

CRAFTSMANSHIP AND SKILLS FOR THE FUTURE

Sectoral Portrait for Turkey

DISCLAIMER

This draft document has been developed through field interviews, desk research and focus groups involving participants working in the craft sector in Turkey. The information contained in the document is subject to revision based on further research. The document has not been through the ETF's quality editing process for language or presentation and is provided on open space solely for information purposes.

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PREFACE

The following Sectoral Portrait was developed as part of the ETF project “*Craftmanship and skills for the future - Study on skills development in the craftmanship and design sector in ETF’s partner countries*”. Eight Sectoral Portraits were developed that describe the main trends and developments of the craftmanship sectors in Albania, Armenia, Azerbaijan, Georgia, Kyrgyzstan, Turkey, Ukraine, and Uzbekistan. In particular, the Portraits identify the main trends and drivers of change that influence the skills necessary to work in the crafts sector.

Working Draft

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INTRODUCTION TO THE CRAFTS AND DESIGN SECTOR

The Turkish dictionary defines craft as “a work performed with hands and tools that require experience, skill and mastery combined with education to meet the material needs of people” (TLA, 2020). According to the İstanbul Chamber of Tradesmen & Craftsmen, craft is defined “as jobs that require expertise in handcraft”.

However, the government defines tradesmen and craftsmen with the same criteria in “Law on Professional Organisations of Craftsmen and Tradesmen” (Law No: 5362). According to it, craftsmen and tradesmen are those:

- who are included in the tradesman-craftsmen professions determined by the Coordination Board for Determining Tradesman, Craftsman, Merchant and Industrialists,
- who have a fixed or mobile working place,
- who base their economic activity on their capital and physical labour,
- whose earnings are smaller than a merchant’s or an industrialist’s,
- who are taxed in a simple manner,
- who on the basis of operating on an account method, are subject to bookkeeping,
- who have professions in arts exempt from tax.

According to the law, there is no distinction between a tradesman who is a merchant with limited capital and a craftsman who produces various goods mainly by hand.¹ They are treated as a small-scale business owner. This makes it difficult to prescribe specific policies for both causing uncertainties (Ministry of Trade, 2017).

According to the Turkish Code of Commerce (Law No:6102), if the income of a craftsman reaches a certain amount, the craftsman gains the title of trader. Then their business is called a commercial business rather than a crafts business. This means being subject to different regulations in terms of tax. The law of the Union of Chambers (Law No: 5174 Article:5) defines an industrialist as “Those creating added value by producing new products serially or in standard form, operating in order to change the characteristics, content, composition or figure of raw material, semi-finished and finished products in part or fully by using machinery such as a workbenches; operators whose work involves unearthing and processing underground resources; and producers of information technology and software, shall be deemed as industrialists, provided that they employ at least 10 people”.

Craft-type production can be seen in a wide array of sectors based on the type of raw material used by craftsman. The classification is made by the Directorate General of Lifelong Learning (DGLL, 2012; Mert et al. 2014), which is a department of the Ministry of National Education:

- Raw Fibre Materials: Carpet, rug, fabric, weaving, knitting, felt, needlework, embroidery, clothing etc.

¹ For further information about differences please see: <https://www.bartintso.org.tr/en/our-services/register-transactions/merchant-natural-person-tradesman-difference-between-merchant-and-craft-legal-entity-merchant>

- Raw Wood Materials: Kitchen utensils, accessories, furniture, production tools for handicrafts, musical instruments, architectural elements (doors, windows) etc.
- Raw Stone Materials: Ornamental stones, accessories, architectural elements (gravestones, fountains, mosque niches) etc.
- Raw Soil Materials: Pottery, ceramics, glazed tiles, stained glasses etc.
- Mine and Metal Raw Materials: Copperwork, gold-silver processing, architectural elements (doorknobs, locks), heating instruments (e.g., stoves, shovels, tongs etc.), animal harnessing tools (e.g., horseshoes, chains, collars etc.) etc.
- Leather and Animal Raw Materials: Clothing accessories (hats, belt, gloves), shoes, bookbinding, animal harnesses, fur and skins etc.
- Thin Branch Stalk Raw Materials: Basket weaving, wickerwork, bags etc.

The classification above reflects that craft production is carried out according to the raw material used. Traditional cultural elements can be seen in the production of all products. However, the areas where traditional handicrafts are most common can be listed as follows: lacework, embroidery, handmade dolls, ceramics and tiles (İznik and Kütahya ceramics), carpets and kilims, glass works.

The definition of crafts provided in the report shares common aspects with the definition of crafts in Turkey. Examples of these common aspects include manual labour in production, achieving perfection in production over time with experience and transferring knowledge to future generations through traditions.

THE CONTEXT OF THE CRAFTSPEOPLE

The workplace of the craftspeople

Companies in the craft and design sector are generally family-owned small-scale business. (It is worth noting that 95% of all kinds of businesses have less than 10 employees in Turkey). Ownership of the means of production belongs to the craftsman, with production taking place in small workshops. However, there are also a few medium-sized businesses in the sector, such as in the production of ceramic tableware products. The decorations of the products are handcrafted by the craftsmen who are employed in these businesses.

Due to the aforementioned legal definition of craftsmanship and tradesmen, we do not have reliable income data about the businesses included in the scope of the report. Nevertheless, according to the data of the International Labour Organization (ILO), it is observed that the monthly nominal earnings of craft and related trades workers (7 coded occupations according to the ISCO 08 classification) are 3.117 TL in 2018. Men earn 3.247 TL, while women earn an average of 2.485 TL per month. In 2014, the monthly gross wage of those working in handicraft and printing (coded 73) was 1.537 TL for men and 1.433 TL for women. In 2020, the real wages of these professions are 3.079 TL for men and 2.871 TL for women. However, the average monthly gross wage for occupations (ISCO 01 to 09) in 2014 is 2.778 TL and the average real wage for those occupations is 5.323 TL in 2020 (TurkStat, 2020). The gross minimum wage in Turkey in 2020 is 2.943 TL.

Employment data is more reliable than income data for the sector. In 2019, approximately 1.2% (approx. 334.200 person) of all employment in Turkey is in businesses related to the scope of the

report. 49% of these people are men and 51% are women (ILO, 2020). The data includes handicraft and printing workers according to ISCO 08 classification (Code:73).

Production within the sector takes place in 3 ways. The first is the businesses producing on behalf of workshops. The second is that businesses and individuals produce as members of a cooperative. The third is that businesses located within walking distance from each other and operating in the same sub-sector perform certain phases of production.

Journeyman and master's certificates are given by vocational education centres. Craftsmen need a master's certificate in order to start a business. In 2016, apprenticeship education became compulsory under law no. 6764. Those who certify that they have been employed with social protection for at least 5 years in their profession, can join the journeyman exams and then the mastery exams. Those who have a working period of less than 5 years can join the journeyman exam.

Apprentice students can enrol in vocational education centres after completing the 8th grade (The compulsory education period in Turkey is 12 years). Another condition for studying at the centre is to sign a contract with a firm operating in a field related to the profession that one will be registered in. The students have practical training in the firm in addition to having theoretical training at the centre. It is obligatory that a master has a master trainer's certificate in the firm to be contracted. There is no age limit to enrol in the centre. The duration of education in the centre is 4 years. If the students are successful in the exams (theory & skill) held at the end of the 3rd year, they receive a journeyman certificate, and if they are successful in the exams at the end of their 4th year, they receive a mastership certificate (Ministry of National Education, 2021). Under the Turkish Qualifications Framework (TQF), graduates are given a Europass Certificate and Diploma Supplement along with a transcript, which includes information about curriculum units/modules completed and the title of the firm where practical training took place. A journeyman/master certificate is given in 181 professions. Firms pay students at least 30% of the minimum wage. At least one-third (for firms with more than 20 employees) or two-thirds (for firms with less than 20 employees) of the fee paid to the student is paid back to the firm as a state subsidy. There are 340 vocational education centres nationwide. As of the end of the 2019-20 academic year, 187.257 students (22% women, 78% men) are studying in vocational education centres (National Education Statistics, 2020).

In business there is a hierarchical order between apprentice, journeyman and master. Before the spread of the formal education, the source of knowledge was the master transferring his know-how to apprentices and journeymen. When the journeymen can produce the goods with quality approved by a master, they usually open their own workshop. According to research based on in-depth interviews with 60 masters from 40 different occupation in 23 provinces (Arioğlu, 2019):

- 90% of the masters have learned the craft skills from their masters. Others have learned from courses or on their own.
- 82% of the masters have taught their experiences to apprentices, students or trainees.
- 93% of the masters stated that there was no ceremony when they started the job.

The financial position of the craftspeople

Generalizing about the financial position of craftsmen can lead to superficial findings. Each subsector may be affected differently by environmental forces. Therefore, in such cases it may be useful to account for findings in the case studies based on subsectors.

- According to the Ministry of Trade's survey on 1.100 tradesman & craftsmen in the leather, clothing and footwear sector, differed each other as to whether the income they earn from their occupation is sufficient to meet all their needs. While this income is sufficient for some, it may not be enough for others (Ministry of Trade, 2017).
- According to TR83 Region Contemporary Handicraft Inventory and Market Research, customers are mostly local people, local and foreign tourists and fair visitors, and they usually buy the products because they find them unique. According to the results of the survey provided by the managers of the Public Education Centres, the customers of handicraft products were locals (31%), foreign tourists (25%), craftsmen themselves (19%), domestic tourists (19%), private companies (6%). Public institutions also act as a source of income for products in the region. These institutions at local and national levels offer handicraft products as gifts to their visitors and especially to the institution officials they visit abroad (Middle Black Sea Development Agency, 2012).

Public Education Centres which are affiliated to the Ministry of National Education, are institutions where courses like wood painting, plant growing, carpet weaving and carpet pattern drawings are carried out within the scope of lifelong learning. There are 995 public education centres across the country. 2739 vocational and technical courses are offered in 72 fields. As of the end of the 2019-20 academic year, about 8 million people received training in these centres (National Education Statistics, 2020).

- According to Hasoğlu's (2015) research on jewellery craftsmen in the Grand Bazaar, the amount of income is small only supporting the masters' family.
- For some traditional crafts, the situation is even worse. The masters of Harik shoes, whose clientele is 90% made up of folk-dance teams, are considering other occupations due to the lack of demand (Sökmen & Balkanal, 2018).
- The research conducted by Tosun (2018) in Trabzon on the jewellery sector stated that male craftsmen get a monthly salary of 2.500 TL, whereas female craftsmen earn on average 720 TL. Within these crafts, women intensively work in matting, knitting the bracelets, necklaces etc., whereas men only partake in the shaping process after the weaving to do the locking and welding.
- Another case study conducted in Trabzon on the crafts sector which included furniture, jewellery, shoe making, quilting, broom making, tailoring, copper and iron working indicated that 63% of craftsmen do not earn sufficient income. The masters who are most dissatisfied with their income, work in quilting (100%), copper working (80%) and tailoring (71%) (Seymen, 2018).

The Law No. 6585 "Regulation of retail trade" states that in shopping centres, at least 0.3% (three per thousand) of the total sales area must be allocated for rent to those who perform occupations with traditional, cultural or artistic value.

The Ministry of Trade determines "Disappearing Occupations with Traditional, Cultural or Artistic Value". The summary of these professions is below:

- Wood carving and wooden spoon production.
- Walking stick production.
- Nightingale's Eye (Çeşm-i Bülbül) production.
- Leather tanning.
- Sandal making.
- Wickerwork, basket weaving.

- Felting.
- Embroidery.
- Quilting.
- Carpet and rug weaving.
- Copper and tinning works.
- Blacksmithing.
- Filigree and kazaziye production.
- Stove making.
- Pottery.
- Tile, chine making
- Bookbinding.
- Making of folk instruments.

CHARACTERISTICS OF THE CRAFTS AND DESIGN SECTOR

Traditions, heritage and cultural practice

Tradition shapes the daily routines and manner of doing business for craftsmen. This is especially true for apprentices who are trained by a master, which allows for learning production know-how while at the same time internalizing certain norms from their masters.

In his field research, Arıoğlu (2019) asked the masters how they define themselves as craftsmen and the differences between old masters (previous generations) and present-day masters. The answers given by the craftsmen sheds light on the values expressed by tradition. According to the craftsmen:

- A craftsman is an honest, hardworking, friendly person, doing his job patiently. Today's craftsmen do not support each other socially and economically as old masters do.
- There were trust based relationships between craftsmen and tradesmen in commercial matters. In addition, the craftsmen were confident that their products would not be imitated by other masters. Today, these kinds of relationships based on trust have been damaged.

It is important to note that craftsmen support each other. The first sale of the day for tradesmen and artisans in Turkey is very important. It is believed that more sales will follow the first one. The craftsman, who makes the first sale of the day, directs the second customer to the neighbouring craftsman. He takes care of not only his own earnings but also the earnings of neighbours, acquaintances or friends. Cooperation rather than competition is at the forefront, with the aim of ensuring that everyone can make money.

According to the research conducted by Tarcan (2017) in the Grand Bazaar of İstanbul, daily life closely resembles historical customs: craftsmen offer tea to the guests while having small talk about daily life, have regular visits to neighbouring craftsmen so they could share daily anecdotes and evaluate each other's craftwork. They seemingly create a community where their craft objects represent the social communication they have established (Hasoğlu, 2015). The community has solidarity mechanisms such as equipment sharing, employee transfers and taking out loans from each other (Çörek, 2011).

It cannot be said that craftsmanship is a desirable career choice among young people. Generally, children who do not follow an academic path or lack financial resources for an education start their profession as apprentices. Children whose father or relative is a craftsman sometimes also choose to continue the tradition by practising the same craft. (Doğan, 2013; Çörek, 2011). However, success stories in the crafts or providing an understanding of aesthetics, architecture, ceramics, rug and carpet-making within the framework of art may arouse interest from the younger generation.

Barbaros (2019) conducted semi-structured interviews with 36 craftsmen from 6 different professions (wood works, cloth weaving, rug weaving, meerschaum works, evil eye jewellery production, oltu stone processing) in 9 provinces. According to the craftsmen, 56% of the customers are curious and want to learn about the cultural aspect of the products they buy. This can be understood as the interest of current demand in the products within the sector.

Organisation of the crafts and design sector

Tradesmen and craftsmen are represented in professional chambers that are found in their provinces. Chambers aim to protect and develop professional ethics, discipline, solidarity, and to expand commerce and industry in line with the public interest. The Turkey Tradesmen and Artisan Confederation has been established to ensure unity between different professional associations and to guarantee their progress. The Confederation has more than 2-million-member tradesmen-craftsmen, representing them nationwide and internationally.

Craftsmen are registered with the relevant tradesmen and craftsmen chambers according to their working area. The relevant chamber provides vocational training to craftsmen, gives vocational qualification certificates to the municipality so the craftsmen can start their own commercial activities. It also carries out activities such as advising its members on professional issues, ensuring their development in the fields of work and organizing courses in order to meet their needs in cooperation with its artisan members.

The Living Human Treasure award is given by the Ministry of Culture and Tourism. Living Human Treasures are determined according to the following criteria (Ministry of Culture and Tourism, 2021):

- Practicing his/her craft for 10 years,
- Having learned his art through the master-apprentice principle,
- Superiority in applying his/her knowledge and skills,
- Having rare knowledge on their subject,
- Dedication of the person or group to the work they do,
- The ability to develop the knowledge and skills of the person or group (including innovations that will enable his art to meet the needs of society),
- The ability to transfer knowledge and skills of the person or group to the apprentice (having trained an apprentice).

Another award in the sector is the Silver Tulip Award given by the Traditional Art Association. It is one of the first awards in the field of traditional arts. The award is given to artists who devoted their lives to traditional arts, contributed to support, developed and promoted these arts, enriched them with new approaches. Their own artistic works and scientific contributions to these arts constitute a basis in determining the award winners (Traditional Art Association, 2021).

A market for the craftspeople

Craftsmen's workshops are usually located in inns and bazaars that are found in the historical parts of cities. The primary marketing activity is retail sales to people visiting those areas. Generally, there are no advertising campaigns or sales promotion for handicraft products, except through word-of-mouth marketing (Middle Black Sea Development Agency, 2012).

The demand for the craft industry has transformed over the last 40 years. It can be said that as Turkey assimilates with foreign markets and industrialization processes, the demand for these products decreases. However, with the growing consideration that these works are art, they become demanded by a niche segment. As in the wooden toy sector, the increasing demand for “clean” products (e.g., chemical free) is apparent. Most handicraft products such as quilts and shoes use natural and organic raw materials, propping up their demand. In addition, craft products, which are positioned in the market as an alternative to the standard products offered by mass production, attract consumers whose desire to be different, trumps considerations regarding price.

When examining the demand for handicraft products in recent years, there are those who think that their sales are getting worse compared to previous years, and those who think that they are getting better (Ministry of Trade, 2017). This divergence most likely emerges from the crafts' sub-sector, with products' resilience to modern trends like mass production differing by sub-sector.

71% of the craftsmen living in Trabzon declared that their financial situation has worsened compared to the previous years. Blacksmiths, quilters and furniture makers are the business that most frequently express this sentiment (Seymen, 2018).

88.6% of the craftsmen who produce wooden cloth, rugs, meerschaum, evil eye beads and oltu stone stated that their daily sales volume has decreased gradually (Barbaros, 2019). In Arıoğlu's study, 83% of craftsmen stated that there is a demand for their products, 87% stated that demand and interest grew in comparison to the past; however, 56% of them expressed that they had difficulties in sales and marketing.

In terms of the sample size covered by the field studies above, it can be questioned how much they reflect the overall situation. Nevertheless, it can generally be said that there are problems such as a lack of demand and access to existing customers in the sector.

Public institutions have created websites in order to effectively benefit from the current demand on traditional handicraft products. One of them is the online sales site of the Ministry of Culture and Tourism (<https://www.ges.gov.tr/>). The website includes wood, glass, metal, stone, ceramic, silver, leather and textile products. The other is the Maturation Institute's online sales platform working on order-based production (<http://hbourunler.meb.gov.tr/>). Maturation institutes are vocational education institutions operating under the DGLL of the Ministry of National Education, providing a 2-year certificate training in order to transfer traditional handicrafts to future generations. Certificate holders can have (providing they pass the other courses given in the vocational school) a vocational high school diploma that allows them to start a business. In addition, www.goturkeytourism.com promotes traditional handicrafts to tourists.

Employment in crafts and design

The main source of employment for people interested in the crafts sector is social relations. It is difficult to make an estimate about the number of employees required by the sector and the quality of

these employees. This is because the sector-specific field studies are not related to the labour market. However, when examining the interviews with craftsman in current field studies, it is seen that masters had difficulties in finding apprentices. In addition to this, masters think that their profession will end due to the absence of apprentices.

There is no available data on the rate of informal employment in the craft sector. But the informal employment average of Turkey in 2019 was 34% allowing for rough estimates. If during the same year, the average informal employment in manufacturing and wholesale retail trade sectors was about 25%, then informal employment in the crafts sector is also likely to be between 25% and 34% (Social Security Institution, 2021).

Business owners turn to informal employment to reduce tax payments. For this reason, the employee is deprived of health insurance, severance pay, and the rights that they gain when they are retired.

For the average age of masters in the sector, it is beneficial to look at the data of field studies. In Arioğlu's work, the average age of 61.78% of the masters is above 44 according to the Masters of Turkey report (Web page: <http://www.turkiyeninustalari.org/en>). As stated in the Seymen's research (2018) 61% of masters are between 50-60 years old, 15% between 40-50 years of age, 10% are between the ages of 70-80. Based on this, it can be said that middle and upper middle age groups are prevalent in the craft sector. The project called Masters of Turkey, attempted to create a database of masters living in the Marmara region. As reported by the study 71% of the masters living in the region are women.

Current and emerging skills demand in the sector

The office responsible for conducting vocational and technical education in the Ministry of National Education is the General Directorate of Vocational and Technical Education. Formal education provided within the scope of vocational and technical education is carried out in three types of schools: Vocational and Technical Anatolian High Schools, Multi-Program Anatolian High Schools and Vocational Education Centres. Vocational and technical education within the scope of non-formal education is provided in Open Vocational High Schools. Educational processes vary depending on school types. A total of 5.630.652 students received education in secondary education during the 2019-2020 academic year. 1.608.081 (approx. 29%) of these students are in vocational and technical secondary education institutions (National Education Statistics, 2020).

Vocational Education Centres are the educational institutions where journeyman and mastership training, vocational and technical course programs are practised. The number of those who received a journeyman certificate in 2014 was 24.568, while the number of those who received a mastership certificate was 15.627. By 2018, the number of those who received a journeyman certificate increased by approximately 4 times to 93.218, while the number of those who received a mastership certificate increased by 3.5 times to 57.582 (Ministry of National Education, 2018). It can be said that the interest in journeyman and mastership training has increased with regulation (Law No:6764) regarding apprenticeship training, which came into force in 2016.

Students are enrolled in vocational education programs by open admission and local placement. Students in vocational education programs select their fields and branches from the 9th grade. A relevant business for the branch and a master instructor working for the business is mandatory to start training in the centres. One or two days of theoretical training is provided in the centre, four or five

days of vocational training is provided in the business. Fine Arts Faculties of Universities, Vocational High Schools and Research Centres are the main training providers in higher education.

The evaluation of skills exam criteria used in journeyman and mastership exams of Vocational Education Centres can provide an idea about the skills demanded by the sector. However, field research is needed to gain information about new and emerging skills that need to be acquired.

THE NATIONAL APPROACH TO CRAFTS AND DESIGN

Laws and policies for the crafts and design sector

Financial support provided by Small and Medium Enterprises Development Organization is below:

Credit to Tradesmen and Craftsmen Operating in Disappearing Professions

Tradesmen and craftsmen, who have a "Tradesman Tax Exemption Certificate" and who operate in the traditional, cultural and artistic professions that are on the verge of disappearance, specified in Article 9 of the Income Tax Law No. 193, can use credit with 100% interest reduction. The professions that are on the verge of extinction in the law are as follows: Hand weaving works, copper working, tile and pottery making, mother-of-pearl inlay, wood carving, spoon making, walking stick, saddle, scarf, quilt, felt, meerschaum and sandal production, oltu stonework, embroidery and other professions accepted by the Ministry of Finance to be similar to these works.

Credit to Entrepreneur, Tradesmen and Craftsmen Who Owned a Mastery Certificate and Established a New Workplace

Within the scope of the Vocational Education Law numbered 3308, entrepreneurs, tradesmen and artisans who have a mastership certificate for at least 3 years as of the loan application date and who can prove that they have established a business in the relevant profession within the last 1 year, can use a loan with 100% interest reduction.

Young entrepreneurs, tradesmen and craftsmen who have completed the Small and Medium Enterprises Development Organization (KOSGEB) Entrepreneurship Support Program and who are younger than 30 on the date of application, can be given loans with a 100% interest reduction up to 100.000 T.L. if they submit their KOSGEB approved projects to Halkbank.

Ministry of Trade - Support Program for Participating to Fairs

This support is granted to facilitate the participation in some fairs abroad.

Agriculture and Rural Development Support Institution - Rural Development (IPARD) Supports

The aim of this support program is to give priority to products that have the Geographical Indication Certificate issued by the Turkish Patent Institute, and to provide support for evaluating and / or processing traditional and original local agricultural, food products and local handicrafts.

Geographical Indication is defined as follows in the Industrial Property Code: *Geographical indication is the sign indicating a product that has become associated with a locality, area, region or country where it originates due to an apparent characteristic, its reputation or other features.*

The applicant is expected to provide the following information for the institution's evaluation:

- The name of the geographical indication requested to be registered, information and documents about the eligibility of the product as an appellation or designation of origin, the product group that it belongs to, and its compliance with the definition of geographical indication.
- Description of the product; technical information and documents describing the physical, chemical, microbiological and organoleptic properties of the product, and if necessary, its raw materials.
- Information and documents clearly identifying and designating the boundaries of the geographical area.
- Information and documents regarding the production method of the product, and if relevant, local production techniques, practices and traditions which give the product its speciality.
- Information and documents proving the link between the characteristics, reputation or other features of the product subject to the registration within the meaning of geographical indication definition and the defined geographical area.
- Information and documents related to the historical background of the product in the specified geographical area/

The support program includes purchase of machinery and equipment, promotion and marketing, architecture, engineering and other consulting services, preparation of work plans including technical projects and feasibility preparation. The IPARD program is implemented in 42 provinces including Ankara, Ağrı, Samsun and Denizli.

The economics of crafts

Between the years of 2014-2019, Turkey's export of handcraft products has increased by 3 times. During the same period, imports have increased by 4.5 times (TurkStat, 2020). However, the sector represents one of the few sectors where exports exceed imports. In 2019, Turkey imported handcraft products in the amount of 11.2 billion T.L. (1.9 billion Dollars) while exports of 33.1 billion T.L. (5.8 Billion Dollars).

In order to examine the employment in the sector, data including occupations coded 73 namely Handcraft and Printing Workers according to ISCO 08 occupation classification in the ILO database can be used. The data covers printing workers, not fully matching with the scope of the project, but there is no 3-digit level data in the database.

According to the data, the share of the sector's employment in total employment is 1.2% in 2019. There is no significant change in the level of employment in the sector between 2011-2019. However, in the same period, the share of women's employment in the crafts sector as part of total women's employment in Turkey decreased by 20%.

Drivers of change in the crafts and design sector

The driving forces of change and innovation affecting the craft industry can be classified under three themes: globalization, technology, and changes in consumer preferences. Globalization has a

negative effect on the sector narrowing its market by increasing competition domestically and offering more cost-effective alternatives. It also facilitates the dissemination of trends that affect consumer preferences. As an example, increasing awareness of sustainable, environmentally friendly and healthy products can be given. These trends increase the demand for sector products. Healthy, environmentally friendly, personalized products containing less additives create new opportunities for the sector.

Increasing automation has made it possible to produce works in a more cost-effective manner. For this reason, some of the sector's products have turned to the production of luxury products with more added value, rather than the products used daily, especially in cities.

In addition, according to interviews with craftsmen, technology and automation change the production process. Computer programs are used in design and manufacturing, with craftsmen having difficulty adapting to these new techniques. For this reason, they continue traditional production or outsource various processes. In vocational education centres, training is given in the fields of computer-enhanced industrial modelling/design and computerized manufacturing. Considering that many craftsmen need capital to maintain their activities, it is difficult to say that computer technologies are used by the majority.

One of the positive effects of technology on the industry is that it enables craftsmen to reach a wider audience. Social media, websites, and the rapid spread of user comments can quickly attract the attention of consumers looking for new and interesting products. However, these opportunities undoubtedly require digital marketing skills.

Younger people affect the sector positively in terms of demand and negatively in terms of supply. While the sector is not a desired career choice for young people, the need for product variety and cultural self-expression provides a positive impetus for demand from younger generations.

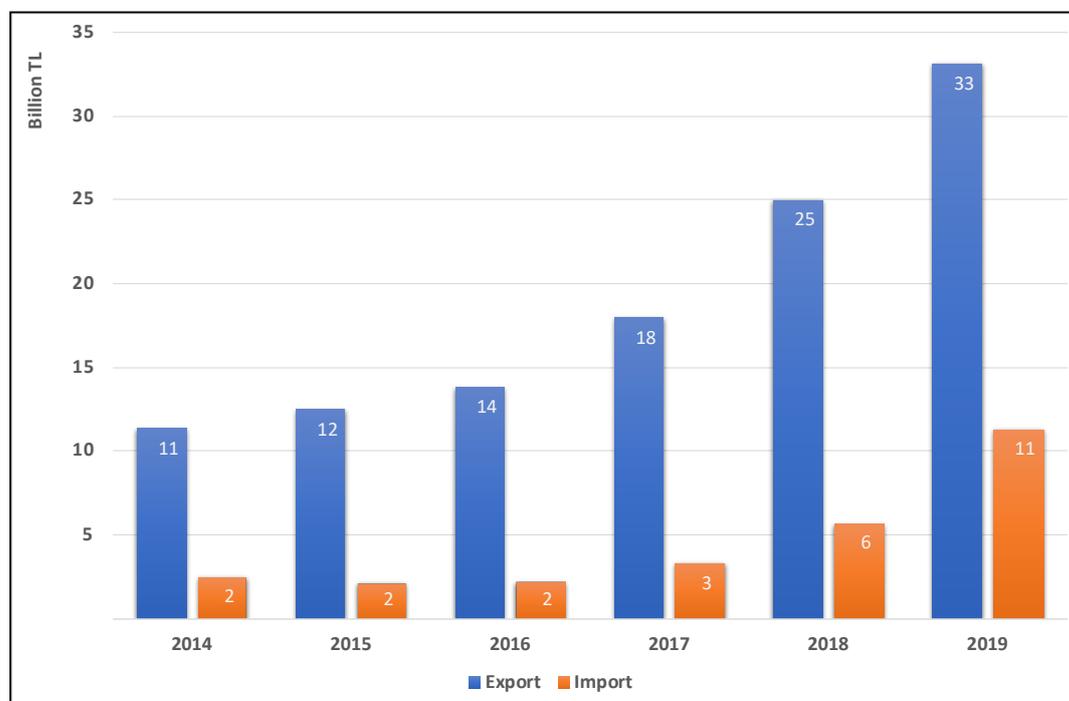
ANNEX 1. LIST OF STATISTICS

Below is an indicative list of statistical data that could be identified. If no data is available on the crafts sector specifically, data on the cultural sector as a whole could be valuable to help contextualise other information collected on the crafts sector.

Category	Data that can be collected (if existing)
Economics	<ul style="list-style-type: none"> Sector share of the GDP; Sector share of a country's trade; Sector share of investment; Sector share of the R&D; Sector share of the innovative firms; Share of companies operating in the crafts sector; <p>See if any data exist on individual sub-sectors (e.g., pottery, woodwork etc.).</p>
Employment	<ul style="list-style-type: none"> Share of crafts employment as part of total employment; Share of the self-employed in the crafts sector; Share of formal/informal employment within the sector. Share of people working on a full-time basis in the crafts sector; Share of the craftspeople who are single job holders (i.e. crafts is their main economic activity); Average salary of the craftspeople; Data on unemployment of craftspeople; Share of women and men in crafts employment; Labour productivity. <p>See if any data exist on individual sub-sectors (e.g., pottery, woodwork etc.).</p>
Education	<ul style="list-style-type: none"> Number of education programmes offered in crafts and design related fields; Share of tertiary students in the crafts-related fields of education; Number of yearly graduates from crafts and design schools / share of total graduates; Literacy rate within a country; Early school leaving rate within a country.
Financial aspects of companies	<ul style="list-style-type: none"> Number of grants awarded for the craftsmen and people; Share of financial support awarded to craftspeople and crafts companies as part of national / private funding schemes. Amount of foreign investment / donor contributions (e.g. EU, UN, etc.)
Digitalisation	<ul style="list-style-type: none"> Share of population having digital access / skills.
Additional aspects	<ul style="list-style-type: none"> COVID-19: Any data that relates to the COVID-19 and its impact on the economics and labour market (specifically the crafts sector)

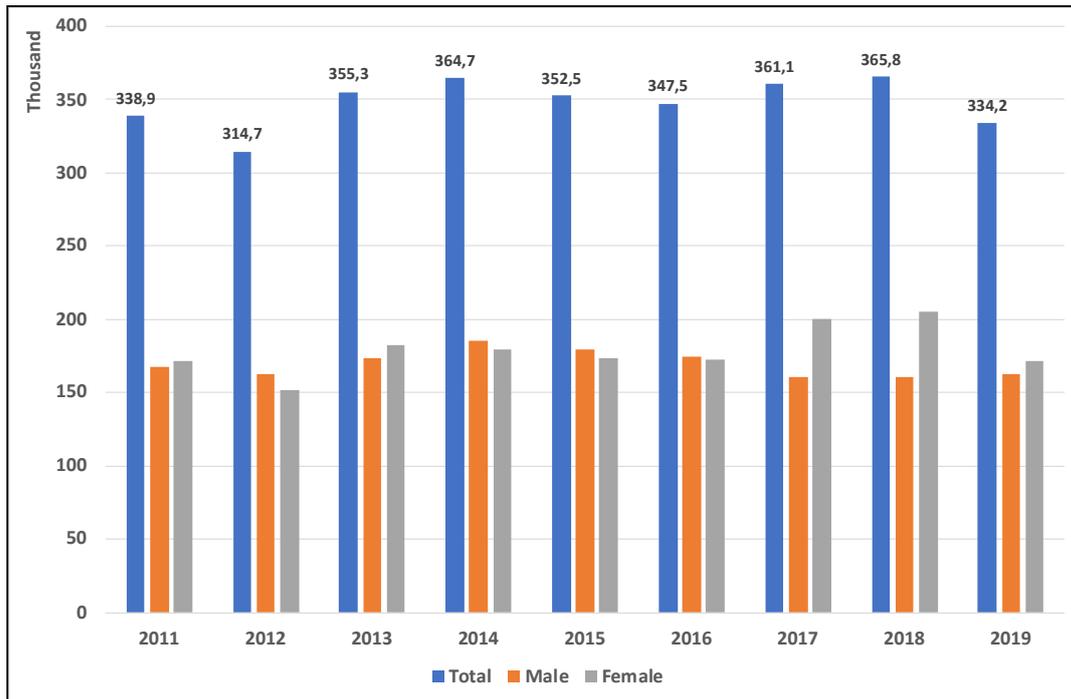
ANNEX 2. THE AVAILABLE STATISTICS FOR THE SECTOR

GRAPH 1. HANDICRAFT PRODUCTS EXPORT & IMPORT, 2014-2019



Source: The Cultural Economy - TurkStat, 2020

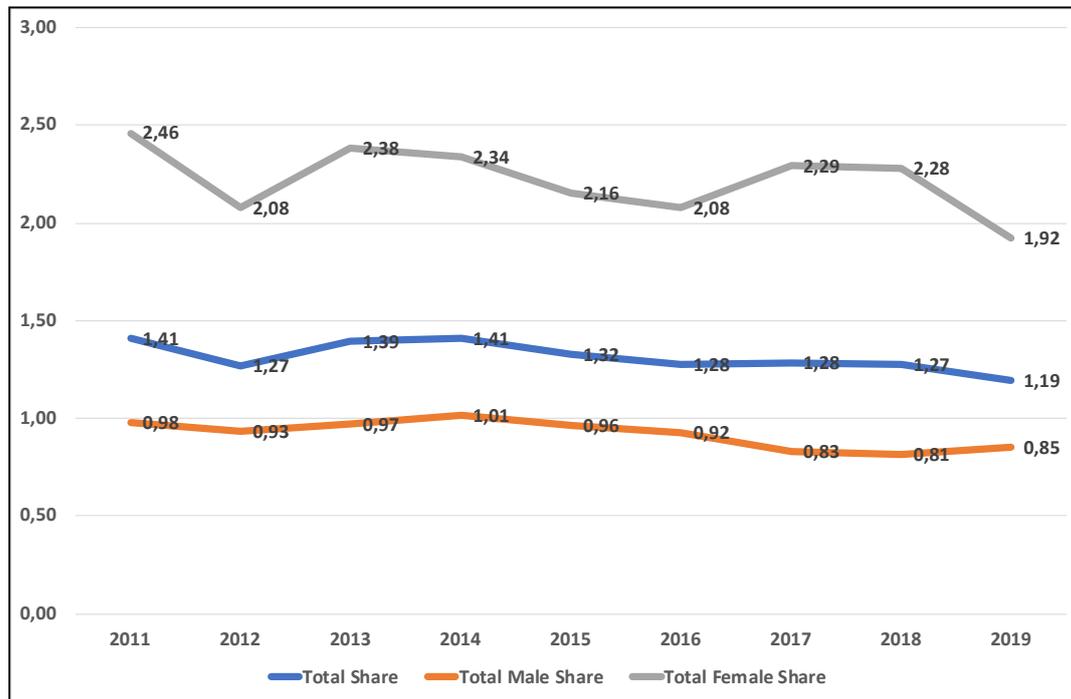
GRAPH 2. EMPLOYMENT IN THE SECTOR



Source: ILO, Labour Force Survey, 2020

Note: Data includes Handicraft and printing workers - ISCO-08 Code:73

GRAPH 3. SHARE OF THE CRAFT EMPLOYMENT IN THE TURKEY



Source: ILO Labour Force Survey, 2020

Note: Data includes Handicraft and printing workers - ISCO-08 Code:73

Note 2: Total female/male share in the graph represents the sector' female/male employment share in total female/male employment by years.

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