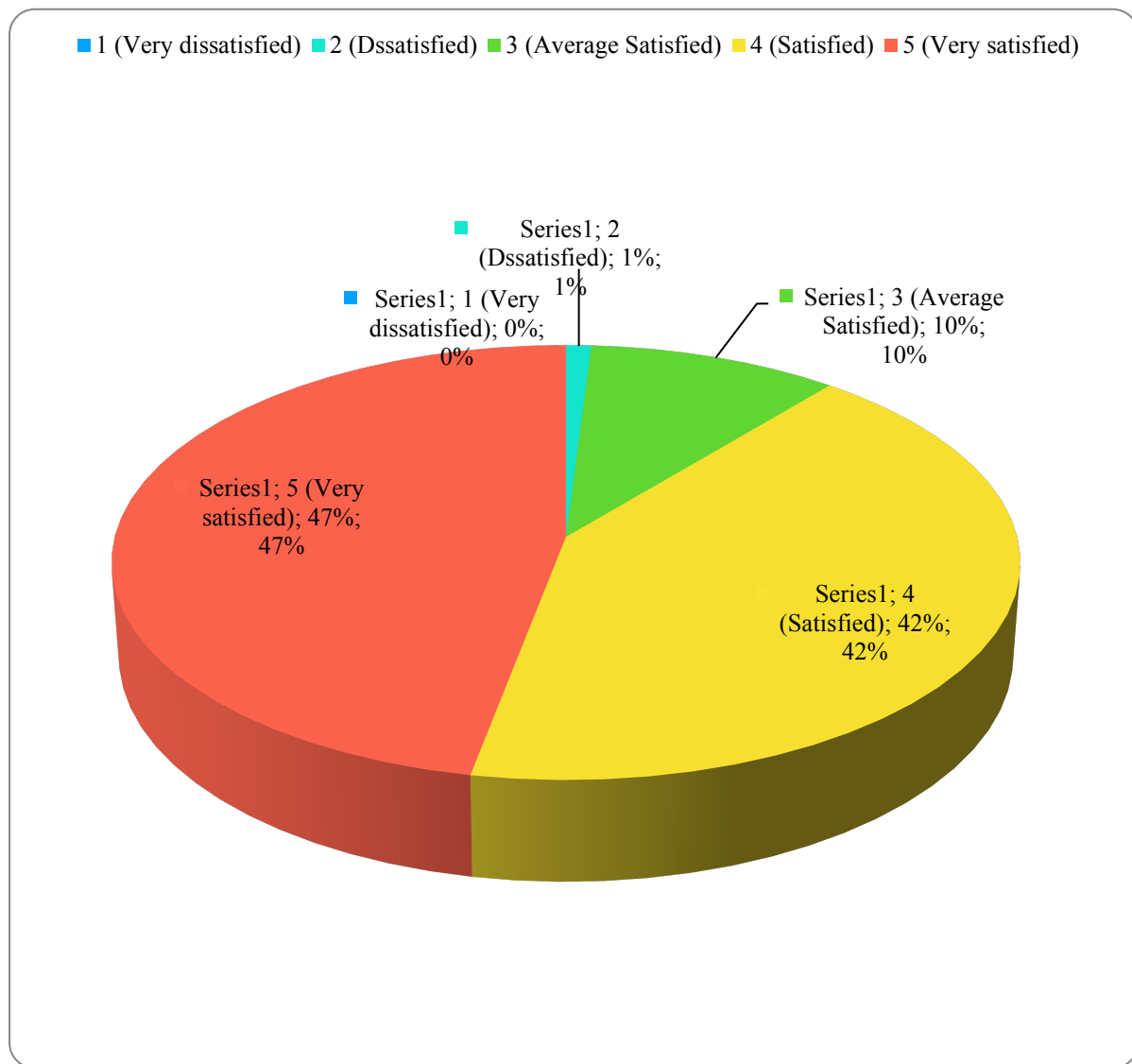
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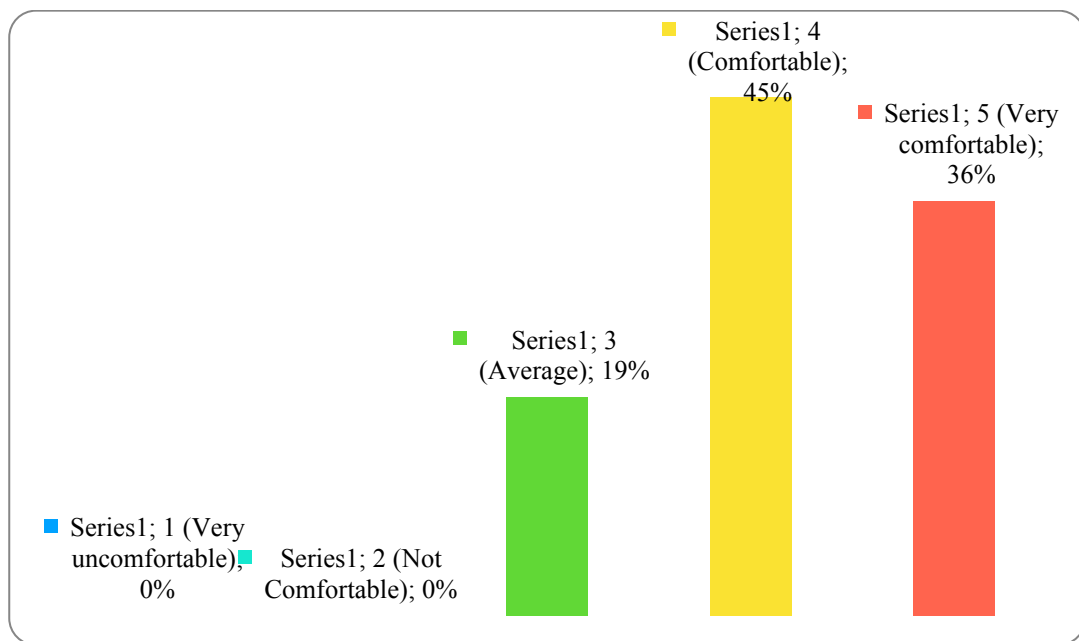
Figure3. Working hours



As far as working hours are concerned (figure3), only 1% of clients expressed dissatisfaction, while there were no clients very dissatisfied with this issue. 10% of respondents were on average satisfied, 42% were satisfied, while 47% of respondents were very satisfied with the bank's working hours.

The idea that internal regulation and providing a sense of comfort in bank premises does not matter can be easily overcome with the data obtained from the survey, as 81% of clients think it is very important to feel comfortable when entering the bank, figure.4.

Figure.4 Do you feel comfortable in the bank premises



Source: Authors' work realized by the research done in Tetovo, March-April 2108

This set of questions was related to more general issues of the bank as the environment, schedule, location or appearance of the bank. The second group of questions is about customer satisfaction with banking services.

The next question was about which banking services they use, the respondents could provide more than one answer, while the results are presented below in the figure 5. By analyzing the same question we can point out also the number of services used by clients. This analysis shows that 6% of clients use only one bank service, 25% use two of the services offered by the bank, 33% use three services, while 36% of clients use more than four banking services.

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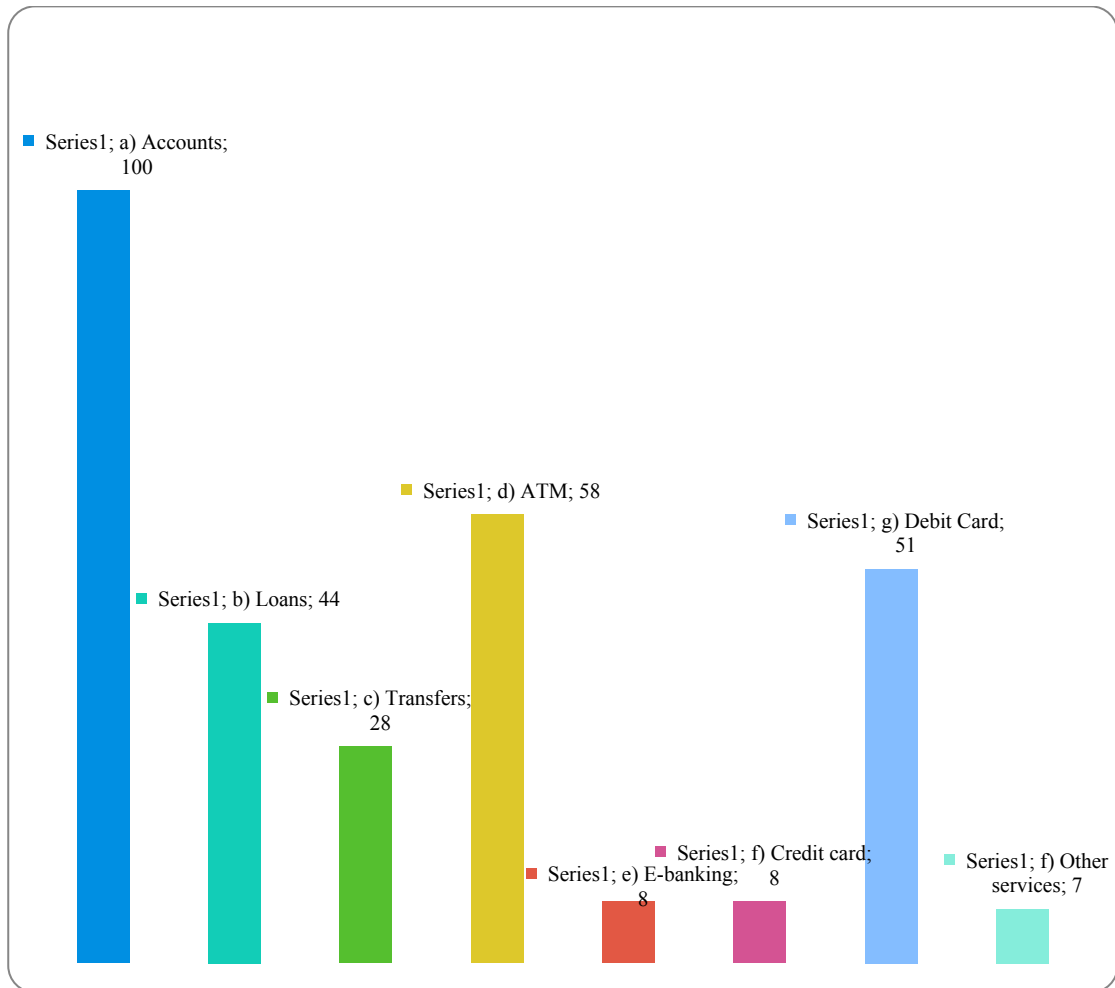
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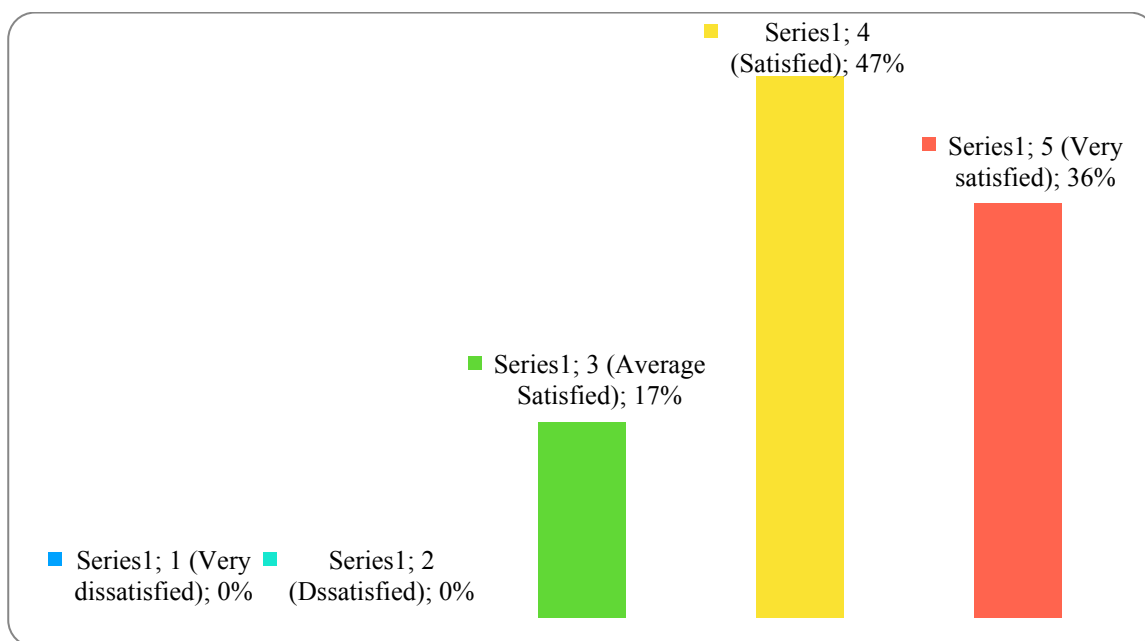
Figure 5. The number of services used by clients



Source: Authors' work realized by the research done in Tetovo, March-April 2108

Regarding the level of satisfaction of services, none of the respondents responded negatively, 17% of clients expressed their satisfaction on average, 47% expressed satisfied with the services, while 36% of the respondents expressed very satisfied. The Economic Bank's challenge is to work on further advancement of services in order to increase the number of satisfied customers, as very satisfied customers can easily become loyal customers to the bank and its services.

Figure 6. Satisfaction from services



Source: Authors' work realized by the research done in Tetovo, March-April 2108

Regarding the Bank staff's professionalism question, the clients had different opinions, 1% of respondents think staff is very unprofessional, 3% think staff is unprofessional, 38% estimate staff professionalism as masters, 42% think that the Economic Bank has a professional staff and 16% are aware that the staff of the bank is very professional.

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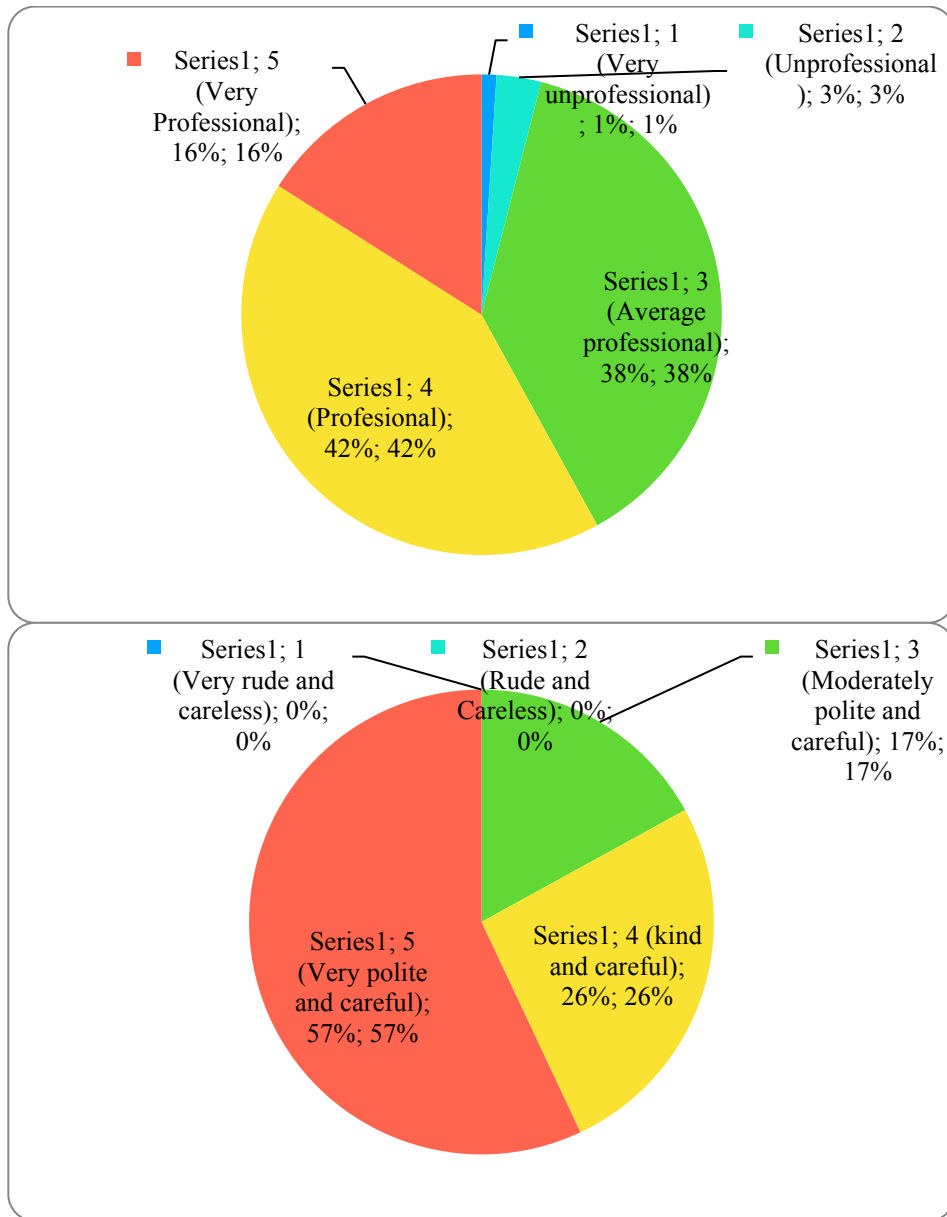
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Figure 7. Staff's professionalism

Figure 8. Staff's behaviour

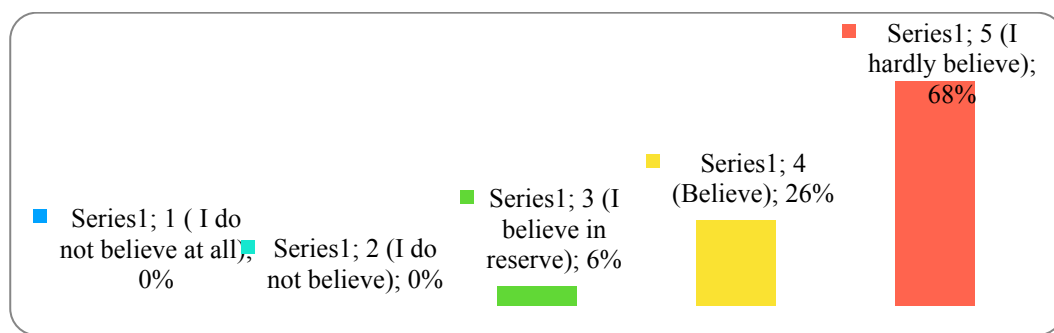


Source: Authors' work realized by the research done in Tetovo, March-April 2108

In addition to staff professionalism, respondents have also responded to the question about behavior and care towards them, as we can see from the figure 8.

The question regarding the bank's security respondents are very satisfied. 6% of respondents have a reserve of confidence in the bank, 26% believe that the bank is safe, while 68% have no doubt about the security of this bank. All this as a result of the client's conviction that the bank is very reliable and safe (the result from Question No. 1 Why did you choose Tetovo Economic Bank)

Figure.9. Bank's security



Source: Authors' work realized by the research done in Tetovo, March-April 2108

The last question was about what the clients think about maintaining the confidentiality of their financial data, the results show that out of the 100 respondents, 5% think that staff does not retain the confidentiality of their financial records while 95% have expressed the conviction that staff does not provide information to anyone who is not authorized to know the financial condition of clients.

Conclusion

The objective of this study was to find out customer satisfaction on service quality on a Commercial Bank in Republic of North Macedonia. From the results obtained on the research of satisfaction and loyalty at the Economic Bank of Tetovo it can be concluded that among the clients of the bank prevails mainly positive opinion regarding the services of the bank as a whole. It has been proven that in most clients, the reliability and security of the bank play the most important role in choosing a bank.

Factors like location, outlook, comfort, and bank work schedules are of great importance as over 80% of consumers consider these important factors to create their satisfaction with the bank.

As far as services are concerned, accounts, credits, debit cards, ATM services and transfers are the most used products from customers. From the data obtained it can be concluded that the majority of customers use more than one product of the bank, whereby customers prefer to have a wide range of banking products in order to have as much opportunity as possible choice.

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Since overall results show a high level of customer satisfaction with banking services, it is in their interest to keep these clients through maintaining ongoing contacts with them and to make efforts to increase the number of loyal customers because that loyal customers will have the role of bank attorneys by referring to others and thereby increasing the number of new clients in the bank.

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ACTIVE POLICIES AND EMPLOYMENT MEASURES IN THE REPUBLIC OF NORTH MACEDONIA

Shpresa Sylva (SEE-University)

Blerta Abazi Chaushi (SEE-University)

Abstract

In many European countries the unemployment rate ranges from 7.6% to 11.3%. The same problem occurs in the Republic of North Macedonia, where the indicator is relatively high (22.9%). Under these conditions the focus of unemployment policies in all countries is based on increasing employment opportunities. To make the unemployed active in the market, various employment programs are being applied, as well as, expenses for their financing. Much of the facts and data on the use and composition of active labor market belong to developed countries. Over the past few years, some data has been available for analyzing the progress of these policies in the transition countries. Practically, there is still no systematic data for developing countries. In this paper, we will present the empirical analysis of the relationship between the expenditure of active labor market policies along with the reduction of the unemployment rate. The analysis will be carried out through multiple linear regression. As parameters and indicators of the model, we will have the following: the number of employees, the number of policy makers and the policy budget active in the Republic of North Macedonia.

Keywords: employment, GDP, policy users, active policy, budget

Introduction

Training programs are one of the most active labor market measures available in Europe. Assessing their effectiveness yields mixed results. Evaluations of the treatment effect are negative in few cases and only few times they result positively. There are a number of indicators which indicate that training programs increase employment opportunities, especially for participants with bright future in the labor market as well as for women. However, this model does not stand for all the studies.

Generally, negative effects of training are reported, though it remains unclear to what extent they are completely undesirable. Recent literature on assessment of training emphasizes the need for long-term effects (Mazza, 2017; Pignatti & Van Belle, 2018; Williams & Bezeredi, 2019). Such an assessment becomes increasingly possible based on wider data. There are indicators from these studies that show that the positive effects of training will appear over a long period of time. The short-term negative effects are balanced by the long-term benefits of participating in the program. Private sector programs are linked with wage subsidies. The analysis in the European countries shows that there are many estimates of subsidy schemes for salaries (Williams & Bezeredi, 2017; Youth Wiki, European Commission, 2017). Conclusions are generally positive.

Virtually, all studies assessing private sector pay subsidy programs - such as numerous studies from Denmark, but also facts from Sweden, Norway, Italy, etc. - affirm beneficial impacts on individual employment opportunities (Betcherman, Dar, & Olivas, 2004; Donev, 2009; Jakimovski, 2017; Uzunov, 2011). Although these encouraging findings need to be specified to some extent, as studies usually do not take into account the effects of substitution that may be associated with wage subsidy schemes.

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In contrast to positive outcomes of incentive programs in the private sector, immediate employment in the public sector rarely gives positive effects. Evidence in all countries suggests that the effects of job creation in the public sector on individual employment opportunities are often negligible. Some studies have positive effects on specific social-demographic groups, but no clear patterns emerge from these conclusions (Abrahart, Kaur, & Tzannatos, 2002; Descy, 2014; Dimeski & Karadjoski, 2018; Dzhekova, Franic, Mishkov, & Williams, 2014; Saveska, 1999). The total potential effects are not taken into consideration. Although these measures may not be justified for efficiency reasons, they justify equality reasons and positive social effects, thus preventing discouragement and social exclusion among participants.

An overall rating of services and sanctions in different countries shows that these measures can be an effective way to reduce unemployment. Given that these measures are the least costly model of PATP, the results are even more promising. Moreover, there are a number of experimental studies for this type of program, which provide robust evaluation results. There are indicators that show that services such as job assistance, or consultation and monitoring work mainly for individuals with sufficient skills and brighter future in the labor market, but less for disadvantaged individuals. This model is not entirely clear as some studies conclude the opposite (Jakimovski, 2017; Saveska, 1999; Uzunov, 2011).

While in some countries there are some types of sanctions for non-compliance with job opening requirements, only some of them are evaluated. (Pavetti, Derr, & Hesketh, 2003; Wiesbrock, 2016) Sanctions have always been defined as a powerful policy. Targeting sanctions is an important element. Unemployed workers with low growth re-employment benefit more from having a dictated sanction. A strict sanctioning policy that punishes more unemployed workers will have the same effects as dictated sanctions.

Studies generally show a positive effect on the degree of re-employment as for the main sanctions and for a beneficial system which involves sanctions (Kassenboehmer & Schatz, 2017; Nwaru et al., 2017). A well-balanced system of services and sanctions related to job search, combined with a range of active measures such as training and employment subsidies, appears as "innovation" in the UK (Johnes, 2018). This highlights the assumption that interaction between services provided by the Public Service, the demand of unemployed individuals and the portfolio of active measures all play an important role.

Active labor market policies and measures in Republic of North Macedonia

When it comes to active labor market policies certain types of active measures have been introduced in the Republic of North Macedonia, since 2002. But, the first operational plans for active employment policies were drafted in 2007 by the Ministry of Labor and Social Policy (Ministry of Labor and Social Policy, n.d.). There is a considerable number of Operational Policies of the Ministry of Labor and Social Policies from 2010 to 2017. Based on the data initially in 2010, there are a smaller number of programs: self-employment program, employment program through various trainings, subsidies for employment, public works organization and internship program. During this period, the biggest focus with financial resources was for the subsidy program for employment with 800 beneficiaries, followed by self-employment program with 500 beneficiaries, employment program through trainings with 5000 beneficiaries, program for organization of public works with 1,400 users and program for practical work, which is less funded with 600 users (Employment Service Agency of Republic of North Macedonia, n.d.; State Statistical Office of the Republic of Macedonia, n.d.).

During 2008, unlike in 2007, a program for the formalization of existing businesses has been added, which included 107 persons, however, the program for organizing public works was canceled. The program for self-employment and training has risen positively but with a small outside margin, while the program for practical work and subsidizing employment has a small decrease, also with a small margin.

During 2009, a program for the organization of public works was included again, in addition to existing programs in the previous years, but there were also three other programs: economic empowerment of women victims of violence, Roma employment support program that included 200 people and program pilot to carry out 90-person job vacancies. In 2009, the budget for the programs in general reached the maximum with 12,162 people involved.

Unlike in 2009, in 2010 there is a dramatic decrease in the number of people involved in these programs from 12,162 to 6,947 people, with the budget being greatly reduced. During 2011, there is a new active policy program known as the pilot program for mobilization or labor mobility. This program will include up to 20 people. In 2012 we have a budget increase for the planned programs by adding programs annually more and more. This year includes 10,183 people.

On 27.02.2017, on the website of the Employment Agency of Republic of North Macedonia, the announcement of the conditional payment compensation (KPC) program was announced for the purpose of hiring unemployed people to subsidize the employment of persons of social risk who wish to participate in this program. Persons are required to be registered in the Statistical Office as unemployed and belong to the target group listed below. They may be part of social assistance beneficiaries or family members as beneficiaries of social assistance or child allowances, individuals who are accounted for as "children without parental care" up to the age of 18, victims of domestic violence located in special centers etc.

Year 2018, the last analyzed year, is the year with more programs involved in active politics. This year includes: self-employment program, training program for employment through training, employment subsidy program, financial support for legal entities (small and medium enterprises) for job creation, municipal programs, pilot programs for conducting job vacancies, pilot programs for Roma community members, pilot program for different masters, and employment program through various trainings.

The Employment Agency and other partners are responsible for the implementation and establishment of detailed administrative procedures for the provision of services and implementation of employment programs. The Operational Plan sets out the basic principles to be respected in providing services and implementing employment programs, such as targeting, service description or measures, scope and target groups, allocation of resources, resources and implementation responsibilities.

Moreover, the analysis of the labor market situation in North Macedonia shows that a significant proportion of long-term unemployed, discouraged by ongoing failures to find a job, have gone through a relative inactivity by hanging their hopes on passive benefits programs. This is a problem that is perceived even in the European labor market.

Further analysis of the situation in the labor market shows that other directions where there is room for improvement include: the extent of unemployment benefits and duration. Relating to the high level of

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unemployment, mainly the long-term unemployment, the unemployment rate is very short compared to the European market where countries such as France, the Netherlands, and Belgium depend on the time of previous employment and the age of jobseekers ranging from 1-5 years. In addition, the low unemployment rate (unemployment benefit is only 40% of the minimum wage) is a serious cause of poverty.

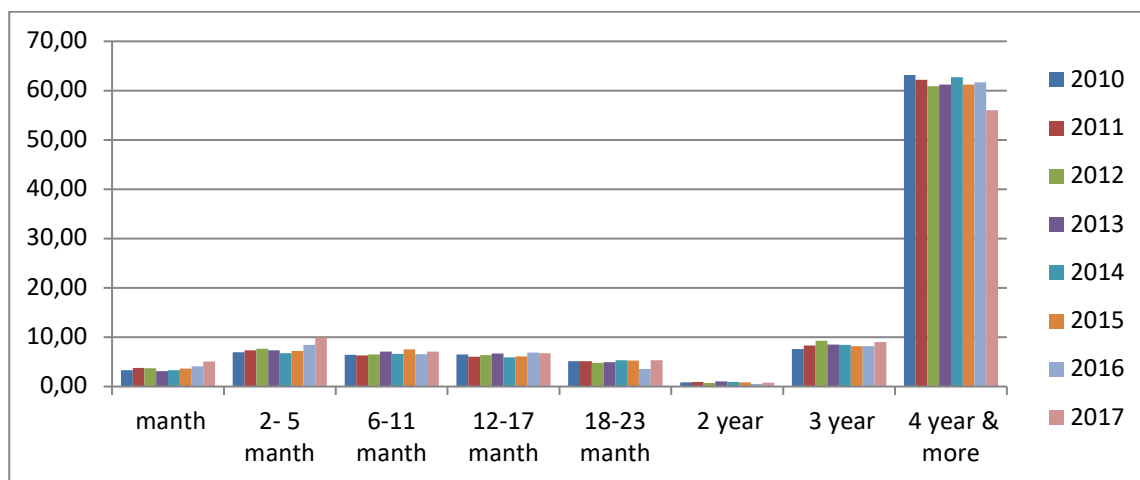


Figure 2: Long term unemployment in Republic of North Macedonia

Source: The waiting time for work, State Statistical Office NRM. Processed by the authors.

As depicted in Figure 2, we can clearly see that the long-term unemployment, high unemployment rate among young people, low participation of women in the labor market and high levels of informal employment remain the biggest challenge.

Research Methodology

In this part of the paper we will present the empirical analysis of the relationship between the expenditure of active labor market policies with the reduction of the unemployment rate. The analysis will be accomplished through multiple linear regression. As parameters or indicators of the model we will have: the number of employees, the number of policy makers and the active policy budget. In this case, the number of employees displays the dependent variables, while the budget and the user are independent variables.

Multiple Linear Regression

Simple linear regression is the simplest form of linear regression analysis. The regression analysis is used to describe the relationships between two variables, for the purpose of:

- Predicting the value of the dependent variables based on the value of at least one independent variable.

- Explaining the effects of changing independent variables in the dependent variables.

The simple linear regression according to the equation appears in this form:

$$E(Y/X) = \beta_0 + \beta_1 X_1 + \epsilon$$

However, in most cases there is more than one predictive variable and this leads to multiple linear regression. Through this model, more factors are influenced by the dependent variables. The multiple regression model appears in this form:

$$E(Y/X) = \beta_0 + \beta_1 X_{i1} + \dots + \beta_n X_{in} + \epsilon_{in}; \quad n = 1, 2, \dots, n.^1$$

Y - represents the dependent variables, in other words regesant

X1, X2, Xn- represent independent variables, in other words regressor

ϵ_{in} - is referred to as the stochastic term, includes all factors not included in the model but affecting the dependent variables

β_0 - coefficient of the constant

$\beta_1, \beta_2, \beta_n$ - partial evaluation factors of the model

For the purposes of the analysis, the data presented in the

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Table 1 should be considered.

Analysis and interpretation of empirical results

From the data presented, it appears that 8 surveys have been used over the years, from 2011 to 2018.

Table 1: Waiting time for work

Year	Users	Budget	Employed
2011	8,300	499,378,880	639,340
2012	6,565	604,524,400	657,849
2013	6,976	554,800,000	685,479
2014	6,411	553,322,983	696,046
2015	16,616	641,830,212	705,991
2016	13,871	180,213,187	723,550
2017	14,835	226,485,225	740,648
2018	16,720	1,045,794,835	759,054

Source : The waiting time for work, State Statistical Office,NRM

The correlation coefficient is the ratio between the variables. It ranges from -1.00 to 1.00. Values -1 to 1 show the perfect and strong correlation between two variables. Values that are closer to 0 indicate a weak correlation if the value is equal to 0, in which case there is no correlation between the two variables. If the correlation is negative, an inverse relationship is shown.

The square R known as the determination coefficient clarifies the suitability of the model, where in our case 60.5% of the employment variations can be explained as the dependency of the budget and the number of active policy users.

$$E(Y/X) = \beta_0 + \beta_1 X_{i1} + \dots + \beta_n X_{in} + \epsilon_{in}; \quad n = 1, 2, \dots, n.^2$$

$$Y = 622346.7 + 6.7349X_1 + 4.890X_2$$

$$Y(\text{Employed}) = 622346.7 + 6.7349 (\text{Users}) + 4.890 (\text{Budget})$$

Based on this model, under other unchanged conditions, if the user-employed ratio, the users increase by 1%, the number of employees will increase to 6.73. If the budget - employed budget, the budget will increase by 1%, then the number of employees will increase to 4,890.

Conclusions and Recommendations

Given the heterogeneity of specific programs and difficulties in comparing programs in different countries, it is difficult to draw accurate conclusions on the question "Which programs work? For who? and Under what conditions?". The quantitative analysis is based on these conclusions and is an attempt to systematize evidence

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and make global conclusions. The purpose of this analysis is to assess whether the available data from all countries support a number of stronger conclusions than those from a single study.

Regardless of the data presented, the unemployment situation in the Republic of North Macedonia remains one of the biggest problems. As a result, the following specific recommendations are given.

- Urgent policies should be devised for employing the unemployed, taking the example of developed and successful countries in this regard by analyzing monitoring and applying those in our country.
- The government must maximally fight corruption and reduce unnecessary costs.
- Finally, in order to be effective, labor market measures should be based on deep labor market analyzes. Given that budget resources are limited, it is even more important that they are well allocated.

Notwithstanding, some general recommendations for policy making in terms of creating active policies and employment measures are also identified.

- Programs should be supported in detailed counseling as well as in job search assistance programs.
- Public training programs should be kept to a small scale and be created for specific needs of both jobseekers and employers.
- While the duration of unemployment is growing, a number of forms of employment subsidies can be used in order to maintain workers' participation in the workforce; however, employment subsidies should be short-lived, structured and monitored closely.
- Use subsidy forms for business establishment for a small number of unemployed who demonstrate entrepreneurial skills and motivation for survival in a competitive environment (Martin p.22).
- The training of employees should be reviewed in the context of lifelong learning for all citizens.
- Countries that are starting to use PATP should start systematically assessing their adaptation programs in the labor market. Evaluation should be introduced within the rigorous program building since the beginning of their implementation
- Increase the role and importance of the Employment Agency, with a qualified staff.
- Stimulating Active Policies in Reducing Bankruptcy in the Republic of North Macedonia.

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THE ASSESSMENT OF TAX EDUCATION REGARDING THE UNIVERSITY STUDENTS WITHIN THE SCOPE OF TAX CONSCIOUSNESS: THE CASE OF CHINA AND TURKEY

VERGİ BİLİNCİ KAPSAMINDA ÜNİVERSİTE ÖĞRENCİLERİNE YÖNELİK VERGİ EĞİTİMİNİN DEĞERLENDİRİLMESİ: ÇİN VE TÜRKİYE ÖRNEĞİ

Ufuk Gergerlioğlu (Hitit University)

Engin Can (Marmara University)

Abstract

Tax consciousness is an important concept which is associated with tax compliance. Without tax consciousness, it is not possible to talk about tax compliance of individuals. One of the most effective arguments for raising tax consciousness is tax education. In particular, the school and family environments are known as the places where tax education is provided. The university environment is one of the places where tax education is given. On the other hand, the raising of tax consciousness is particularly important for developing countries. In light of all this information, this study aims to reveal the impact of tax education on university students from the perspective of developing countries. The students of 3. and 4. grade Department of Accounting who study in Faculty of Business Administration at Macau University situated in China and the students of 3. and 4. grade Department of Public Finance who study in Faculty of Economics at Marmara University situated in Turkey generate the population of this study. The number of samples formed on the basis of this population is 70 people selected from both department students. The data for the students were obtained through the questionnaire method. According to the frequency analysis results, compared to students studying at university level in China, the students studying at the university level in Turkey support tax education more.

Keywords: Tax Compliance, Tax Consciousness, University Students, Attitudes

Giriş

Vergi bilinci, bireylerin vergiye uyumu ile ilişkilendirilen özellikle gelişmekte olan toplumların üzerine eğildikleri önemli bir olgu olarak nitelendirilmektedir. Bireylerin vergi bilinç seviyelerinin yükselmesi ile birlikte, vergiye uyumun artabileceği ve böylelikle kamu harcamalarının finansmanında pozitif bir ivme sağlanabileceğini söylemek mümkün olabilecektir. Böylesi bir durum, vergi bilincini arttırmaya yönelik çabaları anlamlı kılmaktadır. Vergi bilincine ilişkin girişimlerin merkezinde vergi eğitimi yer almaktadır. Bu bilgiler ışığında, çalışma, vergi eğitiminin hangi seviyede ve ne şekilde verileceği konusundan ziyade, üniversite düzeyinde alınan vergi ile alakalı bir eğitimin nasıl bir görünüm ortaya koyabileceği hususunu ele almayı amaçlamaktadır. Bu amaç kapsamında, gelişmekte olan ülkelerde vergi bilincinin artışının önemli bir husus olarak dikkate alınabileceği düşüncesinden hareketle, bu çalışmada, iki gelişmekte ülke konumunda olan Türkiye ve Çin'deki birer üniversite, uygulama için seçilmiştir.

Çin’de konumlanan Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü 3. ve 4. Sınıf öğrencileri ile Türkiye’de yer alan Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü 3. ve 4. Sınıf öğrencileri, bu çalışmanın ana kitlesini oluşturmaktadır. Bu ana kitleye bağlı olarak her bir bölüm öğrencilerinden seçilen 70’er kişi, çalışmaya yönelik örneklem sayısını oluşturmaktadır. Her iki bölüm öğrencileri de, bugüne kadar vergiye yönelik eğitim almışlardır. Bu eğitimin ilgili bölüm öğrencileri arasında nasıl bir görünüme sahip olduğuna ilişkin analizlerin ortaya konulduğu anket uygulamasına dayalı çalışma, karşılaştırılabilir nitelikte sonuçlar ortaya koymaktadır. Anket uygulamasında, Gergerlioğlu & McGee (2017) tarafından vergi bilinci kapsamında İstanbul Üniversitesi İktisat Fakültesi öğrencilerine yöneltilen ifade ve sorulardan faydalanılmıştır. Tüm bu bilgi ve verilerden hareketle, çalışmada, ilk olarak vergi bilinci ile alakalı kavramsal çerçeveye değinilmekte olup sonrasında vergi bilinci çerçevesinde ele alınan uygulamalı çalışmalara yer verilmektedir. Çalışmanın devamında, vergi eğitimi almış olan Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü öğrencileri ile Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerinin vergi bilincine yönelik tutumları, karşılaştırmalı olarak sıklık analizleri yardımıyla açıklanacaktır.

Vergi Bilincine Yönelik Kavramsal Çerçevenin ve Saha Çalışmalarının Ele Alınması

Bu başlık altında, vergi bilincine ilişkin kavramsal çerçeve ile vergi bilinci kapsamında yürütülen saha çalışmaları sonuçlarına değinilmektedir. Bununla birlikte burada, vergi eğitimi kapsamında İstanbul Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerine yöneltilen ifadelerin aynısının Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerine de yöneltilmiş olması sebebiyle kısa bir karşılaştırma da yapılmaktadır.

Vergi Bilincine Yönelik Kavramsal Çerçeve

Vergi bilinci, bir bireyin vergiyi nasıl algıladığına ve bu algılamının ilgili bireyin davranışında ne denli bir etki ortaya koyabileceğine yönelik bir kavram olarak nitelendirilmektedir (Teyyare & Kumbaşı, 2016, s.4). Bununla birlikte, vergi bilinci, vergilerin bir gereklilik olarak bilinmesi ve değerlendirilmesi hususu ile de açıklanabilmektedir (Yeşilyurt, 2015, s.37). Diğer bir tanımlama ile vergi bilinci, bireylerin vergiye gönüllü uyumunu olumlu yönde etkileyen ve vergi eğitimine bağlı olarak gelişen bir görünüm de ortaya koymaktadır (Çiçek & Bitlisli, 2017, s.263).

Vergiye yönelik eğitimin vergi bilinci üzerinde belirleyici yönde bir etkiye sahip olduğu kabul edilmektedir (Teyyare & Kumbaşı, 2016, s.26). Bu bağlamda, bugünün çocuklarının geleceğin vergi mükellefleri olabileceği hesaba katıldığında, küçük yaşta vergi kapsamında alınan eğitimin önem arz edebileceğini söylemek mümkündür (Özkan, 2017, s.482). Bilhassa, vergi bilincine yönelik temel bilgilendirmenin ilköğretim düzeyinde yapılması, vergi bilincinin yerleşmesinde etki bir role sahip olabileceği savunulmaktadır (Demir & Cigerci, 2016, s.128). Dolayısıyla vergi eğitimi, vergi bilincini olumlu yönde etkileyen bir faktör olarak değerlendirilmektedir. Öte yandan, vergi aflarının sıklıkla uygulanması, vergi sistemindeki karmaşıklık, vergilemeye yönelik yapılan incelemeler, ülkelerin gelişmişlik seviyeleri gibi faktörlerin de vergi bilincini etkilediği bilinmektedir (Teyyare & Kumbaşı, 2016, s.6).

Vergi Bilincine Yönelik Mevcut Saha Çalışmaları

Çiçek & Bitlisli (2017), üniversite öğrencileri kapsamında yapmış olduğu bir çalışmada vergiye yönelik eğitim alan öğrencilerin vergilendirme karşısından olumlu bir tutum içerisinde olabileceklerini açığa çıkartmaktadır. Sağlam (2013), üniversite öğrencilerine ilişkin olarak yürütmüş olduğu bir araştırmada, öğrencilerin iktisat ve maliye kapsamında aldığı derslerin onların vergi bilinçlerini olumlu yönde etkileyebileceğini göstermektedir. Akkara & Gencel (2016) ise, üniversite öğrencilerine uygulamış oldukları anket çalışmasına ilişkin sonuç değerlendirmesinde, öğrencilerin vergi bilincinin artırılmasında eğitim ve öğretimin etkili olabileceği yönündeki görüşleri dikkate değer niteliktedir. Hatta kamu maliyesi literatüründe vergi eğitiminin erken yaşlarda alınmasına yönelik birçok çalışmanın yapıldığı da görülmektedir.

Demir & Cığerci (2016) tarafından ilköğretim öğrencilerine yönelik yapılan bir çalışma, vergiye yönelik eğitimin erken yaşlarda verilmesinin vergi bilincini pozitif yönde etkileyebileceğini göstermektedir. Sağbaş & Başoğlu'nun (2005) yürütmüş olduğu araştırma sonuçları, Demir & Cığerci'nin (2016) çalışma neticeleri ile tutarlılık göstermektedir. Bununla birlikte, Taytak (2010) tarafından ilköğretim öğrencilerine yönelik yürütülen anket çalışmasının sonuçları, vergi bilincinin ilk olarak ailede başladığını ortaya koymaktadır. Gür & Yıldız (2017) tarafından meslek yüksek okulu öğrencilerine yönelik olarak yapılan ve vergi bilincini konu alan bir araştırmanın neticeleri, Taytak'ın (2010) çalışma sonuçlarını desteklemektedir. Gür & Yıldız (2017), ankete katılan öğrencilerin vergi kavramını ilk olarak kendi aile ortamı içerisinde duyduklarını ortaya koymaktadır. Buna karşın, Çiçek & Ömürbek (2007), iktisadi ve idari bilimler fakültesinin 4. Sınıf öğrencilerine yönelik olarak yürütmüş oldukları çalışmada, okulda ve aile içinde öğrencilere vergiye yönelik eğitimin verilmesinin vergi bilinci üzerinde pek de fazla olumlu yönde bir etki açığa çıkartmayacağını göstermektedir.

Gergerlioğlu & McGee (2017), vergi bilinci bağlamında İstanbul Üniversitesi İktisat Fakültesi öğrencilerini konu alan kapsamlı bir anket uygulaması yapmışlardır. İlgili ankette, vergi eğitimi kapsamında ifadeler de yer verilmiştir. Anket aracılığıyla sağlanan verilere yönelik sıklık analizi sonuçları, “Müfredatımızda vergi bilinci ile alakalı bir seçmeli dersin olmasından yanayım”, “Okulumda düzenlenecek ‘vergi bilincim nasıl artar?’ konferansına katılmak isterdim”, “Devletin öncülüğünde yapılan ‘vergi bilinci geliştirme eğitimlerinin’ toplumda vergi bilincini arttıracığına inanıyorum”, “Vergi bilinci ile ilgili eğitimlerin, ilköğretimden başlaması gerektiğine inanıyorum” “Vergi bilincinin gelişiminde ailede alınan eğitimin önemli role sahip olduğunu düşünüyorum” ifadelerini öğrencilerin %60-%70 aralığında desteklediklerini göstermektedir.

Vergi Eğitimi Kapsamında İstanbul Üniversitesi ve Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerine yönelik bir Karşılaştırma

Gergerlioğlu & McGee (2017) tarafından İstanbul Üniversitesi İktisat Fakültesi öğrencilerine yönelik yapılan anket uygulamasında öğrencilere yöneltilen soru ve ifadelerin aynısı, bu çalışmaya konu olan Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü öğrencileri ile Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerine de iletilmiştir. Ancak burada sadece İstanbul Üniversitesi ve Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerine yönelik karşılaştırmalı bir değerlendirme yapılmaktadır.

Gergerlioğlu & McGee (2017)'ye ait anket çalışması sonuçları, İstanbul Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerinin “Müfredatımızda vergi bilinci ile alakalı bir seçmeli dersin olmasından yanayım”, “Okulumda düzenlenecek ‘vergi bilincim nasıl artar?’ konferansına katılmak isterdim” ile “Devletin öncülüğünde yapılan ‘vergi bilinci geliştirme eğitimlerinin’ toplumda vergi bilincini arttıracığına inanıyorum” tutum ifadelerini sırasıyla %63.2; %61.4 ve %70.2 oran düzeyinde desteklediklerini ortaya koymaktadır.İlgili tutum ifadelerine yönelik sıklık analizi sonuçları, bu tutum ifadelerinin çalışmaya konu olan Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencileri tarafından sırasıyla %70; %84.3; %87.1 oran düzeyinde desteklendiklerini göstermektedir. Öte yandan Gergerlioğlu & McGee (2017) tarafından yürütülen anket uygulaması neticeleri, İstanbul Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerinin “Vergi bilinci ile ilgili eğitimlerin, ilköğretimden başlaması gerektiğine inanıyorum” ile “Vergi bilincinin gelişiminde ailede alınan eğitimin önemli role sahip olduğunu düşünüyorum” tutum ifadelerini sırasıyla %61.4; %68.4 oran seviyelerinde desteklediklerini açığa çıkartırken, bu çalışma sonuçları aynı tutum ifadelerini Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerinin sırasıyla %68.6 ve %72.9 oran seviyelerinde desteklediklerini göstermektedir.

Araştırmanın Metodolojisi

Çin'deki Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü 3. ve 4. sınıf öğrencileri ile Türkiye'de bulunan Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü 3. ve 4. Sınıf öğrencileri, araştırmanın ana kitlesini oluşturmaktadır. Bu ana kitle esas alınarak oluşturulan örneklem sayısı, her iki bölüm öğrencilerinden seçilen 70'er kişidir. Örneklem olarak seçilen bu öğrencilerin tümü, bugüne kadar vergiye yönelik eğitim kapsamında en az bir ders almışlardır. Her iki örneklem grubu içerisinde 4. Sınıf öğrencileri ağırlıktadır. Her iki örneklem grubunda 15 erkek 55 kız öğrenci mevcuttur. Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü öğrencileri ile Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencileri verilerine ilişkin güvenilirlik analizine temel oluşturan Cronbach's Alfa Değerleri sırasıyla 0.894 ve 0.812'dir. Eğer Cronbach's Alfa değeri, 0.70'i aşmış ise, bu durumda ölçek güvenilirliğinden söz etmek mümkündür (Lavrakas, 2008). Ankette yer alan her bir tutum ifadesine yönelik sıklık analizleri yapılmıştır (Tablo 1).

Sıklık Analizi Sonuçlarının Değerlendirilmesi

Sıklık analiz değerleri, Tablo 1'de ayrıntılı bir biçimde görülmektedir. Bu analiz değerlerine bağlı olarak ortaya çıkan en belirgin sonuçlar aşağıdaki gibidir;

a) 6 Numaralı (Devletin öncülüğünde yapılan “vergi bilinci geliştirme eğitimlerinin” toplumda vergi bilincini arttıracığına inanıyorum), 10 Numaralı (Müfredatımızda vergi bilinci ile alakalı bir seçmeli dersin olmasından yanayım), 22 Numaralı (Okulumda düzenlenecek “vergi bilincim nasıl artar?” konferansına katılmak isterdim) tutum ifadeleri için Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü öğrencileri ile Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü öğrencilerinin vermiş olduğu destekleme yüzdeleri bir arada değerlendirildiğinde, Maliye Bölümü öğrencilerinin Muhasebe Bölümü öğrencilerine nazaran vergi eğitimine daha çok önem verdikleri sonucuna varılabilmektedir.

b) 7 Numaralı (Vergi bilincinin gelişiminde ailede alınan eğitimin önemli role sahip olduğunu düşünüyorum) ve 17 Numaralı (Vergi bilinci ile ilgili eğitimlerin, ilköğretimden başlaması gerektiğine inanıyorum) tutum

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ifadelerine her iki bölümün öğrencilerinin verdikleri cevaplar birlikte ele alındığında, Muhasebe Bölümü öğrencilerine kıyasla Maliye Bölümü öğrencilerinin vergi eğitiminin küçük yaşlarda başlaması konusunda daha çok destekleyici tutum ortaya koydukları görülmektedir.

Yukarıda detayları verilen a ve b maddeleri kapsamındaki tüm tutum ifadelerine yönelik öğrenci destekleri bir bütün olarak göz önünde bulundurulduğunda, vergi eğitiminin Türkiye’de üniversite düzeyinde öğrenim gören öğrenciler tarafından Çin’de öğrenim gören öğrencilere kıyasla daha çok destek gördüğü sonucuna ulaşılmaktadır. Bu sonucun birkaç nedeni olabilir. Türkiye’de vergi bilincini arttırmaya ilişkin çabalar, bilhassa vergi haftası etkinlikleri kapsamında yıllardır süregelmektedir. Öte yandan özellikle son 10 yıl içerisinde gerek üniversite öğrencilerine gerekse ilköğretim seviyesindeki öğrenciler kapsamında çok sayıda saha uygulaması çalışmaları yapılmıştır. Bunlara ilave olarak, Türkiye’de devletin öncülüğünde vergi bilincini eğitim-öğretim seviyesinde arttırmak için resmi internet sitesi bile kurulmuştur. Tüm bu çabaların, vergi bilincinin artırılmasına dair kamuoyunda bir motivasyon oluşturduğu veya oluşturacağı şüphesizdir.

Tablo 1: Üniversite Öğrencilerine Yönelik Tutum İfadeleri Sıklık Yüzdelerinin Karşılaştırılması

ÜNİVERSİTE ÖĞRENCİLERİNE YÖNELTİLEN TUTUM İFADELERİ	TUTUM İFADELERİNE KATILMA YÜZDESİ	TUTUM İFADELERİNE KATILMA YÜZDESİ
	Macau Üniversitesi- İşletme Yönetimi Fakültesi- Muhasebe Bölümü Öğrencileri	Marmara Üniversitesi- İktisat Fakültesi- Maliye Bölümü Öğrencileri
1-Vergi sistemi anlaşılır değilse, toplumdaki vergi bilinci düşebilir.	82.9	87.1
2-Eğitim seviyesi yükseldikçe vergi bilincinin artacağını tahmin ediyorum.	72.9	78.6
3-Vergi denetimlerinin sıklaşması, vergi bilincini artırabilir.	72.9	87.1
4-Vergi bilinci yüksek olan bireylerin, vergi yükümlülüklerini düzenli olarak yerine getireceklerine inanıyorum.	67.1	78.6
5-Vergi idaresinin olumsuz yaklaşımları vergi bilincini zayıflatabilir.	67.1	88.6
6-Devletin öncülüğünde yapılan “vergi bilinci geliştirme eğitimlerinin” toplumda vergi bilincini arttıracığına inanıyorum.	65.7	87.1
7-Vergi bilincinin gelişiminde ailede alınan eğitimin önemli role sahip olduğunu düşünüyorum.	64.3	72.9
8-Vergi adaletsizliğinin vergi bilincini zayıflatacağına inanıyorum.	64.3	92.9
9-Vergi bilinci yüksek olan bireyler de vergi kaçırabilir.	62.9	52.9
10-Müfredatımızda vergi bilinci ile alakalı bir seçmeli dersin olmasından yanayım.	61.4	70
11-Vergi bilincinin artması ile birlikte devletin vergi gelirleri artabilir.	54.3	78.6
12-Vergi bilinci gelişmiş toplumların refah seviyelerinin yüksek olduğuna inanıyorum.	54.3	78.6
13-Vergi bilinci yüksek olan bireyin, iyi bir vatandaş olduğuna inanıyorum.	48.6	67.1
14-Toplumumuzda vergi bilinci daha yüksek olsaydı, daha iyi imkanlar da eğitim alabilirdim.	48.6	58.6
15-Kayıt dışı ekonominin artması, toplumdaki vergi bilincini azaltabilir.	48.6	42.9
16-Vergi bilinci düşük olan bireylerin, vergi öderken gönüllü olmayacaklarına inanıyorum.	48.6	85.7
17-Vergi bilinci ile ilgili eğitimlerin, ilköğretimden başlaması gerektiğine inanıyorum.	45.7	68,6
18-Vergi bilinci arttıkça vergi kaçırma eğilimlerinin azalacağını düşünüyorum.	45.7	80
19-Vergi cezalarının düşüklüğü vergi bilincini azaltabilir.	44.3	57.1
20-Toplumumuzda vergi bilinci artarsa, daha iyi sağlık hizmeti alabilirim.	42.9	65.7
21-Yoksul bireylerin vergi bilinçlerinin daha düşük olduğunu tahmin ediyorum.	38.6	35.7

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22-Okulumda düzenlenecek “vergi bilincim nasıl artar?” konferansına katılmak isterdim.	38.6	84.3
23-Vergi aflarının sıklığı vergi bilincini azaltabilir.	38.6	74.3
24-Dini inançları güçlü olan bireyler, daha çok vergi bilincine sahip olabilirler.	34.3	18.6
25-Vergi bilincinin düşük olduğu ülkeleri, gelişmemiş ülkeler olarak değerlendiriyorum.	32.9	44.3
26-Vergi bilinci yüksek olan bireylerin, ülkelerini daha çok sevdiğini düşünüyorum.	27.1	50
27-Vergi oranlarının yüksek olması, vergi bilincini zayıflatır.	27.1	67.1
28-Bireylerin maddi gelirleri yükseldikçe, vergi bilincinin düşeceğine inanıyorum.	22.9	22.9

Sonuç

Vergi uyumu, hükümetlerin üzerinde önemle durdukları konuların başında gelmektedir. Vergi uyumunu sağlamak için hükümetler, birçok yola başvurmaktadır. Bu yollardan birini de, bireylerin vergi bilinçlerinin artırılmasına yönelik çabalar oluşturmaktadır. Vergi bilinci, bilhassa vergi eğitimi ile ilişkilendirilmektedir. Buna bağlı olarak vergi eğitiminin sağlanmasının vergi bilincini arttırabileceğine yönelik olumlu kanaatler gelişim göstermektedir. Özellikle, gelişmekte olan ülkeler için vergi uyumunun vazgeçilmez bir unsur olarak nitelendirilmesi ve bu kapsamda vergi bilincinin oluşturulması adına vergi eğitime ilişkin bir dizi girişimin desteklenmesi anlamlı bir görünüm ortaya koymaktadır. Bu bağlamda, vergi eğitiminin bilhassa okul çağındaki çocukların vergi bilinçlerine katkı sağlayabileceği düşüncesi ve bu düşünceden hareketle bir takım uygulamaların hayata geçirilmesi önemli hale gelmektedir. Türkiye uygulamaları, bu açıklamaları destekler nitelikte bir çerçeve sunmaktadır. Bu bilgilerden hareketle, çalışmamızda, vergi eğitiminin üniversite düzeyinde nasıl bir etki ortaya koyabileceğine ilişkin bir durum değerlendirmesi yapılmaktadır. Bu değerlendirme yapılırken çalışmaya katkı sağlamak amacıyla gelişmekte olan bir ülke konumundaki Çin’de bulunan bir üniversite de dikkate alınmış ve böylece iki farklı üniversitenin verilerinin karşılaştırılması söz konusu olmuştur.

Ankete dayalı olarak yapılan çalışma, Çin’deki Macau Üniversitesi İşletme Yönetimi Fakültesi Muhasebe Bölümü 3. ve 4. sınıf öğrencileri ile Türkiye’de bulunan Marmara Üniversitesi İktisat Fakültesi Maliye Bölümü 3. ve 4. Sınıf öğrencileri dikkate alınarak uygulanmıştır. Maliye Bölümü öğrencilerinin vergi eğitimi aldıklarını ve belirli bir vergi bilinci seviyesine sahip olabileceklerini söylemek mümkündür. Öte yandan Muhasebe eğitimi alan öğrencilerin aldıkları eğitim sebebiyle vergiye yönelik bir bilgilenmeye sahip olabilecekleri kabul edilmektedir (Erge, 2016, s. 243). Dolayısıyla, muhasebe bölümü öğrencilerinin de belirli bir düzeyde vergi bilincine sahip olabileceklerini söylemek yanıltıcı olmayacaktır.

Çalışmaya yönelik sıklık analizi sonuçları incelendiğinde, her iki bölümün öğrencilerinin “Devletin öncülüğünde yapılan ‘vergi bilinci geliştirme eğitimlerinin’ toplumda vergi bilincini arttıracığına inanıyorum” ve “Müfredatımızda vergi bilinci ile alakalı bir seçmeli dersin olmasından yanayım” tutum ifadelerini %60’ın üzerinde destekledikleri görülmektedir. Bu sonuçlar, Gergerlioğlu & McGee (2017), Çiçek & Bitlisli (2017), Sağlam (2013), Akkara & Gencel (2016) tarafından yapılan araştırma sonuçları ile tutarlılık ortaya koymaktadır. Ayrıca her iki bölüm öğrencileri “Vergi bilincinin gelişiminde ailede alınan eğitimin önemli role sahip olduğunu düşünüyorum” tutum ifadesini %60 oran seviyesinden daha yukarı bir düzeyde

desteklemektedirler. Bu netice, Demir & Cığerci (2016), Sağbaş & Başoğlu'nun (2005), Taytak (2010), Gür & Yıldız (2017), Gergerlioğlu & McGee (2017) tarafından yürütülen anket uygulama sonuçları ile tutarlılık göstermektedir. Tüm bu sonuçlar bağlamında bu noktada birkaç önerinin yapılması yerinde olacaktır.

Vergi bilinci kapsamında vergi eğitime yönelik üniversite öğrencilerine ilişkin uygulamalı çalışmaların, Türkiye boyutuyla daha spesifik bölümler esas alınarak karşılaştırılmaya dönük yapılması, diğer taraftan da gelişmiş veya gelişmekte olan ülkelerdeki üniversite bölümlerinin de göz önünde bulundurularak kapsamlı bir biçimde ele alınması kamu maliyesi literatürüne daha belirgin ve anlamlı katkılar sağlayacaktır.

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ANALYSIS OF A GAME THEORY: BEVERIDGE CURVE

BİR OYUN TEORİSİ ANALİZİ: BEVERIDGE EĞRİSİ

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Abstract

The relationship between price changes, employment and production level maintains its importance. The Beveridge curve basically reveals the existence of an inverse relationship between vacant employment rates and unemployment rates. From this point of view, this study shows the relationship between government, employers and workers. The study will examine the number of optimal staff to be opened by the government.

Keywords: Beveridge Curve, Game Theory, Unemployment, Labor, Monetary Policy, Use of Labor.

Giriş

Makro ekonominin temel ilgi alanlarından birisi de istihdamdır. Literatürde istihdamla ilgili sorunların çözülmesine yönelik geniş bir çalışma alanı bulunmaktadır. Philips Eğrisi ve Beveridge Eğrisi bu kapsamda değerlendirilebilmektedir.

Beveridge eğrisi, temel olarak açık iş oranları ile işsizlik oranları arasındaki ters yönlü bir ilişkinin varlığını ortaya koymaktadır. Bu çalışmanın üzerinde temel aldığı dinamik oyun modelinde açık iş oranları ile işsizlik oranları arasındaki bu ters yönlü ilişki çerçevesinde devlet, işverenler ve işçiler arasındaki ilişki analiz edilmektedir.

Beveridge Eğrisinin Teorik Temelleri

Beveridge Eğrisi olarak adlandırılan U/V eğrisi, işsizlik ve açık iş pozisyonları arasındaki negatif ilişki olarak betimlenmiştir (Dow ve Dicks-Mireaux, 1958). Varlığı ilk defa Beveridge tarafından öne sürülen, bu nedenle “Beveridge Eğrisi” olarak bilinen işsizlik-iş açığı veya “u-v” eğrisine dair bilinen ilk çalışma Dow ve Dicks-Mireaux (1958) tarafından yapılmıştır (Pissarides, 2000). Dow ve Dicks-Mireaux (1958), Britanya’da 1946-1956 yılları arasında işsizlik ve boştaki iş pozisyonları istatistiklerinden hareket ederek, bu iki değişken arasında negatif bir ilişki bulmuşlardır. Buna göre, işsizlik arttıkça, açık iş pozisyonları zamanla azalmaktadır. Bu nedenselliğin tersi de geçerli olmakta, işsizlik azaldıkça açık iş pozisyonları artmaktadır. UV Eğrisi’nin karakteristik özelliklerinden biri onun konveks yapısıdır: Emek talebindeki bir birim artış, işsizlik oranında oransal olarak daha küçük bir azalmaya yol açacaktır ki, Dow ve Dicks-Mireaux bu durumu “işsizliğin artan duyarsızlığı” olarak betimlemektedir.

Emek talebinin çok yüksek seviyelere çıkması durumunda bile işsizliğin var olabilmesi, Beveridge Eğrisi'ne olan ilgiyi arttırmıştır (Rodenburg, 2011). İktisat teorisi işsizlikteki artışın dört temel nedenini şu şekilde açıklamaktadır: Bunlardan birincisi, Keynesyen işsizlik olarak nitelendirilen efektif talepte azalma; ikincisi Klasik işsizlik olarak nitelendirilen reel ücretlerin çok yüksek olması durumudur. Üçüncüsü niteliksel, mesleki veya bölgesel nedenlerden dolayı emek talebi ile emek arzı arasındaki eşleşememe; bir diğer adıyla yapısal işsizliktir. Dördüncüsü friksiyonel işsizliktir: işsizlerin iş aramaktan vazgeçmeye başlaması, emek piyasalarındaki bilgi eksikliği veya işverenlerin aşırı seçici davranması gibi nedenlerle iş eşleşme sürecinin uzamasıdır. Beveridge Eğrisi, bu dört işsizlik nedenini birbirinden ayırmada kullanılabilmektedir. Bu sayede işsizliğin temel sorunu tespit edilmek suretiyle ilgili iktisat politikası uygulanabilmektedir (Christl, 1992).

Beveridge Eğrisi 1970'li yıllara kadar, Phillip Eğrisi ile birlikte makro iktisatın emek piyasasına yönelik önemli analiz araçlarından birisi olmasına karşın, teorik bir altyapı'dan mahrum kalmıştır (Rodenburg, 2011). Hansen (1970), Beveridge Eğrisi'ne, Neoklasik Teori'nin arz ve talep çerçevesini entegre ederek aynı anda hem işsizliğin hem de açık iş pozisyonlarının var olabileceğini göstermiştir. Ancak özellikle eğrideki kaymalar konusunda uzun süre uzlaşa sağlanamamıştır. Beveridge Eğrisi için geliştirilen modellerin statik yapısı ve mikroiktisadi temelden yoksun olması eleştirileriyle birlikte; arama ve eşleşme teorilerine dayanan yeni modeller geliştirilmiştir.

Genel olarak, ekonomik yavaşlama dönemlerinde “işlerdeki yıkım” süreci, iş yaratım sürecine göre daha değişken karakterli olduğundan eğri boyunca aşağıya doğru bir hareket meydana gelmektedir. Bu da daha az açık iş pozisyonuna göre daha yüksek bir işsizlik anlamına gelmektedir. Ekonomideki iyileşme ise eğri boyunca yukarıya doğru bir hareket sağlamaktadır. Yavaşlama dönemlerinde, kısa süreli işlerin teşviki gibi bazı hükümet politikaları, işsizliğin artmasını engelleyerek eğrini içe doğru kaymasını sağlayabilmektedir. İstihdam yaratmayan ekonomik iyileşme süreçleri ise eğriyi dışarı doğru kaydırmaktadır: işsizlik artarken açık iş pozisyon sayısı sabit kalmaktadır (Bova et al, 2018). Eğri boyunca gerçekleşen değişimler çevrimsel, eğrideki kaymalar ise yapısal olarak yorumlanmaktadır (Diamond, 2013).

Açık iş pozisyonları fazlayken, işsizliğin azalmaması eğitimle ilgili sorunlara odaklanmayı getirirken, açık iş pozisyonlarının zaman içinde düşük oranlarda seyretmesi birkaç nedenle açıklanmaktadır (Diamond, agy). Bu nedenler arasında düşük karlılık, yatırımları finanse etmenin eskisine göre daha zor olması, üretim maliyetlerinin artması, istihdam edilecek işçilerin yetenekleri ve üretkenlik seviyelerine kıyasla daha yüksek ücretlerin gerekliliği, kamu düzenlemeleri, kamu harcamaları ve vergilendirmede meydana gelen değişiklikler sayılmaktadır.

Literatür Taraması

Beveridge Eğrisi ile ilgili incelemeler daha çok dengeye, eşleşme mekanizmalarına ve eğrinin kayma dinamiklerine odaklanmaktadır. Bonthius vd (2016), Euro bölgesi için yaptığı analizde, yetenek eşleşmemesini ve düşük nitelikli işgücünün istihdam içinde yüksek bir ağırlığa sahip olmasını dışa kaymanın temel nedenleri olarak işaret ederken, kadınların işgücüne yüksek oranlı katılımının bu etkiyi yumuşattığını ifade etmektedir. Bova vd. (2018), 2000-2013 dönemi için 12 OECD ülkesinde eşleşme ve kaymaları araştırmışlar; işgücü miktarında yüksek orandaki artışların eğriyi dışarı kaydırıldığını, diğer taraftan emek piyasasındaki korumacılığın, işsizlik maaşlarının ve yeniden dağılımı sağlayan vergi ve harcama politikalarının bu etkiyi hafiflettiğini tespit etmişlerdir. Hobjin ve Şahin (2013), ABD'nin büyük resesyon dönemi için yaptıkları

incelemede, işçilerin önemli bir bölümünün iş değiştirmesinin açık iş pozisyonlarının kompozisyonunu değiştirdiğini, bunun da emek piyasasındaki eşleşmezlikleri arttırdığını göstermişlerdir. Daly vd. (2012), ABD’de büyük resesyon döneminde doğal işsizlik oranının yükseldiğini bulmuş, bunun temel nedeni olarak uzatılan işsizlik sigortasını gösterirken, eşleşmezliklerin sınırlı bir etkiye sahip olduğunu belirtmiştir.

Beveridge eğrisinin kısa dönemli dengesini inceleyen Pissarides (1985), ücretlerin bireysel seviyede, firma ile işçinin pazarlığı doğrultusunda belirlendiğini ifade etmekte ve bu şekilde belirlenen ücretlerin iş kabul etmede ve reddetmede esneklik sağladığına dikkat çekmektedir. Diğer yandan açık iş pozisyonu arzı, kar maksimizasyonu temelinde firma tarafından özel olarak belirlendiğinden, iş arayanlar uzun süre işsiz kalabilmektedir. Cheron ve Langot (2000), iş çevrimleri modeli çerçevesinde, teknolojik çalkantıların, açık iş pozisyonu sayısı ile işsizlik arasında güçlü bir negatif bağlantı yarattığını belirtmektedir. Eğer pozitif bir verimlilik şoku yaşanırsa, firmalar açık iş pozisyonlarına yatırım yapmak için motive olacaklar, bu da işsizliği azaltacaktır. Dolayısıyla teknolojik şoklar, BeveridgeEğrisi’nin en güçlü açıklayıcısıdır. Ancak Nadeau (2013), BeveridgeEğrisi’nin ve ücretlerdeki değişimin teknolojik şoklara indirgenmesini eleştirerek, firmaların açık iş pozisyonu yaratmak için maruz kaldığı finansman maliyetlerini ön plana çıkarmaktadır. Sürtünmeli kredi piyasalarını kullanmak zorunda kalmak, firma için açık iş pozisyonu yaratmanın fırsat maliyetini yükselteceğinden, emek piyasasındaki katılıklar da artacaktır. Arama ve eşleşme modellerinden farklı olarak ajan temelli modellerle BeveridgeEğrisi’ni açıklamaya çalışan Cardulla ve Guerci (2017)’ye göre açık iş pozisyonlarının sayısı artsa da, işsizlik oranları düşmeyebilir. Bunun temel nedeni, firmaların, iş arayanların verimlilik seviyeleri hakkında eksik bilgiye sahip olmasıdır.

Model ve Analiz

Bu çalışmanın temel amacı, işçiler, işverenler ve devlet arasındaki ilişkinin modellenmesidir. Oyunun ilk periyodunda işçiler, işverenlerden talep edecekleri optimal reel ücret düzeyini belirlemektedir. İşçilerin fayda düzeyini etkileyen değişkenler, devletin sağlayabileceği toplam kadro sayısı, işçilerin talep edecekleri reel ücret düzeyi, işçilerin ortalama beşeri sermaye düzeyi, piyasadaki toplam emek düzeyi ve piyasadaki işverenlerin talep edecekleri emek düzeyidir. Devletin sağlayabileceği toplam kadro sayısı, işçilerin talep edecekleri reel ücret düzeyi, işçilerin ortalama beşeri sermaye düzeyinin çalışma hayatında etkisi olan düzeyi ve piyasadaki işverenlerin talep edecekleri emek düzeyi, işçilerin fayda düzeyini pozitif yönde etkilemektedir.³ Ancak piyasadaki toplam emek düzeyi, işçilerin fayda düzeyini negative yönde etkilemektedir. Bunun temel nedeni yedek işçi ordusudur. İşçilerin fayda fonksiyonu şu şekildedir:

$$u_{İŞÇİLER} = \left[\left(\frac{\alpha - k}{\frac{P}{W}} \right)^3 - [L - ML_S - \gamma] \right]^3$$

³ İşçilerin ortalama beşeri sermaye düzeyinin işçilerin ortalama beşeri sermaye düzeyinin çalışma hayatında etkisi olmayan düzeyinden kalan kısmı, işçilerin ortalama beşeri sermaye düzeyinin çalışma hayatında etkisi olan düzeyini oluşturmaktadır $(\alpha - k)$.

$\frac{W}{P}$:İşçilerin talep edecekleri reel ücret düzeyi

α :İşçilerin ortalama beşeri sermaye düzeyi

k : İşçilerin ortalama beşeri sermaye düzeyinin çalışma hayatında etkisi olmayan düzeyi

L :Piyasadaki toplam emek düzeyi

L_S :Piyasadaki işverenlerin talep edecekleri optimal emek düzeyi

γ :Devletin işçilere sağlayabileceği kadro sayısı

M :Piyasadaki işverenlerin talep edecekleri optimal emek düzeyinin işçilerin fayda düzeyi üzerindeki etki düzeyi ($M > 0$)

Oyunun ikinci periyodunda piyasadaki işverenler, talep edecekleri optimalemek düzeyini belirlemektedir. İşverenlerin fayda düzeyini etkileyen değişkenler, işçilerin talep edecekleri reel ücret düzeyi ve ortalama beşeri sermaye düzeyi, piyasadaki toplam emek düzeyi, işverenlerin talep edecekleri emek düzeyi ve devletin işçilere sağlayabileceği kadro sayısıdır. İşçilerin talep edecekleri reel ücret düzeyi ve devletin işçilere sağlayabileceği kadro sayısı, işverenlerin fayda düzeyini negatif yönde etkilemektedir. İşçilerin ortalama beşeri sermaye düzeyi ve piyasadaki toplam emek düzeyi, işverenlerin fayda düzeyini pozitif yönde etkilemektedir. Piyasadaki toplam emek düzeyinin işverenlerin talep edecekleri emek düzeyinden ve devletin işçilere sağlayabileceği kadro sayısından arda kalan farkı, işverenlerin fayda düzeyini pozitif yönde etkilemektedir.

$$u_{İŞVEREN} = \left[\left[\left(-\frac{\Re}{\frac{W}{P}} \right)^3 + \alpha^2 \right] + [L - \beta L_S - \gamma]^3 \right]$$

\Re :İşçilerin Ortalama Verimlilik Düzeyi

β :Piyasadaki işverenlerin talep edecekleri optimal emek düzeyinin işverenlerin fayda düzeyi üzerindeki etki düzeyi ($1 > \beta > 0$)

Oyunun üçüncü periyodunda devlet, işçilere sağlayabileceği optima kadro sayısını belirlemektedir. Devletin fayda düzeyini etkileyen değişkenler, işçilerin talep edecekleri reel ücret düzeyi ve ortalama beşeri sermaye düzeyi, piyasadaki toplam emek düzeyi, işverenlerin talep edecekleri emek düzeyi ve devletin işçilere sağlayabileceği kadro sayısıdır. İşçilerin ortalama beşeri sermaye düzeyi, devletin fayda düzeyini pozitif yönde

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etkilemektedir. Toplam işgücü miktarı arttıkça devletin fayda düzeyi azalmaktadır. Ayrıca piyasadaki işverenlerin talep edecekleri işgücü düzeyi arttıkça devletin fayda düzeyi artmaktadır. Devletin işçilere sağlayabileceği kadro sayısı arttıkça devletin fayda düzeyi belli bir seviyeye kadar artmakta fakat bu seviyeden sonra azalmaktadır. Bunun temel nedeni, belli bir seviyeden sonra piyasanın etkinliğinin olumsuz etkilenecek olmasıdır.

$$u_{DEVLET} = \left[\left[\alpha^2 - \frac{W}{P} \right] \right]^3 + \kappa y^2 + [-L + L_S + \mu \gamma]^2$$

κ ve μ : Devletin işçilere sağlayabileceği kadro sayısının devletin fayda düzeyi üzerindeki etkisini gösteren parametreler ($\mu > 0$, $\kappa < 0$ ve $\kappa + \mu \neq 0$).

Oyun, mükemmel tam bilgili dinamik bir oyundur. Oyunun dengesi, geriye doğru çıkarsama yöntemiyle tespit edilmektedir. Oyunun en son periyodu olan üçüncü periyotta devlet, işçilere sağlayabileceği optimal kadro sayısını belirlemektedir:

$$\frac{\partial u_{DEVLET}}{\partial \gamma} = \frac{\partial \left[\left[\left[\alpha^2 - \frac{W}{P} \right] \right]^3 + \kappa y^2 + [-L + L_S + \mu \gamma]^2 \right]}{\partial \gamma} = 0$$

$$2\kappa y + 2[-L + L_S + \mu \gamma] = 0$$

$$2\kappa y - 2L + 2L_S + 2\mu \gamma = 0$$

$$\gamma^* = \frac{L - L_S}{\kappa + \mu}$$

Beveridge Eğrisi, açık iş oranları ile işsizlik oranı arasında ters yönlü bir ilişkinin olduğunu belirtmektedir. Beveridge Eğrisi'nin belirttiği bu ilişki temel alındığında işverenlerin talep edeceği optimal emek düzeyi ile toplam emek düzeyi arasında doğru orantının var olması gerektiği anlaşılmaktadır. Ayrıca devletin işçilere sağlaması gereken optimal kadro sayısı ile toplam emek düzeyi arasında doğru orantının var olması gerektiğine dair bir çıkarımda bulunulabilmektedir. Bu koşulların sağlanması için devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etkisini gösteren parametrelerin toplamının pozitif düzeyde olması gerekmektedir ($\kappa + \mu > 0$).

Oyunun ikinci periyodunda piyasadaki işverenler, talep edecekleri optimal emek düzeyini belirlemektedirler:

$$\frac{\partial u_{İŞVEREN}}{\partial L_S} = \frac{\partial \left[\left[\left(-\frac{\Re}{\frac{W}{P}} \right)^3 + \alpha^2 \right] + \left[L - \beta L_S - \frac{L - L_S}{\kappa + \mu} \right] \right]^3}{\partial L_S} = 0$$

$$\frac{\partial u_{İŞVEREN}}{\partial L_S} = \frac{\partial \left[\left[\left(-\frac{\Re}{\frac{W}{P}} \right)^3 + \alpha^2 \right] + \left[\frac{[\kappa + \mu - 1]L - \left[\kappa + \mu - \frac{1}{\beta} \right] \beta L_S}{\kappa + \mu} \right]^3 \right]}{\partial L_S} = 0$$

$$= 3 \left[\left[\kappa + \mu - \frac{1}{\beta} \right] \beta \right] \left[\frac{[\kappa + \mu - 1]L - \left[\kappa + \mu - \frac{1}{\beta} \right] \beta L_S}{\kappa + \mu} \right]^2$$

Eşitliğin sağlanması için şu iki eşitlikten en az birisinin sağlanması zorunludur:

a. $\kappa\beta + \mu\beta - 1 = 0$

$$\left[\frac{[\kappa + \mu - 1]L - \left[\kappa + \mu - \frac{1}{\beta} \right] \beta L_S}{\kappa + \mu} \right]^2 = 0$$

b.

$$L_S^* = \frac{[\kappa + \mu - 1]L}{\left[\kappa + \mu - \frac{1}{\beta} \right] \beta}$$

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Dolayısıyla devletin işçilere sağlayabileceği optimal kadro sayısı fonksiyonu şu şekildedir:

$$\gamma^* = \frac{\left[1 - \frac{[\kappa + \mu - 1]}{\left[\kappa + \mu - \frac{1}{\beta} \right] \beta} \right] L}{\kappa + \mu}$$

$$\gamma^* = \frac{\left[\frac{[\kappa + \mu][\beta - 1]}{[\kappa\beta + \mu\beta - 1]} \right] L}{\kappa + \mu}$$

Beveridge Eğrisi, açık iş oranları ile işsizlik oranı arasında ters yönlü bir ilişkinin olduğunu belirtmektedir. Beveridge Eğrisi'nin belirttiği bu ilişki temel alındığında devletin işçilere sağlaması gereken optimal kadro sayısı ile toplam emek düzeyi arasında doğru orantının var olması gerektiğine dair bir çıkarımda bulunulabilmektedir. Devletin işçilere sağlayabileceği optimal kadro sayısı fonksiyonuna göre devlet bu durumu şu koşullar altında sağlayabilmektedir:

Devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etki düzeyinin pozitif olması gerekmektedir ($\kappa + \mu > 0$).

İki etki düzeyinin (Devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etki düzeyi ile piyasadaki işverenlerin talep edecekleri optimal emek düzeyinin işverenlerin fayda düzeyi üzerindeki etki düzeyi) etkileşim düzeyinin (çarpımının) 1'den daha düşük düzeyde olması gerekmektedir ($\kappa\beta + \mu\beta$).

Oyunun birinci periyodunda işçiler, işverenlerden talep edecekleri optimal reel ücret düzeyini belirlemektedirler:

$$\begin{aligned}
 \frac{\partial [u_{İŞÇİLER}]}{\partial \left[\frac{W}{P} \right]} &= \frac{\partial \left[\left[\left(\frac{\alpha - k}{\frac{P}{W}} \right)^3 - L - M \left[\frac{[\kappa + \mu - 1]L}{[\kappa + \mu - \frac{1}{\beta}] \beta} \right] - \frac{L - \left[\frac{[\kappa + \mu - 1]L}{[\kappa + \mu - \frac{1}{\beta}] \beta} \right]}{\kappa + \mu} \right] \right]^3}{\partial \left[\frac{W}{P} \right]} \\
 &= \frac{\partial \left[\left[\left(\frac{\alpha - k}{\frac{P}{W}} \right)^3 + \left[\frac{[M - 1]L + [M - \beta][\kappa L + \mu L] + [\kappa + \mu][1 - \beta][\kappa L + \mu L]}{[\kappa + \mu - \frac{1}{\beta}] \beta} \right] \right]^3 \right]}{\partial \left[\frac{W}{P} \right]} \\
 &= \frac{\partial \left[\left[\left(\frac{W(\alpha - k)}{P} \right)^3 + \left[\frac{[M - 1]L + [[M - \beta] + [\kappa + \mu][1 - \beta]][\kappa L + \mu L]}{[\kappa + \mu - \frac{1}{\beta}] \beta} \right] \right]^3 \right]}{\partial \left[\frac{W}{P} \right]} \\
 &= 9(\alpha - k)^3 \left(\frac{W}{P} \right)^2 \left[\left(\frac{W(\alpha - k)}{P} \right)^3 + \left[\frac{[M - 1]L + [[M - \beta] + [\kappa + \mu][1 - \beta]][\kappa L + \mu L]}{[\kappa + \mu - \frac{1}{\beta}] \beta} \right] \right]^2 = 0
 \end{aligned}$$

Eşitliğin sağlanması için şu iki eşitlikten birisinin sağlanması zorunludur:

$$\text{I.} \quad 9(\alpha - k)^3 \left(\frac{W}{P} \right)^2 = 0$$

Eşitlik, işçilerin ortalama beşeri sermaye düzeyinin çalışma hayatında etkisi olan düzeyinin ve/veya işçilerin talep edecekleri reel ücret düzeyinin sıfıra(0) eşit olmasını ifade etmektedir.

$$\text{II.} \quad \left(\frac{W(\alpha - k)}{P} \right)^3 + \left[\frac{[M - 1]L + [[M - \beta] + [\kappa + \mu][1 - \beta]][\kappa L + \mu L]}{\left[\kappa + \mu - \frac{1}{\beta} \right] \beta} \right] = 0$$

$$\frac{W^*}{P} = \sqrt[3]{\frac{[M - 1]L + [[M - \beta] + [\kappa + \mu][1 - \beta]][\kappa L + \mu L]}{\left[\kappa + \mu - \frac{1}{\beta} \right] \beta}} \cdot \frac{1}{\alpha - k}$$

Sonuç

Bu çalışmanın temel amacı, işçiler, işverenler ve devlet arasındaki etkileşimin analizinden faydalanılarak Beveridge Eğrisinin analiz edilmesidir. Beveridge Eğrisi, açık iş oranları ile işsizlik oranı arasında ters yönlü bir ilişkinin olduğunu belirtmektedir. Beveridge Eğrisi'nin belirttiği bu ilişki temel alındığında işverenlerin talep edeceği optimal emek düzeyi ile toplam emek düzeyi arasında doğru orantının var olması gerektiği anlaşılmaktadır. Ayrıca devletin işçilere sağlaması gereken optimal kadro sayısı ile toplam emek düzeyi arasında doğru orantının var olması gerektiğine dair bir çıkarımda bulunulabilmektedir. Bu koşulların sağlanması için devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etkisini gösteren parametrelerin toplamının pozitif düzeyde olması gerekmektedir ($\kappa + \mu > 0$).

Beveridge Eğrisi'nin belirttiği açık iş oranları ile işsizlik oranı arasındaki ters yönlü ilişki temel alındığında devletin işçilere sağlaması gereken optimal kadro sayısı ile toplam emek düzeyi arasında doğru orantının var olması gerektiğine dair bir çıkarımda bulunulabilmektedir. Devletin işçilere sağlayabileceği optimal kadro sayısı fonksiyonuna göre devlet bu durumu şu koşullar altında sağlayabilmektedir:

Devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etki düzeyinin pozitif olması gerekmektedir ($\kappa + \mu > 0$).

İki etki düzeyinin (Devletin işçilere sağlayabileceği optimal kadro sayısının devletin fayda düzeyi üzerindeki etki düzeyi ile piyasadaki işverenlerin talep edecekleri optimal emek düzeyinin işverenlerin fayda düzeyi üzerindeki etki düzeyi) etkileşim düzeyinin (çarpımının) 1’den daha düşük düzeyde olması gerekmektedir ($\kappa\beta + \mu\beta$).

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ANALYSIS OF A GAME THEORY: COORDINATION BETWEEN MONETARY POLICY AND FISCAL POLICY

BİR OYUN TEORİSİ ANALİZİ: PARA POLİTİKASI İLE MALİYE POLİTİKASI ARASINDAKİ KOORDİNASYON

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Abstract

It is of great importance to have the coordination between the policies in ensuring macroeconomic stability effectively. The coherent policies implemented under the leadership of an effective coordination established between the monetary authority and the fiscal authority have a high impact on macroeconomic stability. From this point of view, this study examines the coordination between monetary policy and fiscal policy within the framework of a repeated game.

Key Words: Monetary Policy, Fiscal Policy, Policy Coordination, Repeated Games,

Giriş

1929 ekonomik krizinin aşılmasıyla başlayan süreç ile 1970’li yıllarda yaşanan stagflasyon dönemi arasındaki süreçte Keynesyen iktisat yoğun bir şekilde uygulama alanı buldu. Bu dönemde efektif talebin artırılmasına yönelik maliye politikası uygulamalarıyla ekonomik krizlerin aşılabileceğine duyulan inanç ön plandadır (Keynes, 1936).

Ancak 1970’li yıllarda yaşanan stagflasyon problemine Keynesyen iktisadın çözüm bulamaması, maliye politikası uygulamalarına verilen önemin azalmasına ve para politikası uygulamalarının ön plana alınmasına yol açmıştır. Bu dönemde özellikle de IS-LM modeli çerçevesinde crowding-out olgusuna dikkat çekilmiş ve bütçe açıklarının para basılması yerine borçlanmayla finanse edilmesi gerektiğine yönelik inanç artmıştır (Ataç, 2002).

İktisat politikalarının koordinasyonuna yönelik akademik çalışmalar, maliye politikalarına duyulan güvenin azalması ve para politikasının esnek yapısı gibi nedenlerden dolayı para politikasının koordinasyonuna yoğunlaşmaktadır. Bu noktada koordinasyonun sadece para politikaları açısından düşünülmesinden ziyade para, maliye ve borç yönetimi çerçevesinde dikkate alınması gerektiğinin altının çizilmesi gerekmektedir (Ataç, 2002).

İktisat politikalarının koordinasyonu hususunda alınan tüm kararların sürdürülebilir nitelikte olmaları da büyük bir önem taşımaktadır. Politikaların orta vadede sürdürülebilir nitelikte olmaları, koordinasyonun başarılı olması açısından büyük bir önem taşımaktadır. Bu noktadan hareketle koordinasyonun kısa vade

bağlamında düşünülmemesi ve güvenilir olması, koordinasyonun başarısı açısından büyük bir önem teşkil ettiği sonucuna varılmaktadır (Ataç,2002).

Gümüş vd. (2017), para politikası ile maliye politikası arasında etkin bir koordinasyonun olmaması durumunda ekonomide nelerin yaşanabileceğine dair eksik bilgili dinamik bir oyun kurgulanmaktadır. Bu doğrultuda maliye otoritesinin kamu harcamalarını artırmaya yönelik yaptığı açıklamaların para otoritesinin para arzını belirlemesinde neden olacağı etkiler incelenmektedir. Makro iktisadi istikrarın devamlılığı için maliye otoritesinin para otoritesiyle koordinasyon içerisinde olması gerektiğine dair sonuca varılmaktadır. Aksi halde maliye otoritesinin yapacağı açıklamaların yüksek düzeyde para basımına, fiyat istikrarsızlığına ve merkez bankasının bağımsızlığının zarar görmesine neden olacağı belirtilmektedir.

Lambertini ve Rovelli (2003), makro iktisadi istikrar sürecinde para ve maliye politikaları arasındaki koordinasyona odaklanmaktadır. Politika otoritelerinin iki aşamalı bir dinamik oyunda (Stackelberg Oyunu) ikinci aşamada hareket etmeyi tercih ettiklerini belirtmektedir. Maliye otoritesinin para otoritesinden önce hareket etmesinin daha faydalı olduğuna dair bir sonuca varılmaktadır. Politikalar arasındaki koordinasyonun daha çok arzu edilir bir nitelik taşıdığı belirtilmektedir.

Niemann ve Hagen (2008), uzun vadede ve dolayısıyla da ekonominin istikrarlı durumu üzerinde para ve maliye politikaları arasındaki koordinasyonun etkileri analiz edilmektedir. Fiyat istikrarı hedefini ön plana alan para otoritesi ile bütçe hedefine yönelen mali otorite arasında bir dinamik oyun kurgulanmaktadır. Yüksek düzeydeki para otoritesi muhafazakârlığının kamu borçlarının yükselmesine (ve dolayısıyla da fayda düzeyinin azalmasına) neden olduğuna dair bir sonuca varılmaktadır. Mali otoritenin para otoritesini yönlendirmesi gerektiğine dair bir sonuca varılmaktadır. Koordinasyonun gerekliliğine dikkat çekilmektedir.

Model

Hükümetin borçlanma düzeyinin yükselmesi, merkez bankasının fayda düzeyinin düşmesine yol açmaktadır. Dış borçlanma, ekonominin dışa bağımlılık düzeyinin yükselmesine neden olmaktadır. İç borçlanma ise özel sektörün yatırım düzeyinin düşmesine neden olmaktadır. Ayrıca her iki borçlanma türü de ileriki süreçte daha yüksek düzeyde para basımına neden olmakta ve dolayısıyla enflasyon oranının yüksek düzeylere tırmanmasına neden olmaktadır. Bu yüzden hükümetin borçlanma düzeyinin yükselmesi, merkez bankasının fiyat istikrarı hedefinin gerçekleşmesinde önemli bir engel oluşturmaktadır.

Merkez bankası, hükümetin yaptığı kamu harcamalarının ayrıntılı programını merkez bankasına sunması koşulu altında hükümete r^* kadar avans vermeyi teklif etmektedir. Ancak bu koşulun sağlanmaması durumunda merkez bankası hükümete g kadar avans verecektir.

Hükümetin teklifi kabul etmesi durumunda hükümet ya yüksek düzeyde kamu harcaması yapacak ve bunun için de borçlanacaktır ya da düşük düzeyde kamu harcaması yapacak ve borçlanmayacaktır. Ancak hükümet, düşük düzeyde kamu harcaması yapmanın kendisine k kadar maliyet oluşturacağı kanaatindedir.

Hükümetin borçlanıp borçlanmayacağını merkez bankası gözlemleyememektedir. Merkez bankası, sadece kamu harcamaları hakkında bilgi sahibidir. Merkez bankası hükümeti ya destekleyecektir veya desteklemeyecektir. Hükümetin düşük düzeyde kamu harcaması yapması durumunda merkez bankası

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hükümeti destekleyecektir. Ancak hükümetin yüksek düzeyde kamu harcaması yapması durumunda merkez bankası hükümeti v olasılıkla destekleyecektir; $1 - v$ olasılıkla desteklemeyecektir.

Merkez Bankası, hükümeti desteklerse belli bir düzeyde fayda elde edeceğini düşünecektir ($\mathfrak{R} > 0$). Desteklemez ise fayda düzeyi 0 olacaktır. Merkez bankasının kazancı, düşük (yüksek) düzeyde kamu harcaması yapılması durumunda elde edeceği fayda (zarar) düzeyi ile hükümete verdiği avans düzeyi arasındaki farka eşittir. Teklifin kabul edilmesi durumunda hükümetin kazancı, merkez bankasından aldığı avans düzeyi ile yaptığı kamu harcaması miktarının kendisine sağlayacağı fayda düzeyi arasındaki farka eşittir: $r - k$ veya $r - 0$.

Tarafların rasyonel olduğu varsayılırsa Merkez Bankasının hükümeti destekleyeceği durumda elde ettiği fayda düzeyi hükümete verilecek avans miktarından fazla olacaktır. Ayrıca Merkez Bankasının hükümeti desteklediği durumda ödeyeceği avans miktarı ile hükümetin düşük düzeyde kamu harcaması yaptığı durumda üstleneceği maliyet arasındaki fark Merkez Bankasının hükümeti desteklemediği durumdaki ödediği avans miktarında büyüktür.

$$R \geq r \text{ ve } r - k \geq g$$

Teklifin reddedilmesi durumunda hükümete merkez bankasının vereceği avans düzeyinden daha yüksek düzeyde avansın verilmesine karşılık hükümetin düşük düzeyde kamu harcaması yapması ve yüksek düzeyde kamu harcamasının yapılması durumunda avans verilmemesi rasyoneldir.

Merkez bankasının hükümete teklifin reddedilmesi durumunda vereceği avans miktarından daha yüksek düzeyde bir avans miktarını $r = r^*$ kamu harcamaları düşük düzeyde yapıldığı sürece vermeyi planlamaktadır $r^* > g$ Ancak hükümetin tek bir sefer bile yüksek düzeyde kamu harcaması yaptığını gözlemlerse $r = 0$ düzeyinde avans verecektir. Hükümet, merkez bankasının teklif ettiği avans miktarı, teklifin reddedilmesi durumunda verilecek avans miktarından fazla olduğu sürece merkez bankasının teklifini reddedecektir. Aksi takdirde hükümet, merkez bankasına kamu harcamalarının ayrıntılı programını sunmayacaktır.

Oyuncuların stratejileri, yavuz stratejidir. Bu strateji, karşı oyuncu işbirliği yaptığı sürece işbirliği yapmayı öngörmektedir. Ancak oyunculardan biri, tek bir sefer bile işbirliğinden cayarsa öteki oyuncu sonraki sürecin tamamında işbirliğinden cayacaktır.

Oyun, mükemmel tam bilgili dinamik bir oyundur. Oyunun dengesine geriye doğru çıkarsama yöntemiyle ulaşılmaktadır. Bundan dolayı oyunun çözümü amacıyla ilk olarak hükümetin düşük ve yüksek düzeyde kamu harcaması yapması durumlarında beklenen getirilere yönelik fonksiyonları tespit edilmektedir.

$r_T = r^*$ ve $r_T \geq r$ ise hükümet teklifi kabul edecektir ama yüksek düzeyde kamu harcaması yapacaktır. Birinci periyotta merkez bankasının r_T^* düzeyinde avans vermeyi teklif ettiği varsayalım. Bu durumda hükümetin düşük kamu harcaması yapmasının oyunun bütün sürecinde optimal olması için hükümetin getirisi şu şekilde olmak zorundadır:

$$G_H = \frac{(r_T^* - k)}{1 - \delta}$$

Zaman maliyetini ifade eden iskonto oranı (δ), $1 \geq \delta \geq 0$ aralığında değer almaktadır.

Merkez bankasının v olasılıkla hükümeti desteklemesi durumunda gelecek bütün süreçte de aynı koşullarla karşılaşılacak ancak bir sefer bile $1 - v$ olasılıkla hükümeti desteklemezse bundan sonraki süreçte sürekli $r = 0$ teklifini verecektir. Bu nedenle hükümet bundan sonraki bütün süreçte dışarıdaki opsiyonunu kullanacaktır. Hükümet açısından düşük kamu harcamasının optimal olması durumunda elde edeceği getirinin beklenen değeri şu şekildedir:

$$r_T^* + \delta[vr_T^* + (1 - v)g] + \delta^2[vr_T^* + (1 - v)g] + \dots$$

$$r_T^* + \delta[vr_T^* + (1 - v)g][1 + \delta + \delta^2 + \dots]$$

$$r_T^* + \frac{\delta[vr_T^* + (1 - v)g]}{1 - \delta}$$

Şu eşitliğin sağlanması durumunda hükümetin düşük kamu harcaması yaparak merkez bankasından destek sağlaması hükümet açısından optimal olacaktır:

$$\frac{r_T^* - k}{1 - \delta} > r_T^* + \frac{\delta[vr_T^* + (1 - v)g]}{1 - \delta}$$

$$\frac{r_T^* - k}{1 - \delta} > \frac{r_T^*(1 - \delta) + \delta[vr_T^* + (1 - v)g]}{1 - \delta}$$

$$r_T^* - k > r_T^* - \delta r_T^* + \delta[vr_T^* + (1 - v)g]$$

$$-k > -\delta r_T^* + \delta vr_T^* + \delta(1 - v)g$$

$$(1 - v)\delta r_T^* > \frac{\delta(1 - v)g + k}{(1 - v)\delta}$$

$$r_T^* > \frac{k}{(1 - v)\delta} + g$$

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İlk periyotta hükümet iki durum karşısında tercih yapmak zorundadır:

1. Hükümete $r = r_T^*$ şeklinde teklifte bulunmak ve tek bir sefer bile destek vermemesi durumunda dolayısıyla da hükümetin yüksek düzeyde kamu harcaması yaptığına inandığında-hükümete dışarıdaki opsiyonu kadar avans vermektir. Bu durumda merkez bankası her periyotta $\mathfrak{R} - r_T^*$ kadar fayda elde etmektedir.

2. Hükümete dışarıdaki opsiyonunu vermektir. Merkez bankası her periyotta sıfır fayda elde edecektir. Merkez bankasının hükümete vereceği optimal tepki fonksiyonu şu şekildedir:

$$\mathfrak{R} - r_T^* \geq 0$$

$$\mathfrak{R} \geq r_T^*$$

$$\mathfrak{R} \geq \frac{k}{(1-v)\delta} + g$$

Sonuç

İktisat politika otoriteleri arasındaki koordinasyonun etkin bir şekilde kurulması, makro ekonomik istikrarın sağlanmasında yüksek düzeyde etkili olmaktadır. Bu nedenle uygulanan iktisat politikalarının arkasında iktisat politikası otoriteleri arasındaki etkin koordinasyonunun yer alması gerekmektedir. Aksi takdirde ekonomide etkisi yüksek krizler meydana gelecektir.

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STRATEGIC PLANNING, GOVERNANCE AND INFORMATION TECHNOLOGY FUNDING IN PUBLIC AND PRIVATE UNIVERSITIES: EVIDENCE FROM SURVEY DATA

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Abstract

Higher Education Institutions (HEI) face the challenge of keeping up with the technology developments and coping with the competitive environment to counteract the external pressures that require acquiring competitive advantages through continuous efforts for being distinctive and visible over other institutions. The focus of this research is on the investments in the technology by HEIs as well as the impact on strategic planning and governance. In this context, we have analyzed the response from 801 institutions, as a result from the survey data, within a range of 462 public and 315 private universities, to gain insights of the current state of IT in higher education institutions and IT governance by trying to find the similarities and differences of these institutions through maturity index. Given that one of the major factors that influence the IT funding and strategic planning of the universities is the integration of applications throughout the institution, we have also analysed the level of implementation of ERP systems in HEI within the respondents.

Keywords: IT funding, IT strategic planning, Higher Education, ERP systems, IT architecture

Introduction

The information technology and the rapid dissemination of knowledge has changed the climate of higher education dramatically (Efe 2016). In the time of economic slump, reduced allocation of state funding, endowments object to challenge, and increasing cost of energy and maintenance, universities have to address all the investments in the institutions, counting also the funds allocated to information technology. While the excellence in teaching and learning remains priority, keeping up with the technology developments programs that blend the use of technology with traditional learning methods becomes a requirement. Moreover, apart from various new learning techniques like online courses and smart classrooms, technology has also simplified the management of educational institutions (Sasmal et al. 2019). Given that there is modest available literature to pinpoint the IT funding of the universities, this study happens to provide insights on the subject of information technology funding and its alignment with university's IT strategic planning and governance. In this study we analyze the existing university practices by summarizing data gained by a survey in 801 institutions of higher education worldwide.

For the analysis, universities are categorized into three subgroups: All institutions, Public and Private. We set sights on the dissimilarity between publicly funded universities and private universities. We anticipate that public and private universities will behave differently in information systems implementation since they have different funding scheme and strategic focuses. The analysis in this study that compares the differences and

similarities of the defined categories is very important to see how universities behave toward implementation of information systems. Given that the analyzed survey data is large, summarization techniques are used. The main tool for the analysis that is used extensively in this section is pivoting through Microsoft Excel.

Literature Review

Investigation of information technology (IT) funding in higher education institutions is challenging. While IT has turned out to be crucial in sustaining the growth and sustainability of all types of organizations, higher education institutions have an infrastructure that consists of a mixture of applications, different platforms, academic systems, cloud applications and heterogeneous technologies (Bianchi and Sousa 2016). All these technologies that sustain the research, teaching and administrative processes require an effective IT governance to align with strategic objectives of the institutions. The advances in the technological methods and administrative productivity to deliver education are assumed to predominate the future of HEI. There are studies that pinpoint the critical issues in the potential of new information technology (IT) for education (Burbules 2018). IT, already central to many aspects of our lives, is rapidly becoming an integral part of teaching and learning.

Technology has facilitated competence and novelty in higher education and has been prevalent in implementation over the past decade. HEIs have used technology as a strategic separator, a vehicle for effective operations, and a tool for rationalization of resources. Technology today plays an increasingly vital role in institutions' academic, administrative, research, and advancement endeavours. Technology has become, for many institutions, a strategic and mission-centric consideration (ECAR Working Group Paper 2015). Seeing that the importance of information systems is accelerating, research shows that although there are investments in information systems, higher education institutions cannot reach the required level due to costs being higher than returns (Abazi Chaushi, Chaushi, and Dika 2015). The benefits and the results of the investments remain a gray area for HEI (Davis, Dehning, and Stratopoulos 2003). IT funding continues to remain a requisite for the institutions even if the costs are difficult to identify, quantify, manage and then control" (Irani, Ghoneim, and Love 2006).

Studies that investigate the cost structure of the universities neglect to provide direction to cost saving funding while preserving/convalescening the same quality of services (Johnstone 2004; Sasmal et al. 2019; Bulman and Fairlie 2016). A study conducted by Bakia (Bakia 2000; Baldwin 2009) focuses on the costs of use of Information and Communication Technologies (ICT) for teaching and learning in higher education. Harley (Harley 2002), in the study where he examines several universities, identifies the potential for cost-saving ICT project within higher education, but alleges that there is lack of evidence, and especially empirical studies to support the same.

More recent studies, show IT funding, as one among the top-ten IT issues in higher education institutions, by measuring empirically the level of prioritization and degree of implementation of IT funding in higher education institutions (Manole et al. 2019; Oliver 2002). Marcial conducts the study in HEIs in the Philippines with an evaluation of a total of 95 HEIs in the Philippines (Marcial 2013).

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For this reason, survey data conducted by Educause (“EDUCAUSE Homepage” n.d.) through its yearly Core Data Services (CDS) questionnaire is taken for the comparative analysis with the purpose to bring more inclusive outlook of the current state of IT funding and strategic planning of IT systems and services.

Methodology

We utilize questionnaire based data conducted by Educause through its annual Core Data Service (CDS). Educause is a nonprofit association devoted to the progression of higher education in terms of information technology. Colleges and universities use Core Data Service benchmarks to inform IT strategic planning and management. CDS helps IT leaders of the universities make better decisions by providing peer data comparisons for key IT areas and services. Universities participants in the CDS are enabled to study their IT organization with metrics, benchmark against past performance, assess the institution’s digital capabilities, look at trends over time and have data available “just in case” (“EDUCAUSE Homepage” n.d.). The annual survey is organized in six different modules, with each of the modules containing questions from the specific area. This survey was organized in one module but different sections, whereas the selected questions from several other modules were taken for the purpose of doing this study. The summary of modules as of 2016 is provided in Table 2.

Table 2: Modules of the Educause questionnaire

1-ITOSF: IT Organization, Staffing, and Financing (<i>required, Previously M1</i>)
2-ISA: Information Systems and Applications (<i>optional, Previously M8</i>)
3-CTD: Capability and Technology Deployment (<i>optional, new in 2016</i>)
4-ETS: Educational Technology Services (<i>optional, Previously M3</i>)
5-IS: Information Security (<i>optional, Previously M7</i>)
6: IT Support Services (<i>optional, Previously M2, not offered in 2016</i>)

The first module, *ITOSF-Module*, is mandatory for eligibility. This module has overall 10 questions including here IT organization, staffing, and financing. In this module data about IT budget and its components, centralization and decentralization of IT department is collected. Selected questions from CTD-Module and ETS-Module questions are also taken into consideration for the comparative analysis section.

Table 3 provides a description of the questions from the questionnaire used in the study.

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Table 3: Data Description

Data	Question Nr.	Question Definition	Question Description and use
Educause Questionnaire Data			
CDS	ITOSF, Q7	Central IT Funds Available	Seven categories in multiple-textbox format required. Sum as “Total” used.
CDS	ITOSF, Q8	Central IT Expenditures	Eight categories in multiple-textbox format required. Division in capital and operating expenditures used. Sum as “Total” used.
CDS	ITOSF, Q10	Central IT Staffing	Total staff FTE and Total student FTE employed in Central IT.
CDS	ISA, Q1	Core Information Systems	Who is responsible for providing the system in the institution? Multiple choice grid - 20 systems/rows and 4 responsibilities/columns.
CDS	ISA, Q7	IT Architecture approach	What is the institutions approach for managing the IT architecture. Multiple choice with textbox for other-please specify.
IPEDS Data – National Center for Education Statistics			
Which data		What specifically	Where obtained
<u>Compare Institutions</u>		Number of Students	Provided by Educause in the dataset
(over 7,000 institutions and up to 250 variables)		Number of Employees	Provided by Educause in the dataset
		Total institutional expenditures	Provided by Educause in the dataset
		Type of the institution (private/public)	Provided by Educause in the dataset

We have created three categories for the universities. The following table shows the number of the institutions in each category that participated in the survey.

Table 4: Number of HEI's in all three subgroups

Group of Institutions	Number of institutions
All Institutions	801
Public Institutions	462
Private Institutions	315

We have conducted a lot of data pre-processing to create a dataset ready for use from the one provided by CDS. Functions like *average*, *sum*, *median* and use of pivot tables and charts were used to obtain the results. For the identified variables in the sample, we have selected only the answers with higher variability in answers (those that have less than 90% concentration on one answer).

Likewise, every year Educause issues a report called CDS Executive Summary Report, and an article called Top Ten IT Issues. The issues that appear on the top-ten list point to the challenges that universities face. IT Funding and IT strategic planning and governance appear on the list for more than a decade now. In the following sections, these two main issues are analyzed and the gained insights are put out.

Results

Funding Information Technology

Implementation of technology in HEI's in the past 15 years diverge from sourcing investments through funding to strategic planning of IT infrastructure and support for students, to leveraging the technology for progress in data driven decision making through analytics. IT funding, although changed in terms of nature of supporting a business process from one to another (Abazi Chaushi et al. 2019), has remain is one of the most frequented IS issue for higher education

It is only in the last decade that institutions turn to investing in highly talented IT staff and planned activities and strategic decision making. Technology has changed the way universities operate, on the contrary the funding not a lot. This showcases that although there is a need of making IT more responsive and flexible; the financial funds are insensitively allocated to meet the need of the institutions for transformation.

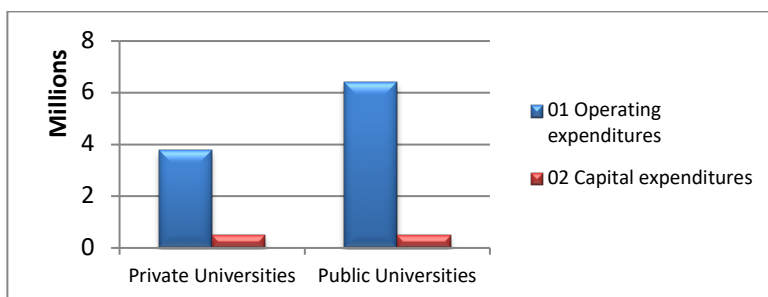


Figure 3: Institutional Capital and Operation IT Expenditures

Source: Author's own calculations

Figure 3 shows the that public universities spend much more on operating expenditures than the private ones and this can be attributed to the large number of students compared to the private universities that they serve. However, when it comes to capital investments, private universities are better than the private universities.

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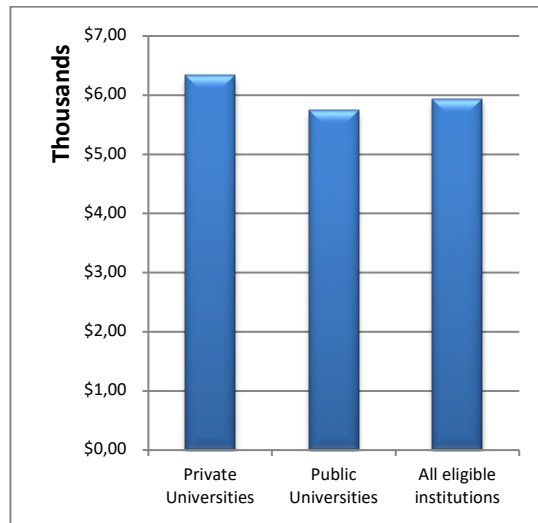


Figure 4: IT Spending per Full Time Employee

Source: Author's own calculations

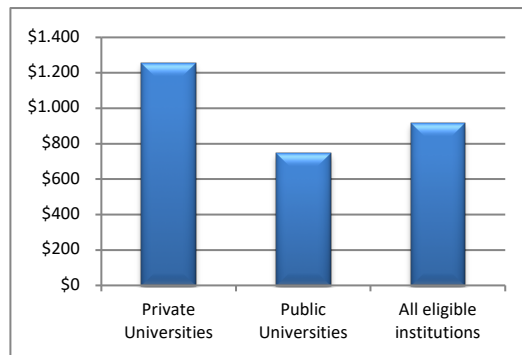


Figure 5: IT Spending per Full Time Institutional Employee

Source: Author's own calculations

Evidently, although Figure 3 show that public universities spend visibly more for operation expenditures than private universities, Figure 4 and Figure 5 when analyzed in median values, show that private universities make higher investments in IT per FTE than public universities.

When we take into consideration the number of students as well, data shows even more drastic difference where Private Universities spend \$1,255 per institutional headcount (faculty, staff and students), whereas Public Universities spend \$747 per institutional headcount, which is almost twice as low compared to private. According to Figure 6 below, around 60% of all capital IT expenditures go for supporting operations, 20 % for growing the institution to accommodate growth and improvements and only 10% to transform the institution by implementing transformative change.

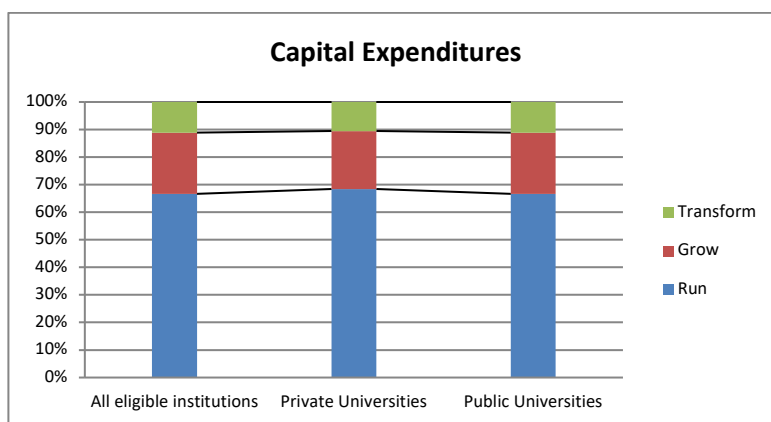


Figure 6: IT Capital Investments for running, growing and transforming the institution
Source: Author's own calculations

The results clearly show that, public universities even though are bigger and with government funding, still there is not a huge difference between them and private universities when it comes to capital investments, i.e. transforming the institution by providing new methods for running the institution, new programs or reengineering the business processes to support “new” customers. The same applies for operational expenses, whereas this percentage drops to 5% for transformative use across all four different subgroups.

IT strategic planning and governance

More effective IT strategic planning and governance is essential to achieve IT governance maturity. Data depicted in **Error! Reference source not found.** below is showing the current level of IT governance maturity in all different university subgroups. It is divided into 5 answers where the option absent/ad-hoc represents the absence of the capacity; repeatable represents the informal practices within the institution; defined represents the documented procedures and to a certain extent consistent capacity; managed represents the ability to have conventional results based on consistent measures performance indicators; and optimized represents the continuous re-evaluation of the capability to improve institutional performance.

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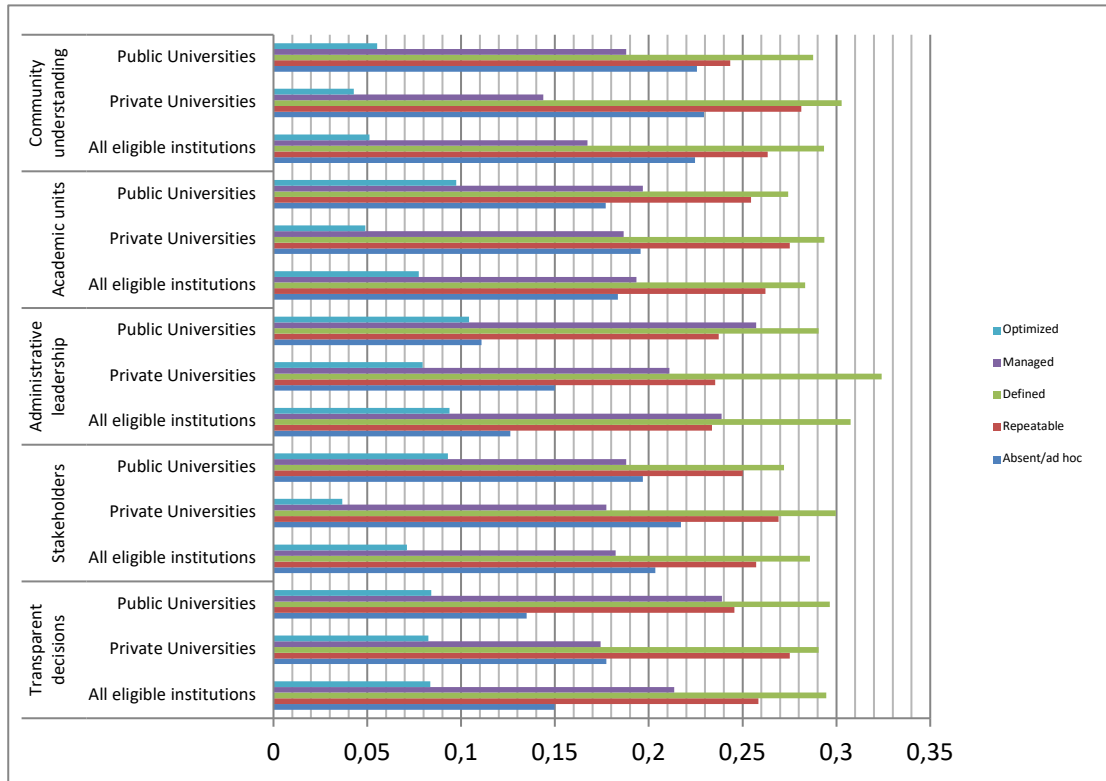


Figure 7: IT Governance Maturity Index

Source: Author's own calculations

Data shows that all universities in all the four subgroups are still missing optimization of the IT governance processes, and mostly, with a median nearly 30% fall under the category “defined” capabilities with standardized and documented procedures. Public universities with an average of 6%-7% are better than private universities in all different capabilities under the IT government processes when it comes to “managed” but still not more than on average 26% of public universities and not more than 20% of private universities that have reported being under this category. One common thing among all different university subgroups is that there is a huge absence of the use of standards of frameworks such as COBIT, ITIL or ISO with 60% absence in private universities and 41% absence in public universities.

The same thing applies also to the view of IT projects as investments. Data shows that the average of the medians of universities responding that fall under the category of optimized, are very low, with as much as 7% for all institutions. Private universities have an average of medians in all five different of groups of capabilities of 6% achievement of optimization, public universities have 7%, and interestingly, for the first two (i.e. prioritization of IT investments with institutional goals and examination of life-cycle costs when making

choices about investments) smaller universities similar to SEEU are better than both private and public with 11% achievement of optimization, but still have absent the capability of having the IT governance to recommend and find appropriate funding models and mechanisms with a median of 47% of universities in this subgroup falling under this category. The IT governance process ability to reach timely decisions and making authoritative decisions on IT investment is mainly repeatable for smaller universities with an average of medians 37% repeatable ability, public universities 27% and private universities 31%.

The reason why universities have still not reached maturity of IT governance is that just as low as 8% of private universities, 10% of public universities and only 5% of smaller universities have optimized capabilities for strategic alignment and influence of the IT governance processes. Only 11% of all universities, with similar results in all different university types analyzed, have clear mission, vision or strategy optimized. Most of the universities fall under the category of defined processes with 32% of universities, then 25% under managed, and 21% repeatable abilities. It is also noteworthy to mention that 11% of all universities do not have this capability at all, with an astonishing 26% of smaller universities lacking clear IT strategy to ease IT governance processes.

The same applies also to the communication and participation component of IT governance maturity. Private universities have optimized capabilities with 6% average of medians and public universities with 9% with optimization of capabilities in all 5 categories of this component. Even in this component the universities fall mainly under the category of defined and documented processes, as well under the repeatable abilities, with an average of medians of 18% of universities do not have the capabilities or address them in a sporadic way.

Data in **Error! Reference source not found.** above shows that universities struggle with reaching the IT governance maturity to a level that will make IT investments key strategic resource for institutions to meet their objectives. To understand better the business value of IT investments, universities should start with an understanding that technology and IT departments within institutions can add value by boosting the fundamental produce of the university, i.e. the understanding of learning for the students and the engagement in teaching of academic staff. They also can bring revenue and reduce the costs.

Integrating applications through Enterprise systems

One of the major factors that influence the IT funding and strategic planning of the universities for the period of 2000-2016, is the integration of applications throughout the institutions. During this period, IS integration has remained amongst the first 5 top issues that universities all around face and continues to remain one of the main concerns of the universities. ERP solutions from early 2000's had only the core functionality as finance, student services, and human resources, and ERP's decade later are much more complex and have almost every functionality needed from a higher education institution, including CMS, LMS, library, business intelligence, etc.

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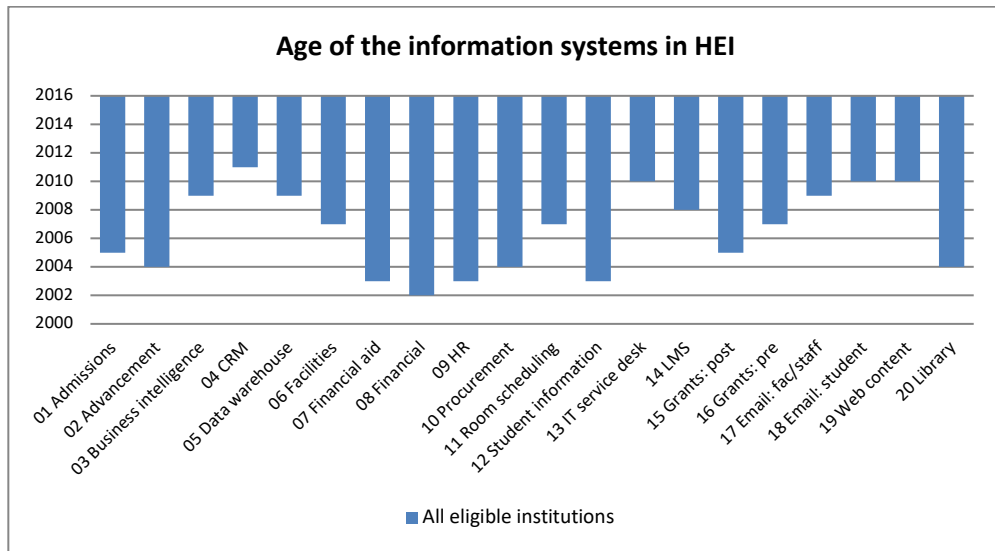


Figure 8: Age of Information Systems in HEI

Source: Author's own calculations

Integration continues to be of a key importance for universities due to the ability it gives the institution to have the data from these applications contribute to the overall view, and not become islands that are of use only for individual units. As can be noticed from Figure 8 above, some systems in the HEIs enterprise resource planning systems are 15 years old, and most of them are founded on blueprint ideology dating from years 1980 - 1990. These systems, usually distinctive in nature and substantially tailored, have difficulties sustaining the requirements for interoperability, data integration, and modern interfaces that contemporary institution of higher education faces.

As can be noticed from **Error! Reference source not found.** above, most of the core systems are provided in higher education institutions. Table 5 below shows the level of system implementation in all three different subgroups no matter whether they are provided by Central IT, are Distributed or run by a System in a department. Data shows that systems that are implemented in 90% or over in HEIs are: Student Information System (SIS) with 100% implementation in all three subgroups and Admissions with 98% implementation in public and private; Financial and Financial Aid system with over 98% in all three subgroups, HR with 98% and over in all different subgroups, and LMS with 99% and over in three subgroups. This is an important indicator that ERPs, which conventionally are a suite of mainly finance and financials, HR and SIS, are implemented in more than 90% of universities.

Table 5: Core Systems provided either by Central IT, Distributed or System Office

Information Systems	All eligible institutions	Private Universities	Public Universities
Admissions	98%	98%	98%
Advancement	93%	100%	91%
Business intelligence	87%	86%	89%
CRM	67%	68%	67%
Data warehouse	79%	68%	85%
Facilities	91%	90%	94%
Financial aid	98%	100%	98%
Financial	99%	100%	99%
HR	99%	98%	100%
Procurement	90%	82%	97%
Room scheduling	94%	94%	94%
Student information	100%	100%	100%
IT service desk	98%	99%	98%
LMS	99%	100%	99%
Grants: post	70%	56%	79%
Grants: pre	67%	53%	77%
Email: fac/staff	100%	100%	100%
Email: student	98%	99%	98%
Web content	97%	99%	97%

Source: Author's own calculations

Assessment, integration and customization of the core enterprise applications, and especially ERPs as well as LMSs, are of key strategic importance to endure existing and forthcoming needs. The solutions aren't visible or simple even though most institutions have a clear view of the requisites, needs and troubles they face with their current systems. Table 6 shows the approach for managing the institutional IT architecture. Most of the universities, in all four subgroups have locally integrated the architectures of multiple major systems with around 50% of the cases, except for Private universities where this percentage is a slightly higher to 56%. The second solution is to follow the architecture of a major ERP suite, like Oracle, Kuali, Ellucian. The reason behind this is since the major systems are provided by a vendor, integrating other systems into these ones takes a lot of customization work, and it is not feasible for the institution. That is the rationale why 30% of institutions decide to follow the primary suite

Table 6: IT architecture approach

	All Institutions	Private	Public
1. We followed the architecture of a primary system or suite	31%	30%	32%
2. We locally integrated the architectures of multiple major systems	49%	56%	45%
3. We had local IT architecture standards and conformed our local and vendor systems to that architecture	17%	13%	20%
4. Other	3%	1%	3%

Source: Author's own calculations

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Conclusions

In this study, we give evidence based on data of the information technology trends that higher education institutions (HEI) follow in terms of IT governance and information systems implementation. The analysis between the three categories (all institutions, private and public) presents the diversity between the groups of higher education institutions. Universities were compared in terms of IT funding and IT strategic planning, as well as integration of IS application systems. We observe that public and private universities have similarities in the structure of capital investments, the optimization of government processes, IT project optimization level, level of implementation for information systems, etc., and have differences in operating and capital expenditure structures. The findings from this section show that public universities spend more in operating expenditures than private ones due to size, but private universities have higher investments in IT. Moreover, we evidence that there is a lack of optimization of the capabilities for strategic alignment and influence of the IT governance process in all three university groups, although there is an impressive level of implementation of the core ERP modules in all three categories. We do recommend that higher education institutions should pay more attention to the benefits of the investments in information technology, instead of seeing these investments as costs. This would lead to more serious strategic planning of the investments to improve institutional effectiveness and achievement of the strategic objectives of the institution.

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LABOR MIGRATION FROM POST-SOVIET COUNTRIES

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Abstract

The processes of migration have an active development in the modern globalized society. It is caused by political, socio-economic, demographic and other transformations. Nowadays the wave of migration reaches its peak. Studies conducted by international organizations show that more than 175 million people have migrated and are away from their homes. 19.2 million people have received refugee or asylum seeking status.

*The United Nations Economic and Social Affairs Department has published data on migration from post-Soviet countries. It appears that, **the leader is Armenia** - 31% of the population left the country after declaring its independence. **The second place took** economically quite strong Kazakhstan - presumably, migration from this country has not economic, but ethnical character. **On the third place is Moldova. As for the Georgia it is on the fourth place with its 21% migrants.***

Keywords: Migration, Post-Soviet Countries, Georgia, Statistics, Europe

The processes of migration have an active development in the modern globalized society, with its both positive and negative consequences for the development of country. It is caused by political, socio-economic, demographic and other transformations. Migration is a multidimensional phenomenon that is viewed from the standpoint of economics, sociology, law and demography. Global migration is a driving force of people's live style. Nowadays the wave of migration reaches its peak. In last decades global migration has received unprecedented levels. Studies conducted by international organizations show that more than 175 million people have migrated and are away from their homes. 19.2 million people have received refugee or asylum seeking status or refugee status.¹

There are many obvious and certain factors for migration but in our paper we are going to concentrate on push and pull factors of migration, especially about the migration from Post Soviet countries, especially since we are from Georgia we would like to emphasize the situation in our country with all its outcomes. According to modern approaches, there are different theories that explain the migration of the two interrelated factors: The first is the existence of destructive factors, so called "compulsory factors" - poverty, unemployment, low social status and so on. Second, the so-called "attractive factors" - a better job perspective, education system, political freedom and so on. In the case of post-Soviet countries, we prefer neo classical approach, which is based on opinion that migrations of migrants from low-paid countries are due to economic factors in high-

¹ <https://www.sem.admin.ch/sem/en/home/internationales/weltweite-migration/migrationsgruende.html>

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paying countries.² Hence, in the following paper, as push factor we consider the unemployment as for the pull factor it is chance to find job and better living condition.

In recent years, the problem of labor emigration has become more and more important in Georgia. As in 2002 according to the universal census, the population of Georgia decreased by more than one million people compared to 1989, which, as experts estimate is largely caused by emigration of population.³ According to research provided by Georgian experts in 2003-2004, every following ten family had one emigrant abroad. High level of unemployment, and low salaries are the push factors to emigrate, to seek any kind of job outside the country, because in most cases this is the only way to feed their families that they left back in Georgia, therefore one out of ten families depend on a financial aid that Georgian emigrants send to their relatives.

It started after the collapse of the Soviet Union. Almost every post Soviet country faced radical changes economy, politics and last but not least in socio-cultural development. The study of labor emigration over a number of years has shown that the geography of labor emigration and the direction of outflows change.

In the post-Soviet period, as a result of emigration from Georgia, the number of the available population decreased by more than a quarter and a narrowed reproduction regime was formed, the decrease in resources necessary for demographic growth in turn caused a radical change in the reproductive behavior of the population, a decline in the birth rate and natural increase, and acceleration of aging. The birth rate in the contingent of labor emigrants, which is much younger than the population remaining in Georgia, especially decreased.

There are no exact statistics about the number of our fellow citizens, Georgians working abroad. However, the fact remains that after the collapse of the Soviet Union, a large number of citizens left the country for the job search and turned into labor migrants. According to the unofficial data of the Office of the State Minister of Georgia on Diaspora Issues, 2 847 621 Georgian or ethnic Georgian live in 43 countries of the world. For 2015 the preference of Georgian labor: 1- Russia – 100%, 2- Greece - 31%, 3- Ukraine -19%, 4- Turkey - 13%, 5 – USA -10%⁴.

The research shows that the migration from Georgia is one of the highest among post-Soviet countries.

The United Nations Economic and Social Affairs Department has published data on migration from post-Soviet countries.

It appears that, **the leader Armenia** - 31% of the population left the country after declaring its independence. It is caused not only by territorial isolation of the country, frozen conflict with neighbor and the complete uncertainties of future prospects, but great and influential Diaspora in different parts of the world. So, the migration from Armenia can be considered by the effect of pull factors.

2 The Manual of Migration, 1st addition, (Georgian) 2017, Published by International Centre for Migration Policy Development, Tbilisi

3 National statistics office of Georgia 2016, p.7

4 <https://storybuilder.jumpstart.ge/en/shromiti-migratsia-saqartvelodan>

The **second place took** economically quite strong Kazakhstan - presumably, migration from this country has not economic, but ethnical character. Kazakhstan had a great number of Russian people, so it appears that Russian population leaves the country and migrates to Russia.

On the third place is Moldova – 21,9 % migration.

As for the Georgia it is slightly differ from Moldova, it has a little less migrant and is on the fourth place with its 21% migrants.

As for the other post Soviet republics the situation is following: Latvia - 17%, Latvia - 17%, Estonia - 15%, Belarus - 15%, Ukraine - 13%, Kyrgyzstan - 12, 8%, Azerbaijan - 11, 8%, Russia - Other countries in the post-Soviet countries - 7%, Tajikistan - 7%, Uzbekistan - 6, 7%.

The migration indicator is the lowest in the world's one of the most totalitarian and closed countries - Turkmenistan - 4,5%.⁵

On 9 March 2016, European Commission officially proposed to the European Parliament and European Council a short-term visa waiver for Georgian nationals for travelling to EU/Schengen countries, meaning that citizens of Georgia having biometric passports could travel to EU/Schengen states without a visa. This proposal was adopted by EU Parliament on 2 February 2017, and by EU Council – on 27 February 2017. Starting from 28 March 2017, Georgian citizens started traveling to EU/Schengen states without a visa.⁶ Visa liberalization process caused a new wave of migration. Out of the eight EU member states with the largest number of asylum applications from Georgian nationals in 2017—only did not register two-month periodic increases of over 50%, compared to the same period in 2016 at least once from March-Dec 2017, which would allow member countries to trigger the mechanism. The number of 50+ percent increases in 2017 appears to be rising every quarter, while Italy, Belgium, Greece, France, and Sweden have had an average 2-month increase of over 50 percent. Meanwhile, recognition rates of Georgian asylum applications in all EU member states remain low.⁷ For instance, the statistics of the increased number of asylum applications made by Georgian citizens after visa liberalization In different European countries is following: Germany- 33%, Sweden – 16%, Italy – 78%, Belgium – 63%.⁸

Since, our paper is about economic migration from Georgia, we cannot avoid Georgian statistic's statement about illegal migration of Georgian citizens to European countries, it is said that there we not certain figures about it. It added that the two main sources which can analyze illegal migration are: Euro Stat and FRONTEX. In their annual reports “the analyses of eastern partnership risks” Euro stat refers the information taken from European countries and Schengen zone as for FRONTEX it only refers to the Eastern European neighborhood countries, such as Norway, Finland, Estonia, Latvia, Lithuania, Poland, Slovenia, Hungary and Romania. According to the 2017 EaP-RAN analyzes about annual report of illegal migration, comparing with the 2016

5 <https://commersant.ge/ge/post/saqartvelodan-migracia-postsabchota-qveynebs-shoris-erterti-yvelaze-magalia>

6 http://migration.commission.ge/index.php?article_id=17&clang=1

7 <http://gip.ge/threats-georgias-visa-free-regime-perspectives-european-capitals/>

8 <http://gip.ge/threats-georgias-visa-free-regime-perspectives-european-capitals/>

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the number of illegal borders crossers in 2017 reduced 3 times. The report says that in 2016 there were revealed 108 illegal border crossing cases, as for the 2015 it was 345.

Since the increasing number of legal and illegal migrants from developed countries, European countries are forced to apply certain measures to regulate this process. According to Eurostat, 1,255,600 first-time asylum seekers applied for international protection in the EU in 2015 (twice more than in 2014). This could certainly represent an opportunity for the EU labor market. If well integrated, refugees can add to a country's workforce and can contribute to the sustainability of the welfare state. However, the arrival of significant numbers of asylum seekers in Europe, mostly in Germany (35% of all the applicants in 2015), Hungary (14%) and Sweden (12%), does not replace the need for opening legal channels for migration. there are issues related to labor market integration. Although integration support varies from country to country, asylum seekers face similar labor market integration challenges in all states. One of them is the waiting time before they are allowed to access the labor market after the asylum application is introduced. The objective of the new team of Commissioners in office since November 2014 is to set up a new policy on legal migration. This was later confirmed in the European Agenda on Migration adopted in May 2015, which highlights the need to maintain Europe as "an attractive destination for migrants." In this context, the European Commission launched a public consultation on the revision of the Blue Card Directive (targeting highly qualified migrants) and the EU's labor migration policies, which ended in September 2015. Following this consultation at the beginning of April 2016, a communication focused inter alia on "enhancing legal avenues to Europe" was published.⁹

There are frequent cases when migrants who have some financial savings, after returning back to their homeland, buy a real or movable estate, but after some time they return to work again abroad. Their argument is following: in social terms, nothing has changed in Georgia and for them it's easier to earn money and have normal life, when they live and work in abroad. Abroad during long years of migration for them who already has citizenship of the host country, there is opportunity to make dual citizenship with the possibility to work. They live in these countries and seasonally come to homeland to spend time with relatives. In short, the number of people who used to live abroad and then returned back from successful labor migration to stay in their homeland is too small.¹⁰

Certainly, the emigration has a great impact over every country's demographic situation and Georgia is not an exception. The population census carried out in 2014 showed that, by the 1th January the population of Georgia was 3,713,700. If we compare it with the 2002 population census we can see that it reduced by 657,731. ¹¹ As for the January 1st 2016 the population was 3,720,400, and in January 1st 2017 we can see that it is reduced again and the figure is 3,718,200.

So, out of these results we can see that the population of Georgia reduces every year. We have to pay attention to the fact that Georgia is a multi ethnic country where are living people with many nationalities: Azerbaijanis,

9 https://www.iemed.org/observatori/arees-danalisi/arxius-adjunts/anuari/med.2016/IEMed_MedYearBook2016_EU%20Labour%20Migration%20Policy_Andreia_Ghimis.pdf

10 <https://www.gfsis.org/media/download/EJSEF/ZazaChitanava.pdf>

11 http://migration.commission.ge/files/migraciis_profilu_2017_a4_new_1.pdf

Armenians, Jews, Greeks, Russians, etc. Hence, the migrants from Georgia can be Georgian citizens of other nationalities, which moved to the countries of their origin.

According to the data of 2017, 840 000 Georgian immigrants live in different parts of the world. The statistics shows that the leading place of Georgian migrants takes Russia, at that period there was 450 000 migrants, then is coming Greece – 80 000 Georgian citizens are living and working there, the third place took Ukraine with 70 000 migrants, then Azerbaijan 50 000, Armenia-40 000, USA 30 000, Germany and Cyprus are at the same level with – 20 000 and the last place is Italy – 10 000 migrants.¹² According to the same statistics more or less then 10 000 migrants are working in each of these countries: Turkey, Israel, Spain, France and other countries. By the year 2017 the number of asylum seeking application from Georgia in European countries increased. This is confirmed by two statistics: one of the European IDPs (EASO) and the second Eurostat, the same as the Statistical Office of the European Union.

According to statistical data released by EASO, the number of asylum applications made by citizens of Georgia in 2017, in 28 European countries and if we compared it with 2016 we can say that it increased by 35%. In 2017, the total number of applications was 11 569. As for the accepting results it is quite low. For example, in December 2017, only 13 citizens of Georgia received asylum status in Europe, 5 persons got subsidies, and as for a negative response, 879 applications were rejected. Since European countries have put Georgia in the list of the safe countries it became more difficult to be granted asylum status.

The statistics of Euro-stat and EASO do not always match each other, because EASO does not give us the information about the particular country's situation: which country has the most refugees' application. Statistics of 2017 about asylum seekers applications in Euro-stat is available only by the October of mentioned year. In addition, the Euro-stat gives the statistics of 28 EU countries plus Norway, Switzerland, Iceland and Liechtenstein.. As for the, the visa-free regime for Georgians it officially started at the end of March. And according to the Euro-stat statistics since April 2017 to October 2017 6660 citizens of Georgia registered as asylum seekers in European countries, while in the same period of 2016 the number was 5495. So, here we can say that visa free regime had both its positive and negative impacts over Georgian citizens.

From April to October 2016, 680 applications were issued to France from Georgia. In the same period in 2017 - 1180. In April-November 2016, there were 460 applications from Georgia in Sweden. In the same period in 2017 - 665. In April-October 2016, 330 applications were applied from Greece to Georgia, in the same period in 2017 - 685. In April-December 2016, the Georgian citizens applied to Italy for asylum in 1606, the same period in 2017 - 440 times. In April-December 2016, Georgian citizens in Belgium filed a shelter application of 175 times, in the same period in 2017 - 365 times. In April-December 2016, 480 applicants of the Georgian citizens in Holland were detected in 2017 - 275. In April-December 2016, citizens of Georgia requested 265 times asylum in Austria, in the same period in 2017 - 330 times. In April-October 2016, 55 applications were filed by Georgian citizens in Ireland. In the same period in 2017 - 220.¹³

While considering the issue of migration, its important to highlight the gender aspect. The majority of researches and theories about gender are mainly related to men. While men are perceived to be independent

12 <https://www.amerikiskhma.com/a/global-migrant-stocks/4276406.html>

13 <http://netgazeti.ge/news/249760/>

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migrants and the main focus is to study their migratory experiences, women's migration cases are often presented as migrants of male migrant wives or daughters. In other words, women do not go to emigrate themselves, but they follow their husbands or fathers. Consequently, women involved in migration processes are not considered as independent actors.¹⁴ In fact, a large number of women from post-Soviet countries are working abroad as immigrants. For instance, according to Geostat in 2018, 56 116 men were migrated abroad, while the number of migrated women was 42 819.¹⁵

Very often women migration is linked to another serious problem as trafficking. Although trafficking can cause migrant men, more often migrant women are suffering as victims.¹⁶

Conclusion

Based on our research we can conclude that of migrants and migration policy from the post Soviet republics, we can say that after the collapse of the Soviet Union there immerge independent states, which had to pass through the harassments and hardships and face radical changes in economy, politics and last but not least in socio-cultural development. All these had a serious impact over the population which at the beginning had the only task – to survive. Hence, for many people there was no way out except to leave the home country in order just to have the necessities. Of course it results the crisis for both: the country of destination and migrant's origin country. Here we have to say that almost all the above mentioned migrants' receiving countries were not ready for this “chaos” which was unconsciously and not intentionally caused by migrants. As for the Post Soviet countries here the situation is left much to be desired. The outflow of citizen resulted first, the demographic crisis - the number of the available population decreased by more than a quarter and a narrowed reproduction regime was formed. Also, the decrease in resources necessary for demographic growth in turn caused a radical change in the reproductive behavior of the population, a decline in the birth rate and natural increase, and acceleration of aging. The birth rate in the contingent of labor emigrants, which is much younger than the population remaining in Georgia, especially decreased. Then brain drain, which brings the country to the disastrous situation as there are no professionals to work in most sphere, and the last but not least the loss of cultural identity.

Also we can claim that the issue of migration is very complex and large. The process of globalization, as it is known, causes the disruption of borders, which in its turn makes it much easier to move around. All this led to the fact that migrants from developing countries are increasingly moving around in Western countries. More and more researchers are interested in migration issues, as a large number of population causes serious demographic problems. Especially for small and developing countries like the majority of post-Soviet parties. The problem of migration has become one of the most important challenges of the 21st century. On the one hand, those states which lose a large number of their population as emigrants need to develop an effective

14 The Manual of Migration, 1st addition, (Georgian) 2017, Published by International Centre for Migration Policy Development, Tbilisi

15 <https://1tv.ge/news/2018-wlis-monacemebit-emigrantebis-raodenoba-98935-s-sheadgens/>

16 The Manual of Migration, 1st addition, (Georgian) 2017, Published by International Centre for Migration Policy Development, Tbilisi

plan to prevent this threat. And on the other hand, Western developed states need to implement the effective policy to regulate this process.

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THE IMPACT OF GLOBALIZATION OVER INTERNATIONAL ECONOMIC RELATIONS

Manana Beruashvili (Georgian Technical University)

Maia Martiashvili (Georgian Technical University)

Abstract

The role of individual states is somehow diminished in the global international system, but it is the fact that in modern world it is impossible to isolate any country. It is true that in order to maintain their own cultural traditions and identity and as well as to gain a proper place in the international system, small countries face certain problem. Nowadays, the world's technologies have changed; transnational organizations are closely linked to the political, social and cultural aspects of globalization. And the most important point which we want to highlight is the fact that all these have resulted digital revolution. Nowadays, the globalization Georgian society became more argent and topical. Today's economic situation make us think about the country's future. Globalization can be considered as a chance for the country to be involved in world's economic and political processes, improving its living standards and future development.

Keywords: Global International System, Transnational Organizations, Digital Revolutions

In order to consider the globalization process generally it is necessary to establish its basic aspects such as: political, economical, social and cultural globalization, each of which is a different direction of one event.

Globalization is, first of all, the process of interconnecting, mutual relations and mutual influence of the world regions and zones, countries, peoples and individuals.

Nation-states are facing the greatest challenge today. In general, the state has a monopoly on use of force within the certain territory. And the solution of global economic problems requires more political units. For example - European Union, illegal trade with drugs or fight against AIDS. These are the main problems, that has got regional, transnational and global significance and the decision of which requires joint effort of the countries.

The quality of economical, scientific, technical, legal and informational interdependence of national farms has reached a level when at least three principal new events became unavoidable:

1. From the fragile relations of more or less connected countries the world economic community has been transformed into a united, total economical system, where national societies became a part of the united world economic body;
2. Under the globalization roles between national and world economic relations were exchanged;
3. Globalization objectively leads us to the weakening of the regulated functions of nation-state. It should be mentioned that globalization does not mean only economical processes. There are different means for determining the level of globalization.

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In the second part of the XX century the unprecedented task was faced with mankind - it became necessary to identify new mechanisms for regulating of global economy, ecology and other spheres. The process of transformation of the millennium organization of the nation-state organization of the world society into the new form began. Mechanisms of global regulation are looked for in the frame of United Nations, as well as within the International Currency Fund, World Bank and World Trade Organization. Different projects were put forward from the strong regulating structures to the idea of creating of world governance. Of course, this does not mean that the nation-state, as regulatory mechanism of internal and international relations, has already exhausted itself: it will exist for a long time but, this time, not as all mighty and sovereign governor, but as one of the links of more complicated mechanism regulating global economical and other processes. It seems that such a mechanism is gradually acquiring a network features: the governments are a key point of the global governance network, and this network, excluding states, includes international public and intergovernmental organizations, transnational corporations, global business elites, like Davos Forum, etc.

Globalization changes the world culture in two fundamental ways. Many researchers consider that cultural globalization is an event of Americanization. In the last decades of the last century because of the information revolution and sharp and rapid development of the communicative technologies internationalization of economic life was accelerated and strengthened. ¹

Modern global culture, first of all, brings the technology civilization to the world. Its cosmopolitanism is mainly based on the largest technological base with a high-level communication system that creates a tightly interconnected economical, social and cultural links. Such universal cultural processes do not have a specific historical basis, nor the specific, characteristic rhythm and sequence of development. Cultural globalization in the third world countries and non-western society is more sensitive issue. It established here new elements and values that are completely alien for the local culture.

Nowadays, such powerful cultural phenomena as music, cinematography, art, sport and clothing are the products of global market. Such commercialization, which leads to impairment of cultural values, is a negative process. There is a danger of losing of many of the cultural characteristics of the country because it is not accepted by global, commercial market. The culture of the nation feeds much more valuable and totally different interests and aspirations. ²

The process of economical globalization leads to collapse of national state sovereignty as a result of impact of new super national structures - global economical education and associations of transnational governing financial structures and religious cultural unions. The most significant tendencies of the globalization process are:

- The world economy's growth at a very high rate;

1 Abzalava A, Global-innovative problems of economy and business, Publishing house, "Universali", Tbilisi., 2014 P 311

2 Shengelia T, Multiculturalism as a socio-economic event and determination of business determinants, Publishing house, "Universali", Tbilisi 2015. P 14

- Structural and geographical changes of the world economy;
- The tendency of unparalleled economic development of countries in terms of economic and technical progress;
- Transnational process expressed in transformation of the huge corporations into the elements of world economy;
- Creation of integrative regional economic blocks that becomes important for the world economy.

Finally, it may be said that the main criteria for the world economy development are: production efficiency, social orientation of economy, expenditure for education, increase of accruals from national income and development of economy.

The positive side of globalization is that its different aspects allow small countries to introduce their culture and national traditions to the whole world that can be considered as mean of promotion of their economical productivity.

It's impossible to talk about globalization without mentioning of the events that are around us every day. People often misunderstood the essence of modern globalization, which is followed by the confrontation of opinions and, in fact, by deadlock of the good discussion.

The topic of discussion today is not only globalization but economical, political, social and cultural globalization separately. Each of them is a different part of one event, but they have one base.

The business is characterized by analytical prognostic approach to unsustainable socioeconomic factors (change of government, frequent changes in tax system, competition and etc.), and the more appropriate this approach, the more stable the business. Many factors can be used to research these factors in Georgian business reality. The same time, we took advantage of the research methodology presented in the works of famous scientist B. Gleiseer. The method is designed to form an impartial concept based on data collecting, analysis and generalization of results. Data collecting and processing provides the possibility of formulating hypothesis and then making theoretical conclusions. The main essence of the method is to be explained by the behavior of an individual (entrepreneur) in this socio-cultural environment. As a result of research we can create logical categories that are used for the explanation of the business reality.³

Good entrepreneurial and investment environment significantly affects the business, as it directly affects the efficient distribution of resources. Due to the strong global competition and the dynamic economic development process the business demands are changing rapidly. Accordingly, entrepreneurial and investment environment is a very important factor in the business. The situation in Georgia in this regard is thoughtful and leads to the feeling of instability. The showing in 2018 is 18th among 178 countries. Despite this fact there are the principal problems remaining in a separate field that prevents increase of competitiveness of private sector and the long-term economic growth. Nowadays, it remains a problem to provide free

3 http://social-orthodox.info/materials/5_3_strauskorbin.pdf

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competition on the market, as well as problems with insolvency, settlement of trade disputes, and other issues related to business. The existing difficulties worsen the entrepreneurial environment, reduce the trust of the investors and make the local business less efficient. It is important not only to register but also to maintain business.⁴

Georgia has one of the highest indicators in the world but businessmen think that there are still some directions in the country where the situation must be improved. The State should take effective steps to correct the existing defects and to make a long-term stable and attractive investment environment. For this purpose a number of legislative and institutional changes are necessary to maintain business.

It can be said that the aspiration to globalization is the characteristic of the development of humanity; strong states make their politics in order to expand their spheres of influence.

Globalization as a single system can be divided into several types: economical activity, political, informational, ecological problems, fight against crime, terrorism, etc.

Economical globalization can be divided into two main types: market globalization and globalization of products. Financial globalization develops at the fastest rate among many forms of globalization, whose objective basis is the internationalization of production and capital movement. Financial globalization is the basis of the rest of the types of globalization, which became the main feature of the world economy.

Under globalization the politics that commanded to economics undergo adaptation and it does not define the development of economy. On the contrary, the economy now defines political relations. This circumstance gives preference to countries with highly developed economy.

The basis for the formation and farther development of the global economic system is a liberal economy, market economy and open economy. The market economy cannot form a socially oriented global system because the economic model of economic development is based on the concept of demand and provision that is far from social justice. Market economy as the core of the mixed economic system acquires sociality through state regulation.

The main basis of globalization process is the liberalization of international relations. The trend of globalization is based on the concept of open economy, which belong to those countries that are actively involved in the whole spectrum of international economic relations, they are:

- International trade;
- International trade of capital;
- Currency financial and credit relations;

4 <https://forbes.ge/news/3407/ekonomikuri-globalizaciis-reitingi>

- International migration of work force;
- Scientific technical contacts and relations, etc.

One of the most problematic issues today is influence of the globalization on social and economical development.

In parallel to social and economic development in the last decade the globalization has acquired a particular importance. The economic conception dominates in the approach to the globalization that involves the integration of national, international economy, by way of the international trade, foreign direct investment, capital flows, migration and technological progress.

Nowadays Georgian national economy is in the process of integration with the world economy that develops the global processes. As a result of globalization processes the world economy is becoming more and more involved in the national economy. It defines the future, norms and standards of its development, but does not have influence and does not change the importance of the national state. Globalization process is a transition process for the developing countries, developed countries and countries with transitional economies.

Georgia is an active participant in the multilateral trading system, which has more advantages, because in this case the trade liberalization is based on mutual concessions. The country's trade policy aims at obtaining favorable positions on the global market for economic objectives such as: elimination of discriminatory impacts of external force, obtaining and maintaining of competitiveness, access to major export markets, attracting of investments, etc.

Georgia's ability to fulfill the role of transit country attracts the attention of the international community. Georgia's geopolitical and geo-economical location is a subject of an international interest. Of course, Georgia's transit role in participation in the globalization process is important. Together with the increase of cargoes, investments and information flows, the quality of Georgia's integration into the world economy will be increased.

In order to be integrated in global economy Georgia made liberalization of trade, concluded international agreements for Free International Trade with Turkey and CIS.

After getting acquainted with the national characteristics of their partners the international entrepreneurs should get recommendations how to interact with each other, to analyze what they can, expect from what they see, and how they differ from and like each other. There are some areas, where two nations can reach an agreement.

Success of the international business depends on the factors as follows:

- Type of relations with the partner;
- Knowledge in business relations;

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- Ability to make necessary impressions about partners;
- Ability to understand motivation of the partner.

As a result of the increase of interdependence and interpenetration between national economies in modern global conditions the state border as an economical category loses its significance as a historical-legal category but it does not disappear, but becomes more liberal in terms of movement of the different factors.

For the development of international business it is necessary to define national cultural models of different countries, to analyze them and to participate in the integration processes.

International business means establishment of business contacts and their deepening, making new combinations in production, supporting them to invest resources, finding of new markets, creating of new products.⁵

Cultural stereotype of *Islamic states* mean: creation of atmosphere of obscurity, friendship and trust, orientation to work and its result, refraining from confrontation and criticism of others, respect for the use of secret force, pride and elevated emotionality, etc.

Georgians are characterized by loyalty to traditions. They are oriented on the development of interpersonal relationships. They easily agree on partnership in business relations. Georgians are characterized by impulsiveness, less pragmatism and mutual care. Georgians are solely in making decision.⁶

As a results accumulated in achievement of modern scientific technical progress and business development, the contours of the future business are expressed. This is natural that it raises new possibilities and demands towards companies and businessmen involved in international entrepreneurial relations. Tomorrow's leader will be obliged to look at the extraordinary possibilities in advance, the type of 'Global Manager' must appear, which will fit for any country, will know the languages and traditions of different countries and will not have national advantages.

On the background of world events and globalization almost every organization that has a desire to conduct international entrepreneurial activities has to conduct international entrepreneurial activities, to think about the creation of an appropriate organizational culture. When the companies' activities go beyond the national fields and communicate in many countries all over the world, their corporate culture is particularly affected by the national characteristics of different countries.

Conclusion

According to the above mentioned, finally, it is possible to say that globalization has both positive and negative impact on the economical and political development of different countries, regardless of whether this country is developed or far behind the other countries in the international arena, economical and political processes of

5 Jolia G, International Economic Relations, Publishing house "Georgian Technical University", Tbilisi 2015, P 437

6 Cultures and Organizations, Software of the Mind. Geert Hofstede and Gert Jan Hofstede 2011, P. 40

the globalization improves the situation of some of the countries, while in some cases it worsens situation. However, it is indisputable that involvement into the economic and political processes of globalization for any countries today can be considered as a step forward in improving their future development and living standards.

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THE SURVIVAL OF MODERN ECONOMIES – CHALLENGES AND REMEDIES

Julia Dobрева (VUZF University)

Abstract

Economic development in the 21 century differs in many aspects from the development we have experienced in previous centuries. This paper discusses the current challenges faced by modern economies. It highlights the main problems and impediments to growth and explains why economic development cannot be achieved or is at unsatisfactory levels both in developed and developing economies. The paper also addresses the key factors for economic growth of modern economies. It explains the main drivers of growth and how they can be appropriately and effectively used as remedies to achieve economic development. Some examples are provided to illustrate the main points.

Keywords: Economic development, drivers of growth, economic growth, developing economies

Introduction

Ever since the late 80s humanity has gone through a major shift in its understanding of what factors matter for sustainable economic growth and development. The role of such factors as education, healthcare, institutions, and technology is becoming more and more debatable with regard to their contribution to the advancement of modern societies.

This paper addresses the major challenges which economies nowadays are facing amidst constantly changing political contexts and climate changes, while at the same time it proposes efficient remedies for both developed and developing countries. The analysis examines corruption, state bureaucracy, low infrastructure and population growth as key impediments to the process of economic development. Furthermore, the paper discusses the major issues which undermine economic development and impede economic growth in modern-day economies. Even though as factors they are more attributable to developing economies, their overreaching effect is affecting developed economies as well and creates burdens to the global economic development.

On a next level the paper examines some key factors which trigger economic growth in modern day economies and proposes them as remedies. It distinguishes human resources, education, healthcare and energy resources as the main drivers in the process of economic development and discusses the major issues which facilitate economic growth today.

General Impediments To Economic Growth

Corruption

At the macro level, the literature generally shows that corruption has a negative, direct impact on economic growth and development (Chene, 2014). Corruption also has an indirect effect on a country's economic

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performance by affecting many factors leading to economic growth such as investment, taxation, and effectiveness of public expenditure. There are a number of channels through which corruption may affect economic growth:

- Corruption distorts incentives and market forces, leading to misallocation of resources.
- Corruption diverts talent and resources, including human resources, towards “lucrative” rent-seeking activities, such as defence, rather than productive activities.
- Corruption acts as an inefficient tax on business, ultimately raising production costs and reducing the profitability of investments.
- Corruption may also decrease the productivity of investments by reducing the quality of resources - for example, by undermining the quality and quantity of health and education services, corruption decreases a country’s human capital.

he definition of corruption for many development economists is generally the “abuse of public office for private gains.” Some economists like Andrei Shleifer and Robert Vishny (1993) defined government corruption as “the sale by government officials of government property for personal gain.” Also according to Nathaniel Leff “corruption is an extra-legal institution used by individuals or groups to gain influence over the actions of the bureaucracy” (Leff, 1964).

Another point argued by Tanzi (1998) is that the tax system itself is often a source of corruption, particularly in those cases where the underlying legislation is unclear or otherwise difficult to understand. Unclear tax laws will give rise to “compromises” between tax inspectors and taxpayers. There are various ways in which various features of government organization and policy create incentives for the emergence of corrupt behavior. An important point is that *the imposing presence of the government in the economy and, in particular, the provision of goods and services at below market prices create fertile ground for corruption.*

State bureaucracy

An important source of corruption stems from the distributional attributes of the state. The role of the state in the economy has expanded significantly over the last century and this has led to the proliferation of benefits under its control, as well as in the various ways in which the state imposes costs on civil society and the business community. A large state is not necessarily associated with higher levels of corruption – e.g. the Nordic countries have the highest levels of public spending in the world but are also the least corrupt. The larger the number of interactions between officials and private citizens, the larger the number of opportunities in which the latter may wish to illegally pay for benefits to which they are not entitled.

Fan, Lin and Treisman (2012) observe data from 80 countries which provides evidence that firms are more likely to report bribery in countries with more government tiers, or with a larger number of local government employees. In such countries the state is involved in the distribution of social benefits in ways that are not transparent which may involve corruption. Governing often translates into the issuing of licenses and permits and hence the average citizen has to enter into transactions with some government office or bureaucrat to

engage in one of the following: to obtain a birth certificate, to get a passport, to pay taxes, to open up a new business, to drive a car, to register property, to engage in foreign trade, to sell a good or service to the government, to hire an employee, to use the publicly provided health services, to be allowed to build a house, etc.

Low infrastructure

Inadequate infrastructure, including unreliable energy, an ineffective urban-rural road network, and inefficient ports, is considered one of the largest impediments to economic growth in Africa. It limits the returns from human capital investment such as education and health. Hospitals and schools cannot function properly without electricity (Sy, 2016). According to 2009 World Bank study it was estimated that sub-Saharan Africa's infrastructure needs are about \$93 billion a year. Also according to IMF estimates the budget spending on infrastructure by sub-Saharan African countries reached about \$51.4 billion, meaning a financing gap of about \$41.6 billion (IMF, 2014).

Furthermore Sy (2016) observes that except for Nigeria and South Africa, sub-Saharan African countries have been unable to attract significant private investment outside the telecommunications sector. In 2013, sub-Saharan Africa received about \$17 billion in private funds, of which all but \$2 billion went to South Africa and Nigeria in sectors other than telecommunications. Overall, private investment (which includes public-private partnerships) went mostly to information and communications technology and electricity from 2005 to 2012. Hence, a policy agenda for building and maintaining infrastructure in sub-Saharan Africa under these circumstances should have at least three priorities:

- First, domestic budget spending—the largest source of African infrastructure financing—should be increased.
- Second, sources of domestic revenue should be broadened.
- Third, funds must be spent efficiently.

The above priorities can be widely applied to other developing countries or, in general, countries experiencing economic and financial difficulties. It is evident that most of the debate on infrastructure needs in sub-Saharan Africa focuses on financing issues. *However, there is also evidence that efficiency, not financing, is often the barrier to investment.*

Growing population

The first and foremost economic explanation of underdevelopment or the existence of mass unemployment and poverty of today's developing countries is the serious imbalance between population and productive resources, especially the stock capital. This imbalance between resources and population has manifested itself not only in low per capita income and poverty, but also in the existence of huge unemployment and disguised unemployment in the underdeveloped countries. The present capital (including land) is quite insufficient to employ the entire working age population and at a reasonable level of real per capita income.

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For several decades in the past the rate of investment and therefore the growth of the capital stock has not been following the rate of growth of population in underdeveloped countries like India, Bangladesh, Yemen, etc. This implies that opportunities for productive employment have not been increasing commensurate with the growth of population and labour force and this has resulted in mass poverty and unemployment.

The lack of real capital per head of population is a characteristic feature of the developing economies and they are often called “capital-poor economies”. Low productivity of the population and therefore their low income in the developing countries is considered to be due to the small amount of capital per head of population. Hence the most important economic explanation for underdevelopment and poverty is the imbalance between capital and population. Capital is too small in relation to the huge amount of population in developing economies.

Key Factors for Economic Growth

Human resources

Human development has important effects on economic growth. An increase in the capabilities and functionings available to individuals should allow more of them to pursue occupations in which they are most productive. These capabilities of the human capital are increased mainly through education and health and we will consider these to factors as contributing to economic growth. Most certainly, human development can be seen as the relaxing of constraints which may have interfered with profit maximization and hence leading to income generation and economic development. Furthermore, although human development represents a broader concept, many of its elements overlap significantly with the more traditional notion of human capital.

More specifically, each of the various components of human development is likely to have a distinct impact on economic growth. Education, for instance, has a strong effect on labour productivity. In addition to its direct effect on productivity, education also affects the rate of innovation and technological improvements. The quantity and quality of investment, domestic and foreign, together with the choice of technology and overall policy environment, constitute other important determinants of economic performance (Ranis, 2004). Health has also demonstrated positive effects on economic growth beyond its inherent desirability as an end in itself. Strauss and Thomas (1998) review a large literature documenting how improvements in health and nutrition improve productivity and incomes. Education and health may also have strong indirect impacts on economic growth through their effect on the distribution of income, and education even more so through its impact on health. As education and health improve and become more broadly based, low income people are better able to search for economic opportunities (Strauss & Thomas, 1998).

The most important step towards the implementation of a human development approach is in the design of specific policies that lead to the empowerment of people and their participation in development, particularly those that are marginalized because of limited income, their place of living, disability, gender or age. For example, youth unemployment always keeps high levels in both developed and developing economies. Human development cannot take place except in a free and democratic environment where the civil society is invited to participate in the design and implementation of policies directly affecting people and local communities.

Education

Education is one of the major factors in developing human capital and therefore it plays a major role in the economic development of any country, developed or developing one. Many resources play a part in the growth of a country's economy one of which and perhaps the most important is human capital, which means the workforce of the country. Thus, a good and productive workforce by making use of other resources can lead an economy to growth and prosperity. Therefore education is one of the most important factors that leads a given economy to sustained economic growth. Education has become a very important part of every government policy and much effort has been done with respect to improving education in many developing countries (e.g. India, Pakistan, Bangladesh, Afghanistan, etc.). Many studies have been conducted in the past to examine the relationship between education and the economic development of a country.

The theoretical growth literature emphasizes three mechanisms through which education may affect economic growth:

- *First - education can increase the human capital inherent in the labor force*, which increases labor productivity and thus transitional growth toward a higher equilibrium level of output (as in augmented neoclassical growth theories, (Mankiw et al., 1992);
- *Second - education can increase the innovative capacity of the economy, and the new knowledge on new technologies, products, and processes promotes growth* (as in theories of endogenous growth, e.g. Lucas, 1988; Romer, 1990; Aghion & Howitt, 1998); and
- *Third - education can facilitate the diffusion and transmission of knowledge needed to understand and process new information and to successfully implement new technologies devised by others, which again promotes economic growth* (e.g. Nelson & Phelps, 1966; Benhabib & Spiegel, 1994).

The educational provisions within a given economy represent one of the main determinants of the composition and growth of that country's output and exports and constitute an important ingredient in a system's capacity to borrow foreign technology effectively. Health and nutrition, and primary and secondary education all raise the productivity of workers. Secondary education facilitates the acquisition of skills and managerial capacity. Tertiary education supports the development of basic science, the appropriate selection of technology imports and the domestic adaptation and development of technologies. Secondary and tertiary education represent critical elements in the development of key institutions, of government, the law, and the financial system, among others, all essential for economic growth. Empirical evidence available at both micro and macro levels further illuminate these relationships: at a micro level, numerous studies indicate that increases in earnings are associated with additional years of education, with the rate of return varying with high level of education (Behrman, 1990; Psacharopoulos, 1994).

Healthcare

Healthcare is not only a desirable, but also an essential priority, ensuring the development of most societies. However, modernday health systems face complex challenges, which are partially derived from new global pressures, such as ageing population, growing prevalence of chronic illnesses, and intensive use of expensive

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but vital health technologies. Health performance and economic performance are deeply interlinked. Wealthier countries have healthier populations and also poverty, mainly through infant malnourishment and mortality, adversely affects life expectancy in developing countries. National income has a direct effect on the development of health systems, through insurance coverage and public spending. A basic message is that investments in health and the design of health financing policies should be addressed in terms of the interaction between health and economic growth.

Furthermore, the effects of health on development are clear. In some countries with weak health and education conditions it is hard to achieve sustained economic growth. Economic evidence provided by the WHO proves that a 10% improvement in life expectancy at birth is associated with a rise in economic growth of some 0.3-0.4 percentage points a year. It is acclaimed that healthier workers are physically and mentally more energetic and robust, they are more productive and earn higher wages. Also they are less likely to be absent from work because of illness. It is a major belief that illness and disability reduce hourly wages substantially, with the effect especially strong in developing countries, where a higher proportion of the work force is engaged in manual labor than in developed industrial countries. Several research works comment on many of these effects (Strauss & Thomas, 1998). Also, health in the form of life expectancy has appeared in many cross-country growth regressions, and investigators generally find that it has a significant positive effect on the rate of economic growth (Bloom & Canning, 2000; Bloom & Canning, 2001).

Energy resources

Both developed and developing economies are dependent on energy supply. Both heavy and light industry require energy, it is necessary to build and to light new homes, to transport goods, to practice modern intensive agriculture, and for practically every aspect of modern society. As societies develop, their demand for energy grows, requiring some sort of national energy policy in order to maintain the rate and level of development. Since energy use results to some extent in an environmental effect, a nation's environmental goals are meant to affect its energy and economic policies and vice versa. Many developing economies are pressured by developed economies to exhibit a high degree of environmental awareness and protection. This also has an effect on a nation's economic growth as well as its energy policies.

There are various ways to create intelligent and efficient energy policies. In order to attain high levels of efficiency it is important to consider the following: utilizing existing energy sources in more efficient ways, distributing energy to all people fairly, creating rules which facilitate wise energy use, problems involved in creating such rules (both within countries and throughout regions within and between countries), creating new energy sources and supplies, transitions to utilizing new energy sources, creation and upkeep of infrastructure for an energy source, using energy for economic gain, countries' interests in possessing its own energy, and concerns for the environment in using energy.

It is often the case that a particular country lies in a region which has few natural resources, or resources which have been depleted (like the Aral Sea in Khazakhstan). It is then necessary for that country to use what they do have to the best of their ability. For example, Japan has little in the way of energy-producing natural resources. To help reduce Japan's dependence on imported petroleum, the Japanese government began emphasizing the use of nuclear power to the extent that well over half of Japanese electrical energy is supplied by nuclear reactors. This energy policy has helped to significantly improve the quality of Japanese air. Another resource-poor

nation, Lithuania, relies on nuclear power for nearly eighty percent of its energy production as well as selling extra energy as a major source of hard currency.

Conclusion

This paper analyzed the major concerns which economies nowadays are facing. It highlighted four major impediments to economic growth and development, i.e.: corruption, state bureaucracy, low infrastructure and population growth. Furthermore, the paper focused on the major issues which undermine economic development and impede economic growth in modern-day economies. It stated clearly that such impediments are detrimental both to developed and developing economies and affect both in many cases. Even though as factors they are more attributable to developing economies, their effect is impacting developed economies indirectly and may significantly affect global economic development.

Secondly, the paper analyzed the major factors which contribute to the growth of modern economies and identified them as remedies. It highlighted four major factors ensuring economic growth and development, i.e.: human resources, their education and health, as well as energy resources. Furthermore, the paper focused on the major issues which boost economic development and generally set the environment for economies to thrive. It stated clearly that these key factors are vital for both developed and developing economies and affect both in many cases.

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THE LEGISLATIVE BUDGET PROCESS IN TURKEY: THE STRUGGLE WITH TIME

TÜRKİYE’DE YASAMA BÜTÇE SÜRECİ: ZAMANLA MÜCADELE

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Abstract

The government budget proposal prepared by the executive branch must be submitted to the assembly before the beginning of the fiscal year. The assembly which has a limited time to examine the budget proposal has some disadvantages. A failure to submit the budget proposal to the assembly on time may result in the assembly not being able to investigate sufficiently on the budget. This failure damages the power of the purse. In addition, the delay in the legislative budgetary process causes the assembly to fail fulfilling its fiscal responsibility and adversely affects the budget transparency. This study tries to determine when should assembly be included in the budget cycle. The aim of this study is to compare and to evaluate the legislative budget process schedule in Turkey and OECD countries.

Keywords: Legislature, Budget Process, Timeliness

Giriş

Anayasa ve bütçe ile ilgili yasalar, yasama organının bütçe üzerindeki rolünü ve yetkilerini belirlemektedir. Yasama organının bütçe üzerindeki yetkileri ülkeden ülkeye değışmekle birlikte ülkelerin anayasal düzenlemelerine, yasal kısıtlamalarına, politik faktörlerine ve bütçe geleneklere göre farklılık göstermektedir. İyi yönetişimi, mali saydamlığı ve hesap verilebilirliği sağlamak için yasama organının bütçe sürecine aktif katılımı büyük önem taşımaktadır. Bütçe politikaları ve orta vadeli bütçe hedefleri mecliste tartışıldığında, bu politikalar ve hedefler daha etkin uygulama alanı bulmaktadır.

Yasama organının bütçe politikalarını etkin bir şekilde tartışması ve değerdendirilebilmesi için bütçenin mecliste yeterli bir sürede bulunması gerekmektedir. Hükümetin önerdiği harcamaları yapma ve gelirleri toplama tekliflerini inceleyebilmek amacıyla yeterli zamanı olan bir yasama organı her zaman avantajlı konumdadır. Böylece yasama organı bütçe hakkını gerçekleştirebilir ve kamu kaynaklarının etkin kullanımı sağlayabilir.

Bu çalışmanın amacı meclislerin bütçe döngüsüne ne zaman dahil edilmelidir sorusuna cevap aramaktadır. Çalışmanın Türkiye’deki yasama bütçe sürecini zaman açısından değerdendiren ilk çalışma olması sebebiyle literatüre katkı yapması beklenmektedir. Çalışma şu şekilde organize edilmiştir. Birinci kısımda literatür taraması ele alınmakta, ikinci kısımda Türkiye’de yasama bütçe sürecinin zamanı incelenmekte ve son kısımda sonuç ve değerdendirme ile bitirilmektedir.

Literatür

Literatürde bütçe teorisi ile bürokrat davranışı arasındaki ilişkiyi açıklayan ilk çalışma Niskanen (1971)'e aittir. Niskanen (1971), bürokratların her zaman bütçe maksimizasyonu peşinde koştuğunu ileri sürmüştür. Bürokratlar özellikle asimetrik bilgi ve güçlü teşviklerle bütçelerini maksimize edebilmektedir. Bürokratlar genellikle politika yapıcılarının talepleri ve arz maliyetleri hakkında daha fazla bilgiye sahiptir. Yasama önlemleri ve hükümet politikaları kamusal bilgi niteliği taşıdığından, bürokratlar politika yapıcılarının hizmet taleplerini kolayca bilebilmektedir. Politika yapıcıları, bürokratik hizmet tedariki talebini gizleyebilecek bir konumda değildir ve dolayısıyla bu talebin maliyetini öğrenememektedir (Simandan, 2009: 85). Diğer bir ifadeyle hiç kimse bürokratlardan daha iyi bir bilgiye sahip olmadığından, bürokratlar bütçelerini optimalin üstünde arttırma yeteneğine sahiptir. Böyle bir bütçe artışı, hem yolsuzlukların artmasına hem de kamu kaynaklarının etkin kullanılmamasına sebep olmaktadır (Sam-Tsokwa ve Ngara, 2016: 1).

Bununla birlikte meclisin bütçe sürecine aktif katılımı demokrasinin en önemli parçalarından biri olarak kabul edilmektedir. Bürokratların bütçe maksimizasyonu yaklaşımı, ulusal bütçelerin meclise zamanında gönderilmemesi veya bütçelerin mecliste kısa sürede görüşülerek, yürürlüğe girmesi durumuna da açıklık getirmektedir. Bu şekilde hızlıca görüşülen bir bütçede, bürokratlar kamu kaynaklarını istedikleri şekilde kullanabilir.

Bürokratların yanı sıra meclis üyeleri de çıkarları doğrultusunda hareket ederek yeniden seçilebilmek amacıyla bütçe harcamalarını maksimize etmeye odaklanmaktadır. Yasama organı üyeleri, maliye politikalarına ilişkin kararlar verirken genellikle kısa vadeli bir ufka sahiptir. Meclisin sınırsız bütçe düzenleme yetkisine sahip olduğu ülkelerde, meclis üyeleri harcamaları arttırma veya gelirleri azaltma, dolayısıyla mali durumu kötüleştirme ve kamu borcunu arttırma eğiliminde olabilmektedir. Meclis üyelerinin bütçe üzerindeki yetkileri anayasal düzenlemelere, yasal kısıtlamalara, politik faktörlere ve bütçe geleneklere göre farklılık göstermektedir (Lienert, 2013: 117).

Bu farklılıklara rağmen meclislerin en temel görevi öncelikle hükümetlerin hazırladığı bütçe taslağını gözden geçirmek ve yıllık bütçe planının uygulaması için hükümetlere yetki vermektir. Posner ve Park (2007)'e göre yasama organının bütçe etkisi; yürütme organının hazırladığı bütçe üzerinde değişikliklerin yapılması ve bütçenin onaylanmasında yaşanan içsel süreçlerin bir fonksiyonu olarak ifade etmektedir. Wehner (2004) ise, yasama organlarının bütçe üzerindeki etkisini üç ayrı sınıflandırma ile ele almaktadır:

- Bütçe mevzuatında yasama organları, yürütmenin hazırladığı bütçe tekliflerini değiştirebilir veya reddedebilir. Ayrıca yasama organı, değiştirdiği veya reddettiği maddeleri kendi kararlarından biri ile ikame etme yetkisine de sahiptir (Örneğin: İsveç, Amerika Birleşik Devletleri (ABD)).
- Bütçe mevzuatında yasama organları, yürütmenin hazırladığı bütçe tekliflerini değiştirebilir veya reddedebilir. Ancak yasama organı kendi bağımsız bütçe maddelerini oluşturma yetkisine sahip değildir. Bütçe maddelerini değiştirme yetkisi de genellikle sınırlandırılmıştır (Örneğin: İtalya, Hollanda).

- Bütçe mevzuatında rolü az olan veya hiç olmayan yasama organları, genel olarak hükümetin düşmesi kaygısına sahiptir. Bu sebeple, yürütmenin hazırladığı bütçe tekliflerini önemli ölçüde reddetme yetkisinden yoksundur (Örneğin: İngiltere)

Yasamanın bütçe üzerindeki etkisi aynı zamanda hükümetlerin isteklerini göz önünde bulundurabilecek süreden de etkilenmektedir. Hükümetin bütçe tekliflerini incelemek için, zamanı sınırlı olan bir yasama organı dezavantajlıdır. Bütçe sunumundan yeni mali yılın başlangıcına kadar geçen süre, ABD'de sekiz ay, diğer ülkelerin çoğunda ise yaklaşık üç ay gibi genel bir norm kalıbındadır. İngiltere'de bütçe önerileri, meclis değerlendirmesinden sadece iki hafta önce sunulmasına rağmen, yürütme ve yasama arasında önemli bir gayrı resmi dayanışma bulunmaktadır. Meksika'da, cumhurbaşkanları bütçelerini eskisinden daha erken sunmalarını gerektiğine dair bütçe kanunlarında değişiklikler yapmıştır. Tablo 1'de, bazı ülkelerin bütçe sunum zamanlaması gösterilmektedir (Posner ve Park, 2007: 11).

Tablo 1: Bütçe Sunumu Zaman Çizelgesi

Ülke	Mali Yıl Başlangıcı (A)	Bütçenin Son Teslim Tarihi (B)	Bütçenin Mecliste Kaldığı Süre (B-A)	Dayanağı
Fransa	1 Ocak	Ekim ayının ilk Salı günü	Yaklaşık 3 ay	Organik Bütçe K. (LOLF)
Japonya	1 Nisan	Ocak ayı boyunca	3 aydan fazla	Kanun (Kamu Maliyesi K.)
Kore	1 Ocak	2 Ekim	Yaklaşık 3 ay	Anayasa
Meksika	1 Ocak	8 Eylül	Yaklaşık 4 ay	Kanun
Hollanda	1 Ocak	Eylül ayının üçüncü Salı günü	3 aydan fazla	Anayasa
İsveç	1 Ocak	En geç 20 Eylül	3 aydan fazla	Kanun (Meclis K.)
İngiltere	1 Nisan	Hazine takdirinde	-	-
ABD	1 Ekim	Şubat ayının ilk Pazartesi günü	Yaklaşık 8 ay	Kanun (Bütçe ve Muhasebe Yasası)

Kaynak: Posner, P., Park, C.K., (2007), "Role of the Legislature in the Budget Process: Recent Trends and Innovations", OECD Journal on Budgeting, Vol. 7(3), 11.

OECD ülkelerinin yaklaşık % 85'inde bütçe, yasama organına yeni mali yılın başlangıcından 2 ay (Kanada) ila 4 ay (Danimarka, Norveç, Almanya, Finlandiya) öncesi sunulmaktadır. Ancak bazı ülkelerde, 0 (İngiltere) ve 8 ay (ABD) gibi geniş bir varyans aralığı da bulunmaktadır. Bununla birlikte bazı ülkelerin yasaları, yeni mali yılın başlangıcından önce yıllık bütçe kanununun kabul edilmesini gerektirmektedir. Yasal olarak bağlayıcı bir tarih olmasa da, çoğu OECD ülkesinin meclisleri yeni mali yılın başlangıcından önce yıllık bütçe yasasını kabul etmektedir. Fransa, Almanya ve Türkiye'de bütçe, yeni mali yılın başlangıcından önce meclis tarafından onaylanmaktadır. Kore örneğinde ise, meclis onayı mali yılın başlangıcından 30 gün önce yapılmaktadır. Mali yılın başlangıcından sonra bütçe yasalarını kabul eden istisnai örneklerde mevcuttur. Bunlar arasında; İngiltere, Kanada, İrlanda, Yeni Zelanda, Anglofon Afrika ülkeleri yer almaktadır (Lienert, 2010: 11; OECD, 2004: 91).

OECD ülkeleri dışında farklı ülkelerdeki bütçe süreçlerini inceleyen çalışmalarda bulunmaktadır. Bunlardan ilki Krafchik ve Wehner (1999)'a aittir. Krafchik ve Wehner (1999) Güney Afrika'da meclisin bütçe

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sürecindeki rolünü incelemektedir. Çalışmada Güney Afrika Parlamentosu bütçe konularında değişiklik yapma yetkisine sahip olmasına rağmen, komisyonların bu yetkiyi etkin şekilde kullanmadığı sonucuna varılmıştır. Bu sebeple, bütçenin meclise sunumu, mali yılın başlangıcından Mart ayından Ocak ayına taşınmalıdır. Bu sayede meclis bütçe görüşmeleri ve analizi için yeterli zamanı kazanabilir. Sam-Tsokwa ve Ngara (2016) ise, Nijerya’da bütçe sürecinin etkinliğini değerlendirmektedir. Nijerya’nın 1999 yılında demokrasiye dönmesiyle birlikte göreve gelen başkanların bir sonraki mali yılın başlamasından 2 ila 4 ay önce bütçeyi, Ulusal Meclise göndermesi gerektiği halde göndermediği ileri sürülmektedir. Bu gelişme, bütçe tahminlerinin zaman çizelgesi olmadan meclise sunulduğunu göstermektedir. Bütçenin mecliste uygun ve yeterli bir şekilde tartışılmadığı ve bütçenin incelenmesi için gerekli sürenin olmadığı iddia edilmektedir. Bunun sonucunda bütçe hakkı zedelenmekte ve demokratik yönetim yeterince uygulanmamaktadır. Ancak burada hükümet için kazan kazan durumu ortaya çıkmakta, bütçede istediği ödenekleri mecliste tartışmadan hızlıca geçirebilmektedir.

OECD (2002)’e göre de, bütçenin bir araya getirilmesi aylar almakta ve bu tür karmaşık bilgi gruplarını anlamamak için birkaç ay yeterli olamamaktadır. Uluslararası deneyimler, bütçenin anlamlı bir yasal incelemeyi mümkün kılabilmesi için mali yılın en az üç ay öncesine getirilmesi gerektiğini ileri sürmektedir. Bütçenin detaylı inceleme zamanlaması kısmen yasama organının kendi zaman çizelgesine ve kısmen yasama gündemini ne kadar etkili kontrol edilebildiğine bağlıdır. Ancak bütçenin zamanlaması aynı zamanda anayasal kısıtları da yansıtabilmektedir (Wehner, 2006: 771) Lienert (2013) ise OECD üyelerinde yasama organının bütçe yetkilerinde, yasama ve yürütme erkleri arasındaki ayrımın, özellikle başkanlık sistemlerinde güçlü olduğu ülkelerde en yüksek seviyede olduğuna işaret etmektedir. Heller (1997)’e göre yasaları kaldırabilecek veya içeriğini değiştirebilecek aktörlerin fazla olması, bütçe yasasının kabul edilebilmesini zorlaştırmakta ve bütçe sürecini uzatmaktadır. Özellikle çift meclisli ülkelerde yasama odaları arasında iki taraflı bir veto oyunu kurulmaktadır. Bu durumda bütçesinin açık vermesine neden olmaktadır. İki meclisli yasama organları arasında anlaşma sağlama, genellikle daha yüksek bütçe harcamalarına sebep olmaktadır.

Tablo 2: OECD Ülkelerin Yıllık Bütçelerinin Satır Sayıları

Satır Ögesi Sayısı	Ülke
200’e kadar	Kanada, Fransa, Meksika, Güney Kore
201’den 500’e kadar	Finlandiya, İsveç
501’den 1.000’e kadar	İrlanda, Japonya, Yeni Zelanda, Slovakya
1.001’den 2.000’e kadar	Danimarka, İzlanda, İtalya, Norveç, İsviçre, ABD
2.000’den fazla	Almanya, Türkiye
Rapor etmeyen	İngiltere

Kaynak: Lienert, I., (2010), "Role of the Legislature in Budget Processes", Technical Notes and Manuals, IMF Fiscal Affairs Department, 9.

Meclis hükümetin performansını ayrıntılı değerlendirmek isterse bütçenin, “girdilerini” ve “çıkıklarını” satır satır ayrıntılı bir şekilde kontrol etmesi gerekmektedir. Bu bağlamda, yıllık bütçede optimal bir bütçe kalemi sayısı olmamasına rağmen, 1.000’den fazla bütçe kalemi olduğunda bütçenin ana hedeflerinin şeffaflığı

kaybolmaktadır. Ülkelerin yıllık bütçelerindeki satır kalemleri sayısındaki geniş farklar Tablo 2’de gösterilmektedir (Lienert, 2010: 9).

Türkiye’de Yasama Bütçe Süreci Zamanı

16 Nisan 2017’de Anayasa değişikliği ile Türkiye Cumhuriyeti, Cumhurbaşkanlığı Hükümet Sistemini benimsemiştir. Bu sistemde Cumhurbaşkanı bütçe kanun teklifini mali yılbaşından en az 75 gün önce (17 Ekim) TBMM’ne sunmaktadır. Bütçe kanunun belirlenen sürede yürürlüğe girmezse, bu durumda geçici bütçe uygulaması gerçekleşmektedir. Cumhurbaşkanlığı hükümet sistemi öncesinde uygulanan parlamenter demokratik sistemde de hükümetin hazırladığı bütçe kanun tasarısı mali yılbaşından en az 75 gün önce (17 Ekim) TBMM’ne sunmaktaydı. Bu noktada, iki sistem arasındaki en önemli farklardan biri bütçeyi hazırlayacak tarafın Cumhurbaşkanlığı olması ve bütçe kanun tasarısının yerini bütçe kanun teklifinin alması olmuştur.

Cumhurbaşkanlığı hükümet sisteminde bütçe zamanında onaylanmaz ve geçici bütçe kanunu da çıkarılamazsa eğer, yeni bütçe kanunu kabul edilinceye kadar bir önceki yılın bütçesi yeniden değerlendirilerek uygulanacak olması birçok yönden sakıncalar doğurmaktadır. Bunlardan en önemlisi, bütçe hakkı zedelenmekte ve bütçe hakkı kısmen TBMM’nin elinden alınmaktadır. Cumhurbaşkanlığı tarafından hazırlanan bütçe teklifi, Cumhurbaşkanının beş yıllık görev süresinde hiçbir şekilde TBMM’den geçerek yürürlüğe girmezse ne yapılacağı konusu belirsizlik taşımaktadır. Bu durum Cumhurbaşkanlığının hazırladığı bütçe teklifinin TBMM’den geçmeyecek kaygısına kapılmasının önündeki tüm engelleri kaldırmaktadır (Kartalci, 2019: 105).

Uluslararası Bütçe Ortaklığı (The International Budget Partnership, IBP), (2019)’a göre Türkiye’de yasama organının bütçenin planlaması ve uygulaması sırasında zayıf gözetimini olduğunu ileri sürmektedir. Etkili yasal gözetimi önleyen ana engelleri ise kısaca şu şekilde sıralamaktadır: birincisi yasama organı bütçe teklifinin hazırlanmasından önce bütçe politikası hakkında herhangi bir tartışma yapamamaktadır. İkincisi, yasama organı yıl içindeki bütçe uygulamasına ilişkin raporları incelememekte veya yayınlamamaktadır. Üçüncüsü hükümet yürürlüğe giren bütçede, idari birimler arasında ödenek aktarması yapmadan önce yasama organına danışmamaktadır. Ayrıca bütçe uygulanması sırasında beklenmeyen bir gelir doğduğunda bu gelirin kullanılmasında veya gelir eksikliği nedeniyle harcamaların azaltılması gerektiğinde yasama organı dikkate alınmamaktadır.

Yeni bütçe yılı ile birlikte en az iki bütçe yılını kapsayan orta vadeli program (OVP), hazırlanan bütçe kanunlarına eşlik etmektedir. Türkiye’de bütçe hazırlık süreci orta vadeli programın hazırlanması ile başlamaktadır. Tablo 3’te Türkiye’de hazırlanan orta vadeli programların Bakanlar Kurulu kabul tarihleri ile resmi gazetede yayınlandığı tarihler gösterilmektedir. Türkiye’de orta vadeli program meclis onayından geçmemektedir. Ancak bazı ülkelerde bütçe kanunlarına eşlik eden bu programlarda tıpkı bütçe kanunları gibi meclis onayına tabidir. Lienert (2005), İtalya Meclisi ve İsveç Meclisi bütçenin yanı sıra hükümet tarafından hazırlanan orta vadeli bu stratejiyi de onaylamaktadır. Ancak İtalya Meclisi sadece bütçe yılını takip eden yıl ile ilgili orta vadeli görünümü onaylamakta iken, İsveç Meclisi harcama sınırlarını içeren orta vadeli görünümü birkaç yıl için onaylayabilmektedir.

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Tablo 3: Türkiye’de Orta Vadeli Programlar ve Kabul Tarihleri

Dönemsel OVP	OVP Bakanlar Kurulu Kabul Tarihi	OVP Resmi Gazetede Yayınlanma Tarihi
2006-2008	23 Mayıs 2005	31 Mayıs 2005
2007-2009	30 Mayıs 2006	13 Haziran 2006
2008-2010	28 Mayıs 2007	21 Haziran 2007
2009-2011	25 Haziran 2008	28 Haziran 2008
2010-2012	14 Temmuz 2009	16 Eylül 2009
2011-2013	8 Ekim 2010	10 Ekim 2010
2013-2015	10 Eylül 2012	9 Ekim 2012
2014-2016	9 Eylül 2013	8 Ekim 2013
2015-2017	5 Eylül 2014	8 Ekim 2014
2016-2018	04 Eylül 2015	11 Ekim 2015
2016-2018 *	29 Aralık 2015	11 Ocak 2016
2017-2019	7 Eylül 2016	6 Ekim 2016
2018-2020	11 Eylül 2017	27 Eylül 2017
2019-2021 **	20 Eylül 2018	20 Eylül 2018

Kaynak: <http://www.sbb.gov.tr/orta-vadeli-programlar/>; <https://www.bumko.gov.tr/TR,42/orta-vadeli-program.html> ve <http://www.resmigazete.gov.tr> adreslerinden derlenmiştir.

NOT: *2016-2018 OVP’nin güncelleştirilmiş halini yansıtmaktadır. ** 2018 yılında Cumhurbaşkanlığı hükümet sistemine geçilmesi sebebiyle Bakanlar Kurulu kaldırılmış ve Cumhurbaşkanlığı ibaresi eklenmiştir. Orta Vadeli Programın (OVP) ismi Yeni Ekonomi Programı (YEP) olarak ilan edilmiştir.

Türkiye’de parlamenter demokratik sistemde 2006-2018 döneminde bütçe kanun tasarılarının ve 2019 yılında cumhurbaşkanlığı hükümet sisteminde bütçe kanun tekliflerinin meclise sunulma ve görüşülme zaman çizelgesi Tablo 4’te sunulmuştur.

Tablo 4: Türkiye’de 2006-2019 Döneminde Bütçe Kanun Tekliflerinin/Tasarılarının Meclise Sunulma ve Görüşülme Zaman Çizelgesi

2006 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM’ne Gönderilme Tarihi	18 Ekim 2005
Bütçenin Plan Bütçe Komisyonu’na Giriş Tarihi	20 Ekim 2005
Bütçenin Plan Bütçe Komisyonu’nda Görüşme Tarihi	28 Ekim-30 Kasım 2005
Bütçenin Plan Bütçe Komisyonu’nda Kabul Tarihi	30 Kasım 2005
Bütçenin Plan Bütçe Komisyonu’ndan Çıkış Tarihi	09 Aralık 2005
Bütçenin TBMM Genel Kurul’da Görüşmeye Başladığı Tarihi	14 Aralık 2005
Bütçenin TBMM Genel Kurul’da Kabul Edildiği Tarih	27 Aralık 2005
Bütçenin Cumhurbaşkanlığı’na Gidiş Tarihi	28 Aralık 2005
Bütçenin Cumhurbaşkanlığı’ndan Geliş Tarihi	29 Aralık 2005
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2005 / 26040
Plan ve Bütçe Komisyonu’nda Görüşüldüğü Gün Sayısı	17
TBMM Genel Kurul’da Görüşüldüğü Gün Sayısı	13

2007 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2006
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	17 Ekim 2006
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	19 Ekim-30 Kasım 2006
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	06 Aralık 2006
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	06 Aralık 2006
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	15 Aralık 2006
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	26 Aralık 2006
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	28 Aralık 2006
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	29 Aralık 2006
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	29 Aralık 2006 / 26391
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>21</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>11</i>
2008 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2007
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	18 Ekim 2007
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	25 Ekim-22 Kasım 2007
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	26 Kasım 2007
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	26 Kasım 2007
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	04 Aralık 2007
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	14 Aralık 2007
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	19 Aralık 2007
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	19 Aralık 2007
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	28 Aralık 2007 / 26740
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>19</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>11</i>
2009 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2008
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	17 Ekim 2008
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	23 Ekim-25 Kasım 2008
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	01 Aralık 2008
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	01 Aralık 2008
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	16 Aralık 2008
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	27 Aralık 2008
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	29 Aralık 2008
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	29 Aralık 2008
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2008 / 27097
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>17</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>10</i>
2010 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2009
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	19 Ekim 2009
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	26 Ekim-23 Kasım 2009
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	03 Aralık 2009
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	04 Aralık 2009
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	14 Aralık 2009

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Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	25 Aralık 2009
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	29 Aralık 2009
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	30 Aralık 2009
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2009 / 27449
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>17</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>12</i>
2011 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	15 Ekim 2010
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	19 Ekim 2010
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	26 Ekim-26 Kasım 2010
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	03 Aralık 2010
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	06 Aralık 2010
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	13 Aralık 2010
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	26 Aralık 2010
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	29 Aralık 2010
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	29 Aralık 2010
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2010 / 27802
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>16</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>12</i>
2012 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2011
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	18 Ekim 2011
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	26 Ekim-26 Kasım 2011
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	02 Aralık 2011
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	02 Aralık 2011
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	08 Aralık 2011
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	21 Aralık 2011
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	28 Aralık 2011
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	29 Aralık 2011
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	29 Aralık 2011/ 28157
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>16</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>14</i>
2013 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2012
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	17 Ekim 2012
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	30 Ekim-26 Kasım 2012
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	03 Aralık 2012
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	03 Aralık 2012
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	10 Aralık 2012
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	20 Aralık 2012
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	25 Aralık 2012
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	29 Aralık 2012
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2012/ 28514
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>17</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>11</i>

2014 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	11 Ekim 2013
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	21 Ekim 2013
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	22 Ekim-22 Kasım 2013
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	22 Kasım 2013
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	02 Aralık 2013
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	10 Aralık 2013
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	20 Aralık 2013
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	24 Aralık 2013
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	25 Aralık 2013
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	27 Aralık 2013/ 28864
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>16</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>11</i>
2015 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	16 Ekim 2014
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	16 Ekim 2014
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	23 Ekim-25 Kasım 2014
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	25 Kasım 2014
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	03 Aralık 2014 / 09 Aralık 2014
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	10 Aralık 2014
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	22 Aralık 2014
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	23 Aralık 2014
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	24 Aralık 2014
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	26 Aralık 2014/ 29217
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>17</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>13</i>
2016 Yılı Merkezi Yönetim Geçici Bütçe Kanunu (3 ay)	
Bütçenin TBMM'ne Gönderilme Tarihi	7 Aralık 2015
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	7 Aralık 2015
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	7 Aralık-10 Aralık 2015
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	14 Aralık 2015
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	14 Aralık 2015
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	16 Aralık 2015
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	18 Aralık 2015
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	21 Aralık 2015
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	22 Aralık 2015
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	23 Aralık 2015/ 29571
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>3</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>3</i>
2016 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	15 Ocak 2016
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	18 Ocak 2016
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	20 Ocak-17 Şubat 2016
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	17 Şubat 2016
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	23 Şubat 2016

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Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	26 Şubat 2016
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	9 Mart 2016
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	15 Mart 2016
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	15 Mart 2016
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	16 Mart 2016 / 29655
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>16</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>13</i>
2017 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2016
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	18 Ekim 2016
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	25 Ekim-25 Kasım 2016
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	25 Kasım 2016
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	30 Kasım 2016
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	5 Aralık 2016
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	16 Aralık 2016
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	21 Aralık 2016
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	23 Aralık 2016
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	24 Aralık 2016/ 29928
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>18</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>12</i>
2018 Yılı Merkezi Yönetim Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2017
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	17 Ekim 2017
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	24 Ekim-24 Kasım 2017
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	24 Kasım 2017
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	05 Aralık 2017
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	11 Aralık 2017
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	23 Aralık 2017
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	25 Aralık 2017
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	28 Aralık 2017
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2017/ 30287
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>21</i>
<i>TBMM Genel Kurul'da Kabul Görüşüldüğü Gün Sayısı</i>	<i>12</i>
2019 Yılı Yönetim Merkezi Bütçe Kanunu	
Bütçenin TBMM'ne Gönderilme Tarihi	17 Ekim 2018
Bütçenin Plan Bütçe Komisyonu'na Giriş Tarihi	18 Ekim 2018
Bütçenin Plan Bütçe Komisyonu'nda Görüşme Tarihi	23 Ekim- 22 Kasım 2018
Bütçenin Plan Bütçe Komisyonu'nda Kabul Tarihi	22 Kasım 2018
Bütçenin Plan Bütçe Komisyonu'ndan Çıkış Tarihi	06 Aralık 2018
Bütçenin TBMM Genel Kurul'da Görüşmeye Başladığı Tarihi	10 Aralık 2018
Bütçenin TBMM Genel Kurul'da Kabul Edildiği Tarih	22 Aralık 2018
Bütçenin Cumhurbaşkanlığı'na Gidiş Tarihi	24 Aralık 2018
Bütçenin Cumhurbaşkanlığı'ndan Geliş Tarihi	31 Aralık 2018
Bütçenin Resmi Gazetede Yayın Tarihi ve Numarası	31 Aralık 2018/ 30642
<i>Plan ve Bütçe Komisyonu'nda Görüşüldüğü Gün Sayısı</i>	<i>19</i>

Kaynak: TBMM bütçe kanunu tasarıları ve genel kurul tutanakları, TBMM bütçe görüşme programları, TBMM Plan ve Bütçe Komisyonu Tutanakları, TBMM Plan Ve Bütçe Komisyonu Merkezi Yönetim Bütçe Kanunu Tasarısı Raporları derlenerek oluşturulmuştur.

Tablo 4'e göre bütçe kanun tasarılarının TBMM Plan ve Bütçe Komisyonu'nda görüşüldüğü ortalama gün sayısı yaklaşık 17 gündür. 2007 ve 2018 merkezi yönetim bütçe kanunu komisyonunda 21 gün görüşülerek, komisyonunda görüşülen en uzun bütçe kanunları olmuştur. Bunu 19 gün ile 2008 ve 2019 yılı merkezi yönetim bütçe kanunu takip etmektedir. Komisyonunda en kısa sürede görüşülen bütçe kanunu ise 2016 yılına ait olan geçici bütçe kanunudur. Bu süreye ilk gün TBMM'de açılış sunumu ve son iki gün bütçenin onaylanması ve en son gün bütçe hakkında son konuşmaların yapılması da dâhildir. Bütçe kanunların TBMM Genel Mecliste görüşüldüğü ortalama gün sayısı ise yaklaşık 12 gündür. Mecliste en uzun sürede görüşülen bütçe kanunu 2012 yılına aittir ve 14 gün süre ile tartışılmıştır. Mecliste en kısa sürede görüşülen bütçe kanunu 2016 yılına ait olan geçici bütçe kanunudur. Mecliste kısa sürede görüşülen diğer bir bütçe kanunu ise 2009 yılına aittir ve 10 gün süre ile tartışılmıştır. Ayrıca mecliste ve komisyonunda gelecek yılın bütçe kanunu görüşülürken, aynı zamanda geçmiş yılın kesin hesap kanunu da tartışılmaktadır. Bütçe kanunu ve kesin hesap kanunu mecliste görüşülürken siyasi parti gruplarının konuşma süresi 80 dakikadır. Milletvekillerin kişisel konuşmaların süresi lehte ve aleyhte olmak üzere 5'er dakikadan oluşmaktadır. Bu sürelere ek olarak milletvekillerine 10 dakika soru ve 10 dakika cevap hakkı tanımlanmıştır.

Sonuç ve Değerlendirme

Yasama organının bütçe üzerindeki yetkisini kullanabilmesi için zamana ihtiyacı vardır. Bütçenin oluşturulması aylar sürmekte ve bu uzun süreçte hazırlanan bütçenin değerlendirilmesi, anlaşılması ve analiz edilmesi de zaman istemektedir. Bütçenin anlamlı bir yasal incelemeyi mümkün kılabilmesi için mali yılbaşından en az 3 ay öncesi yasama organına getirilmesi gerekmektedir.

Ülkeden ülkeye farklılık göstermesine rağmen OECD ülkelerinin yaklaşık % 85'inde bütçe, yasama organına yeni mali yılın başlangıcından yaklaşık 2 ay ila 4 ay öncesi sunulmaktadır. Türkiye'de ise bütçe mali yılbaşından en az 75 gün önce (yaklaşık 2,5 ay) meclise sunulmak durumundadır. Bütçenin incelenme süresi aynı zamanda bütçe kalemi sayılarına göre de değişiklik gösterebilmektedir. Optimal bir bütçe kalemi sayısı olmamasına rağmen, 1.000'den fazla bütçe kalemi olduğunda bütçede şeffaflığın kaybolduğu ve inceleme süresinin uzaması gerektiği ileri sürülmektedir. Türkiye'de Almanya gibi bütçe kalemi sayısı 2.000'den fazladır. Ancak Almanya ulusal bütçesini yasama organına mali yılbaşından 4 ay önce göndermekte iken, Türkiye için bu süre sadece 2,5 aydır.

Bununla birlikte hazırlanan bütçe önce TBMM'nin anayasa ile düzenlenmiş tek komisyonu olan Plan ve Bütçe Komisyonu'nda görüşülmektedir. Bu komisyondan sonra ise bütçe (varsayılan değişiklikler ve düzeltmelerden sonra) TBMM Genel Kurul'unda görüşülmek üzere gönderilmektedir. Bütçe Kanunun ve Kesin Hesap Kanunun TBMM Plan ve Bütçe Komisyonu'nda görüşüldüğü ortalama gün sayısı yaklaşık 17 gündür. 2007 ve 2018 merkezi yönetim bütçe kanunu komisyonunda 21 gün görüşülerek, komisyonunda görüşülen en uzun bütçe kanunları olmuştur. 2007 yılı merkezi yönetim bütçe kanun tasarısının ve 2005 yılı kesin hesap kanun tasarısının uzun görüşülme sebebi olarak 2006 yılında tüm kamu kurumlarında uygulamaya başlatılan 5018 sayılı KMYKK olduğu düşünülmektedir. 2018 merkezi yönetim bütçe kanun tasarısı ile 2016 yılı kesin

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hesap kanun tasarısının uzun görüşülme nedeni olarak 2017 yılında yapılan anayasa referandumu olduğu söylenebilir. Bu süreci 19 gün ile 2008 ve 2019 yılı merkezi yönetim bütçe kanunu takip etmektedir. 2008 yılı merkezi yönetim bütçe kanun tasarısı ile 2006 yılı kesin hesap kanun tasarısının uzun görüşülme sebebi olarak 2007 yılında yapılan anayasa referandumu ile genel seçimler olduğu ileri sürülebilir. 2019 yılı merkezi yönetim bütçe kanun tasarısı ile 2017 yılı kesin hesap kanun tasarısının uzun görüşülme nedeni 2018 yılında yapılan Cumhurbaşkanlığı seçimi ile genel seçimler olduğu düşünülmektedir.

Komisyonunda ve TBMM genel kurulda en kısa sürede görüşülen bütçe kanunu ise 2016 yılına ait olan geçici bütçe kanunudur. Bütçenin yetişmemesinin ve zamanında yürürlüğe girememesinin en temel nedeni 2015 yılında hem Haziran hem de Kasım ayında yapılan genel seçimlerdir. Bütçe kanunların TBMM Genel Mecliste görüşüldüğü ortalama gün sayısı ise yaklaşık 12 gündür. Mecliste en uzun sürede görüşülen bütçe kanunu 2012 yılına aittir ve 14 gün süre ile tartışılmıştır. Bunun nedeni ise yine 2011 yılında yapılan genel seçimlerdir. Mecliste kısa sürede görüşülen bir diğer bütçe kanunu ise 2009 yılına aittir ve 10 gün süre ile tartışılmıştır. 2007 yılında başlayan küresel krizin etkilerini hafifletebilmek amacıyla hızlıca yürürlüğe sokulmak istenen mali önlemler bunun temel nedeni olarak görülmektedir. Genel olarak bakıldığında bütçe ve kesin hesap kanunun hem komisyonunda hem de genel kurulda tartışılma ve görüşülme süresi oldukça kısadır. Bu durum, bütçe üzerinde yasama organının sınırlı bir gözetim yetkisine sahip olduğunu ve bütçe hakkının tam olarak işlemediğini göstermektedir.

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POLITICAL ECONOMY OF THE ARTIFICIAL INTELLIGENCE

YAPAY ZEKÂNIN EKONOMİ POLİTİĞİ

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Abstract

One of the fields that technology, which has made a speedy progress in the last quarter of the 20th century, stands upon is the artificial intelligence discussions, whereas the other is that robotics studies accelerate. However, the observed developments in these two fields, on the other hand, brings the inquiries about a series of alterations predicted to emerge in the relations of production. In fact, the argumentations about that the developments in the fields of robotics and artificial intelligence could upset the balances of the labor market and cause a mass unemployment is discussed as an agenda item becoming hot with each passing day. By this study, it is aimed to handle the possibility of that the progress line of the artificial intelligence and robotics, by its very nature and structure of the capitalism, not only can formalize and dominate the daily life of humans and societies but also can emerge as an increase in exploitation to the detriment of the labor within the balance of the capital-labor dichotomy of the relations of production instead of a mass unemployment, rather than a future prediction as mentioned frequently.

Keywords: Artificial intelligence, industrialization, global capitalism, technology, relations of production, political economy.

Giriş

“Robotlar, insanlara zarar veremez ya da eylemsiz kalarak onlara zarar gelmesine göz yumamaz” (Asimov, 2016: 7).

Bilhassa son yıllarda hayli ilgi çeken distopik bilimkurgu film ve dizilerin sayısındaki artış ve bunların izlenme oranları, bu yapımların her ortaya çıkışında dünya çapında bir tartışmanın da alevlenmesine sebep olmaktadır. Bu tartışmanın konusu ise başta robotik ve yapay zeka teknolojisinin gelişiminin bu ivmeyle yoluna devam etmesi sonucunda gelecekte insanlığı bekleyen senaryonun niteliği üzerine. Çoğunlukla da gelecek öngörülleri oldukça karamsar/kötümser bir tablo içinde anlatılmakta; bir yanda kitlesel işsizlik ve yoksulluk, diğer yanda ise yeni tür savaşlar ve başka felaketleri betimleyen türden. Oysaki, “[h]ikâyenin özü, dijital teknolojinin doğasıyla ilgili olmaktan ziyade, kapitalizmin mutasyona uğramış yeni bir biçimi. Çoğumuzun sadece algoritmik gizem sandığı şey, aslında kapitalizmin uzun evrimindeki yeni aşama” (Naughton, 2019a: 43). Esas sorun, ne bilim ve teknolojinin son sürat ilerlemesinde ne de yapay zeka ve robotik çalışmalarının ivmeli bir gelişim çizgisi izlemesindedir. Esas sorun kapitalizmin doğasında ve bilim-teknolojinin kapitalizmin kar güdüsü yönünde kullanılmaya çalışılmasındadır. Bu çalışma ile de, bilim ve teknolojinin en son görüngüsü olan yapay zeka ve robotik çalışmaların kapitalizmin bekası için işler hale getirilmesinin nedenleri, koşulları ve bunların ortaya çıktığı süreçler ele almaya çalışılacaktır.

Yapay Zekâ ve Küresel Kapitalizm

2017 yılında, ilk olarak, Facebook mühendislerinin üzerinde çalıştığı iki *chatbot*un birbirleri ile konuşmaları üzerinden yapılan bir çalışmada, kendileri dışında kimsenin anlamlandıramayacağı bir biçimde İngilizce kelimeler kullanarak geliştirdikleri bir tür dil vasıtasıyla konuştukları ve anlaştıkları haberleri tüm dünyada garip bir panik havası içinde hızla yayıldı (Durgun & Karataş, 2017; Say, 2017). Oysa bu çalışmadan önce, zaten yapılan/yapılmakta olan birçok yapay zekâ (artificial intelligence – AI)¹ çalışmasından da biliniyordu ki çeşitli botlar/robotlar² kendi dillerini yaratıp, onun üzerinden anlaşıyorlar (Sulleyman, 2017; Griffin, 2017a, 2017b; Robertson, 2017). Halbuki, esas sorun, muhabbet etmeleri değil elbet.³ Lakin, asıl mesele, sohbetin sonunda birinin bu sohbete dair otonom bir işlem yapması ve bu işlem için dışarıdan herhangi bir müdahaleye ihtiyaç duymaması ihtimalidir. Eğer ki öğrenebilen, düşünebilen ve kendi kararlarını alıp da bunu işleme döküp, bir nevi ona verilen girdilerin ötesine adım atarak, yeni bir şeyler (veri, kavram, fikir, karar, görüş vb.) üretebilen bir zekâ mümkün kılınıbiliyorsa, işte o zaman durum kötü.⁴ Öğrenebilen ve yapabilen bir zekâ için bir sonrası otonom bir biçimde karar verebilmek ve yine otonom bir biçimde bunu hayata geçirebilmek ise gerçekten endişelenmeye başlayabiliriz. Çünkü burada devreye, bu gücü kimin ne için kontrol edeceği, kontrol edip edemeyeceği ve bu kontrolün etik çerçevesi meseleleri giriyor artık. Belki de geleceğe dair distopik varsayımların yapılmasına sebep olan esas kritik nokta da burada düğümleniyor.

İkinci olarak da, zamanında Facebook'ta çalışmış bir şahsın işinden ayrıldıktan sonra aldığı adada Silikon Vadisi üzerine belgesel çeken *BBC* ekibine verdiği demeç de dünyayı yapay zekâ ve robotlarla ilgili başka bir kıyamet senaryosunun içine çekti. Şahsın apokaliptik savları ise, bir kısım insan tarafından fazlasıyla ciddiye alınırken diğer bir kısım için mizah unsuru haline geldi. Gelecek onyıllar içinde yapay zekâ ve robot teknolojinin küresel ekonomik dengeleri tümenden yerle bir ederek medeniyetin sonlanacağını ileri süren ve bir önlem olarak yaşadığı adaya bir poligon (!) sahası yaptıran bu kişiye göre: “Gelecek 30 yıl içerisinde dünya nüfusunun yarısı işsiz olacak. İşler çirkinleşebilir. Medeniyet tamamen çökebilir. O yüzden ben de buradayım. [...] Teknolojik gelişmelerin sonucunda çok sayıda kişi işini kaybedecek. Bu durumun önüne geçip oluşacak sefaleti önleyecek sosyal politikalara dair ise hiçbir çalışma yok” (*BBC*, 2017a). Esasında, bu duruma dair yapılacak derinlemesine bir analiz sonucunda bunun tek kelime ile, Slavoj Žižek'in (2011: 260) “[h]egemonyanın işleyişi, boş Evrensel'i tikel bir içeriğe ‘diker’” cümlesinde de belirttiği gibi, kapitalizmin her geçen gün daha da yayılması, genişlemesi neticesinde insanlığın geleceğin belirsizliğine dair duyduğu kaygının

1 “Artificial Intelligence” (Yapay Zekâ) terimi ilk olarak 1956 yılında Dartmouth Konferansı'nda John McCarthy tarafından kullanıldı. Yapay zekâ araştırmalarının tarihsel temelini oluşturan fikirler ve çalışmalar ise çok daha eskiye dayanmaktadır. Bkz. <https://aitopics.org/misc/brief-history>.

2 “Robot” kavramını yaratan kişi Çek bilimkurgu yazarı Karel Čapek'tir ve bu kelimeyi ilk olarak R.U.R. (Rossum's Universal Robots/ Rossum'un Evrensel Robotları, 1920) adlı eserinde kullanarak sözcük dağarcığına katmıştır. İşin ilginç tarafı ise, “robot” sözcüğü Eski Slavca'da “zorla çalışma, angarya, hizmet, kulluk” anlamına gelen “rabota” kelimesinden gelmekte ve aynı zamanda “rabota” (paбoтa) kelimesi mesela Rusça'da da “iş, çalışma(k)” manasına gelmektedir. Bkz. Čapek (2013).

3 İsterseniz sizinle de muhabbet ederler. İngilizce konuşmak için geliştirilmiş bir örneği için bkz. <http://alice.pandorabots.com/>.

4 Burada bahsettiğimiz “zekâ”nın artık özel ve görece sınırlı alanlarda işleyen değil de, “genel yapay zekâ”ya ya da “insan seviyesinde yapay zekâ”ya tekabül ettiğine dikkat edilmesi gerekiyor. Böyle bir yapay zekânın mümkün olup olamayacağı tartışmaları da güncelliğini koruyor. Bu bağlamda klasikleşmiş ve günümüz tartışmalarının çoğunun da temelini oluşturan bir tartışma için bkz. A. Turing (1950) ve J. Searle (1980). Daha fazla tartışma içinse bkz. <http://debategraph.org/Stream.aspx?nid=75&vt=bubble&dc=focus>.

daha da artması olarak adlandırabileceğimiz “boş Evrensel”in bugünlerde yapay zeka tartışmalarından doğan “tikel bir içeriğe” dikilişini görmekteyiz. Bu “dikiş” e iğneyi ipliği sağlayan hegemonik ideoloji ise, kapitalizmin sonsuzluğuna duyulan inancın sonucu olarak onu medeniyet ile eşlemek ve halkların tahayyülüne bunu bu biçimde zerk etmek olarak karşımıza çıkmaktadır. Oysa, insanlığın belleğine yapılacak ufak bir referans ile, şu an insanlığın içinde bulunduğu anın anlaşılması da daha kolay olacaktır. Çok değil bundan iki yüz, üç yüz yıl önce, 18. ve 19. yüzyıllarda ortaya çıkan Sanayi Devrimi’yle başta Avrupa olmak üzere etkileri tüm dünyayı tesiri altına alan bir değişim-dönüşüm çağının getirdiği nikbin umutların bedbaht sonuçlarla sönümlenmesinin deneyimlenmesidir, belki de insanlığı günümüzde bu kadar bedbin kılan. İnsanlık adeta, Walter Benjamin’in tasvir ettiği gibi, fırtınaya yakalanmış bir “Angelus Novus” gibi.

Bunların dışında, yapay zekânın tüm münferit, tekil/tikel avantaj ve dezavantajlarının yanısıra daha bütüncül ve daha yapısal bir yerde bakılacak olursa da mevcut kapitalist sistem içinde teknolojinin gelişiminin kaçınılmaz olarak getirdiği/getireceği bir dönüşümden de bahsetmek şarttır. Şüphesiz ki insanların gündelik hayatlarını ciddi bir biçimde dönüştürmekte olan teknolojik gelişimin varolan üretim araçları, üretim ilişkileri ve üretim süreçleri üzerinde ciddi bir dönüşüme yol açacağı da aşîkârdır. Bu bağlam dâhilinde, teknolojinin hatta yapay zekâ ve robotların kapitalist sistem içinde alacakları yeni rollerinin ekonomi-politik bir analizinin yapılması ise çağın ruhunu okumak adına elbette yararlı olacaktır. Bu hususta, belki de ele alınabilecek en önemli ve en çok dillendirilen mesele ise, yapay zekâyâ sahip robot ve diğer makinelerin ciddi bir işsizliğe yol açacağı savıdır. Bu soruna yönelik olarak belki de ilk söylenebilecek olan da yine Sanayi Devrimi sürecinde yaşanan deneyimlerden çıkan örneklerin verilmesi üzerinden bu konunun ele alınması olacaktır. Şöyle ki, Sanayi Devrimi öncesi insanlığın yüzyıllardır kendine iş edindiği birçok meslek ya da faaliyet alanı yok olurken onların yerini zaman içinde yeni işler, yeni meslekler ve yeni faaliyet alanları almıştır. Yoğunluklu olarak at arabasının yerini otomobil/lokomotif, atölyelerin yerini fabrikalar, köyün yerini kent almıştır bu süreçte. Günümüze kadar gelen süreçte, insanlık, bazı örnekler üzerinden eski olanın tamamen yok olduğu ve yenisi ile tümünden yer değiştirdiğine şahit olsa da, çoğunlukla eskinin azalarak varlığını sürdürdüğünü ama daha çok yeninin kullanım yoğunluğunun arttığını deneyimlemiştir. Gelecek günlerde de insanlığı bekleyen yüksek teknolojik gelişim sürecinde de yine benzer bir durumun yaşanacağı bir ihtimaldir. Günümüzde varolan bazı işler, meslekler, faaliyet alanlarının ya etki alanları azalacak ya da yeni türden işler, meslekler ve faaliyet alanları ile yer değiştirecektir (Hern, 2017; Wakefield, 2017; BBC, 2016, 2017b, 2017c, 2017d). Büyük olasılıkla, yapay zekâyâ sahip robotlar ve/veya makineler insanların bugün yaptığı birçok işi yapar hale gelip de, ya insanların faaliyet alanlarını değiştirmesine ya da yeni alanlar açılmasına ön ayak olacak bir gelişim sürecine neden olacaklardır. Bu da bazı işler, meslekler ve faaliyet alanlarından insanların çekilmesine elbet sebep verecektir. Bu durumda sürecin başlarında kısa bir süre için belki belli bir düzeyde bir işsizliğe sebep olsa da gerekli gelişim aşamalarının alınması veya evrimleşmesi sonucu bu durum da kuşkusuz ki aşılabacaktır. Yani, milyonlarca dolar verip de bir ada alıp, orada inzivada kıyameti beklemek yerine, insanlık tarihindeki deneyimler üzerinden neden-sonuç ilişkisi kurabilen ve rasyonel bir biçimde mevcut sistemin yapısal mekanizmalarını analiz edebilecek daha gerçekçi bir sonuca varmak elbette mümkündür.

Diğer bir yandan da, bu husustaki esas mesele ise kapitalizmin dünya üzerindeki varlığı üzerinden bu durumu okumanın gerekliliğidir. Kapitalizmin doğası gereği daha fazla kar elde etme gayesiyle sürekli olarak üretim süreci içinde emeğin verimliliğinin artması hedeflenir. Günümüzde oldukça kompleksleşen üretim sürecinin bir getirisi olan uzmanlaşma ve tikelleşmenin yanısıra dünya tarihinde zamansal, mekânsal ve uzamsal bazda genişleyen piyasa mekanizmalarının artan rekabet, azalan emek verimliliği ve düşen kar oranlarıyla baş edilmesi için makineleşmenin ivedi ve elzem bir rol üstlenerek üretim sürecine dâhil edildiği görülmektedir. Lakin

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kapitalizmin inşa edildiği zeminin sermaye ve emek arasındaki ilişkiselliğe dayanıyor olması ve bu ilişkiselliğin nüvesi olan artı-değeri yaratanın da canlı emek olması nedeniyle esasında makineleşme meselesi bir biçimde eninde sonunda doğası gereği kapitalizmin tıkanacağı yeri de imlemektedir. David Ricardo ve Karl Marx'ın da ele aldığı gibi; makineleşme, zaman içinde işçilerin işsiz kalmasına, yedek işsiz ordusunun kalabalıklaşması sonucu ücretlerin düşmesine, aynı zamanda birer tüketici olan işçilerin yaşam koşullarının kötüleşmesi sonucu arzın yükselişine ters oranda yeterince talebin doğmamasından kaynaklanan kar oranlarının düşmesine ve elbette nihai olarak da ekonomik krizlerin baş göstermesini yol açacaktır. Esas olarak da, kapitalist sistemin ömrü boyunca kısa vadede işsizliğe sebep olabilecek makineleşme orta vadede ciddi ekonomik ve elbette toplumsal ve siyasal krizlere yol açacaktır. Ama yine de bugün tartışmakta olduğumuz, yapay zekâya sahip robot ve makinelerin gelecek günlerde yol açacağı öngörülen kıyamet senaryolarının bir kısmı zaten kapitalist sistem içinde ihtimal dâhilinde değildir. Hatta dünya üzerindeki eşitsiz gelişim seyrine koşut bir şekilde ortaya çıkan emek piyasalarının ulusöteleşmesi (transnationalization of labour market) ve uluslararası emek bölümünün (international division of labour) mevcudiyeti ise üretim sürecinin makineleşmesi meselesini çok başka bir boyuta da taşımaktadır (Starosta, 2016; Narin, 2010). Filhakika, Marx'ın da belirttiği gibi, “sermaye aslında bir teknolojik mesele değil, sosyal bir ilişkidir.” (Yeldan, 2017)

Katil robotlar meselesi ise ayrı bir tartışma konusu bu konu dâhilinde (Gibbs, 2017; Ball, 2017; BBC, 2017e; Duvar, 2017). Dünyada yapay zekâ çalışmaları var ve henüz bizim anladığımız anlamda yapay zekâya sahip makineler yok. Ne kadar yakın bir vakitte de otonom zeki makineler üretilir, o da belli değil elbet. Ayrıca, belki de asıl mesele; bu tür robotlar ve makineler var olsa bile, herhangi bir eyleminden dolayı bir makineyi suçlamak ne kadar doğru olur. Esasında katil olanlar ise robotlar değil onları bu amaç doğrultusunda üreten insanlardır. Misal, bir hata yapsa otomatik pilotu mu suçlamaktayız acaba? Bu sebeple de, otonom hareket etsin ya da etmesin, zeki olsun ya da olmasın, robotları veya makineleri ontolojik olarak bu tür kategoriler içine koyup da bunun üzerinden doğan bir tartışma olsa olsa ya beyhude bir laf kalabalığıdır özünde ya da insanların insanlığa dair duyması gereken ahlaki sorumluluklarını üstlerinden atma çabasıdır. Diğer bir taraftan, yapay zekâ çalışmalarının da mühim bir parçası olduğu “Endüstri 4.0” olarak adlandırılan ileri teknoloji. Oysa tehlike tahmin ettiğimizden daha yakınımızda; hem de her an her yerde yanbaşımızda (Dewey, 2016; Morozov, 2017; Tarnoff, 2017; Levin, 2016). Dört bir yanımızı çevreleyen teknolojik aygıtlar üzerinden dinleniyor, izleniyor, politik ve/veya ekonomik olarak manipüle ediliyor ve elbette daha hızlı ve daha çok tüketmeye sevk ediliyoruz. Mahremiyetimizi sadece kendi ellerimizle büyük bir şevkle kamuya açmıyoruz, aynı zamanda artık petrol sektörü kadar değerli bir alan olan bilişim sektörüne dilediğince kullanması için teslim ediyoruz fakat nerede, nasıl, niye kullanılacağı ise tamamen bizim bilgimiz dışında. Bütünlüklü bir kontrol, denetim ve tahakküm dönemine doğru hızla ilerliyoruz; hem de güle oynaya. Etraflıca Shoshana Zuboff'un (2019) tanımladığı ve kuramsallaştırdığı “Gözetim kapitalizmi” olarak adlandırılan bu yeni paradigma esas olarak internette veri madenciliği yoluyla elde edilen verilerin satışı ile işleyen yeni bir piyasa yaratmıştır (Naughton, 2019a, 2019b; Bridle, 2019). Zuboff'un (Naughton, 2019b: 44-45) belirttiği gibi: “‘Akıllı’ veya ‘kişiselleştirilmiş’ sözcüğü le başlayan neredeyse her ürün veya hizmet, internete bağlı her cihaz, gözetim ekonomisinde davranışsal verilerin akışına yönelik bir tedarik zinciri arayüzünden ibaret”tir. Bu sektörün başını çekenler ise gün içinde sıklıkla kullanılan sosyal medya mecraları: Facebook, Twitter, Google, Instagram, vd.:

“Bizim hiçbir şey yapmadan vakit öldürmemizi bile paraya dönüştürmeyi başaran bu durumun artık bir adı da var: Gözetim kapitalizmi. Attığımız her adımın, vakit öldürmek için yaptığımız her gereksiz şeyin veriye ve bu veri hâlinin de birilerine satılarak paraya dönüştürülmesine tanık oluyoruz. Bu işi en iyi becerenler ise hepimizin her gün bir şekilde kullanmak zorunda kaldığı Facebook ve Google. Gözetim kapitalizminin başını

çeken bu iki şirket, yalnızca bu sayede yüz milyarlarca dolarlık servetler yaratmakla kalmadı, arkalarından bu yöntemi izlemeyi görev edinmiş yüzlercesinin de gelmesine neden oldu. Ve bizden topladıkları veriler sayesinde, şu anda internette bize bir şey satmak isteyen herkes verilerimizi kullanmak için onlara koşuyor. Peki ellerinde bu kadar değerli ne var? Facebook için en önemli verilerden birisinin kaynağı, insanlar arası ilişkiler. Oradaki ilişkilerimiz, verdiğimiz 'like'lar, beğendiğimiz sayfalar ve bunun yanı sıra ziyaret ettiğimiz ve Facebook butonu bulunduran her site, bizim profilimizin altında birleşiyor ve dijital gölgemizin bir parçası hâline geliyor. Ardından Facebook, dijital gölgemizi kendi analiz sistemlerinden geçiriyor, etiketliyor ve kendisi üzerinden reklam vermek isteyenler için satışa hazır hâle getiriyor. [...] Google ise bir diğer önemli veri kaynağına, ilgilendiğiniz ve merak ettiğiniz şeylere sahip. Yaptığınız her arama, yazdığınız her mail ve bunların yanı sıra girdiğiniz her site Google tarafından profilinizin bir parçası hâline getiriliyor. Eğer Android işletim sistemine sahip bir telefon kullanıyorsanız toplanan veriler daha da zenginleşiyor. Girdiğiniz sitelerin büyük bir kısmına ise, kendi verdiği bir hizmet olan Google Analytics sayesinde sahip olabiliyor. Birçok web sitesi sahibi sitesini ziyaret edenler hakkında bilgi edinmek için bu aracı kullanırken, Google da topladığı verileri sizin dijital gölgenize eklemek ve bunu reklam verenlere satabilmek için kullanıyor. [...] Facebook, Google, Twitter ve daha birçok sosyal ağın yaptığı bu veri toplama işinin temelinde bir diğer faydalı uygulama bulunmakta: Çerezler. Çerezler ziyaret ettiğiniz sitelerle ilgili kimi ayarlarınızı kaydediyor. Yani her seferinde o siteye kullanıcı girişi yapmanıza, dil seçeneği gibi ayarları değiştirmenize gerek kalmıyor. Ancak zaman içerisinde çerezlerin yetenekleri arttı ve örneğin Facebook, 'like' butonu olan her web sitesinde çerezini aktif hâle getirerek sizin ziyaret ettiğiniz siteleri görebilme yeteneğini kazandı. Bunu birçok büyük sosyal ağ ve reklam şirketi kullanıyor" (Sabancı, 2017).

Ayriyeten, bu bağlamda başka önemli bir soru da; yapay zekânın ve/veya robotların kullanıldığı yüksek teknolojinin kimin yararına kimin zararına olduğu ve bu durumun dünyada gerçek anlamda kaç kişinin daha iyi bir hayat sürmesine vesile olacağıdır. Gelişmiş ülkelerin kontrolü altında ilerleyen yapay zekâ çalışmalarına dair, küresel kapitalizmin tüm vahşiliği ve barbarlığı ile hüküm sürdüğü yeryüzü üzerinde sanki bütün insanlar benzer koşullarda yaşıyormuşçasına bir önkabul üzerinden kurulan cümlelerin kifayetsizliği ise ayrı bir tartışmadır. Dünya sathında hala oldukça yaygın bir biçimde varlığını sürdüren yoksulluk; Batı'da obezite ve sağlıksız/dengesiz beslenme, pahalı sosyal hizmetler, bitmek bilmeyen borçlanma, kötü yaşam ve çalışma koşulları, vb. olarak, Batı-dışı dünyada ise açlık, kıtlık, susuzluk, zaruri ihtiyaçların noksanlığı, hastalıklar, insanlık-dışı yaşam ve çalışma koşulları, vb. olarak milyonların hayatlarını şekillendirmektedir. Diğer bir taraftan, bazılarının göre, zeki robotlar veya akıllı makineler; "yoksulluk, açlık, hastalık ve diziler arasındaki uzun süreli reklamlar gibi zor sorunların çözülebileceği düşünülüyor." (Maney, 2015). Böylesine bir durumda belki de asıl mesele, insanların kendi aralarında yürütecekleri bir etik tartışmanın vuku bulmasının gerekliliğidir. Hatta, bunun yanı sıra, doğa/fen, temel ve mühendislik bilimleri felsefe ve sosyal bilimlerle -bir süredir yadsıdığı, göz ardı ettiği- karşılıklı ilişkiselliğini yeniden gözden geçirmelidir. Ancak da böylece ortaya çıkacak muhtemel sorunlara yönelik verilecek gerekli cevapların mümkün olacağı bir zemin oluşturulmuş olur.

Sonuç

Nihayetinde, yapay zekâ tartışmalarının yol açtığı kıyamet senaryoları iki önemli meseleyi önümüze koymaktadır. İlk olarak, insanlığın binlerce yıldır yaşadığı şu dünyaya, doğaya ve insanlara son iki yüz, üç yüz yılda verdiği zarar ortada, aşıkâr bir biçimde duruyorken hala insanların tehlikeyi dışarıda, yani sürecin kontrolünün kendi ellerinden çıkacağı senaryolarda görmesi hakikaten tarihin insanlığa yaptığı bir şaka gibi: Hem de kendi eli ve aklıyla ürettiği robotlar ve makinelerden. Belki de bu diğer bir yandan insanlığın -kendi

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benmerkezciliği/bencilliği, fütursuzluğu, hoyratlığı ve aptallığı üzerinden- kendine duyduğu özgüvensizliğin bir sonucu. İkinci olarak da, insanların, içinde yaşadığı kapitalist sistemin ebediyetini ne ölçüde içselleştirmiş olduklarını da böylesine bir konuda kapitalist sistemin ne kadar söz konusu edilip edilmemesi üzerinden anlamak mümkün olmuştur. Ayrıca, mevcut kapitalist sistemin -zamansal, mekânsal ve uzamsal kuşatıcı-hegemonik ideolojisini anlamak için ise, şu cümle oldukça yardımcı olacak cinstendir: “Google şirketinin mühendislik direktörü Ray Kurzweil, 2029 yılında insanların süper insanlara dönüşeceğini açıkladı [ve] ‘süper’ insanların daha akıllı, seksi ve güçlü olacağını iddia etti.” (Milliyet, 2017). Halbuki, Zizek’in (2005) de dediği gibi:

“Hepimiz sessizce küresel kapitalizmin kalıcı olduğunu kabullendik. Öte yandan, kozmik felaketler bizde bir saplantı halini aldı. Yeryüzündeki yaşamın bir virüs ya da dünyaya çarpacak bir asteroit yüzünden bütünüyle sona ereceğinden korkuyoruz. Asıl paradoks şu ki yeryüzündeki yaşamın nasıl son bulacağını hayalimizde canlandırmak, kapitalizmin mütevazı bir kökten değişim geçireceğini hayalimizde canlandırmaktan çok daha kolay.”

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DECENTRALIZATION OF COLLECTIVE BARGAINING SYSTEM IN GREECE: BETWEEN DISMANTLING, SURVIVAL AND RESTORATION

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Abstract

Until the current economic crisis, the vast majority of the wage labour in Greece was covered by collective bargaining and collective agreements at sectoral/occupational level. During the crisis period the collective bargaining system has been radically transformed through a process of disorganized decentralization, as a result of the policy of “internal devaluation” imposed by the European Commission, the European Central Bank and the International Monetary Fund. The collective agreements at sectoral/occupational level have been undermined in favour of individual contracts. The latter have contained worse terms and have been concluded by over one million salaried employees. Nevertheless, a restricted number of sectoral/occupational collective agreements has survived during this period. In this context, the present paper aspires to contribute to the analysis of the collective bargaining system transformation. Moreover, the determinants of the survival of these few collective agreements and the prospects of restoration for sectoral/occupational collective agreements at national level are examined by focusing on the sector distribution of collective contracts that have survived.

Keywords: Industrial relations, collective bargaining, decentralization, Greece, Greek economic crisis

Introduction

During the current economic crisis, the collective bargaining systems of the European countries have been strongly pressured towards their decentralization (Marginson, 2015). This means that the multi-employer bargaining (at sectoral and/or occupational level) that ensured high coverage rates from the collective bargaining and collective agreements have been undermined, in favour of the single-bargaining at company level and/or individual contracts (Zisimopoulos, 2018; Zisimopoulos and Economakis, 2018; Economakis *et al.*, 2016). The centralized collective bargaining systems were challenged even in countries where multi-employer bargaining was dominant (see Leonardi & Pedersinim, 2018).

During the current economic crisis, a dismantling of the Greek collective bargaining system took place through a process of “disorganized decentralization”, i.e. the depreciation of multi-employer bargaining (at sectoral and occupational level). This process was guided by the policy of “internal devaluation”, which was mainly supported by the fiscal adjustment programs (memoranda) of the period 2010-2014. Despite the drastic reduction of the collective bargaining and collective agreements at sectoral/occupational level, some collective agreements remained active or re-concluded. Moreover, since August 2018 the “favourability principle” and “extension” of the sectoral collective agreements have been restored and the question of the renegotiation of collective agreements in many federations and trade unions has been raised.

In this context, the purpose of this paper is to investigate: (a) the aspects of the Greek collective bargaining system transformation; (b) the sectors of the economy in which collective bargaining and collective agreements have been retained.

Importance, structure and trends of the decentralization of collective bargaining systems

The collective bargaining is the most important process that mediates the employment relationship. The levels at which the collective bargaining takes place in a country are the national, sectoral, occupational, enterprise levels and the level of the workplace (Leat, 2007). Industrial relations systems dominated by the collective bargaining at the enterprise level are considered as decentralized. In contrast, collective bargaining at sectoral or national level is associated with centralized systems of industrial relations (Kristal and Cohen, 2007).

The distinction between multi-employer (MEB) and single-employer bargaining (SEB) is relevant. The “fundamental difference” between multi- and single-employer bargaining systems is “whether or not sector-level negotiations take place” (European Commission, 2011: 97; see also Economakis *et al.*, 2016: 53). “If single-employer bargaining is the prevalent form of collective bargaining in a country, then individual labour contracts offer an alternative to any form of collective bargaining” (Traxler, 2003: 7).

It must be noted that the efficiency of MEB is determined by the articulation of the collective bargaining across levels. The state supported the articulation of the collective bargaining across levels through the legislation of the favourability principle and the extension of collective agreements to those employees that were not covered by collective bargaining (Marginson, 2015).

The existence of multi-employer bargaining, or single-employer bargaining influences the collective bargaining coverage in the European Union countries. The collective bargaining coverage is considerably higher in countries dominated by multi-employer bargaining than in countries dominated by single-employer bargaining (European Commission, 2011).

During the 80's and 90's the process of decentralization was shaped into two directions among the EU countries: “organized decentralization” and “disorganized decentralization” (Traxler, 1994: 186; see also Economakis *et al.*, 2016: 53). The “disorganized decentralization” resulting “from a breakdown or dismantling of higher-level arrangements” (Traxler, 1994: 186), leads to the replacement of multi-employer bargaining by single-employer bargaining.

Special features of the Greek collective bargaining system until 2010

The Greek industrial relations were highly centralized and state controlled during the period after WWII until 1990. Collective bargaining took place at national and occupational level and was not encouraged at sector and enterprise level.

The collective agreements at national level set the minimum wage and working conditions and it was not possible for collective agreements at occupational level to contain terms that were worse than those of the National General Collective Agreement (EGSSE). The State reserved the right to modify or to not approve collective agreements that were in contrast to the government policy.

In 1990 an attempt was made by the state to withdraw from the role of compulsory arbitration, thus exerting pressure on employers' organizations and trade unions to negotiate and obtain consensus (Zambarloukou, 2006). This effort, which encouraged the decentralization of collective bargaining, was ratified by the adoption of Law 1876/90 on "Free Collective Bargaining".

According to this Law, bargaining at sectoral and enterprise level was first introduced. Additionally, according to the same Law, the state-controlled compulsory arbitration was abolished and the Organization for Mediation and Arbitration (OMED) was constituted. The principal task of OMED was the settlement of disputes between employers and employees when collective bargaining reached a dead end and collective agreement signing was not feasible (at any level). The decisions of OMED were assimilated to collective agreements. This guaranteed the existence of collective contract for all employees and particularly for the majority of employees in micro and small enterprises, which were mainly covered by sectoral agreements. This also ensured high levels of bargaining coverage.

Nevertheless, the collective bargaining system remained centralized and the role of the sectoral bargaining dominant, ensuring a favour position for employees in the collective bargaining.

The “disorganized decentralization” of the Greek collective bargaining system during the economic crisis

During the current economic crisis a process of “disorganized decentralization” has taken place. This process was guided by the policy of “internal devaluation”, which mainly was supported by the memoranda of 2010-2014 period, that were implemented by the Greek governments in line with the requirements of the International Monetary Fund (IMF), the European Commission (EC) and the European Central Bank (ECB). According to the IMF (2012), “internal devaluation” could be achieved through a) the context readjustment of collective bargaining and b) the acceleration of labour costs reduction in private and public sectors.

The main interventions in this line, concern mainly the collective bargaining structure and the mediation and arbitration procedure (see Zisimopoulos, 2018; Zisimopoulos and Economakis, 2018; Economakis *et al.*, 2016).

More precisely:

- a) National General Collective Agreement was weakened through the introduction of the minimum wage set by the state and collective bargaining at national level was weakened, too
- b) sectoral and occupational collective agreements were devaluated, through the abolishment of “favorability principle”
- c) the extension of sectoral collective agreements to all employees of a sector was abolished
- d) the principle of “collective agreement time extension” was abolished, too
- e) the role of the OMED was weakened

f) according to the Law 4024/2011, a collective agreement at enterprise level can be concluded either by a trade union, or by an association of persons if 3/5 of employees participate in negotiations (regardless of the total employment in an enterprise), i.e. also for enterprises which employ fewer than 21 employees and thus no trade unions exist.

Aspects of collective bargaining collapse at sectoral and occupational level and the question of the “few” collective agreements resilience

The decentralization of the Greek collective bargaining system resulted in drastic reduction of collective agreements at sectoral and occupational level. Nevertheless, some collective agreements remained active or re-concluded. The collective agreements signed in the period 1992-2010 were on average 183 per year. The corresponding average during the period of Memorandum implementation was 31 collective agreements per year. While in the first period almost 50% of the collective agreements were concluded after recourse to the OMED services, in the period 2011-2017 the corresponding percentage was about 30% (OMED, 2018).

Along with the drastic reduction of sectoral and occupational collective agreements, the number of collective agreements at enterprise level was spectacularly increased (238 in 2010 and 959 in 2012), and especially those concluded by associations of persons. At the enterprise level, 27.4% of the collective agreements were concluded by a trade union and 72.6% by an association of persons (Ioannou & Papadimitriou, 2013).

The drastic reduction of sectoral and occupational agreements (Koukiadaki *et al.*, 2014), also implies the reduction of the coverage rate by sectoral collective agreements and collective agreements in general (Ioannou, 2012; see also Yannakourou and Tsimpoukis, 2014). It is estimated that the coverage rate by collective bargaining, reduced from 83% of all private sector employees in 2009 to 42% in 2013 (Visser, 2016).

The widespread use of individual contracts confirms the dramatic reduction of coverage rate by collective bargaining-collective agreements. The consequence of the collective bargaining system restructuring was the reduction of wages in the private sector by 19.1% between 2010 and 2017 (ETUI, 2018).

Nevertheless, during the period of validity of the legal framework (2011 onwards) leading to the dismantling of the collective bargaining system, certain collective agreements remained active or re-concluded at sectoral and occupational level. Thus, in order to investigate the determinants of survival of these sectoral/occupational collective agreements, an initial investigation is needed: in which sectors collective contracts have survived?

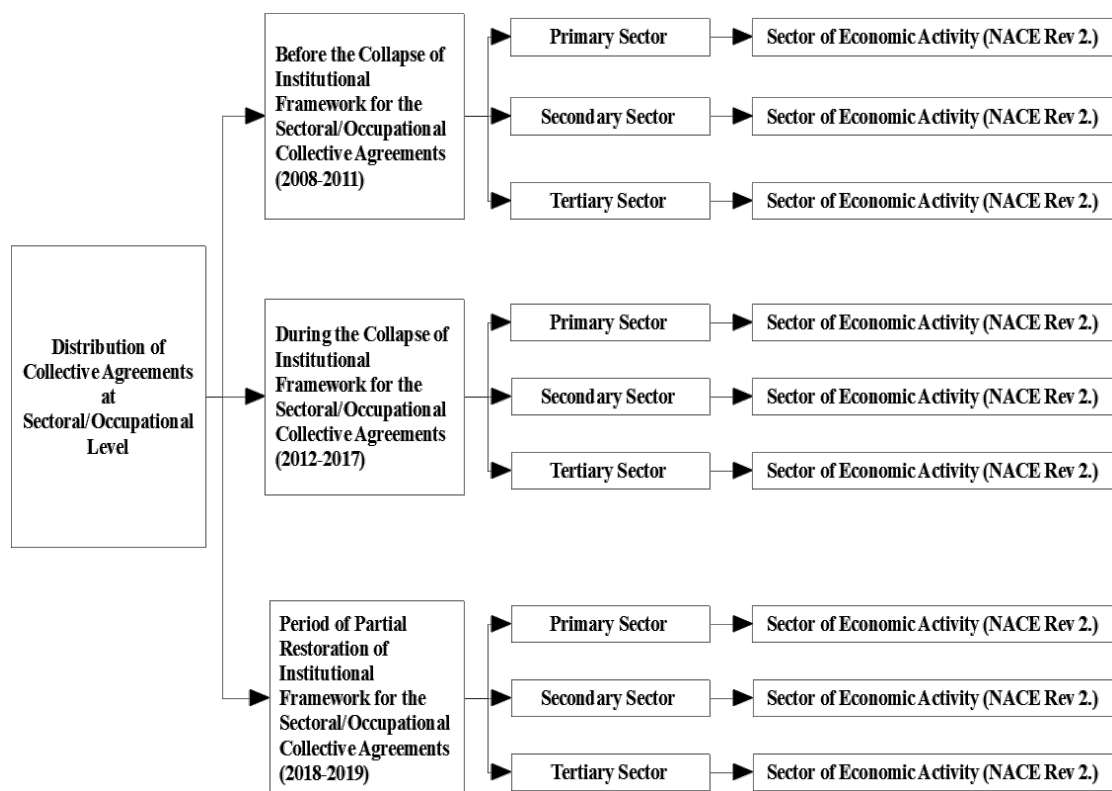
Methodology

In order to investigate the distribution of sectoral/occupational collective agreements across the sectors of the economy, the quantitative content analysis method has been adopted.

The research question is the determination of the sectors in which sectoral/occupational agreements have been concentrated. Regarding data sources, our analysis has been based on data derived from the database of the

OMED, and especially on the analysis of 701 collective agreements at the sectoral/occupational level that have been signed during the period 2008-2019. The sampling unit is the collective agreement and the unit of analysis is the whole text of the collective agreement. The coding categories (see Chart 6.1) are the period (before, during and after the collapse of the institutional framework for the collective agreements and the sectoral/occupational level), the year in which the agreement was concluded, the sector of the economy and the sector of the economic activity (in accordance with NACE Rev2.).

Chart 6.1 Coding categories for the classification of the units of analysis



Results

The analysis of collective agreements at sectoral/occupational level shows that during the period of implementation of memoranda, a drastic reduction of all collective agreements in all sectors of the economy

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has taken place (see Table 7.1). After this period collective agreements have not considerably increased despite the partial restoration of institutional framework.

Table 7.1 Collective agreements at sectoral/occupational level by sector of the economy, 2008-2019

Year	Sector of the Economy			
	Primary	Secondary	Tertiary	Total
2008	9	96	131	236
2009	1	44	66	111
2010	3	42	64	109
2011	5	21	36	62
2012	0	5	27	32
2013	1	5	17	23
2014	1	4	13	18
2015	1	5	16	22
2016	0	2	18	20
2017	1	6	14	21
2018	1	7	25	33
2019	0	4	10	14

The collective agreements in the primary sector of the economy as a percentage of all sectoral/occupational collective agreements, remain relatively stable (with slightly decreasing trends) from 2011 and onwards (see Table 7.2). As regards the collective agreements in the secondary sector, Table 7.2 depicts that after the transformation of the institutional framework, their share in sectoral/occupational collective agreements has almost doubled. On the contrary, the collective agreements in the tertiary sector have increased as a percentage of all sectoral/occupational collective agreements. This finding indicates that most collective agreements that survived during the economic crisis (almost 75%) were signed in the tertiary sector.

Table 7.2 Collective agreements at sectoral/occupational level by sector of the economy as % of all sectoral/occupational agreements, 2008-2019

Sector of the Economy	2008-2011	2012-2017	2018-2019
Primary	3,5%	2,9%	2,13%
Secondary	39,2%	19,9%	23,40%
Tertiary	57,3%	77,2%	74,47%
Total	100,0%	100,0%	100,00%

According to Table 7.3, the reduction of the percentage of collective agreements in the secondary sector is mainly due to the drastic reduction of the percentage of collective agreements in the manufacturing sector. Moreover, Table 7.3 shows that the increase of collective agreements in the tertiary sector is the result of the

increase of the percentage of collective agreements in the economic activities “Transportation and storage”, “Accommodation and food service activities”, and “Administrative and support service activities”. These sectors are related to the tourism and the so-called “tourism industries”.

Table 7.3 Collective agreements at sectoral/occupational level by sector of economic activity as % of all sectoral/occupational agreements, 2008-2019

Sector of the Economy	Sector of Economic Activity (NACE rev. 2)		2008-2011	2012-2017	2018-2019
Primary	A	Agriculture, forestry and fishing	3,47%	2,94%	2,13%
Secondary	B	Mining and quarrying	2,12%	0,00%	2,13%
	C	Manufacturing	36,49%	17,65%	17,02%
	D	Electricity, gas, steam and air conditioning supply	0,00%	0,00%	2,13%
	E	Water supply, sewerage, waste management and remediation activities	0,58%	2,21%	2,13%
	F	Construction	0,00%	0,00%	0,00%
Tertiary	G	Wholesale and retail trade; repair of motor vehicles and motorcycles	4,83%	5,88%	2,13%
	H	Transportation and storage	6,37%	8,82%	8,51%
	I	Accommodation and food service activities	4,44%	14,71%	23,40%
	J	Information and communication	7,14%	6,62%	6,38%
	K	Financial and insurance activities	1,16%	1,47%	4,26%
	L	Real estate activities	0,39%	0,74%	0,00%
	M	Professional, scientific and technical activities	1,35%	0,00%	0,00%
	N	Administrative and support service activities	5,60%	16,91%	19,15%
	O	Public administration and defence; compulsory social security	11,20%	5,15%	8,51%
	P	Education	4,83%	2,21%	0,00%
	Q	Human health and social work activities	5,02%	5,15%	0,00%
	R	Arts, entertainment and recreation	3,47%	5,88%	0,00%
	S	Other service activities	1,16%	3,68%	2,13%
	T	Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	0,00%	0,00%	0,00%
	U	Activities of extraterritorial organisations and bodies	0,39%	0,00%	0,00%
Total			100,00%	100,00%	100,00%

Based on the previous finding, we have focused the analysis of the results in the “tourism industries”. For the classification of collective agreements that correspond to economic activities related to the “tourism industries”, we have followed the United Nations definitions for tourism industries that are connected with ISIC Rev.4

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and NACE Rev.2 classifications for the economic activities (see United Nations, 2010a, pp. 24-25, 2010b, p. 111; Eurostat, 2008, pp. 61-90). Based on this classification, Table 7.4 shows that during the period of the economic crisis, the share of collective agreements signed in sectors of economic activity belonging to the “tourism industries” almost tripled. In addition, the collective agreements in “tourism industries” represent almost 45% of all collective agreements and 57% of collective agreements in tertiary sector.

Table 7.4 Table 7.4 Sectoral/occupational collective agreements in the “tourism industries” as % of all sectoral/occupational agreements and collective agreements in tertiary sector, 2008-2019

	2008-2011	2012-2017	2018-2019
% of total sectoral/occupational collective agreements	16,22%	44,12%	48,94%
% of sectoral/occupational collective contracts in tertiary sector	28,28%	57,14%	65,71%

Further analysis of the data shows that the most dynamic “tourism industries”, in terms of survival of collective bargaining, are the industries “Accommodation for visitors” and “Travel agencies and other reservation services activities” (Table 7.5).

Table 7.5 Distribution of collective agreements at sectoral/occupational level by “tourism industry”, 2008-2019

Tourism Industries	2008-2011	2012-2017	2018-2019
1. Accommodation for visitors	23,81%	31,67%	30,43%
2. Food- and beverage-serving activities	3,57%	1,67%	17,39%
3. Railway passenger transport	0,00%	0,00%	0,00%
4. Road passenger transport	23,81%	13,33%	17,39%
5. Water passenger transport	0,00%	0,00%	0,00%
6. Air passenger transport	2,38%	5,00%	0,00%
7. Transport equipment rental	0,00%	0,00%	0,00%
8. Travel agencies and other reservation services activities	26,19%	35,00%	34,78%
9. Cultural activities	20,24%	13,33%	0,00%
10. Sports and recreational activities	0,00%	0,00%	0,00%
11. Retail trade of country-specific tourism characteristic goods	0,00%	0,00%	0,00%
12. Other country-specific tourism characteristic activities	0,00%	0,00%	0,00%
Total	100%	100%	100%

Discussion

From the above analysis the decentralization of the Greek collective bargaining system during the current economic crisis is revealed. The organized decentralization of the collective bargaining system has been reflected in the drastic reduction of collective agreements at sectoral/occupational level.

Nevertheless, some of the sectoral/occupational collective agreements have survived. The largest portion of them has been signed in the tertiary sector.

Among the collective agreements that have survived, the portion of those concluded in “tourism industries” has increased. This finding suggests the necessity for a further investigation concerning the special reasons of their durability.

In conclusion, it seems that the partial restoration of the institutional framework for collective bargaining and agreements at sectoral/occupational level is not enough for the revival of collective agreements. The reconstruction of the trade union movement –and especially of the trade unions at sectoral/occupational level– is needed.

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LONG-TERM UNEMPLOYMENT AND EMPLOYMENT POLICIES IN THE EUROPEAN UNION

AVRUPA BİRLİĞİNDE UZUN SÜRELİ İŞSİZLİK VE İSTİHDAM POLİTİKALARI¹

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İsmail Şiriner³

ABSTRACT

The unemployment problem is one of the biggest economic and social problems of the European Union countries in recent years. The prolongation of the unemployment period affects people socially, economically and psychologically and brings many problems. The problem of long-term unemployment with social and economic returns became the most important problem of the European Union, especially in the 1980s. While unemployment rates has increased in EU member states, the duration of unemployment has increased dramatically. Therefore, the EU has established employment policies against the long-term unemployment problem. In this study, the structure and general characteristics of long-term unemployment in the European Union will be examined and employment policies implemented in the fight against long-term unemployment will be included.

Key Words: *Long-Term Unemployment, Employment Policies, European Union*

GİRİŞ

Bir yıl ve daha uzun süredir işsiz olan kesimi kapsayan uzun süreli işsizlik kavramı, işgücü piyasalarının durumu, ülke ekonomilerinin gidişatı ve buna ilaveten olarak bireysel ve sosyal huzurun bozulmasına neden olan bir faktör olarak karşımıza çıkar. Eurostat Avrupa Birliği istatistik ofisi, yapılan çalışmalarda uzun süreli işsizliği tanımlarken bir yıllık süreyi esas almıştır.

İşsizlik problemi AB ülkelerinde her zaman en önemli ekonomik ve sosyal problemlerden biri olmuştur. İşsizlik süresinin uzaması da kişileri ekonomik, sosyal ve psikolojik yönlerden olumsuz etkilemektedir. İşsiz kalanın süre uzadıkça işsizlik ile ilgili çalışmaların sağlıklı bir şekilde yapılması mümkün olmamaktadır. Sürenin uzaması işsizlik sorunu ile ilgili yapılan analiz ve değerlendirmeleri gerçekçi olarak ortaya koymayı da zorlaştırmaktadır. Çünkü işsizlik süresi uzadıkça işsizlik problemi yapısal bir sorun halini alır.

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AVRUPA BİRLİĞİNDE UZUN SÜRELİ İŞSİZLİK

Tablo 1: AB Ülkelerinde Toplam Uzun Dönemli İşsiz Sayısı (000)

YILLAR	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
AVUSTURYA	59	55	42	48	52	51	52	57	67	74	87	83
BELÇİKA	196	177	158	168	197	167	165	192	211	218	201	176
ÇEK CUMHURİYETİ	205	148	115	110	167	147	157	166	144	129	91	56
DANİMARKA	24	18	14	17	44	54	61	51	48	49	42	39
ESTONYA	20	16	12	25	52	49	37	26	22	16	15	13
FİNLANDİYA	49	42	31	37	52	47	44	46	53	62	62	57
FRANSA	942	818	713	839	978	995	1054	1141	1207	1228	1238	1149
ALMANYA	2365	2015	1625	1450	1332	1141	1002	967	918	850	723	675
YUNANİSTAN	243	208	183	195	285	435	706	893	936	875	814	747
MACARİSTAN	147	148	154	177	236	227	220	220	168	144	111	79
İRLANDA	30	31	38	77	147	186	193	169	141	114	92	71
İTALYA	801	695	752	844	987	1059	1414	1729	1966	1763	1728	1682
LETONYA	53	37	42	50	93	91	81	58	46	44	39	32
LİTVANYA	79	42	38	50	113	119	97	74	71	57	44	38
LÜKSEMBURG	3	2	3	3	3	3	4	5	4	5	6	6
HOLLANDA	142	107	81	74	106	140	168	224	258	261	223	173
POLONYA	1,18	742	351	356	421	524	608	654	568	512	372	262
PORTEKİZ	212	207	197	227	307	333	407	482	432	371	317	231
SLOVAK CUMHURİYETİ	258	207	170	165	231	233	241	257	240	196	151	132
SLOVENYA	30	23	19	18	33	37	43	52	53	47	42	32
İSPANYA	398	376	467	988	1700	2084	2578	3006	2964	2609	2167	1742
İSVEÇ	..	36	35	50	68	66	64	63	61	59	55	52
BULGARİSTAN	170	141	103	103	162	210	226	250	232	187	146	114
HIRVATİSTAN	119	115	103	99	125	158	189	202	191	195	121	84
KIBRIS	3	3	2	2	5	7	15	26	33	29	24	19
MALTA	4	4	4	5	5	5	6	5	5	5	4	3
ROMANYA	415	321	238	215	225	271	277	295	258	274	265	186

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Kaynak: OECD.Stat

Bir yıl ve daha fazla süredir işsiz olanlar uzun süreli işsizlik olarak tanımlanmaktadır. Uzun dönemli işsizlik AB üye ülkelerin en büyük işsizlik sorunlarından biridir.

Hatta işsizlerin yarısından fazlası bir yıl ve daha fazla süredir işsiz sayılmaktadır. Tabi bunlardan bir kısmı da belli süre sonra umudunu kaybederek cesareti kırılmış işsizler arasına girmektedir (Işığışık, 2011, pp. 122-123).

AB toplam uzun süreli işsizlik sayılarına baktığımızda İspanya, Letonya, Almanya, Fransa gibi ülkeler en yüksek toplam uzun süreli işsiz sayısına sahiptir. En düşük sayıya sahip ülkeler ise Kıbrıs, Malta, Lüksemburg gibi ülkelerdir. Almanya’da 2006’da toplam uzun süreli işsiz sayısı 2,365 iken 2017’de 675 bine kadar düşmüştür. Fransa’da ise 2006 ‘da toplam uzun süreli işsiz sayısı 942 bin olmasına rağmen 2017’de 1,149’lara kadar artmıştır. Fransa ve İspanya ‘da aynı şekilde toplam uzun süreli işsizlik sayıları son 5 yılda çok artış gösteren ülkelerdendir.

Cinsiyete Göre Uzun Süreli İşsizler

AB’de kadınların sosyal alanda en çok koruma yasalarına sahip kesimdir. Bu kesimler lehine çok fazla düzenlemeler olup, pozitif ayrımcılığında uygulandığı bir bölgedir (Mahiroğulları ve Korkmaz, 2013, pp. 88).

Tablo 2: AB Ülkelerinde Cinsiyete Göre Uzun Dönemli İşsiz (ERKEK) (000)

YILLAR	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
AVUSTURYA	33	27	23	27	31	29	29	32	38	45	53	48
BELÇİKA	95	86	80	89	107	89	94	108	125	128	113	99
ÇEK CUMHURİYETİ	91	64	52	51	84	72	72	76	68	61	43	25
DANİMARKA	11	8	7	10	28	31	33	24	25	25	21	21
ESTONYA	11	10	7	16	32	27	21	15	14	9	9	8
FİNLANDİYA	27	24	17	22	34	31	29	28	32	38	36	34
FRANSA	470	412	371	441	526	515	566	610	668	685	686	627
ALMANYA	1300	1087	884	805	771	653	574	554	544	508	437	417
YUNANİSTAN	77	64	60	69	111	190	336	442	462	420	375	335
MACARİSTAN	78	77	84	99	133	123	123	120	90	78	59	40
İRLANDA	21	22	29	59	111	137	142	118	98	80	64	44
İTALYA	368	318	347	408	507	552	734	941	1037	971	923	902
LETONYA	31	23	22	30	57	56	44	33	26	27	24	19
LİTVANYA	40	22	16	28	68	69	54	40	40	32	25	23
LÜKSEMBURG	1	1	2	1	2	2	2	2	2	3	3	3
HOLLANDA	75	54	43	38	57	73	86	121	136	140	113	85
POLONYA	589	380	163	171	223	263	306	333	296	278	208	148
PORTEKİZ	98	91	91	103	143	168	212	251	219	190	167	113
SLOVAK CUMHURİYETİ	133	104	82	82	124	133	133	143	135	99	78	74
SLOVENYA	13	10	9	9	19	20	22	27	27	22	21	17
İSPANYA	147	144	186	486	914	1103	1364	1569	1517	1290	1020	810
İSVEÇ	..	20	19	28	40	39	38	37	36	35	32	32
BULGARİSTAN	86	68	52	53	92	125	137	146	138	109	84	65
HIRVATİSTAN	56	52	44	41	61	87	103	112	97	103	66	46
KIBRIS	1	2	1	1	3	4	9	15	18	16	14	11
MALTA	3	3	3	4	4	4	4	4	4	4	2	2
ROMANYA	260	199	158	136	147	166	169	177	160	173	170	127
AVRUPA BİRLİĞİ 28	4367	3635	3144	3685	4964	5314	5977	6620	6496	5895	5111	4399

Kaynak: OECD.Stat

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Tablo 3: AB Ülkelerinde Cinsiyete Göre Uzun Dönemli İşsiz Sayısı(Kadın) (000)

YILLAR	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
AVUSTURYA	27	28	19	21	20	22	23	25	29	28	35	35
BELÇİKA	101	91	78	79	90	79	71	84	86	90	88	76
ÇEK CUMHURİYETİ	114	84	64	59	84	75	85	90	76	68	48	31
DANİMARKA	13	10	7	7	16	23	29	28	23	23	21	18
ESTONYA	9	6	5	10	20	21	16	11	9	7	6	5
FİNLANDİYA	22	18	14	14	19	16	15	17	21	24	26	23
FRANSA	472	406	342	398	452	480	489	531	539	544	552	523
ALMANYA	1065	928	741	644	561	487	428	413	375	342	286	259
YUNANİSTAN	166	144	122	127	174	245	370	451	474	454	439	413
MACARİSTAN	70	71	70	79	103	105	97	100	77	66	52	39
İRLANDA	8	9	9	18	36	48	51	51	44	35	28	27
İTALYA	433	377	405	436	480	507	680	788	928	792	805	780
LETONYA	22	14	20	20	36	34	37	25	20	18	15	13
LİTVANYA	39	19	22	22	45	50	43	34	31	25	19	15
LÜKSEMBURG	1	1	2	2	1	2	2	2	2	2	3	2
HOLLANDA	67	52	38	36	49	68	82	103	122	121	110	88
POLONYA	593	362	188	185	199	261	302	322	272	234	164	114
PORTEKİZ	114	116	106	125	164	164	195	231	213	181	150	118
SLOVAK CUMHURİYETİ	126	103	88	84	107	101	108	114	104	96	72	58
SLOVENYA	17	13	10	9	14	17	21	25	27	25	21	15
İSPANYA	251	233	281	503	786	982	1214	1437	1448	1319	1147	932
İSVEÇ	..	16	16	22	28	27	26	26	26	24	23	20
BULGARİSTAN	84	73	51	50	71	85	90	104	94	78	62	49
HIRVATİSTAN	64	62	58	58	64	71	86	90	93	92	55	38
KIBRIS	2	1	1	1	3	3	6	12	15	13	11	8
MALTA	1	1	1	1	2	2	2	2	1	1	1	1
ROMANYA	155	122	79	79	78	104	109	118	98	101	95	60
AVRUPA BİRLİĞİ 28	4146	3483	2969	3286	3960	4376	5010	5568	5512	5009	4503	3910

Kaynak: OECD.Stat

AB 28 ülke ortalamasına göre 2006 yılından 2008 yılına kadar erkek ve kadınlarda uzun dönemli işsizlik sayıları düzenli olarak azalmıştır. Fakat 2009 yılında hem erkek hem de kadın işsiz sayıları artış göstermiştir.2009

yılından 2013 yılına kadar hem erkek hem de kadın uzun süreli işsiz sayıları düzenli şekilde artmıştır. En düşük ve yüksek uzun süreli işsiz sayılarına sahip ülkeler kadın ve erkeklerde aynı ülkelerdir. Uzun süreli işsiz sayıları en düşük olan ülkeler; Lüksemburg, Malta ve Kıbrıs'tır. En yüksek uzun süreli işsiz sayılarına sahip ülkeler ise Almanya, İspanya ve İtalya'dır.

AVRUPA BİRLİĞİ'NDE UZUN SÜRELİ İŞSİZLİĞİ ÖNLEMeye YÖNELİK İSTİHDAM POLİTİKALARI

AB istidam politikaları, Avrupa halkının, huzuru, mutluluğu, refahı ve yaşam standartlarına uygun bir hayat sürmeleri için çabalamaktadır. Bu çabalarını sistematik ve kurumsal bir hayat tarzıyla yapmaya çalışır (Menteşe, 2017, pp. 44).

AB uzun süreli işsizliğin önüne geçebilmek için pasif istihdam politikalarından aktif istihdam politikalarına bir geçiş yaşamaktadır. Fakat AB ülkelerinde hala pasif politikalara yapılan harcamalar aktif politikalardan fazladır (Brandt ve diğ, 2005, pp. 8).

AVRUPA BİRLİĞİ'NDE UYGULANAN PASİF İSTİHDAM POLİTİKALARI

AB komisyonu tarafından uzun dönemli işsizlik oranlarının düşürülmesi için hazırlanan işsizlik yardımı ve işsizlik sigortası gibi pasif politikalar kişileri işsiz kalmaya yönlendirdiğinden bu tür politikaların irdelenmesi öngörülmektedir. Bu gibi yardımların azaltılarak bireylerin daha fazla gayret göstererek işgücü piyasalarında aktif olmasının sağlanması gerekir (Duruel, 2007, pp. 410). Ayrıca sosyal yardımlar ve işsizlik sigortası gibi pasif politikalar işsizlere gelir desteği sunduğu için kamu harcamalarına oldukça ağır bir yük getirmektedir (Martin, 2000, pp. 7).

İşsizlik Sigortası

AB ülkelerinde işsizlik sigortasının finansmanı genellikle işçi ve işveren tarafından sağlanmaktadır. Fakat İtalya ve Polonya gibi devletlerde işveren tarafından karşılanırken, Danimarka gibi az sayıdaki ülkede ise sadece çalışan tarafından finanse edilmektedir. AB ülkelerinde çalışanlardan alınan primlerle işverenden alınan primler ya daha azdır ya da eşittir. Ödenen prim miktarları çalışan sektöre ya da alınan ücrete göre ülkeden ülkeye değişkenlik göstermektedir (Küçükbayrak, 2012, pp. 53).

İşsizlik Yardımı

İşsizlik yardımı işsizlik sigortası gibi birey işsiz kaldıktan belli bir sürenin geçmesi halinde verilir. Avusturya, Finlandiya, Almanya ve Yunanistan'da işsizlik yardımından faydalanabilmesi için hem ailenin hem de işsiz kalan bireyin gelir düzeyine bakılarak verilir (www.mevzuatdergisi.com).

AB ülkelerinde işsizlik yardımlarından faydalanabilmek için, kişinin halen iş arıyor olması ve muhtaç duruma düşmüş olması gerekmektedir. İşsizlik yardımlarını alan kişilerin aktif olarak iş aradığını kanıtlaması, muhtaçlık tespitinde ise yapılan gelir testinin aralıklı zamanlarla yenilenmesi ve muhtaçlığın halen devam etmesi gerekmektedir. Asgari yaşam standardı da AB ülkeleri arasında farklılık göstermektedir. Bu nedenle de işsizlik

yardımları için ödenecek miktar AB ülkeleri arasında farklılık göstermektedir (Mahiroğulları ve Korkmaz, 2013, pp. 101).

AVRUPA BİRLİĞİ'NDE UYGULANAN AKTİF İSTİHDAM POLİTİKALARI

Aktif işgücü piyasası politikaları modern refahın önemli bir parçasıdır. Aktif istihdam programları işsizlik durumunda gelir telafi edici faydalar sunmak yerine iş kaybını önleme ve işsizlerin işgücü piyasasına girmeyi hızlandırmaktadır. Aktif işgücü piyasası politikaları işgücü piyasasına katılımı arttırmaktadır. AB'de de pasif politikalardan aktif politikaları doğru bir kayma yaşanmaktadır. Bu kaymada işgücünü giderek arttırmaktadır (Helmdag ve Kuitto, 2016, pp. 3-8).

Mesleki Eğitim Programları

AB ülkelerinde işsizliğin önüne geçmek ve özellikle de uzun süreli işini kaybetmiş bireylerin iş dünyasına tekrar kazandırılması konusunda en etkili politika mesleki eğitim politikalarıdır. Hemen hemen bütün AB ülkelerinde mesleki eğitim birinci sırada yer almaktadır. Uzun süreli işsiz bireyleri için mesleki eğitim programları birçok yardım programının ana unsurunu oluşturur (Alabaş, 2007, pp. 59).

Mesleki eğitim programları çeşitli nedenlerle işten ayrılmış olanların veya işe yeni gireceklerin ya da işten çıkma risk, taşıyanların işe girişlerini kolaylaştıran bir programdır. Mesleki eğitim programların temelde amacı bireylerin verimliliklerini ve istihdam edilebilirliklerini yükselterek tekrar emek piyasasına geri dönmelerini amaçlamaktadır (Uşen, 2007, pp. 71-72).

Meslek Danışmanlığı

Uzun süreli işsizlerin iş bulmalarına yardımcı olmak amacıyla danışmanlık hizmetleri verilmesinin katkısı fazladır. 1990 yılında AB Komisyonu uzun süreli işsizlere danışmanlık hizmetleri konusunda yardımcı olmak için danışmanlık hizmetlerine erişim imkanı sunmuştur. Danışmanlık hizmetleri; pratik bilgileri, iş konusunda yönlendirmeyi ve işe başvururken kullanılan yöntemleri kapsamaktadır (Alabaş, 2007, pp. 60).

İş arama yardımları ve danışmanlıklar birçok AB ülkesinde var olmasın rağmen kamu hizmetlerinin daha çok olduğunu söyleyebiliriz. İş arama yardımlarına ve istihdam hizmetlerini alan grup her uygulamaya göre değişebilmektedir (İş ve Meslek Danışmanlığı, 2011, pp. 33).

Doğrudan İş Yaratma Programları

Doğrudan iş yaratma programları iş bulmaları zor olan bireylere yönelik yapılan bir programdır. Bu nedenle katılımcıların büyük çoğunluğunu uzun süreli işsizler oluşturur. Birçok ülkede iş yaratma programları ülkede bireylerin çalışma hayatı ile ilişkilerini geliştirmeleri ve bir tecrübe kazanmalarını sağlamak için oluşturulan tamamlayıcı bir politikadır. Doğrudan iş programları uzun dönemli işsizlikle karşı karşıya kalan kesimi ele alır. Bu uzun süreli işsizlerinde geneli genç kesimdir (Taş ve Bilen, 2014, pp. 65).

AB ülkeleri bazı özel kesimin işgücü maliyetlerini indirmek için işveren sosyal güvenlik katkı oranlarında indirimle başvurarak tedbir almıştır. İşgücü maliyetlerinin yüksek olması İspanya, Yunanistan, İtalya gibi ülkelerde işsizliği artırır ve kayıt dışı istihdamında yaygınlaşmasına neden olur (Sanal, 2013, pp. 4).

Geçici İş Programları

AB ülkelerinde geçici iş programları kapsamına giren evde iş imkanı sağlayan çalışmalar vardır. Uzun dönemli işsizler bu yolla kendilerine olan güvenlerini kazanarak işgücü piyasasına geri dönmelerini kolaylaştırmaktadır. Bu programlar sayesinde uzun dönemli işsizler bir yandan iş sahibi olmakta bir yandan da kişisel problemlerinden uzaklaşarak topluma faydalı bireyler olma yolunda adım atmış olurlar. (Duruel, 2007, pp. 400-401).

Geleneksel kamu çalışma programları kapsamında kısa süreli geçici işler yaratılmaktadır. Bu geçici işler işsizlikten düzenli istihdama geçme yolunu kolaylaştırarak, büyük destek sağlamaktadır (Meager- Evans, 1998, pp. 41).

İstihdam Maliyetlerinin Düşürülmesi

İstihdam sübvansiyonları genelde uzun süreli işsizliğin fazla olduğu yerlerde işsiz bireylerin istihdamını istihdam sübvansiyonlarıyla destekleyerek iş dünyasını canlandırmaya yönelik uygulamalardır. Ekonomik koşullar ne kadar değişse de sübvansiyonlar her zaman uygulama alanı bulmuştur. Uzun süreli işsizler toplumda sosyal dışlanmaya maruz kalırlar. İstihdam maliyetlerinin düşürülmesi de uzun süreli işsiz kesimi istihdama teşvik ederek toplumsal amaca kaynaklık ederler.

Ücret ve İstihdam Sübvansiyonları

Ücret ve sübvansiyon teşvikleri uygulanırken farklı yol ve yöntemler kullanılır. Birincisi vergi sistemi kullanılarak yapıldığı gibi nakit verilerek de teşvik sistemi uygulanır. Vergi teşvikinde hükümet işverenlere istihdam ettiğinde vergi indirimi uygulamaktadır (Işığışık, 2011, pp. 183).

Vergi indirimi yapılarak maliyetler azaltılması ve bu yolla istihdam arttırılmaya çalışılmaktadır. Danimarka, İrlanda ve İsveç'te vergi indirimine gidilerek istihdam teşviki yapılır (Gündoğan, 1999, pp. 75).

ABD'de işsiz kişiler eğer 11 hafta içinde iş bulup ve 4 ay da çalışırlarsa devlet belli bir ikramiye vermektedir (Uşen, 2007, pp. 73).

Ücret istihdam politikaları sübvansiyonlarında özellikle uzun süreli işsizlere yönelik yapılan teşviklerde başarı sağlanmıştır (Martin, 2000, pp. 92).

Esnek Çalışma Modelleri

Esnek çalışma modeli değişen koşullara ayak uydurarak koşulların yeniden gözden geçirilmesini ve bu değişen koşullara göre davranış sergileyerek işgücü piyasasını ve çalışma koşullarının daha uygun hale getirilmesini sağlar.

Ülke ekonomisi durgunluk, daralma ve artan rekabet ortamında katı çalışma ilişkilerini devam ettirmek oldukça zordur. Katı çalışma koşullarının devam ettirilmesi ya işletmeleri faaliyetlerine son vermeye zorlayarak istihdamın düşmesine neden olur. Ya da işletmeleri kayıt dışına sürükleyerek çalışan bireylerin aleyhine doğabilecek çok daha zor çalışma koşullarının oluşmasına neden olur. Bu sebeple esnek çalışma koşullarının değişen koşullara uygun biçimde ve sosyal tarafların rızası ile çalışma hayatına girmesi gerekir. (Varçın, 2004, pp. 62-64).

Girişimciliğin ve KOBİ'nin Desteklenmesi

AB'de uzun dönemli işsizliğin önüne geçmek için KOBİ'lerden faydalanılması çalışmaları 1980'lerden beri gündemdedir. Kobi işletmeleri daha esnek bir yapıya sahip ve yeni istihdam oluşturma kapasiteleri de oldukça fazla olduğundan işsizliğin azaltılması için gerekli çalışmalardandır. (Duruel, 2007, pp. 413).

AB uzun süreli işsizliğin önlenmesi ve işsizlik sürelerinin azaltılması için KOBİ'lerin desteklenmesinin gerekliliğini öne sürerler. Bu nedenle AB ülkeleri tarafından bu tür yaralı işletmelere ucuz krediye ulaşma imkanı, eğitim ve danışmanlık hizmetlerinin artırılmasını ve vergi indirimleri gibi kolaylıklar sağlanlar (Alabaş, 2007, pp. 67).

SONUÇ

AB ülkelerinde uzun süreli işsizlik sorununun ciddi boyutlara ulaşması sonucunda AB ülkeleri uzun süreli işsizliği önlemek amacıyla istihdam politikaları uygulama yoluna gitmişlerdir. Bu nedenle de uzun süreli işsizliği önlemek için özel olarak politikalar hazırlamışlardır. AB uyguladıkları pasif politikalarla uzun süreli işsizliğin daha fazla artmasına sebebiyet vermiştir. Uygulanan işsizlik sigortası ve işsizlik yardımları gibi politikalarla işsizlere çok fazla geniş haklar tanıyarak onların iş aramalarını geciktirmiştir. Fakat genel anlamda AB ülkeleri uzun süreli işsizleri önemsemişler ve uzun dönemli işsizliği önlemek için uyguladıkları politikalarda kısmen de olsa başarılı olmuşlardır. Uzun süreli işsizliği azaltmayı hedefleyen en iyi politikalar aktif istihdam politikalarıdır.

Ortaya çıkma sebepleri ve sebep olduğu sonuçlar bakımından ülkeden ülkeye önemli farklılıklar gösteren uzun süreli işsizlikle mücadele konusunda uygulanan istihdam politikaları tek tip bir modelin ya da tüm ülkelerde başarısızlıkla sonuçlanan bir uygulamadan söz etmek doğru değildir. Fakat AB ülkeleri gibi birçok ülkenin de ortaya çıkardığı genel kanı, uzun süreli işsizlikle mücadelede uygulanan politikalardan aktif istihdam politikaların daha önemli olduğu kanısına varılmıştır. Hem uygulama alanı bakımından hem de çözüm imkanları ile aktif istihdam politikaları uzun süreli işsizlikle mücadele konusunda kullanılan yaygın bir politikadır.

AB ülkelerinde uzun süreli işsizlikle mücadelede uygulanan istihdam politikaları sorunun çözümünde yeterli olmamaktadır. Dolayısıyla sorunun çözümünde uygulanan istihdam programları uzun süreli işsizlikle ilgili politikalara ayrıca yer vermeli ve bu konudaki politikalarını genişletmelidir.

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THE SHARE OF THE INVESTMENTS IN THE CENTRAL GOVERNMENT BUDGET IN TURKEY, AND THE NECESSITY OF REVIVING INVESTMENTS IN THE CONTEXT OF GLOBAL TRENDS

TÜRKİYE’DE YATIRIMLARIN MERKEZİ YÖNETİM BÜTÇESİ İÇERİSİNDEKİ PAYI VE KÜRESEL EĞİLİMLER ÇERÇEVESİNDE YATIRIMLARI CANLANDIRMA GEREKLİLİĞİ

*Meral Fırat**

Abstract

After the 2008 global economic crisis, a recession was experienced in the world economy and its impact was also seen in the field of international trade. While the foreign trade volume of many industrialized countries narrowed, the investments had also declined, especially due to the decrease in growth rates, the increase in private sector debts, and some risks in politics and economics of the developing countries. The protectionist policies have been brought to the agenda by many countries regardless of the welfare-enhancing effects of the international agreements and the free market economy upon the worsening of economic indicators after the crisis and being felt its effects by the economics managers. Trade restrictions starting between the U.S. and China have evolved into a global trade war affecting the entire world economy and also Turkey’s economy. The aim of this study is to investigate the general economic effects of trade wars on the global economy, particularly the U.S. and Chinese economy. In this context, it has been examined that how the direct capital flows to developing countries, especially to Turkey changed, and the share allocated for the investment outlays from the central government budget; and it has been put forward what needs to be done to stimulate investments.

Key Words: International Trade, Investments, Protectionism, Trade Wars

GİRİŞ

ABD, Genişletilmiş Tarifeler ve Ticaret Anlaşması’nın (GAAT) 21. maddesine atıfta bulunarak Dünya Ticaret Örgütü üyesi bir ülkeye ‘silah, patlayıcı unsurlar veya bir ülkeden tehdit algılaması’ durumunda mal ithalatını yasaklayabileceği gerekçesi ile Çin, AB, Kanada ve Meksika ile başlattığı ticaret savaşının alanı son dönemde tüm Dünya’yı kapsayacak şekilde genişlemiştir. ABD sadece bazı mallara ek gümrük vergisi uygulamakla kalmamış Çin ve AB şirketlerinden teknoloji ticaretini de yasaklayarak, G7 ülkeleri arasında gerginliği artırmıştır. ABD’nin tek taraflı olarak İran ile nükleer anlaşmayı ortadan kaldırıp, başta AB, Çin ve Türkiye ile pek çok ülkeyi İran’dan petrol almamaları konusunda tehdit etmesi de küresel ekonomi ve politik açılarından konunun önemini ortaya koymaktadır. (Alkin,2018).

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Mart 2018’de ABD ve Çin arasında yaşana gerginlik, sadece her iki ülkenin ekonomilerini etkilemekle kalmayıp tüm Dünya ekonomisini olumsuz etkilemiştir. Avrupa Birliği hem küresel ticaret savaşlarından hem de Brexit belirsizliğinden etkilenerek yavaşlamaya başlamıştır. Küresel kriz öncesiyle kıyasladığımızda küresel borçluluk oranı yaklaşık milli gelirin 3 katından daha fazla artmıştır. Böyle bir ortamda Türkiye için temel sorun ekonominin bu durumdan ne kadar etkileneceğidir.

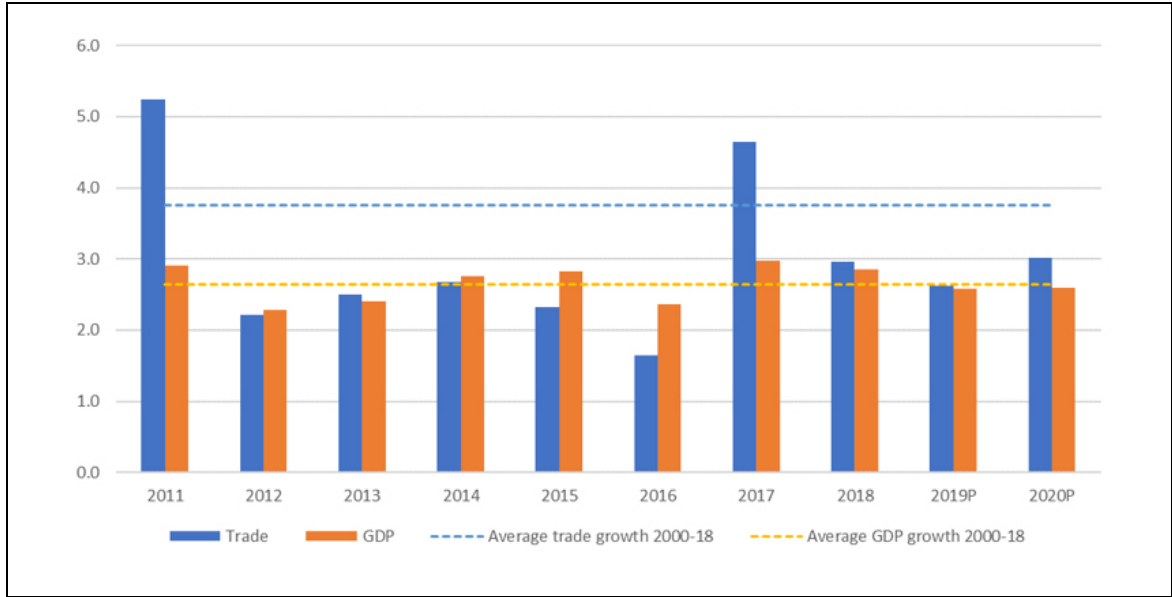
Ekonomik İşbirliği ve Kalkınma Örgütü (OECD) tarafından yayınlanan raporda, ABD ve Çin arasında devam eden ticaret savaşlarının devam etmesi ve korumacı ekonomik tedbirlerin yürürlüğe girmesi durumunda bundan en çok etkilenecek ülkelerin başında ekonomileri dışa daha çok açık olması nedeniyle ilk sırada Türkiye yer alırken, ikinci sırada İsrail ve üçüncü sırada Güney Kore’nin yer alacağını belirtilmektedir.

Küresel ekonomide uygulana sıkı para politikaları ve küçülme ile beraber gelişmekte olan ülkelere yönelen doğrudan sermayede azalmıştır. Bu durumda merkezi yönetim bütçesinden yatırımlara çok sınırlı bir pay ayıran Türkiye, doğrudan yabancı sermayeyi de ülkeye çekemediği için olumsuz etkilenmiş ve yatırımları yeniden canlandırma gereksinimi doğmuştur.

1.Dünya Ekonomisinin Genel Görünümü

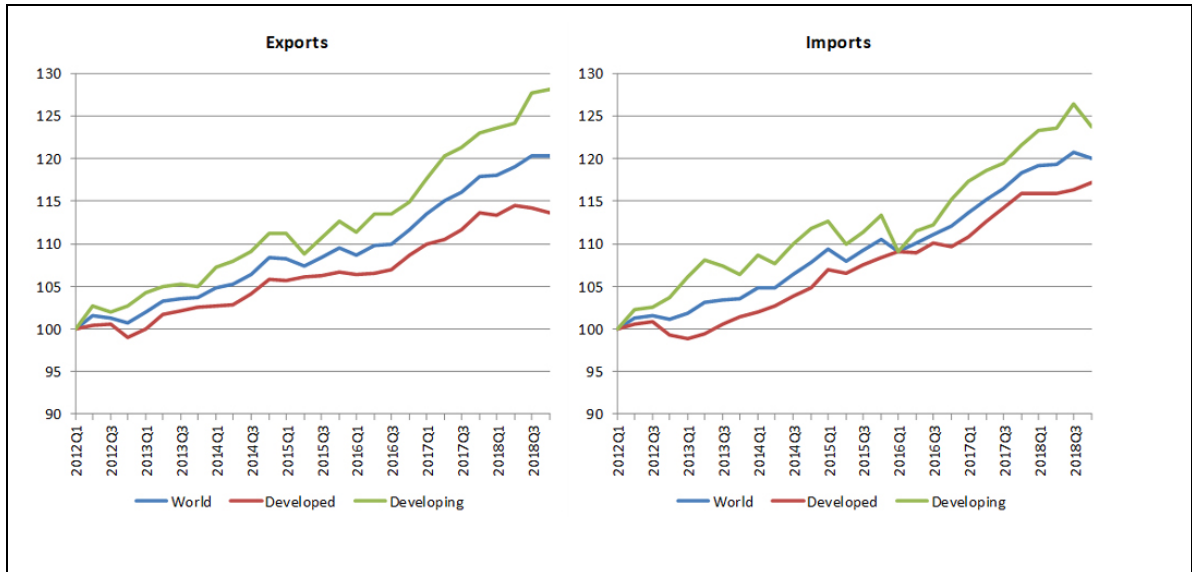
Aşağıda yer alan Grafik 1 ve 2 görüldüğü üzere, 2018’de beklentilerin altında büyüme gösteren Dünya ticareti 2019 ve 2020 de aynı düşük büyüme hızını devam ettirecekmiş gibi görünmektedir. Dünya Ticaret Örgütü, 2019 yılı için küresel ekonominin % 2.6 oranında büyüyebileceğini beklenmektedir. 2018’de bu rakam % 3 olarak gerçekleşmişti. 2020 de de büyüme oranı yine %3 olarak beklenmektedir. Ancak küresel arenada yaşanacak gerilimler bu rakamları etkileyecektir. 2018’deki %3’lük büyüme oranı 2017’deki % 4.6’lık oranın oldukça altındadır. Asya ülkelerinde 2018 yılında ihracat hacmindeki büyüme 2017 yılında ulaşılan % 4.6’dan % 3.8’e gerilemiş, ithalat hacmi ise aynı yıllarda % 8.3’dan % 5’e gerilemiştir. Dünya Ticaret Örgütü 2018 yılı için büyümeyi % 3.9 olarak öngörmüştür. Ancak dördüncü çeyrekte yaşanan ABD-Çin ticaret savaşının ekonomik etkileri nedeniyle büyüme hızı beklentilerin altında gerçekleşmiştir. Küresel ticarette 2018 yılında ihracat19.4 trilyon dolar ithalat ise % 19.8 trilyon olarak gerçekleşmiştir. Bu rakam 2017 yılına göre % 10 artış anlamına gelmektedir. Ancak hacimdeki artış oranında bir gerileme söz konusu iken değerdeki artışı doğrudan 2018’de yaşanan petrol fiyatlarındaki artışa bağlamak gerekmektedir. (Azevedo,2019)

Grafik 1: 2011-2020 Dünya Ticaret Hacmi ve Ekonomik Büyüme (Yıllık değişim%)



Kaynak: Dünya Ticaret Örgütü, www.wto.org, 25 Nisan 2019

Grafik:2 2012-2018 Dünya İhracat ve İthalatındaki Gelişmeler



Kaynak: Dünya Ticaret Örgütü, www.wto.org, 25 Nisan 2019

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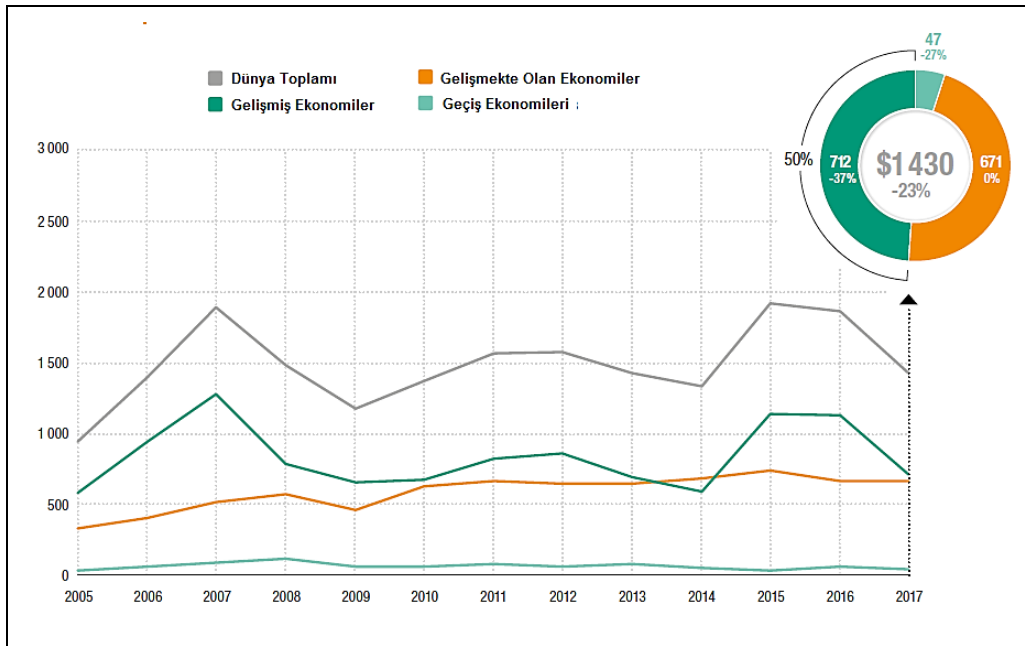
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2008 Küresel ekonomik krizinden sonra Dünya ekonomisinin durgunluktan çıkması ve yeniden talebin canlanması oldukça uzun sürmüştür ve bugün Dünya ekonomisi hala eski gücüne kavuşamamıştır. 2003-2008 yılları arasında gelişmekte olan ülkelerde yatırımlardaki artış ortalama büyüme oranının yaklaşık iki katından daha fazla olan % 12 gibi bir oranda gerçekleşmiştir. Bu artış emtia fiyatlarındaki yükselmeden kaynaklanmıştır. (Köse ve diğerleri,2017:5).

Küresel ekonomik kriz ile beraber küresel boyutta ortaya çıkan durgunluk, etkisini uluslararası ticaret alanında da göstermiş ve birçok sanayileşmiş ülkenin dış ticaret hacmi bir önceki yıla göre ciddi biçimde daralmıştır. Kriz sonrası ekonomik göstergelerin daha da kötüleşmesi ve bunun etkilerinin ekonomi yöneticileri tarafından iyice hissedilmeye başlaması ile birlikte, uluslararası anlaşmaları ve serbest piyasa ekonomisinin temel mantığına uygun olmayan korumacı ve içe kapanma gibi tedbirlere uzun vadede pek çok ülke bir çözüm olarak başvurmuştur. Bu şekilde korumacı uygulamalar gündeme gelmiştir. (Durusoy, 2013:511).

Küresel ekonomik krizden sonra gelişmekte olan ülkelere yatırımlar azalmıştır. Bunun temel nedeni aşağıda yer alan Grafik:3’de görüldüğü üzere 2009 yılından itibaren gelişmekte olan ülkelere yönelik doğrudan yatırımların azalması ve ticaret hacmindeki daralma, özel sektör borçlarındaki artış, büyüme rakamlarındaki düşüş, politik ve diğer bir takım ekonomik riskler ile diğer birtakım aktivitelerdeki yavaşlamadan kaynaklanmaktadır. (Köse ve diğerleri, 2017:5)

Grafik:3 Dünya Geneline ve Ülke Gruplarına Göre Doğrudan Yabancı Yatırım Girişleri, 2005-2017
(Milyar Dolar ve Yüzde)



Kaynak: UNCTAD, World Investment Report 2018,s.2

Yukarıda yer alan Grafik:3’de görüldüğü üzere doğrudan yabancı sermaye akışları 2017 yılında 2016 yılına göre %23 oranında düşüşle 1.43 trilyon dolara gerilemiştir. Bu oran 2017 yılı gayri safi yurt içi hasıla ve ticaretteki hızlı büyümeye ters bir trend göstermektedir. Gelişmiş ekonomilere yönelik uluslararası doğrudan yatırım akışları % 37’lik sert bir düşüşle 712 milyar dolar olarak gerçekleşmiştir. Gelişmekte olan ekonomilere yönelik uluslararası doğrudan yatırım akışları ise 671 milyar dolarda sabit kalmıştır. Geçiş ekonomilerine olan uluslararası doğrudan yatırım akışları %27’lik bir düşüşle 47 milyar dolara gerileyerek 2005 yılından bu tarafa ikinci en düşük seviyeye ulaşmıştır. (UNTACT, 2018:3-4)

2.Türkiye’de Yatırımlar

Merkez Bankası verilerine göre; Türkiye’ye yönelik uluslararası doğrudan yatırım (UDY) girişi 2017 yılında bir önceki yılın aynı dönemine göre %19 düşüş göstererek 10,8 milyar \$ olarak gerçekleşmiştir. Bu giriş içerisinde gayrimenkulün payı % 43’tür. Ancak 2017 yılında gerçekleşen sermaye girişleri 2016 yılın aynı döneminde gerçekleşen sermaye ile aynı seviyede seyretmiştir. Buna karşın, 1.8 milyar dolarlık tasfiye gerçekleşmiştir. 2013 yılından bugüne kadar; Türkiye’ye gelen toplam UDY içinde sanayi sektörü %31 pay almıştır. Sanayi sektörü ana faaliyet alanlarından olan imalat ile elektrik ve gaz üretimi sektörleri sırasıyla, %19 ve %9 pay almıştır. Toplam UDY girişinde %36 pay alan hizmetler sektörü altında yer alan finans ve sigorta faaliyetleri kalemi ise toplam girişlerin %17’sini oluşturmaktadır. Bu dönemde gayrimenkul alımlarının toplam UDY girişlerindeki payı da %29 ‘dur. (YASED,2017 :18)

Yine Merkez Bankası verilerine göre, 2018 yılında (Ocak-Kasım) Türkiye’ye yönelik doğrudan yabancı sermaye girişleri bir önceki yılın aynı dönemine göre çok az bir düşüşle (%1.6) 10.3 milyar dolar olarak gerçekleşmiştir. Toplam UDY girişleri içerisinde yabancıların gayri menkul alımlarının payı ise yine %43 olarak gerçekleşmiştir. (YASED,2018:28)

Türkiye’de yatırımlardaki azalma nedenlerinden birisi doğrudan yabancı sermaye miktarındaki düşüş iken diğer bir neden de merkezi yönetim bütçesinden yatırımlara ayrılan oranın çok düşük olmasıdır. Aşağıda yer alan Tablo:1’e göre 2019 yılında yatırımları gösteren sermaye ve sermaye transferlerinin merkezi yönetim bütçesindeki payı % 6.7 olarak belirlenmiştir. Kamu yatırımları genellikle özel sektör için alt yapı oluşturur ve sürükleyici niteliktedir. Yatırımların bu kadar küçülmesi ekonomik büyümenin düşmesine ve işsizliğin artmasına yol açacaktır.

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Tablo:1 2019 Yılı Merkezi Yönetim Bütçe Ödenek Teklifi

Harcama Türleri	(Bin TL)	Ödenek Tekliflerinin Yüzde Dağılımı
Personel Giderleri	247.302.546	25.7
Sos. Güv. Kurum. Dev. Primi Giderleri	43.375.018	4.5
Mal ve Hizmet Alım Gideri	67.550.825	7.0
Faiz Giderleri	117.317.000	12.2
Cari Transferler	391.337.230	40.7
Sermaye Giderleri	54.432.026	5.7
Sermaye Transferleri	10.045.697	1.0
Borç Verme	21.749.451	2.3
Yedek Ödenekler	7.865.890	0.8
Toplam	960.975.683	100

Kaynak: 2019 Yılı Bütçe Gerekçesi, s:64 www.bumko.gov.tr

3.Korumacılık Politikaları ve Ticaret Savaşları

Gelişmekte olan ülkelerde ve Türkiye’de yatırımların durumu bu iken Dünya’daki küresel eğilimler ve başta ABD ve Çin arasında yaşanan ticaret savaşları hem küresel ekonomiyi hem de Türkiye ekonomisini olumsuz etkilemektedirler. ABD ve Çin arasında yaşanan bu ticaret savaşının ayrıntılarına baktığımızda ticarete konu olan mal ve hizmetler dışında teknoloji casusluğu iddiası ve ulusal güvenlik önemli bir yere sahiptir. Dünya teknoloji liderliğini elinden kaçırmak istemeyen ABD bazı yöntem ve suçlamalarla çeşitli yaptırım kararları almıştır. (Ulusoy,2018:1)

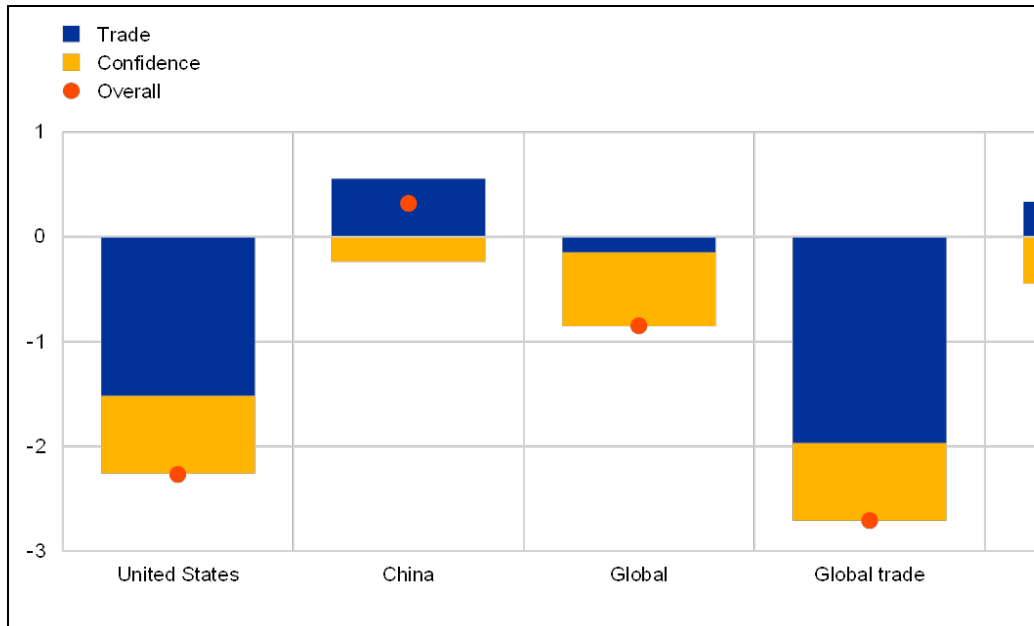
Liberal uluslararası ticaret yaklaşımını şimdiye kadar en fazla etkileyen faktör ABD başkanı Trump’ dan gelmiştir. Trump, ABD’nin Çine karşı büyük ticaret açığı verdiği görüşünden hareketle bir takım ticaret kısıtlayıcı önlemler almıştır. Bu önlemler sadece Çin ile kısıtlı kalmayıp başta Kanada olmak üzere AB, Güney Kore ve Meksika ile Türkiye’ye den de ihraç edilen ürünleri hedef alınca ortaya Dünya genelinde bir ticaret savaşı çıkmıştır.

23 Mart 2018 tarihinde ABD’nin Çin’e tarife uygulayarak başlatmış olduğu ticaret savaşları gün geçtikçe küresel ticaret savaşına dönüşmeye başlamış ve 2018 yılının Ağustos ayında Türkiye’ye de sıçramıştır. ABD başkanı Trump Türkiye’den satın alınan çelik ve aliminyumda gümrük vergisini iki katına çıkarmıştır. Türkiye ise 15 Ağustos 2018 tarihinde yayınlanan Resmi Gazetede ABD menşeli bazı ithal ürünlere % 50 ve % 100’den daha fazla ek gümrük vergisi ile yanıt vermiştir. ABD 17 Mayıs 2019 tarihinde de 1975 yılında Türkiye’yi dahil ettiği ticarete vergi avantajı sağlayan Genelleştirilmiş Tercihler sisteminden çıkarmıştır (Aytekin ve Uçan,2018:858).

Ticaret savaşlarının etkisi ile küresel ekonomide gözlenen ekonomik yavaşlama tüm ülkeleri özellikle hammadde satan ülkeleri etkilemiştir. Petrol fiyatları OPEC tarafından yapılan kesintiye rağmen düşmüş ve ekonomileri petrol ve doğalgaza bağlı Suudi Arabistan ve Rusya gibi ülkeleri zor durumda bırakmıştır. ABD ekonomisine yüksek düzeyde hammadde sağlayan Kanada ve enerji ve tabii kaynak açısından zengin olan Latin

Amerika ticaret savaşlarından kazançlı çıkacak olan ülkeler gibi görünmektedirler. ABD ve Çin dışında değerlendirildiğinde bu savaşın asıl kaybedeni Doğu Asya ülkeleri ve Avustralya'dır. Bu ülkeler hem global değer zincirinde önemli bir yer tutmakta hem de Çin ekonomisine hammadde ve aramalı tedarik etmektedir. Güney Kore, Vietnam ve Malezya gibi ülkeler ise Çin için ara malı üreten küresel merkezler olarak çalışmaktadır. Bu nedenle Çin'deki ara malı talebindeki bir azalma bu ekonomileri olumsuz etkileyecek ve bu ekonomiler küresel durgunluktan daha fazla etkilenerek çıkacaklardır. Ayrıca Singapur gibi mal taşımacılığında önde gelen ve ekonomisi ticarete bağlı olan ülkelerde küresel arz zincirinde aktarım merkezi oldukları için ticaret savaşlarının negatif etkilerini daha fazla hissedeceklerdir. (Keskin,2019:1)

*Grafik:4 Ticaret gerilimlerinin artmasının tahmini etkisi - ilk yıl etkileri
(GSYİH tepkisi, başlangıç seviyelerinden sapma; yüzdeler)*



Kaynak: ECB Calculations

Avrupa Birliği Merkez Bankası ekonomistleri Vanessa Gunnella ve Lucia Quaglietti tarafından hazırlanan "Artan Korumacılığın Ekonomik Etkileri: Euro Bölgesi ve Küresel Bakış Açısı" isimli çalışmada ticaret savaşlarının gelecekteki etkilerini araştırmak için bir senaryo oluşturulmuş ve burada güven ve ticaret etkileri birlikte değerlendirilmiştir. Araştırmada, ABD ile ticaret ortakları arasındaki yeni tarifelerin Euro Bölgesi ekonomik büyüme hızında ılımlı bir düşüşe neden olacağına işaret edilmektedir. Çalışmada ABD ve ticaret ortakları arasında %10'luk bir tarife artışı simülasyonu yapılmıştır. Böyle bir durumda, ABD ürünleri küresel pazarda daha pahalı bir hale geleceği için ABD ekonomisinin Çin ve Avrupa ekonomilerine göre daha fazla zarar göreceği belirtilmiştir. Aynı çalışmada Avrupa'da ise simülasyonu yapılan ticaret savaşının iş güvenliğine vereceği zararın, ABD dışındaki ülkelere yapılan ihracat artışları ile büyük ölçüde ortadan kalkacağına işaret edilmiştir. Buna göre küresel faaliyet ve küresel ticaret, ticaret ve finansal kanallar yoluyla meydana gelen

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olumsuz etkilerin bir sonucu olarak sırasıyla % 2.5 ve % 1 oranında düşebilir. Çalışmada, ticaret savaşlarının daha da artması durumunda, Avrupalı şirketlerin Çin'deki rakip ABD'li şirketlerin pazar paylarını alacaklarına da işaret edilmiştir. Çok taraflı işbirliği çerçevesinde ticaretin serbestleştirilmesinin küresel ekonomik refahı belirleyen önemli bir faktör olduğunun altı çizilerekten ticarette artan korumacılığın küresel ticarete zarar vereceği belirtilmiştir. (Vanessa and Quaglietti,2019:13-15)

Aşağıda yer alan Tablo 2, çeşitli ülkelerin IMF tarafından yapılan 2019 yılındaki tahmini makroekonomik verilerini göstermektedir. IMF 2019 Yılı Dünya Ekonomik Görünüm Raporuna göre, 2019 yılı için ABD ekonomisinde cari denge açık verirken, Çin'de fazla vermektedir. Yaşanmakta olan güven kaybı ve belirsizlik gelişmekte olan ekonomilerde yabancı sermayeye erişim sıkıntısı yarattığı için o ekonomilerde yavaşlamaya yol açmıştır. Yıl sonu için ABD'de enflasyonun artacağı beklentisi de muhtemelen ticaret savaşlarından kaynaklanmaktadır.

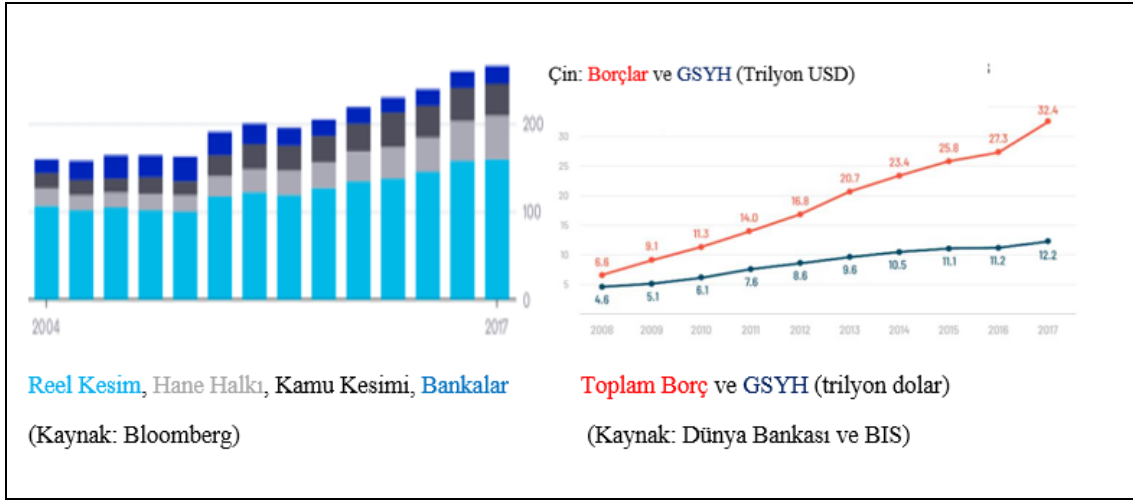
Tablo:2 Bazı Ülkelerin 2019 Yılındaki Makroekonomik Verileri Konusunda IMF Tahminleri

2019	Büyüme	Enflasyon (Ortalama)	Enflasyon (yılsonu)	Cari Denge / GSYH (%)	İşsizlik Oranı
ABD	2,3	2,0	2,7	-2,4	3,8
Euro Bölgesi	1,3	1,3	1,4	2,9	8,0
Japonya	1,0	1,1	1,7	3,5	2,4
Almanya	0,8	1,3	1,6	7,1	3,4
Çin	6,3	2,3	2,2	0,4	3,8
Hindistan	7,3	3,9	4,1	-2,5	-
Brezilya	2,1	3,6	3,6	-1,7	11,4
G. Afrika	1,2	5	5,3	-3,4	27,5
Türkiye	-2,5	17,5	15,5	0,7	12,7

Kaynak: IMF, World Economic Outlook 2019

Aşağıda yer alan Grafik:5'de Çin'de ekonomiyi olumsuz etkileyen borçluluğu ortaya koymaktadır. Çin ekonomisi yukarıda yer alan Tablo: 2 de görüldüğü üzere her ne kadar cari fazla verse de Grafik:5'de görüldüğü üzere çok yüksek kamu borç oranlarına sahip bir yapıdadır.

Grafik : 5 Çin'deki Borç Yükü (GSYİH içindeki pay)



Tablo:3 1923-2018 Türkiye Dış Ticaretindeki Gelişmeler (Milyon Dolar)

Yıllar	İhracat	İthalat	Dış Ticaret Açığı
1923	51	87	-36
1930	71	70	1
1940	86	53	33
1950	263	286	-22
1960	321	468	-147
1970	589	948	-359
1980	2.910	7.909	-4.999
1990	12.959	22.302	-9.343
2000	30.700	53.100	-22.400
2010	121.000	177.000	-56.000
2017	156.000	233.000	-76.000
2018	167.000	223.000	-55.000

Kaynak: TUIK,2019

Yukarıda yer alan Tablo 3’de Türkiye’nin 1923-2018 yılları arasındaki dış ticaret rakamları yer almaktadır. Türkiye, 1930’lardan 1980’lere kadar korumacı politikalar uygulanmıştır. İthal ikameci politikalar çerçevesinde 1920’lerin ikinci yarısından itibaren ve ağırlıklı olarak da 1930’larda gümrük vergileri yükseltilmiş ve ithalat kotaya bağlanmıştır. Türkiye ekonomisinde korumacılığın uzun sürmesi gelişmeyi durdurmuş ve tembellik yaratmıştır. Yüksek gümrük vergileri ve miktar kısıtlamalarına dayalı bir ithalat rejimi birçok sanayi dalında Dünya ile rekabet edemeyecek ürünlerin üretilip daha pahalıya satılmasına yol açarak rekabet gücünü

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düşürmüştür.1980'den sonra Türkiye kısıtlamaları kaldırarak ihracata dayalı sanayileşme politikasına geçmiştir. Böylece Türk sanayi Dünya rekabetine açılmıştır. Yukarıda yer alan Tablo:3'de de görüleceği üzere 1980'den itibaren ihracata yönelik sanayi sistemine geçince ihracat hızlı bir şekilde artmıştır. (Eğilmez:2018)

Gelişmekte olan bir ülke olarak Türkiye'nin Dünya Ticaret Örgütü tarafından da onaylanmayan geleneksel korumacılık politikaları yerine daha modern korumacılık yöntemleri ile stratejik gördüğü sektörleri desteklemesi gerekmektedir. Bu nedenle büyük çaplı kamu alımlarının öncelikli sektörlerdeki KOBİ'ler ile küresel piyasalarda büyüme potansiyeli taşıyan şirketleri destekleyecek biçimde yapılması, kamu tedarik zincirindeki koşulların yerli firmaları avantajlı kılabacak şekilde tasarlanması, üretime yönelik AR-GE ve eğitim harcamalarına destek olunması gerekmektedir. (Ünay ve Dilek,2018:26)

Türkiye örneğinde de gördüğümüz gibi korumacı politikalar ekonomilerde yavaşlamaya ve ticaret hacminin düşmesine neden olmaktadır. Böyle bir ortamda Türkiye ve diğer gelişmekte olan ülkelerin yabancı sermayeyi tekrar kendi ülkelerine çekmeleri her ne kadar zor olsa da bazı yükümlülükleri yerine getirmeleri kendilerine faydalı olacaktır.

4.Doğrudan Yatırımları Etkileyen Faktörler

Çok uluslu şirket yöneticilerine gelişmekte olan ülkelerde yatırım kararı alınmasında, politik istikrar ve güven, yasal düzenleyici ortam, iç pazar büyüklüğü, makro ekonomik istikrar ve döviz kuru, işgücünün niteliği, fiziksel altyapı, düşük vergi oranları, işgücü ve girdi maliyetlerinin düşüklüğü, arazi ve taşınmazlara erişim, iç piyasanın finansmanı gibi faktörlerin ne kadar etkili olduğu sorulduğunda alınan cevaplar aşağıdaki gibi olmuştur. (Gonzales ve diğerleri,2017/2018:6)

Tablo:3 Yatırım Kararını Etkileyen Faktörler (%)

Ülke Özelliklerinin Önemi	Çok Önemli	Önemli	Biraz Önemli	Önemli Değil	Bilinmiyor.
Politik İstikrar ve Güvenlik	50	37	9	2	
Yasal ve Düzenleyici Ortam	40	46	12	2	
İç Pazar Büyüklüğü	42	38	14	4	
Makro Ekonomik İstikrar ve Döviz Kuru	34	44	16	5	
İşgücünün Niteliği	28	45	22	5	
Fiziksel Altyapı	25	46	24	5	
Düşük Vergi Oranları	19	39	31	9	
İşgücü ve Girdi Maliyetlerinin Düşüklüğü	18	35	35	11	
Arazi ve Taşınmazlara Erişim	14	31	32	22	
İç Piyasanın Finansmanı	16	28	31	24	

Kaynak: Anabel Gonzalez ve Diğerleri,2018 Global Investment Competitiveness Report, World Bank Group,2018:6

Yukarda yer alan Tablo:3 de de görüldüğü üzere uluslararası doğrudan yabancı sermayenin teşvik edilmesinde vergi oranlarının düşürülmesi tek başına yeterli değildir. Vergi oranlarını düşürülmesi önemli bir kriter

olmakla birlikte ilk başta dikkate alınan bir ölçüt değildir. Ancak yatırımları etkileyen temel faktörler; siyasi ve makro ekonomik istikrar, demokratik bir hukuk sistemi, iyi işleyen bürokratik ve idari yapı nitelikli işgücü ve gelişmiş bir alt yapıdır.

Kurumlar vergisinin doğrudan yabancı sermaye yatırımları üzerindeki etkisi ile ilgili olarak bazı yazarlar vergi oranındaki azalmanın doğrudan yabancı sermayeyi teşvik ettiğini belirtirken Pain ve Young (1996) mali etkilerin ve vergi oranlarındaki düşüşün doğrudan yabancı sermaye üzerinde etkili olmadığını belirtmişlerdir. Gonder ve Nistor (2012) yılında AB'ye sonradan katılan 6 AB ülkesi; Bulgaristan, Macaristan, Letonya, Litvanya, Polanya ve Romanya ile ilgili olarak yapmış olduğu çalışmada vergi oranları bu altı ülkeden daha yüksek olan gelişmiş AB ülkelerinin daha fazla doğrudan yabancı sermayeyi teşvik ettiği sonucuna varmış ve böylece doğrudan yabancı sermayenin sadece düşük vergi oranlarına değil, öngörülebilirliğe şeffaflığa, vergi kaçakçılığı ve dolandırıcılığına bağlı olduğunu belirtmiştir.(Simoës,2014:9)

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Tablo:4 Kurumlar Vergisindeki Değişim

Ülkeler	1986	1991	1995	2000	2018
Avusturalya	49	39	33	34	30
Avusturya	30	30	34	34	25
Belçika	45	39	39	39	29
Kanada	36	29	29	28	15
Danimarka	50	38	34	32	22
Finlandiya	33	23	25	29	20
Fransa	45	42	33	33	34
Almanya	56	50	45	40	16
Yunanistan	49	46	40	40	29
İzlanda	51	45	33	30	30
İrlanda	50	43	40	24	12
İtalya	36	36	36	37	24
Japonya	43	38	38	27	23
Kore	30	34	32	28	25
Lüksemburg	40	33	33	37	19
Meksika	34	34	34	35	30
Hollanda	42	35	35	35	25
Yeni Zelanda	45	33	33	33	28
Norveç	28	27	19	28	23
Portekiz	47	36	36	32	30
İspanya	35	35	35	35	25
İsveç	52	30	28	28	22
İsviçre	10	10	10	8	8
Türkiye	46	49	25	33	22
İngiltere	35	34	33	30	19
ABD	46	34	35	35	21

Kaynak: OECD Data Historical Table II.1 (1981-1999) ve Table II Statutory Corporate Income Tax Rate'den alınan bilgilerle tablo tarafıma oluşturulmuştur.

Yukarıda yer alan Tablo:4'de de görüldüğü üzere; 1980'li yıllardan 2000'li yıllara kadar kurumlar vergisinde önemli ölçüde indirim yapılmıştır. Söz konusu indirimde diğer faktörlerin yanında vergi rekabetinin de payı büyüktür. Ülkeler üretim kapasitesini artırmak, sermaye başta olmak üzere üretim faktörlerini çekmek, teknoloji transfer etmek ve toplam tasarruflarını artırmak, doğrudan ve kısa vadeli yatırımları ülkesine çekmek amacıyla kurumlar vergisi oranlarını düşürmüşlerdir. Türkiye'nin de gelecek dönemlerde kurumlar vergisinde küçük bir indirim yapması doğrudan yabancı sermaye çekmek açısından önemli olacaktır.

Küresel rekabet endeksi ülkelerin yatırım ortamını göstermek ve diğer ülkelerle karşılaştırmak için kullanılan bir sıralama ölçütüdür. Dünya Ekonomik Forumu her yıl, ülkelerin üretkenlik düzeylerini, kurumların, politikaların ve faktörlerin birbiri ile etkin çalışıp çalışmadığını analiz ederek küresel rekabetçilik raporunu

yayınlanmaktadır. 2005 yılından beri yayınlanan küresel rekabetçilik endeksinin net yapısı, her ülkenin ulusal rekabet gücünü, zayıf ve güçlü yönlerini belirlemesine yardımcı olmaktadır.

Tablo:5 2017-2018 Küresel Rekabetçilik Endeksi Ülke Sıralaması

Ülkeler	2017-2018 (137 Ülke)
İsviçre	1
ABD	2
Singapur	3
Hollanda	4
Almanya	5
Hong Kong	6
İsveç	7
İngiltere	8
Japonya	9
Finlandiya	10
Fransa	22
Çin	27
İspanya	34
Azerbeycan	35
İtalya	43
Türkiye	53
Güney Afrika	61
Yunanistan	87

Kaynak: Global Competitiveness Report 2017-2018 s:13

137 ülkeyi içeren 2017-2018 raporunda, kurumlar, alt yapı, makroekonomik çevre, sağlık ve temel eğitim, yüksek eğitim ve öğretim, mal piyasası etkinliği, işgücü piyasası etkinliği, finansal piyasa gelişimi, teknolojik hazırlık, piyasa büyüklüğü yenilikçilik gibi göstergeler kullanılarak ülkelerin rekabet güçleri ortaya konmuştur. Bu rapora göre, Tablo:5’de görüldüğü üzere ilk sırada İsviçre yer almaktadır, ikinci sırada ABD, üçüncü sırada Singapur, dördüncü Hollanda, beşinci Almanya yer almaktadır. Türkiye’nin küresel anlamda rekabet edebilirlik geçmişine baktığımızda 2012-2013 yılında 43. sırada yer alırken 2017-2018 ‘de 53. sırada yer almıştır. (Global Competitive Report,2017-2018:24)

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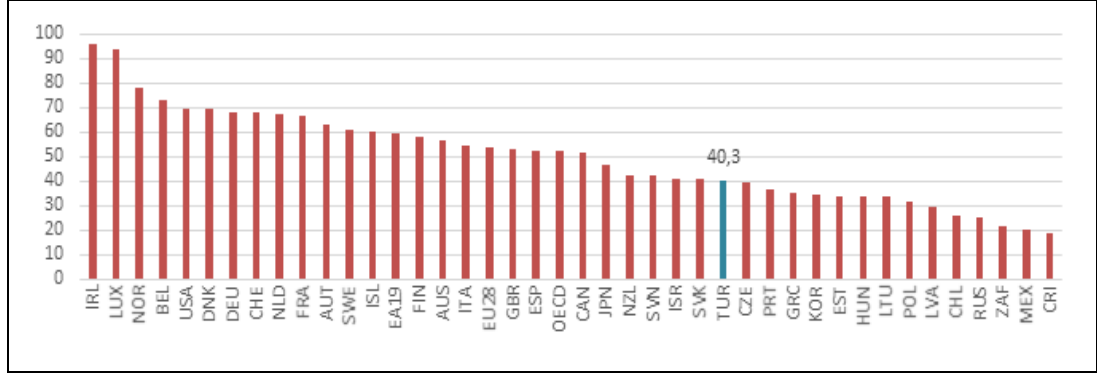
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Grafik:6 İşgücü Verimliliği 2016, Çalışılan Saat Başına GSYİH, Toplam Ekonomi, Cari Fiyatlar, Cari Satın Alma Gücü Paritesi, \$



Kaynak: OECD Compendium of Productivity Indicators 2018,s.41

Ekonomik büyüme; üretim faktörlerinden işgücü ya da sermaye faktörleri artırılarak ya da bu faktörlerin kullanımındaki verimlilik artırılarak gerçekleştirilmektedir. Yukarıda yer alan Grafik:6'da da görüldüğü üzere Türkiye'nin de içinde bulunduğu pek çok ülkede verimlilik oranları düşmüştür. Doğrudan yatırımları çekmek ise üretimi daha verimli hale getirmekle mümkün olacaktır. Sermaye ve işgücü kaynaklarında verimliliği artıracak reformlar mutlaka yapılmalı ve sermayenin kaynağını oluşturan tasarrufların stratejik önceliklere göre dağıtılması gerekmektedir.

Sonuç

Türkiye'de yatırımlara Merkezi Yönetim Bütçesinden ayrılan pay 2019 yılı için % 6.7'dir. Kamu yatırımlarının özel sektör için alt yapı oluşturması, sürükleyici nitelikte olması, istihdam sorununa çözüm olması nedeniyle söz konusu oranın en az %20'ye çıkarılması gerekmektedir. Bu nedenle bütçeden cari transferler için ayrılan % 40 payın azaltılarak onun yerine yatırım harcamalarının artırılması uygun olacaktır. Böylece kamu sektörü ve piyasa arasında optimal dengede sağlanmış olacaktır.

Türkiye doğrudan yatırımlarını artırarak ekonomik büyüme ve istihdam sorununu çözebilir. Ancak tüm Dünya'da korumacılık ve ticaret savaşları yaşanırken ve Türkiye'de de bir takım ekonomik ve siyasi istikrarsızlıklar söz konusu iken doğrudan yabancı sermayeyi ülkemize çekmek çok kolay olmayacaktır. ABD'nin Çin ve AB ile ticaret savaşına gireceği endişesi 2017 yılında Dünya'da doğrudan yabancı yatırımları % 23 oranında düşürmüştür. Türkiye'ye yönelik doğrudan yatırımlar da %16 oranında azalmıştır. Ticaret savaşlarının gelecek dönemlerde devam etmesi Türkiye'nin ABD ve Çin ile çok yüksek bir ticareti olmadığından dış ticaret açısından sorun teşkil etmeyecektir. Türkiye'nin Dünya ticaretindeki payı % 0.9'dur. Ancak ABD yaptırımları nedeniyle AB'nin ekonomisi tekrar durgunluk yaşarsa bu durum Türkiye'nin AB'ye olan ihracatını olumsuz etkileyecektir. Ticaret savaşlarının devam etmesi gelişmekte olan piyasalara sermaye akımlarının azalmasına yol açacaktır. Hatta bu ülkelerden fon çıkışına yol açabilir. Bunun sonucunda bu piyasalarda finans sektöründe görülen kriz reel sektörü de etkileyebilir. Türkiye'nin Dünya'da yaşanan bu ticaret savaşlarını bir fırsata çevirerek yabancı sermayeyi çekmek için bazı önlemler alması gerekmektedir.

Küresel ekonomi ticaret savaşlarının etkisi ile 2018’de beklentilerin altında % 3 oranında büyümüş, 2019 da da % 2.6 civarı bir büyüme beklenmektedir. Düşük büyüme ile beraber doğrudan yabancı sermaye akımlarında da bir azalma görülmektedir. Geçen yılın ilk çeyreğinde 91,1 milyar dolar olan ABD’nin Çin’e karşı verdiği dış ticaret açığı, 2019’un aynı döneminde yüzde 12 azalarak 79,9 milyar dolar seviyesine inmiştir. Çin’in ABD’nin ithalatındaki payı, 2018’in ilk 3 ayında yüzde 20,5 olurken, bu yılın aynı döneminde yüzde 17,7’ye gerilemiştir. Böylece geçen yıl ABD’nin en büyük ticaret ortağı olan Çin, bu yılın ilk çeyreği sonu itibarıyla üçüncü sıraya düşmüştür. Ticaret savaşları ABD’de fiyatların yükselmesine yol açarken, Çin’de ihracatın azalmasına dolayısıyla büyüme oranının düşmesine neden olmuştur. Bu savaşlardan asıl etkilenen ülkeler ise Asya ülkeleri ve Avusturalya ile özellikle Çin’e hammadde satan Güney Kore, Malezya ve Vietnam olmuştur. Ekonomisi petrole dayalı Rusya ve Suudi Arabistan ekonomileri de bu durumdan olumsuz etkilenmişlerdir. Avrupa Merkez Bankası ekonomistleri tarafından yapılan bir simülasyon, ticaret savaşlarından ABD’nin daha fazla etkileneceğini, Çin ekonomisinin ise misillemeler sonrasında daha iyi olacağını öngörmektedir. Bu simülasyon ABD’nin tüm ithalatına %10 gümrük tarifesi uygulaması ve ticari partnerlerinin de aynı oranda misilleme yapması senaryosuna göre yapılmıştır. Yani ABD’nin net ihracatı, üretimi ve dolayısıyla ekonomik büyümesi ve istihdamının azalacağını öngörmektedir.

Ticaret savaşları nedeniyle ABD ve Çin yaptıkları ithalatı başka ülkelere kaydırabilirler. Türkiye bu yön değiştirmeden olumlu olarak etkilenip pay alabilir. ABD’nin Çin’e yönelik yaptırımları Türkiye’nin önemini artırmaktadır. Diğer taraftan ticaret savaşları nedeniyle ikili ülke anlaşmaları ve ilişkiler önem kazanabilir. Özellikle İngiltere AB’den ayrılır ise ikili ticaret ve yatırım anlaşmaları gündeme gelebilir. Ayrıca Türkiye Rusya ve Çin ile olan ikili ilişkilerini güçlendirebilir.

Türkiye BRICS artı T ismiyle BRICS’e katılmaya çağrılmıştır. Bu noktada Türkiye Afrika ve Asya üreticileri için tedarikçi ülke fonksiyonunu üslenebilir.

İpek Yolu ya da diğer adıyla “Kuşak Yol Projesi” küresel ekonomi ve özellikle Çin ekonomisi açısından önemlidir ve Türkiye burada kilit ülke konumundadır. Kuşak Yol Projesi Türkiye’ye daha fazla doğrudan yabancı sermaye gelmesini sağlayacaktır. Ancak Türkiye’nin maksimum ölçüde doğrudan yabancı sermayeyi çekmesi öncelikle ekonomik ve siyasi istikrarını sağlamasına bağlıdır. Bunun yanında vergi oranlarını düşürmek yabancı sermayeyi teşvik açısından önemli bir kriter olmakla beraber, demokratik bir hukuk sistemi, iyi işleyen bürokratik ve idari yapı, nitelikli işgücü ve gelişmiş bir alt yapıya bağlıdır.

Korumacı politikalar ekonomilerde yavaşlamaya ve ticaret hacminin düşmesine neden olmaktadır. Bu nedenle Türkiye’nin korumacı politikalar yerine stratejik sektörleri ve özellikle hammaddesi Türkiye’de bulunan sektörleri desteklemesi gerekmektedir

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MIDDLE INCOME TRAP IN TURKEY, BULGARIA, MALAYSIA, CHINA AND SOUTH KOREA COMPARISON

ORTA GELİR TUZAĞINDA TÜRKİYE, BULGARİSTAN, MALEZYA, ÇİN VE GÜNEY KORE KARŞILAŞTIRMASI¹

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ABSTRACT

The middle income trap (MIT) is defined as the failure in the economy to reach a higher income group after reaching a certain level of income and the standing of gdp per capita at the same level for many years without exceeding a certain threshold. In this experiment the comparison of the selected countries (of Bulgaria, Malaysia, China, South Korea and Turkey) were performed in the frame of MIT according to the macroeconomic data and global competitiveness report index between the years of 1990-2018. What is the situations and solution offers of the selected countries against MIT by considering the growth process of them from past to present? In addition, what is the reason behind the success of the South Korean economy in the excess of the MIT barrier? Questions were sought. According to the survey, Bulgaria and Turkey for many years and will continue to wrestle with barrier, Malaysia's economic structure of Bulgaria and Turkey, which is better than the economic structure and concluded that the continuation of Malaysia's progressive economic structure has been reached. Furthermore, it is concluded that the Chinese economy is the closest country to overcome the MIT barrier and South Korea is the best in the selected countries in terms of economic structure compared to the selected countries. This thesis these days, especially after the declaration of the republic of Turkey's economy to grow adventures, with reference to case studies across the MIT takes place Turkey and Turkey's policy is to present proposals on the basis of special purpose.

Keywords: Sub-MIT, Theories of Growth, Top-MIT, Development Theories, Macro Economic Data, Middle Income Trap.

GİRİŞ

Orta gelir tuzağı kavramı ilk olarak 2007 yılında dünya bankasının yayınlandığı “Doğu Asya Rönesans’ı: İktisadi Büyüme İçin Fikirler” başlıklı raporda ortaya atılmıştır. OGT ekonominin belirli bir gelir düzeyine ulaştıktan sonra bir üst gelir grubuna geçememesi ve kişi başına düşen gelirin belirli bir eşiği aşmayarak uzun yıllar o eşikte kalması olarak tanımlanmaktadır. Bu bir üst ekonomik seviyeye geçememe durumu düşük gelirden orta gelire yükselmeye olabileceği gibi orta gelirli ekonomik yapıdan yüksek gelirli ekonomik yapıya geçememe şeklinde de olabilmektedir.

¹ Bu makale, “Orta Gelir Tuzağı ve Seçilmiş Ülkeler Arasında Karşılaştırma: Bulgaristan, Malezya, Çin, Güney Kore ve Türkiye” yüksek lisans tezinden hazırlanmıştır.

Dünya bankası raporuna göre; OGT kavramı alt- OGT (Kişi başına düşen milli gelirin 1,006-3,975 dolar) ve üst- OGT (Kişi başına düşen milli gelirin 3,976-12,275 dolar) olarak ikiye ayrılmaktadır. Yüksek gelirli ekonomiler ise 12,276 dolar ve üzeri olan ülkelerdir. Bir ülkenin alt orta gelirde en az 28 yıl kalması veya üst orta gelirde 14 yıl ve üzeri kalması, o ülkenin OGT engeline olduğunu göstermektedir.

Orta Gelir Tuzağı

Dünya Bankası (DB) ülkeleri, düşük gelirli ekonomiler ve orta gelirli ekonomiler olarak ayırmakta, orta gelirli ekonomileri de alt-orta gelirli ekonomiler, üst-orta gelirli ekonomiler ve yüksek gelirli ekonomiler olarak ayırmaktadır. Bu ayrımı Gayri Safi Yurtiçi Hasıla (GSYH) ve kişi başına düşen gelire göre yapmaktadır. DB, orta gelir kavramını ilk kez kullanmaya başladığında ABD kişi başına düşen gelirinin %20'sine karşılık gelen 10.000 doların altında olanlar, düşük veya orta gelirli ekonomiler olarak sayılmaktaydı (The World Bank, 2016).

DB, 2012 yılında yayınladığı raporda, ülkelerin kalkınma düzeylerini aşağıdaki şekilde sınıflandırmaktadır.

Tablo 1.1. Dünya bankasına göre ekonomilerin/ ülkelerin gelir gruplarını belirleme ölçütü

Ekonomiler	Kişi Başına Yıllık Ortalama Gelir
Düşük Gelirli Ekonomiler	1.005 doların altı
Orta Gelirli Ekonomiler	1.006-12.275 dolar arası
• Alt-Orta Gelirli Ekonomiler	1.006-3.975 dolar arası
• Üst-Orta Gelirli Ekonomiler	3.976-12.275 dolar arası
Yüksek Gelirli Ekonomiler	12.276 dolar ve üzeri

Kaynak: Eğilmez, M., 2012, Orta Gelir Tuzağı ve Türkiye [online], Kendime Yazılar, <http://www.mahfielmez.com/2012/12/orta-gelir-tuzag-ve-turkiye.html> [Erişim Tarihi: 1 Kasım 2017].

Orta Gelir Tuzağından Korunmak ve Çıkış Yolları

DB verilerine göre, dünya üretimi içindeki ülkelerin paylar incelendiğinde düşük ve orta gelirli ülkelerin payının azalması önemli bir sorun oluşturmaktadır. Dış ticaret dengesi açığı ve ihracatın ithalatı karşılama oranı azalmakta, yani dış ticaret açığı milli gelir düştükçe artmaktadır. Yine geri kalmış ve az gelişmiş ülkelerde dış ticaretin büyüklüğüne bakıldığında, yüksek gelirli ülkelere kıyasla dış ticaret hacmi oldukça azdır. Dış borçların fazla olması ile ülkenin var olan sınırlı kaynakları da bütçe ve cari açıklarını kapatmaya ayırması yeni yatırımların oluşmasına ayrılması gereken kaynakları azaltmakta ayrıca yeterince yatırım yapılamaması sorunu ile karşı karşıya kalınmaktadır. OGT riski ile karşı karşıya olan ülkelerde özellikle yatırım oranlarının düşük olması konusunda gerek kamu, gerekse özel sektör açısından yatırımların artmasının sağlanması halinde, OGT'den çıkışta önemli bir avantaj sağlanacaktır (Gill ve Khras, 2007).

Sınırlı sayıda ülke büyüme stratejilerini olumlu yönde ilerleyerek sürdürülebilir bir büyüme ortamı yakalamaktadır. Hatta sınırlı sayıdaki bu ülkeler OGT düzeyine ulaşmalarına rağmen sürdürülebilir büyüme

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ortamını koruyamamaktadır. Sürdürülebilir büyüme performansları ülkeden ülkeye değişkenlik göstermesinin yanında bölgeden bölgeye de değişkenlik gösterebilmektedir. Uzun vadeli ekonomik politika hedeflerinin güçlü yönetim anlayışı ile desteklenmesi, ekonomik hedeflere sadık kalınması ve özel sektörün desteklenerek gerek Ar-Ge harcamaları, gerekse doğrudan yatırım harcamaları konusunda üretime yönlendirilmeleri gibi başarılarıdır (Bayraktar ve Yıldız, 2017).

Ülkelerin OGT'den çıkmak için genel olarak yapmaları gereken belli başlı yapısal reformları ve öncelikli durumları gerçekleştirmeleri gerekmektedir. Bu yapısal reformlara ve öncelikli durumlara maddeler halinde değinecek olursak bunlar: (Ülger, 2018).

- Pazarın ihtiyaçlarına cevap verecek yenilikçi ürünlerin geliştirilmesidir. Bilgi tabanlı bir ekonomik hedefe yönelik olarak yüksek bilgi içerikli sanayileşme ve yüksek katma değerli ürün imalatı sanayisine yatırım çekme konusunda yeni stratejilerin belirlenmesi ve gerek iç talebin, gerekse dış talebin isteklerine cevap verilmesi gerekmektedir.
- Kurumların ulusal ve uluslararası güvenini arttıracak denetim ve şeffaf bir yönetim anlayışının, kurumların her türlü birimine sirayet etmesi gerekliliği önemli bir konudur. Kurumların özgür olduğu saygınlığının ve hesap verebilir bir yapısı olduğu ülkeler genellikle gelişmiş refah toplumlarıdır. OGT'de olan ülkelerin bu engelden çıkmak için geliştirdikleri yollara bakıldığında öncelikli durumlarının başında kurumların özgürlüğünün sağlanması gelmektedir.
- Beşeri sermayeye ağırlık vererek, piyasa ekonomisine yönelik yapılacak reformlarla eğitim ve nitelikli insan yetiştirme konusunda verimliliği artırılması sağlanmalıdır.
- Devletin gerekli ortamı oluşturmak için kamu işletmelerinin yanında özel sektörü teşvik edeceği her türlü finansal araçları kullanmaya olanak sağlayacağı, küçük ve orta ölçekli işletmelere fikri mülkiyet hakkının korunacağının güvencesi verilerek uluslararası düzeyde rekabet edebilecekleri ortamı oluşturması gerekmektedir.
- İhracatçı firmalara devlet kontrolünde olan bankalar aracılığı ile özel faiz oranları uygulayarak finansal sistemde destek sağlanmalıdır.
- Ar-Ge harcamalarında kamunun yanında özel sektörün de Ar-Ge harcamalarına ağırlık verilmesi ile gelişen transformasyon ve inovasyon yeteneğinin pazarın ihtiyaçlarına yönelmesi gerekmektedir.

OGT bağlamında gelişimini tamamlayamayan büyüme ve kalkınma süreçlerinde gerekli adımların atılamaması ile karşı karşıya kalmış ülkeler olmalarından dolayı büyüme ve kalkınma teorilerinin bilinmesi gerekmektedir. Büyüme ve kalkınma kavramları iktisatçıların, ekonomistlerin önemli bir uğraş alanı olmasının altında yatan nedenlerin başında gelişmiş ekonomilere ve gelişmiş refah toplumlarına ulaşma çabasıdır (Berber, 2006).

Seçili Ülke Karşılaştırmaları

Bulgaristan, Malezya, Çin, Güney Kore ve Türkiye'nin makroekonomik verilerinden özellikle; Büyüme oranları çerçevesinde karşılaştırılması yapılacaktır.

Tablo 1.2. GSYH'nin büyüme oranları karşılaştırması (Yıllık %)

ÜLKELER/YILLAR	1990	2000	2010	2015	2016	2017
Bulgaristan	-9,12	4,9	1,32	3,62	3,94	3,56
Malezya	9,01	8,86	7,42	5,03	4,22	5,9
Çin	3,91	8,49	10,64	6,9	6,7	6,9
Güney Kore	9,81	8,92	6,5	2,79	2,93	3,06
Türkiye	9,2	6,6	8,5	6,1	3,2	7,42

*Kaynak: The World Bank, 2018, [online], Word Bank,
https://datacatalog.worldbank.org/search?sort_by=field_wbddd_modified_date&sort_order=DESC [Erişim Tarihi: 1 Ocak 2019].*

Tablo 1.2'de GSYH'nin büyüme oranları seçili ülkeler bazında verilmiştir. Buna göre;

- Bulgaristan'ın ekonomisinin 1990 yılında %9,12 gibi bir küçülme yaşamasının altında 1990'lı yıllara kadar komünist rejimin varlığı, Doğu Blokunun yıkıldığı yıllara denk gelmesi ve rejim değişikliklerinin gerçekleştiği yıllar olmasından dolayı etkili olduğu söylenebilir. 2000 yılında %4,90 gibi olumlu bir büyüme yakalaması 1997 yılında uygulanmaya başlanan ekonomik istikrar programlarının meyvelerini verdiğinin işaretleridir. 2010 yılında büyüme oranının %1,32 gibi düşük bir düzeyde kalmasında, 2008 küresel krizin etkisinin olduğu söylenebilir. Bulgaristan'ın 2007 yılında AB'ye tam üyeliğinden dolayı 2015-2017 yılları arası büyüme oranı %3,56-3,96 arası bir istikrara sahip olmuş ama bu durum OGT'den kurtulmasına yetmemiştir.
- Malezya ekonomisinin büyüme oranlarının 1997 yılına kadar ortalama %9-10 seviyelerinde seyretmesinin altında ekonomik kalkınma programları yatmaktadır. 1990-2016 yılına kadar büyüme oranlarının düşüş eğilimi içinde olması, verimliliğin az olması, teknoloji yatırımlarının azlığı ve işçi maliyetlerinin fazlalığı gibi nedenler etkili olmaktadır. Malezya'nın üst-OGT düzeyinden çıkamaması ve büyüme oranlarının düşme eğiliminde olmasının nedenlerinin aynı olduğu görülmektedir. 2013 yılına gelindiğinde halkın reform yanlısı tutumu 2017 yılı büyüme oranlarının 2016 yılına göre arttığı görülmektedir (İjomo ve Hui, 2010).
- Çin ekonomisi aslında üst-OGT'den kurtulacak düzeye yaklaşmıştır. Tarihte Çin kadar yüksek büyüme oranları yakalamış bir ülke yoktur. 2000 ve sonraki yıllarda ciddi bir büyüme terendi

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yakaladığı görülmektedir. Bu başarısını özellikle yüksek tasarruf oranlarına, istikrarlı hükümet politikalarına ve dış ticarete oldukça avantaj getiren ucuz işgücüne bağlanabilir. Büyüme oranlarının bu denli yüksek olduğu bir ekonominin aslında OGT tuzağında olmaması gerekmektedir. Ancak Çin nüfusunun çok olması ve ekonominin sektörel dağılımında hizmetler sektörünün sanayi sektörünün bazı yıllar altında kalması gibi faktörler OGT’de olduğunu düşüncesine neden olmaktadır (Özekicioğlu ve Kılıç, 2017).

- Güney Kore ekonomik büyümesine bakıldığında dalgalı bir seyir izlemektedir. 1960’lı yıllarda ekonomik atılımların hızlandığı yıllardır. 1970’li yıllarda Türkiye ekonomisinin gerisinde olan bir ekonomiden Asya’nın en büyük 3. büyük ekonomisi arasına girecek kadar ilerlemeyi başarmıştır. 2000’li yıllara kadar %9-10 ortalama ile büyümüş bir ekonomi 2015-2017 yılları arasında %2,79-3,06 arasında bir büyüme trendine girmiştir (Çakmak, 2016).

Türkiye Özelinde Politika Önerileri

OGT, birkaç politikanın değişikliğine gidilerek çözülecek kadar basit bir yapıya sahip değildir. Birbirini etkileyen birçok değişkenin gerek farklı, gerekse beraber etkileşim içinde olduğu yapısal sorunların bir bütündür.

Kadın istihdamının %30 düzeyinde olduğu Türkiye’nin aksine gelişmiş ülkelerde %50 seviyelerinde olmasından dolayı; kadının eğitim hayatının engellenmemesi, kadınların özellikle kırsaldaki eğitim düzeyinin düşüklüğünden dolayı kırsalda eğitimin özendirilmesine yönelik politikalarının hayata geçirilmesi ile kadının ekonomik yapının içine çekilmesi gerçekleştirilebilir (Bayar, 2016).

Şeffaf, hesap verebilir ve özgürlükçü yapının Türkiye’nin kurumlarına sirayet etmesi gerekmektedir. Yargı bağımsızlığının, basın özgürlüğünün, uyuşmazlık mahkemelerine olan güvenin artırılması ve yolsuzluk oranlarının azaltılmasının gerekliliği üzerinde durulmalıdır. Kurumların özgür olduğu ve ileri demokrasinin egemen olduğu toplumlarda; eğitim sisteminin iyi işlediği, insanların aidiyet duygusu ile hareket ettiği, gerek vergiden kaçınma gerekse de kaçırma konusunda daha hassas olduğu ve hangi ırktan olursa olsun yasal hakların korunduğu bir yargı sisteminin de yerli ya da yabancı yatırımcıların ülkede yatırım yapma konusunda artış sağlayacağı beklenir (Pamuk, 2014).

Ar-Ge, toplumun kültür seviyesinden ve insanın bilgisinden meydana gelen bilgi düzeyinin artırılması ve bilginin yeni sistemlerinin tasarlanması ve kullanılması için itina ile yürütülen yenilikçi çalışmalardır. Ar-Ge harcamalarının GSYH’nin gelişmiş ülkelerde en az %1,5 seviyelerinde (Güney Kore’de 2017 yılında %4,15 seviyelerinde) seyretmesi Türkiye’nin ise son yıllarda yeni yeni %1,01 (2017 yılı) seviyesine çıkması ile gelişmiş ülkelere göre düşük düzeyde kaldığını ve bu yüzden Ar-Ge harcamalarını arttırması ile ilerleme gerçekleştirilebilir (Aydın ve Soylu, 2018).

Kayıt dışı ekonominin azaltılması için harekete geçilmesi gerekir. Kayıt dışı ekonomi azaltılarak kamu tasarrufunu arttırmak yani vergi oranlarını arttırmadan vergi gelirlerinde artış sağlamak, tasarruf oranlarındaki bu artışı yenilik ve inovasyon politikaları için harcanması verimlilik düzeyinde de artışlara neden olacaktır (Arzova, 2018).

Bölgesel gelişmişlik düzeylerinin farklı olduğu ve gelir dağılımı adaletsizliğinin fazla olduğu ülkemizde stratejik teşvik politikaları ve kalkınma politikaları ile kısmen giderilmesi, ekonominin belirli kesimler elinde toplanmaması, bölgesel gelişmişlik farklarının azaltılması ve toplumun her kesiminin ekonomik yapı içinde kendine yer bulması ile ekonomik büyüme gerçekleşecektir (Dündar, 2013).

SONUÇ

OGT’de olan ülkelerin yapısal ekonomik sorunların olması kalkınma konusundaki eksiklerden kaynaklanmaktadır. OGT’den kurtulmak isteyen ülkelerin kalkınma öncelikli politikalara önem vermeleri gerekmektedir.

Bulgaristan, Malezya, Çin, Güney Kore ve Türkiye’nin 1990-2018 yılları arası makroekonomik verilerden özellikle büyüme oranları çerçevesinde karşılaştırılmaları yapılmıştır. Karşılaştırmada Bulgaristan’ın ve Türkiye’nin kötü bir konumda olduğu gözlemlenmiştir. Malezya makroekonomik verilerinin Bulgaristan ve Türkiye’den daha iyi bir konumda olmasına rağmen OGT’den kısa sürede çıkacağı görülmektedir. Çin’in OGT’den çıkması muhtemel görülmektedir. Güney Kore ise yüksek gelire sahip başarılı bir ülke olmasından dolayı seçili diğer ülkelere ne yapmaları gerektiği konusunda fikir vermesi açısından bu araştırmada seçilmiştir.

Bulgaristan 1990 sonrası bağımsızlığını kazanması sonucu, serbest piyasa ekonomisine adaptasyonu konusunda sıkıntılar yaşamıştır. 1 Ocak 2007 de AB’ye üye olmasından dolayı nispeten kendini toparlamışsa da; göç veren bir ülke olması, katma değeri yüksek ürün üretememesi, kalifiyeli iş gücünün diğer Avrupa birliği ülkelerine göç etmesi gibi nedenlerden dolayı Türkiye’den daha kötü bir ekonomik yapıya sahiptir. Uzun yıllar bu tuzakta olmasının altında ise gerekli kalkınma hamlelerini yeterince yapamaması yatmaktadır. Bulgaristan’ın bu engelden çıkması için lojistik ve transit taşımacılık potansiyeli olması dolayısı ile bu alanı odak sektör seçerek bu yönde uzmanlaşma eğilimine gitmelidir.

Malezya kalkınma hamlelerini uzun yıllar önce başlatmasına rağmen bir türlü yüksek gelirli ülkeler kategorisine kendini çıkaramamıştır. Türkiye ve Bulgaristan’dan daha iyi bir konumda olan Malezya’da işçi maliyetlerinin yüksekliği, Ar-Ge harcamalarının düşüklüğü ve özellikle politik istikrar konusundaki sorunlar göze çarpmaktadır. Politik istikrar sorununda; halkın istediği yapısal dönüşümlerin gerçekleşmemesi, yönetimim belirli kesimlerin elinde toplanması ve çıkar gruplarının fazlalığı dikkat çekmektedir.

Dünyanın en büyük ekonomisi olan Çin ekonomisinin bu engelde olmasının en önemli nedeni nüfusunun çok olması ile ilgilidir. ‘Çin 2030’ raporuna ve bu konuda yapılmış çalışmaların ortak görüşüne göre Çin’in dünya ülkelerine nazaran en yakın zamanda OGT’yi aşarak yüksek gelirli ülkeler kategorisine seçilecektir.

Güney Kore kişi başına düşen geliri 30 bin dolara yaklaşması ile seçili ülkeler arasında en yüksek seviyededir. Bu seviyelerde olmasının altında inovasyon ve yeniliklere önem vermesi, Ar-Ge harcamaları konusunda odak sektör seçimi, eğitim yapısı güçlendirerek beşeri sermaye unsurunu geliştirmesi, istikrar ortamının varlığı ve teknoloji yoğun üretim ve katma değeri yüksek ürün ihracatına önem vermesi gibi faktörler yatmaktadır.

Türkiye ekonomisinin seçili ülkelerden yalnızca Bulgaristan ekonomisinden daha başarılıdır. Cumhuriyetin kuruluşundan günümüze büyüme serüvenine baktığımızda özellikle 1990-2018 yılları arasının siyasal,

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toplumsal, sosyal ve ekonomik birçok krizle karşı karşıya olan Türkiye'nin en önemli ekonomik sorunu kırılgan ekonomik yapısından dolayı oluşan makroekonomik istikrarsızlıktır.

OGT konusunda Türkiye'nin içinde yer aldığı 2014-2018 yılları arasında yapılmış çalışmaların sonuçlara göre; kişi başına düşen gelir ile ihracat ve tasarruf oranları arasında pozitif ilişkinin olduğuna değinilmiştir. Özellikle bu çalışmalar Türkiye'nin OGT'de olup olmadığı ve çözüm önerileri üzerinde durmaktadırlar. Genel olarak çalışmalarda görülen Türkiye'nin OGT'de olduğudur. Çözüm önerilerinde ise; Ar-Ge harcamalarının düzeyinin artırılması, insan sermayelerinin verimliliğinin artırılması, iş gücünün eğitime önem verilmesi, bölgeler arası eşitsizliklerin giderilmesi ve katma değeri yüksek ürün ihracatının artırılmasının gerekliliği üzerinde durulmaktadır.

Türkiye ekonomisinin OGT'den çıkması için geliştirilen politika önerileri sonuçlarına göre, özellikle odak sektör seçiminin gerekliliğine vurgu yapılarak demir yolu sektörü ile ilgili teknolojiler önerilmektedir. Bir diğer odak sektör olarak ise ilaç sektörü önerilmektedir.

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If Globalism is Dead—Long Live What?

Globalization is characterized by a systemic interconnection in which what happens in one country affects all other members of the system. It is above all an economic process of interaction and integration, linked to social and cultural aspects. Until recently, it has been generally assumed that increasing the free flow of goods and services would lead to economic growth conducive to prosperity and peace, which would provide political support for increased economic integration. In developing countries, many see globalization as a positive force to free them from poverty.

Philosophical differences in the costs and benefits of globalization lead to a wide range of ideologies and social movements. Opponents of globalization argue that there is an inequality of power and respect in international trade between developed and underdeveloped countries. Criticism of globalization is usually based on discussions about the impact of such processes on the planet and the people. Others point out that, although globalization has led to the expansion of Western-style democracy, it has been accompanied by rising tensions, inequalities, illiberal politics, inter-ethnic violence, refugee crises, and the crisis of global governance.

History has shown that globalization is not linear and can be reversed. In recent years, reactions against international cooperation have intensified, fueled by populist political leaders in many countries and citizens are less willing to let the market dictate. A collection of emotions (doubt, anger, fear, anxiety, frustration, and insecurity) that momentarily animates economic protectionism and identity politics across the globe. It is clear that at least a certain type of globalization is losing ground: the kind of globalization we have seen since the end of the 1970s. At the same time, cross-border exchanges of ideas are developing as never before. The development of digital technologies allows us to share information and ideas with unprecedented speed and unprecedented ease, which is like a double-edged sword can be positive, negative, or both in its impact. Therefore, the main question this conference seeks an answer to is whether globalism is dead or just on pause: It aims at examining the deeper-level root causes of the political economy problems of the world today, exploring and deliberating on the pressing question of what can be done about them.





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