

Turkey



The events of early June 2013, symbolised by the protesters' choice of Istanbul's Taksim Square as their meeting place, were uncannily reminiscent of those seen in Cairo in 2011, as police used tear gas to disperse the crowds. For the most part the protesters were young, middle class and significantly female. The movement had begun in protest at the proposed demolition of the downtown Istanbul Gezi Park to make way for a housing development. The Turkish government, as had been the case with protests on the other side of the Mediterranean, initially simply dismissed the protesters, President Erdogan describing them as *çapulcu* or looters. However, to compare the street protests in Turkey with those of the Arab Spring was misguided. Democratic Turkey was years ahead of the Arab dictatorships. None the less, in Tunisia the government even saw fit to deploy anti-riot troops around the Turkish embassy.

Erdogan loses touch

Mr Erdogan had in early June 2013 dismissively stated that 'There's a problem called Twitter'. But the problem wasn't Twitter – the problem was that the Turkish middle class – and not just its younger members – had begun to communicate, organise and take action without having recourse to the support, infrastructure or organisation of any particular political party. A government that was originally

seen as pursuing a path of moderate Islam, that had been democratically elected was now seen to be ignoring its promised reforms and, on the contrary, attempting to curtail the secularism of the state introduced in 1923 by Kemal Atatürk. The reforms being introduced included that of the educational system where the Koran was to be taught in primary schools, as well as restrictions on the sale of alcohol. The government's efforts to introduce an Islamic 'presence' into public life revealed a deep fault line. The army had always been seen as the guarantor of the secular state. However, in the face of June 2013 protests, the army appeared to be adopting a neutral stance.

The sit-in at Taksim Square soon developed into a full-scale protest camp as protesters set up tents, a medical centre and organised food distribution. As had been the case in North Africa and latterly Brazil, social media such as Twitter and Facebook played an important part in the protests. Echoing the government's stance, Turkey's mainstream media (also surprisingly wrong-footed) began by downplaying the protests. Ironically, Gezi Park, the protests' trigger, could hardly have been described as a high profile urban space. But once the protests went viral and the police response was clearly exaggerated and heavy handed, the protests widened, to express discontent at the lack of scope for dissent of any kind. Mr Erdogan's ruling Adalet ve Kalkinma

KEY FACTS

Official name: Türkiye Cumhuriyeti (Republic of Turkey)

Head of State: President Abdullah Gül (from 28 Aug 2007)

Head of government: Prime Minister Recep Tayyip Erdogan (AKP) (from 2003; re-elected 12 Jun 2011)

Ruling party: Adalet ve Kalkinma Partisi (AKP) (Justice and Development Party) (elected 2002; re-elected 12 Jun 2011)

Area: 779,452 square km

Population: 74.89 million (2012)

Capital: Ankara

Official language: Turkish

Currency: Yeni Turk Lirasi (New Turkish Lira) (YTL) = 100 kuruş

Exchange rate: YTL1.92 per US\$ (Jul 2013)

GDP per capita: US\$10,610 (2012)*

GDP real growth: 2.62% (2012)*

GDP: US\$794.47 billion (2012)*

Labour force: 27.84 million (2012)

Unemployment: 9.50% (2012)*

Inflation: 8.91% (2012)*

Balance of trade: -US\$65.24 million (2012)

Annual FDI: US\$16.04 billion (2011)

* estimated figure

Partisi (AKP) (Justice and Development Party) began to appear seriously out of touch with a large, vociferous, segment of the Turkish population. The Taksim/Gezi protests began to be about the wider issue of Turkey's national identity. Just under the surface lay the issue of the imposition of Islamic, rather than the secular values that Atatürk had fought hard to see his country adopt. An article in the *Wall Street Journal* (WSJ) described Mr Erdogan's administration as 'increasingly autocratic', reporting that the protestors claimed that Erdogan 'silenced the media, doled out government contracts to his supporters and was bent on imposing his Islamic values on their personal lives.' 'Restrictions on alcohol sales,' said the WSJ 'became a flash point – proof, Gezi supporters say, of the prime minister's creeping intention to replace constitutional law with Islamic law, Sharia.'

Whither Turkey?

Amid a welter of uncertainty, one thing that was certain was that the Gezi/Taksim protests had revealed the government to be reluctant to enter any serious dialogue with what, for want of a better word, had become a protest movement. The government's response to the existence of an articulate – if disorganised – protest movement on its doorstep had been one of ill-advised repression, describing the protestors as 'terrorists'. By the second week

of June two people had died, 3,195 wounded and 1,300 arrested. One young activist was killed when shot in the head by a tear gas canister. Another young worker from Ankara died after being in a coma when a bullet ricocheted and hit him in the head. There were also protesters who lost their eyes to tear gas or to canisters shot in their faces. It was claimed that riot police deliberately targeted individuals with gas grenade launchers. Whatever the political prospects and the outcome of Turkey's 'Occupy' movement, the ministry of the interior will have a lot to answer for.

The figure for arrests included a number arrested for simply stating their case on Twitter. The Erdogan government's creeping Islamisation sat uncomfortably with what was still an avowedly secular country as did its apparently 'religious' opposition to the protestors demands. Worryingly, the government's positioning risked endangering its tentative progress towards European Union (EU) membership. As every action generates a reaction, the EU seemed to be distancing itself from Erdogan's Turkey where democratic values seemed to be risking erosion by those of Islamic clerics. Turkey's constitution was based on democratic legislation; once that legislation was by-passed in any way the man in the Turkish street could see his ability, however diffused, to determine events disappear.

Mr Erdogan's apparent indifference to popular disquiet runs counter to the principles of Western democracy where democracy is about reflecting popular wishes rather than about simply oppressing or even crushing them. For the most part, the EU had left behind the age of religious oppression; not Turkey. The Turkish uprisings, which by mid-June had affected not only Istanbul but 86 other towns and cities, combined both issues that were purely Turkish with the wider discontent felt by the younger generation in Turkey and elsewhere. Exceptionally, the Turkish protests were not directed at economic difficulties: Turkey's economy continued to grow and its standard of living to rise.

The economy

In its annual assessment of the Turkish economy, the European Bank for Reconstruction and Development (EBRD) noted that after a strong growth performance in 2010 and 2011, the Turkish economy slowed down significantly in 2012. Gross domestic product (GDP) grew by only 3.3 per cent year-on-year in the first quarter of 2012, down from 5.2 per cent in the fourth quarter of 2011, and continued to slow in the second quarter, reaching 2.9 per cent year-on-year, its slowest pace since 2009. The key macro-economic vulnerability of the Turkish economy remains the current account deficit, which stood at 10 per cent in 2011, but gradually narrowed throughout 2012, with the 12-month rolling deficit reaching 7.9 per cent of GDP by July 2012. To tackle the trade deficit the government raised indirect taxes in several categories of imported consumer durables (mobile phones and some high-end cars) and introduced wide-ranging investment incentives aimed at import substitution in areas such as mining, chemicals and defence electronics that contribute to the trade deficit. Inflation was only slowly declining from its double digit heights of end-2011. The Türkiye Cumhuriyet Merkez Bankasi (TCMB) (Central Bank of the Republic of Turkey) cut its lending rate for the first time in seven months in September 2012. It also increased banks' reserve option coefficients in order to manage the pressures associated with potential capital inflows brought about by quantitative easing in the US and the European Central Bank's (ECB) bond purchase programme. In an effort to help tame domestic consumption, according to the EBRD, the ECB succeeded in guiding bank credit growth to 19 per cent in August 2012, down from as high as 40 per

KEY INDICATORS

Turkey

	Unit	2008	2009	2010	2011	2012
Population	m	69.66	70.54	*72.70	*73.95	*74.89
Gross domestic product (GDP)	US\$bn	730.30	730.30	741.90	778.10	*794.47
GDP per capita	US\$	8,723	8,723	10,399	10,522	*10,610
GDP real growth	%	-4.7	-4.8	8.2	8.5	*2.6
Inflation	%	6.3	6.3	8.6	6.5	*8.9
Unemployment	%	11.0	14.0	11.9	9.8	*9.2
Industrial output	% change	-0.7	-8.6	13.4	–	–
Agricultural output	% change	3.5	3.6	2.4	–	–
Coal output	mtoe	17.2	17.4	17.4	16.6	15.4
Exports (fob) (goods)	US\$m	140,739.0	109,635.0	120,902.0	143,497.0	163.3
Imports (fob) (goods)	US\$m	193,922.0	134,511.0	177,347.0	232,486.0	228.6
Balance of trade	US\$m	-53,183.0	-24,876.0	-56,445.0	-88,989.0	-65.2
Current account	US\$m	-41,289.0	-13,853.0	-47,739.0	-77,141.0	*-46,935.0
Total reserves minust gold	US\$m	70,428.0	70,874.0	80,713.0	88,799.0	99.4
Foreign exchange	US\$m	70,231.0	69,178.0	79,046.0	87,072.6	98.3
Foreign direct investment (FDI)	US\$bn	19.5	8.4	9.4	16.0	–
Exchange rate	per US\$	1.30	1.55	1.50	1.50	1.79

* estimated figure

cent in 2010. Moderating food, energy and import prices during the first half of the year had led to a lowering of inflation, which had fallen to 8.8 per cent year-on-year by August, down from 11.1 per cent in April. The central bank had maintained its inflation target of 5.5 per cent by end-2012, but revised its end-year inflation forecast in July from 6.5 per cent to 6.2 per cent. Meanwhile, the EBRD noted, the general government deficit had fallen by more than half to 1.4 per cent of GDP in 2011 from 3.6 per cent in 2010. In the view of the EBRD, the economy looked likely to continue to grow but the possibility of a significant drop in growth remained. While the current account deficit had begun to fall, the pace of re-balancing had been moderate in the first half of 2012 and there were risks that it would lose momentum in the second half as domestic demand picked up and the lira appreciated. However, the government had also shown its readiness to act promptly if needed to smooth the possible adverse impact of the new global financial turmoil and economic slow-down by the means of monetary and fiscal policies. The government was lending support to the private pension system with new incentives. The essence of the new law adopted in June 2012 was a combination of tax incentives, such as a zero tax withholding tax rate for equity mutual funds (versus a 10 per cent tax for all other mutual funds), a lower withholding tax rate for longer-term bank deposits and, most crucially, direct government contribution to the private pension system.

In the view of the EBRD, progress has been made in developing infrastructure public/private partnerships (PPPs). The government identified a number of road sections to be developed on a PPP basis and Build, Operate, Transfer (BOT) contracts for both the Eurasia Tunnel and the Gebze-Izmir Road were tendered, as were, a number of potential PPPs in the railways sector, including a high speed railway line between Istanbul and Ankara. Reforms on improving labour market competitiveness are also continuing. As part of a reform package under the Ulusal İstihdam Stratejisi (National Employment Strategy) (NES) the government started to implement changes to mandatory severance pay, flexible working hours as well as providing for different fixed-term contract options. In April 2012 a new incentive scheme was introduced to minimise the cost of labour, whereby new employees hired in Turkey's least advanced eastern regions were exempt from employer

social contributions and from employee contributions and income taxes.

Turkey's financial sector switched to the Basel II regime in July 2012, encouraging improvements in risk management and mitigation. An incentive package was adopted to spur domestic and foreign investments and having come into effect in June 2012, the incentives complemented the existing incentive structure. Priority sectors were identified in tourism, mining, rail and maritime transport and pharmaceuticals to receive stronger investment incentives. Other incentives target sectors that reduce Turkey's import dependence, including accelerating agriculture reforms. After identifying around 30 agricultural areas in 2010 designated to receive differentiated support, the government stepped up its commitments in 2012. Area-based payments were disbursed, especially for irrigation investments and land consolidation efforts, particularly in regions that were defined as top priority, such as the south-eastern and eastern parts of the country. Irrigation projects have been identified and designed to promote more efficient use of water.

The Kurds

Turkey's Kurdish movement has for decades confronted the violence of riot police, water cannons and tear gas. However, the parliamentary representatives of the Kurdish movement were hesitant about endorsing the protests. Anti-Kurdish protesters resented their government embarking on peace negotiations, in which Kurdish guerrillas had agreed to end their paramilitary operations and leave Turkey, following the AKP's symbolic move to negotiate with the Partiya Karkerên Kurdistan (PKK) (Kurdistan Workers' Party) and its imprisoned leader, Abdullah Öcalan. Many younger Kurds disagreed with their party's reluctance to endorse the recent protests. These anti-government Kurdish dissenters could understand why their representatives were being careful not to alienate the AKP in the middle of the Kurdish peace process, but were nevertheless uncomfortable with the *realpolitik* their leadership chose to follow.

On 1 January 2013 Turkish media revealed the existence of talks between Mr Öcalan and the Turkish intelligence services. The talks appeared to have reached a relatively advanced stage; Kurdish members of parliament were convened to visit Mr Öcalan in his prison cell to provide independent confirmation of Ankara's good intentions. On 21 March, the

Kurdish New Year, a letter from Mr Öcalan in which he announced the end of the 'armed struggle' was read to a large crowd in Turkey's *de facto* Kurdish capital. Mr Öcalan also sought the withdrawal of PKK guerrillas from Turkey. These events were all the more surprising since 2012 had seen something of an escalation in the PKK offensive.

Hydrocarbons

Turkey's importance in the energy markets is growing, both as a regional energy transit hub and as a growing consumer. Recently, Turkey has seen the fastest growth in energy demand in the Organisation for Economic Co-operation and Development (OECD) and unlike a number of other OECD countries in Europe, its economy has avoided the prolonged stagnation that has characterised much of the continent for the past few years. Turkey's energy use is still relatively low, although it is increasing at a very fast pace. According to the International Energy Agency (IEA), energy use in Turkey is expected to double over the next decade, while electricity demand growth is expected to increase at an even faster pace. Meeting this level of growth will require significant investment in the energy sector, much of which will come from the private sector. Large investments in natural gas and electricity infrastructure will be essential.

In addition to being a major market for energy supplies, Turkey's role as an energy transit hub is increasingly important. It is key to oil and natural gas supplies movement from Russia, the Caspian region and the Middle East to Europe. Turkey has been a major transit point for seaborne-traded oil and is becoming more important for pipeline-traded oil and natural gas. Growing volumes of Russian and Caspian oil are being sent by tanker via the Turkish Straits (the Bosphorus and the Dardanelles) to Western markets, while a terminal on Turkey's Mediterranean coast at Ceyhan (approximately 30 miles south-east of Adana on the Mediterranean Sea coast on the Bay of Iskenderun) serves as an outlet for oil exports from northern Iraq and Azerbaijan. The terminal at Ceyhan facilitates oil exports from northern Iraq via a pipeline from Kirkuk (Iraq-Kurdistan) and from Azerbaijan via the Baku-Tbilisi-Ceyhan (BTC) pipeline. The Kirkuk-Ceyhan pipeline is Turkey's largest oil pipeline (by capacity) and serves as a transport pipeline of Iraqi oil. It is approximately 600 miles long and consists of two lines with a nameplate capacity of 1.65 million bpd. However, only

one of the twin pipelines is operational with a maximum available capacity of 600,000bpd, according to IEA. Frequent attacks on the pipeline regularly result in operation disruptions and actual flows averaged just over 300,000bpd in 2012. The pipeline was attacked at least five times between April and September 2012. The BTC is Turkey's longest pipeline and runs approximately 1,100 miles. Its original capacity was 1 million bpd, which was increased to 1.2 million bpd in 2009 with the use of drag-reducing agents. The pipeline transports Azeri light crude (mainly from the Azeri-Chirag-Guneshli field) via Georgia to Ceyhan for further export. Since 2008, Kazakh crude oil has also been shipped via the BTC. The crude is then shipped via tankers to European markets. The pipeline initially came into service in June 2006.

In January 2013, the *Oil & Gas Journal* (OGJ) estimated Turkey's proved oil reserves at 270 million barrels, located mostly in the Hakkari Basin (which is also where most of Turkey's oil production occurs), with additional deposits found in Thrace in the north-west. There may also be significant reserves under the Aegean Sea. However, this has not been confirmed as a result of the ongoing territorial dispute with Greece. The Black Sea may hold significant oil production potential for Turkey. The Turkish national oil company, Türkiye Petrolleri Anonim Ortaklığı (TPAO) (Turkish Petroleum Corporation), has increased its exploration activities in the Black Sea, which could hold between seven and 10 billion barrels of oil. The offshore area is being explored by TPAO, which has formed joint ventures with ExxonMobil and Petrobras. Turkey's ministry of energy and natural resources (MENR) aims for commercial production to occur in the Black Sea by 2016. In addition to the Black Sea, TPAO plans on developing hydrocarbon resources in the Mediterranean. In November 2011, TPAO had signed an agreement with Shell for hydrocarbon exploration in the Mediterranean and the south-east area of the country. This agreement covers plans for shale gas exploration in the south-east near the city of Diyarbakir. According to MENR, Shell began exploration at the Saribugday 1 field in August 2012.

Natural gas

As reported by the EIA, in January 2013, the OGJ estimated Turkish natural gas reserves at 218 billion cubic feet (bcf). Turkey produced 27bcf of natural gas in

2011, relying almost exclusively on imports to meet domestic demand of 46.3 billion cubic metres. Turkey's energy demand growth had been among the fastest in the world in 2010 and 2011, although slower economic growth in 2012 dampened the natural gas consumption increase. Natural gas is accounting for an increasing share of the energy mix in Turkey and has overtaken oil and become the most important fuel in terms of volume consumed. EIA data indicated that natural gas consumption in Turkey exceeded oil and coal consumption by about 0.3 quadrillion British thermal units in 2011.

The state-owned Petroleum Pipeline Corporation (BOTAS) dominates the natural gas sector, although the majority of the market is open to competition. BOTAS also builds and operates gas pipelines in Turkey and dominates in the wholesale market and in exports of natural gas. Turkey's midstream natural gas market has been led by BOTAS for decades and the company continues to exercise the Turkish state's mandate for developing the country's pipeline networks and procuring sufficient natural gas supplies. In addition to ensuring adequate supply for the domestic market, a key part of this mandate has been participation in international pipeline projects that can take advantage of Turkey's location as a key corridor between Europe and the Middle East and Central Asia to play an active role in trans-regional energy supply.

Risk assessment

Politics	Poor
Economy	Fair
Regional stability	Fair

COUNTRY PROFILE

Historical profile

Founded by Constantine the Great in AD330, Turkey (or Asia Minor as it was known) was for more than 1,000 years the heartland of the Eastern Roman (Byzantine) empire. From the eleventh century, invasions from Central Asia led to the Islamic Turkification of the region, headed by the Ottomans, a name derived from their fourteenth century leader Osman Gazi, who had masterminded the comprehensive defeat of the Byzantines at the Battle of Baphaeon in 1301. The modern republic was established in the 1920s by nationalist leader Kemal Atatürk.

1453 The Ottomans gradually expanded their areas of territorial control, creating the Ottoman Empire.

1500s–1800s The Ottoman Empire attempted to widen its territorial control into

the Mediterranean and central Europe. This led to conflicts with the major European powers, including the Habsburgs and the Russians. Successive wars eventually undermined the Ottoman Empire. 1914–18 Turkey fought in the First World War on the side of the Germans. The majority of Ottoman possessions came under British or French control after the war. 1920–22 Mustafa Kemal, renamed Atatürk (Father of all the Turks) in 1934, led the country in the War of National Liberation, following the dismemberment of the Ottoman Empire by the *entente* powers at the end of the First World War. 1923 The Republic of Turkey was established; the independence of the Turkish state was recognised by the Treaty of Lausanne. Atatürk was elected as the Republic's first president. Sweeping changes were made in all areas – legal, political, social and economic. The Islamic legal codes were replaced by Western ones. Turkey is the only Muslim country where the principle of secularism is written into the constitution.

1925 Turkey adopted the Gregorian calendar. The *fez* (a conical, brimless hat), considered to be a sign of Ottoman backwardness, was prohibited.

1928 Islam ceased to be the State religion. The Arabic script was replaced by the Latin alphabet.

1930 Constantinople was officially renamed Istanbul.

1934 Women were given the vote.

1938 Atatürk died and was succeeded by Ismet Inonu.

1945 President Inonu kept Turkey out of the Second World War, except for the last four months, when it fought on the side of the Allies against Germany. Turkey joined the UN.

1950 The first open multi-party elections were won by the Democratic Party.

1952 Turkey joined NATO.

1960 The government was overthrown in a military coup.

1961 A constitution was approved in a referendum; it established a two-chamber parliament. Elections were held and civilian rule was restored.

1963 An agreement was signed with the European Economic Community (EEC).

1965 Süleyman Demirel became prime minister (he went on to occupy this office seven times).

1971 After a wave of strikes and unrest, there was a period of military supervision of government.

1973 Return to civilian rule.

1974 Turkey invaded northern Cyprus and 37 per cent of the island came under Turkish control, enforcing partition between north and south.

1978 The US lifted the trade embargo it had imposed on Turkey after the 1974 invasion.

1980 A military coup followed civil unrest and martial law was declared throughout the country.

1981 All political parties were disbanded.

1982 A new constitution was approved in a referendum. It created a seven-year presidency and reduced parliament to a single chamber.

1983 New political parties were allowed, subject to strict rules. Turgut Ozal became president. Northern Cyprus officially declared its independence as the Kuzey Kıbrıs Türk Cumhuriyeti (KKTC) (Turkish Republic of Northern Cyprus) and introduced its own government and legal system. The independence move was rejected by the international community and only Turkey recognised it as a state.

1984 The Partiya Karkerên Kurdistan (PKK) (Kurdistan Workers' Party) launched a separatist guerrilla war in the south-east.

1987 Martial law ended, enabling Turkey to become a full and active member of the Organisation of Economic Co-operation and Development (OECD), in addition to becoming an associate member of the EEC.

1990 Turkey allowed the use of its bases for the launch of air strikes against Iraq by the US-led coalition in the war to drive Iraqi forces out of Kuwait.

1992 In an anti-PKK operation, Turkish troops entered Kurdish safe havens in Iraq. Turkey joined the Black Sea alliance.

1993 Following the death of Turgut Ozal, Süleyman Demirel became president.

Tansu Çiller was appointed as Turkey's first female prime minister. The PKK declared a unilateral cease-fire in March but by July it had broken down.

1995 Turkey launched a major military offensive against the Kurds in northern Iraq. The Çiller coalition collapsed. Although the pro-Islamist Welfare Party (RP) won the elections, it lacked support to form a government. Two major centre-right parties formed an anti-Islamist coalition. Turkey entered the EU customs union.

1996 The centre-right coalition fell and Necmettin Erbakan was appointed prime minister, heading the first pro-Islamic government since 1923.

1997 The Erbakan coalition government collapsed and Mesut Yılmaz was appointed prime minister.

1998 Corruption allegations forced out the Yılmaz government and Bülent Ecevit was appointed prime minister. The RP was banned.

1999 The PKK leader, Abdullah Öcalan, captured in Kenya, received a death sentence, later commuted to life

imprisonment. Two earthquakes in the Izmit region killed over 17,000 people.

2000 After the failure of a move to change the constitution to allow Süleyman Demirel to stay in office, Ahmet Necdet Sezer was elected president.

2001 Parliament voted to change the constitution to bring it closer to the constitutions of EU countries.

2002 To meet EU conditions on opening membership talks, parliament voted for wide reforms. The Islamist Adalet ve Kalkınma Partisi (AKP) (Justice and Development Party) won a landslide victory in parliamentary elections. Abdullah Gül became prime minister. Constitutional changes allowed the AKP leader, Recep Tayyip Erdoğan, previously disbarred from public office due to a criminal conviction, to run for parliament.

2003 Recep Tayyip Erdoğan was appointed prime minister. Parliament adopted a package of human rights reforms including freedom of speech, giving the Kurdish language some rights and reducing the political role of the military.

2004 EU leaders agreed to open talks towards Turkey's EU accession after Turkey agreed to recognise Cyprus as an EU member. The death penalty was banned.

2005 The new Turkish lira, Yeni Türk Lirası (YTL), was introduced as six zeroes were dropped from the currency. EU accession negotiations commenced. The Blue Stream gas pipeline under the Black Sea from Russia to the Turkish port of Samsun opened.

2006 The Baku-Tbilisi-Ceyhan oil pipeline opened. Turkey's refusal to open its ports to Cypriot traffic caused deadlock in the EU accession negotiations.

2007 After two rounds in a presidential election, held in parliament, the sole candidate, Abdullah Gül (AKP), failed to win enough votes. Protests against his candidacy due to his Islamist background came from both the public and military, which protested he would challenge the secular constitution. Gül withdrew his candidature. The government was denied the option of reforming the constitution to allow directly elected presidents. To resolve the issue, early general elections were called in which the ruling AKP won 46.76 per cent of the vote (341 seats out of 550).

With a majority in parliament the AKP was able to elect Abdullah Gül as the president. The Turkish military launched air strikes against the Kurdish PKK inside Iraq.

2008 Parliament approved a constitutional change to allow women to wear the *hijab* (Islamic headscarf) in universities. The ruling AKP risked a ban on its existence and loss of power when it was accused of undermining the secular constitution by introducing this legislation that was seen by its opponents as creating

an Islamic state by stealth. The Constitutional Court overturned the legislation and fined the political party 50 per cent of its treasury funding for one year. An indictment was filed against 86 people for plotting to overthrow the government; they were alleged to belong to the ultra-nationalist and Kemalist group, Ergenekon. 2009 Legislation to allow civilian courts to try military personnel for threats to national security or involvement in organised crime was ratified by the president. An agreement was signed to allow the EU-backed Nabucco gas pipeline to transit Turkey. Turkey agreed 'in principle' to also allow the rival Russian South Stream gas pipeline to transit Turkey. The EU seeks to ensure a supply of energy that is not dependent on Russian oil and gas, and Russia wants to avoid transiting Ukraine, with which it has had several disagreements over payments. Turkey's accession talks (to the EU) were blocked by the Cypriot government when it refused to allow the start of talks in five policy areas unless Turkey changed its position on the Cyprus dispute.

2010 After a four-day marathon parliamentary session all but one of 27 amendments to the constitution were approved. Among the proposed changes were increased power for the government, while reducing the influence of the military, and reform of the judiciary, which critics claim may weaken Turkey's secular society in favour of one more Islamic. A flotilla of six ships, organised by a Turkish human rights organisation, attempted to break the Israeli blockade of the Gaza Strip. It was repelled by the Israeli military, with the deaths of nine Turkish activists. Condemnation of the Israeli military action was voiced by many in the international community. The Constitutional Court annulled the changes that would have reduced the powers of the army and the judiciary. A referendum on constitutional reforms covering economic and social rights, individual freedoms and judicial reforms passed with 58 per cent in favour; the proposal to limit the power of the Supreme Court to dissolve political parties failed. The changes brought the constitution into line with EU standards.

2011 Prime Minister Erdoğan announced in April that a new waterway would be built to by-pass the Bosphorus, which has become very crowded. General elections were held in June, in which the ruling AKP won 49.83 per cent of the vote (327 seats out of 550) and the CHP won 25.98 per cent (135). The AKP failed to win the two-thirds majority necessary to allow it to change the constitution in line with its political objectives. Some 30 per cent of the elected members (from the main opposition party (CHP) and minority Kurds)

boycotted parliament's swearing in ceremony in June. The CHP later rescinded their boycott but the Baris ve Demokrasi Partisi (BDP) ((Kurdish) Peace and Democracy Party), despite urging by Abdullah Ocalan, leader of the PKK, maintained their boycott. Ironically the constitutional changes proposed by Erdogan, which needed BDP support would benefit the Kurdish community. In June, Syrians refugees fled across the border into Turkey, where refugee camps were hastily set up; within two weeks over 5,000 people had found sanctuary. In July Turkey recognised the rebel Transitional National Council in Benghazi (Libya) as the legitimate representatives of the Libyan people. Angered by the arrest of senior military personnel, accused of plotting to undermine the government, Isik Kosaner, chief of the armed forces, resigned in July, along with the army, navy and air force heads. President Gül appointed General Necdet Ozel as head of the army. In August, Turkey warned the Syrian government to stop its military operations, aimed at quelling internal civil disorder, 'immediately and unconditionally'. A UN report, published on 2 September, into the deaths of nine Turkish activists on board a convoy of ships attempting to break the naval blockade of the Gaza Strip in May 2010 concluded that Israel had used 'excessive force', but that the naval blockage was legal. Turkey immediately expelled the Israeli ambassador and cut military ties with Israel. While Turkey demanded an apology from Israel for the killings, it rejected the findings of the report and threatened to set it before the International Court of Justice (ICJ) for a judicial ruling. During a meeting in Istanbul on 1–2 October the newly combined opposition, the Syrian National Council (SNC), led by Chairman Burhan Ghalioun agreed its structure and aims. An earthquake of magnitude 7.2 struck the eastern province of Van in October. Initial estimates put the death toll of over 200 people and over 1,000 people injured, as dozens of buildings were destroyed. In November, Turkey imposed a number of sanctions against Syria that included suspension of financial dealing with and a freeze of assets of the Syrian government and a travel ban on the Syrian leadership; an arms ban is already in place.

2012 On 7 February, Prime Minister Erdogan said that the veto of the UN resolution to halt the violence in Syria was a 'licence to kill' for Syrian President Bashar al Assad. He also announced his government would 'start a new (regional) initiative with those countries which stand by the Syrian people, not the regime.' On 30 March, a new controversial education bill was passed that not only extended

compulsory education from aged eight to 12 years, but allowed children to switch from state, secular schools to specialist, religious schools as young as 10 years of age. Some members of parliament (MPs) came to blows during the debate, while outside demonstrations in Ankara were broken up by police with tear gas and water cannon. The secular Cumhuriyet Halk Partisi (CHP) (Republican People's Party) accused the prime minister of wanting to impose Islamic values on the country. Prime Minister Erdogan refuted the charge saying he was committed to secularism but not at the expense of those Turks who wish to express their religious beliefs openly. On 12 June public schools were allowed to offer the Kurdish language as an optional course. On 22 June, Syria shot down a Turkish military jet plane; in response Turkey changed its rules of engagement and so that all Syrian troops would be seen as a military threat if they approached the Turkish border. On 3 October Syria fired mortars into a border town, killing five civilians; in retaliation Turkey shelled Syrian targets on 3–4 October. On 6 November a Turkish court began the trial of four senior Israeli military commanders, *in absentia*, for the deaths of nine Turkish activists in 2010. Israel refused to co-operate with the prosecution, but if the military commanders are found guilty of the charges an international warrant of arrest could be issued. On 4 December NATO approved the deployment of the Patriot anti-missile batteries along the Turkish-Syrian border, following news that Syria had been preparing chemical weapons for use.

2013 Murat Karayilan, military leader of the PKK, announced on 25 April that under the terms of a ceasefire, PKK fighters would begin withdrawing from Turkey in May. The move followed lengthy negotiations between the Turkish government and the PKK's imprisoned leader Abdullah Ocalan. Ocalan said that 'the weapons should be silent and ideas should speak. The withdrawal will be in three stages: withdrawal of PKK forces from Turkey; constitutional amendments by the Turkish government; and, once Ocalan and other imprisoned Kurdish militants have been released, the PKK to lay down all arms. On 8 May PKK separatists began leaving south-east Turkey for northern Iraq. Five years after their trials began, former armed forces chief, Gen Ilker Basbug, and numerous officers, lawyers, writers and journalists, were convicted of involvement in the so-called Ergenekon plot. General Basbug, lawyer Kemal Kerincsiz and Workers' Party leader Dogu Perincek were sentenced to life imprisonment and there were long sentences for others

including 34 years for Mustafa Balbay, a journalist and MP.

Political structure

Constitution

A 1982 referendum approved a new constitution embodying considerable restrictions on personal liberty.

The constitution was amended in 1999 and 2001. The 1999 amendment was undertaken to ease the path of the privatisation programme while an amendment in 2001 was aimed at redefining human rights in view of Turkey's aspirations to join the EU. In 2002, three articles of the constitution were amended, allowing a person with a prison conviction (non-terrorist charge) to stand for parliament. Apart from these additions, the new constitution differs little from the 1926 version, promulgated by Kemal Atatürk, which enshrines Turkey as a secular, democratic and unitary republic.

A referendum will be held in June 2010, following parliamentary proposals, in May, that had failed to gain the necessary two-thirds majority to amend the constitution. Proposals include the prime minister being given increased powers, while reducing the influence of the military on the democratically elected government.

A constitutional referendum was held on 12 September 2010, in which 57.88 per cent of voters agreed to 23 changes to articles within the constitution to bring it into line with European Union standards. Measures included equality of men and women, protection of children and vulnerable adults, personal data protection, increased worker's rights including right of collective bargaining for government employees. The ban on overseas travel was lifted for business people under investigation and with tax debts. The right of citizens to have disputes with government adjudicated by an ombudsman and the right to petition the constitutional court were granted. The abolition of legal safeguards for the 1980 military coup conspirators was enacted as well as further judicial reforms.

The new constitution will allow parliament to select senior judicial candidates and the removal of existing judges. The judiciary would no longer be able to prohibit political parties.

Independence date

29 August 1923

Form of state

Parliamentary democratic republic

The executive

Executive power rests with the president and council of ministers. The president is the head of state. The president, who serves a seven-year term, is elected by the parliament and appoints the prime minister, who in turn chooses the Council of

Ministers. A National Security Council guides government policy in areas of security and law and order. It is chaired by the president and is composed of government ministers and armed forces commanders.

National legislature

The unicameral Türkiye Büyük Millet Meclisi (TGNA) (Turkish Grand National Assembly) has 550 representatives, elected by proportional representation from party lists, to serve five-year terms. Only political parties with over 10 per cent of the vote are eligible to sit in the TGNA.

Only political parties gaining more than 10 per cent of the national vote are entitled to parliamentary seats
Voting eligibility: universal direct suffrage over 18 years.

Legal system

The legal system is based on European models and the 1982 constitution. The court system is divided into three areas: civil, penal and administrative. The highest courts are the Appeal Court for civil and penal cases and the State Council for tax and administrative cases.

Last elections

27 April, 6 May and 28 August 2007 (presidential); 12 June 2011 (parliamentary)

Results: Presidential: (third round) Abdullah Gül (AKP) won 339 votes; Sabahattin Çakmakoglu (MHP) 70; Hüseyin Tayfun İçli (Demokratik Sol Partisi (DSP) (Democratic Left Party)) 13. National assembly member turnout 448. Parliamentary: Adalet ve Kalkınma Partisi (AKP) (Justice and Development Party) won 49.83 per cent of the vote (327 seats out of 550), Cumhuriyet Halk Partisi (CHP) (Republican People's Party) 25.98 per cent (135), Milliyetçi Hareket Partisi (MHP) (Nationalist Movement Party) 13.01 per cent (53), independent candidates 6.57 per cent (35); 12 other political parties each won less than 2 per cent and failed to win seats. Turnout was 83.16 per cent.

Next elections

2012 (municipal); 2014 (presidential); 2016 (parliamentary).

Political parties

Ruling party

Adalet ve Kalkınma Partisi (AKP) (Justice and Development Party) (elected 2002; re-elected 12 Jun 2011)

Main opposition party

Cumhuriyet Halk Partisi (CHP) (Republican People's Party)

Population

74.89 million (2012)
About 31 per cent of the population is under 14 years; 64 per cent 15–64; 5 per cent over 65.

There has been a huge shift of population from the countryside to the towns: in 1945 only 18 per cent of the population lived in towns; by 2005, the urban population was estimated at 67.3 per cent of the total population.

Last census: October 2000: 67,803,927

Population density: 84 inhabitants per square km. Urban population 70 per cent (2010 Unicef).

Annual growth rate: 1.5 per cent, 1990–2010 (Unicef).

Internally Displaced Persons (IDP)

Over 1.0 million (UNHCR 2004)

Ethnic make-up

Mainly ethnic Turks, with a large Kurdish minority and small numbers of Armenians, Greeks and Jews.

Religions

Muslim with a small Christian minority. Turkey is a secular state which guarantees complete freedom of worship to non-Muslims.

Education

A new education bill was passed in March 2012 that not only extended compulsory education from aged eight to 12 years, but more controversially allowed children to switch from state, secular schools to specialist, religious schools at as young as 10 years of age (the previous age was set at 15 years).

Although compulsory education is free, facilities are extremely limited, forcing a number of students to attend night school or take private tuition to improve their chances of gaining a place at one of Turkey's 29 universities.

Literacy rate: 87 per cent adult rate; 96 per cent youth rate (15–24) (Unesco 2005).

Compulsory years: Six to 14

Enrolment rate: 105 per cent male, 96 per cent female, gross primary enrolment; 67 per cent male, 48 per cent female, gross secondary enrolment, of relevant age groups (including repeaters), (Unicef 2004).

Pupils per teacher: 23 in primary schools.

Health

Healthcare is provided free of charge. Standards are low, leading many to seek medical services in private hospitals and abroad. Major differences exist in the availability and quality of medical care between major urban centres and eastern parts of the country. Family planning was introduced in the 1960s. Due to opposition from religious groups it did not receive strong support and funding.

Life expectancy: 71 years, 2004 (WHO 2006)

Fertility rate/Maternal mortality rate: 2.1 births per woman, 2010 (Unicef)

Birth rate/Death rate: 17.95 births per 1,000 population; 5.95 deaths per 1,000 population (World Bank).

Child (under 5 years) mortality rate (per 1,000): 14 per 1,000 live births (WHO 2012); 8 per cent of children under aged five are malnourished (World Bank).

Head of population per physician: 1.35 physicians per 1,000 people, 2003 (WHO 2006)

Welfare

The social security system is based on three major organisations, the Social Insurance Institution (SSK), the Emekli Sandığı (government employees' retirement fund) and Bag-Kur for the self-employed.

Mass social security began in 1946 with the SSK giving limited benefits and has been gradually expanded. Membership is compulsory for all salaried employees except civil servants, who join Emekli Sandığı. Social insurance law provides for benefits covering work injury and occupational illness, sickness, maternity, old age, disability and death.

Main cities

Ankara (capital, estimated population 4.2 million (m) in 2012), Istanbul (12.9m), Izmir (2.9m), Bursa (1.6m), Adana (1.6m), Gaziantep (1.5m), Konya (942,298), Kayseri (850,442), Antalya (826,145), Mersin (626,918).

Languages spoken

Armenian, Greek and Ladino are used by ethnic minorities. The use of Kurdish was restricted until parliament voted to change the constitution in 2001 and relaxed the restriction. Arabic, Circassian, and Judezmo are also spoken.

Almost all educated Turks have command of a foreign language and English is the dominant language for international business. German and French are also spoken.

Official language/s

Turkish

Media

Press

Dailies: There are several national and regional dailies including in Turkish *Hürriyet* (www.hurriyet.com.tr), *Türkiye* (www.turkiyegazetesi.com.tr) and *Milliyet* (www.milliyet.com.tr), are mass circulation newspapers, *Yeni Asir* (www.yeniasir.com.tr) and *Sabah* (www.sabah.com.tr), *Aksam* (www.aksam.com.tr), *Posta* (www.postagazetesi.net) and *Today's Zaman* (www.todayzaman.com) (with English online articles).

In English, the main publication is *Turkish Daily News* (www.turkishdailynews.com.tr) with *The New Anatolian* (www.thenewanatolian.com).

Weeklies: Some daily newspapers have weekend editions, such as *Sunday's Zaman*. Other magazines, in Turkish, include *Aksiyon* (www.aksiyon.com.tr), *Aydinlik* (www.aydinlik.com.tr), *Yeni Mesaj* (www.yenimesaj.com.tr) and *Yeni Ümit* (www.yeniumit.com.tr). In English *Voices* (www.voicesnewspaper.com) from Altinkum and *Turkish Weekly* (www.turkishweekly.net).

Business: In Turkish, *Dünya Ekonomi Politika* (www.dunyagazetesi.com.tr), (with English online articles), and *Finansal Forum* are important publications; others include *Eko Haber* (www.ekohaber.com.tr) and *Referans* (www.referansgazetesi.com). *Yktisat, Yönetim ve Finans Dergisi* (Journal of Economy, Business and Finance) is a monthly economic publication.

Periodicals: In Turkish, English, and French. *Bizim Anadolu* (www.bizimanadolu.com) is a monthly newspaper. The State Institute of Statistics (www.turkstat.gov.tr) publish yearbooks.

Broadcasting

The national broadcaster is the Türkiye Radyo ve Televizyon Kurumu (TRT) (www.trt.net.tr).

Radio: TRT (www.trt.net.tr) has six stations, providing a national, regional and local network, which includes news, education and cultural programmes, modern and traditional music and programmes for foreign tourists. There are numerous commercial radio stations based in all regions, including Kanal D (www.kanald.com.tr), Radio Sok (www.asyaradyo.com) (Adana), Radyo Marti (www.radyomarti.net) (Antalya), Radyo Net (www.vizeradyonet.com) (Ankara) and Metro FM (www.metrofm.com.tr) (Istanbul).

Television: TRT (www.trt.net.tr) operates four national channels. There are many subscriber cable and satellite television services available with programmes in Turkish, Kurdish and Arabic. Major TV networks include NTV MSNBC (www.ntv.com.tr), Pusula (www.pusula.tv), Samanyolu Haber TV (www.samanyoluhaber.com), Sky Turk (www.skyturk.tv) and Ulusal Kanal (www.ulusalkanal.com.tr).

National news agency: Anadolu Agency

Other news agencies: Anka News Agency (www.ankaajansi.com.tr) Turkish News Agency (www.turkishnewsagency.com)

Economy

Turkey has a mixed economy, dominated by the service sector, which in 2010 contributed 63.8 per cent to GDP. Industry provided 26.7 per cent, of which manufacturing constituted 17.7 per cent and agriculture 9.6 per cent. The tourist sector has increased in importance for over a

decade, so that by 2010 there were 28 million tourists with foreign exchange worth US\$24.6 billion. The majority of visitors arrived from the Organisation for Economic Co-Operation and Development (OECD) countries of Europe. The volume of tourists did not fall even though the global economic crisis in 2008 cut into the disposable income of foreign holidaymakers. As the euro rose in value during 2008–09 European-Mediterranean holidays became progressively more expensive and Turkey was seen as a more economical destination.

Industrial production is centred on textile and clothing manufacturing, consumer electronics and electrical goods, vehicle assembly and automotive parts and shipbuilding. Turkey is self-sufficient in food production and is a world leader in production of hazelnuts, cherries, figs, apricots, quinces and pomegranates and is second in producing watermelons, cucumbers and chickpeas with its surplus sold for export. Livestock farming and by-products contribute around 30 per cent of overall output; fishing and aquaculture are also important components of the agricultural sector. GDP growth in 2007 was 4.7 per cent, falling to 0.7 per cent in 2008 as the economic crisis cut worldwide trade and investment. The economy fell into recession in the first quarter of 2009 with an annual rate of -4.8 per cent. In 2010 as world trade picked up, GDP growth surged to 9 per cent, led by private consumption and investment, before weakening slightly to an estimated 8.5 per cent in 2011. While the banking system was caught up in the economic crisis of toxic debt and credit squeeze worldwide in 2008, for participating banks that offered Islamic banking, business grew by 40 per cent in 2009, with the volume of funds up by US\$17.8 billion. Services in Islamic banking also include insurance and financial services, real estate and energy investments.

In 2009, the currency was renamed the Turkish lira, with the issuing of new banknotes and coins. Since then it has appreciated in value, prompting the central bank to moderate some policy measures and to de-couple the behaviour of the Turkish lira exchange rate from other emerging market currencies. When signs in 2011 indicated a deterioration in global markets the central bank reversed its policies and applied more controls, contributing to the domestic slowdown.

External trade

Turkey is a member of the regionally based, Islamic, intergovernmental Economic Co-operation Organisation (ECO), comprising 10 regional Central Asian

countries that promote economic, technical and cultural development between member countries. Turkey has trade agreements with its neighbours in the Black Sea Economic Co-operation Organisation (BSEC), which promotes trade and investment among the 11 regional member states. Turkey is also a signatory of the Euro-Mediterranean Partnership agreement, which provides for the introduction of free trade between the EU and 10 Mediterranean countries by 2012. Turkey has been in negotiation for entry to the European Union since 1987, but has yet to resolve the issue of Cyprus and the Turkish Republic of Northern Cyprus (TRNC). In July 2010, negotiations were still underway. Turkey has a customs union with the EU, although this is hampered by Turkish refusal to allow Cypriot vessels to dock at its ports.

Manufacturing consists principally of textiles and clothing and consumer electronics and electrical goods, vehicle assembly and automotive parts and shipbuilding. Turkey exports many agricultural products and is the world's third largest exporter of tobacco.

A major oil pipeline is in existence and another major natural gas pipeline is proposed through Turkey, connecting the oil and gas fields of Central Asia with Europe.

Imports

Principal imports include hydrocarbons, machinery, chemicals, semi-finished goods, vehicles.

Main sources: Russia (11.3 per cent of total), Germany (9 per cent), China (9 per cent).

Exports

Principal exports are textiles and clothing, agricultural products, tobacco, iron and steel, electrical and electronic equipment, chemical and industrial products, vehicles and parts.

Main destinations: Germany (8.6 per cent of total in 2012), Iraq (7.1 per cent), Iran (6.5 per cent).

Agriculture

Turkey is self-sufficient in food and agriculture accounts for around 17 per cent of GDP, over 20 per cent of exports and employing about 45 per cent of the labour force. The sector is subsidised, with state support accounting for as much as 7.5 per cent of GDP.

The mainstays of Turkish agriculture are wheat and sheep, although there has been an increase in fruit and vegetable production as well as growth in regional crops such as tea, tobacco, cotton and hazelnuts. Turkey expects to become a leading cotton producer over the next 10 years.

Turkey is the world's largest producer of hazelnuts (70 per cent of the world supply). Production is dominated by Fiskorbirlik, the state-run hazelnut farmers' co-operative.

The GAP south-eastern Anatolian irrigation project, although incomplete, has already raised production and productivity considerably: according to official figures, wheat production nationally has jumped 64 per cent since 1985, barley production by 42 per cent and cotton production by almost 500 per cent. Rice, wheat, soyabeans and potatoes are now produced in more than minimal amounts for the first time. The project will irrigate some 1.8 million hectares (ha), 25 per cent of which will be given over to cotton production.

Agricultural exports including tobacco, cotton, dried fruit (hazelnuts, seedless raisins, figs, apricots), pulses (chickpeas and lentils), live sheep, goats, fresh fruits (apples and citrus fruits) and fresh tomatoes. Cereals, especially wheat and barley, are Turkey's most important crops.

Imports, particularly of dairy products and beef, are growing faster than exports. Significant quantities of rice and processed food products are also imported. Liberal trade policies have opened up markets for imports of both cotton and burley tobacco.

Salt water fishing contributes to 77 per cent of the total fishery production, with 62 per cent of the catches obtained from the Black Sea. Anchovies remain the traditional catch with a potential for further processing. Fishery production also thrives on horse mackerel, whiting and bonito. The main production area for inland fisheries is Lake Van, where gray mullets are mainly caught. The Atatürk Dam and other smaller dams, which were constructed under the Southeast Anatolian Project (GAP), have increased the potential for inland fisheries by over 9,000 tonnes.

Trout constitute more than 60 per cent of the total aquaculture production, 25 per cent of which is obtained from the Aegean Sea. Turkey mainly exports large quantities of canned tuna to the EU and other developed countries.

Forest and other wooded land accounts for slightly more than a quarter of the total land area, with forest cover estimated at 10.2 million hectares (ha). Most of the forest is available for wood supply, although it is moderately used for fuel consumption. Only a small area of forest is owned by the state.

Turkey produces a significant quantity of industrial roundwood. Major forest industries rely on local resources for the production of sawnwood, particle board and plywood. The pulp and paper industry is

able to meet domestic demand by imports.

Industry and manufacturing

Industry accounts for 25 per cent of GDP and employs approximately 18 per cent of the labour force.

There have been high levels of industrial growth since the mid-1970s, despite low levels of capital investment and plant utilisation. There has also been rapid development of light industry, general diversification and growth in exports of manufactured goods.

Main areas of specialisation include textiles, ready-to-wear clothes, ceramics and glass, iron and steel, chrome, chemicals and light consumer goods.

The industrial sector is still dominated by large state-owned industries. These State Economic Enterprises are mainly engaged in textiles, food processing, chemicals, metals and motor vehicle production. The food processing sector is growing rapidly and agricultural products continue to provide a large proportion of export revenue. Turkey's non-state industrial sector is dominated by a number of family-run conglomerates. Koc Holding is the largest, with 108 companies operating in 10 core sectors. Koc produces one-third of Turkey's cars, most of its fridges and televisions and owns the biggest supermarket chain. Sabanci Holdings, which has 50 operating companies, is active in chemicals, textiles, cars, banking, and supermarkets. The third-largest conglomerate, Cukurova, is active in commercial vehicles, paper and mobile telephones, although it is concentrating its efforts on the finance sector. There are also dozens of smaller conglomerates with up to 33 companies.

The textile sector, once one of the engines of Turkish economic growth, is losing the interest of the major conglomerates that dominate Turkey's industrial structure.

Tourism

Although Turkey is the site of the world's oldest known temple, at Göbekli Tepe, and the ancient city of Troy, as well as the classical city of Byzantium (later renamed Constantinople and then during the Ottoman Empire, Istanbul), tourist activity is concentrated along the coasts of the Aegean and Mediterranean Seas, where the bulk of accommodation is concentrated. There are 10 sites included on Unesco's World Heritage List, which range from cultural to mixed cultural and natural sites. There is a growing market of visitors travelling to spas and clinics in Turkey for health and wellness. Turkey is large and diverse enough to offer many activities, in both summer and winter. Most visitors (28.6 million in 2010) enjoy competitively priced packaged holiday

deals in coastal resorts. In 2010, the leading visiting nationalities were Germany with 4.3 million arrivals, Russia 3.1 million and UK 2.6 million.

Infrastructure facilities are good with a comprehensive road network, ferries, international and domestic flights, plus a reliable rail network.

Travel and tourism has grown to be an important component of the economy, contributing an average 10.7 per cent (2007–11) to GDP and providing employment for 8.2 per cent of the workforce (1.8 million jobs) over the same period. Foreign receipts for the period were US\$24.4 billion (15.2 per cent of total); domestic spending on travel and tourism was US\$28.4 billion (2007–11).

The southern and south-eastern regions may not be safe for tourists, due to instability in neighbouring countries and a simmering Kurdish insurgency.

Mining

Substantial mineral reserves exist, including copper, zinc, lead, iron ore, coal and lignite. Deposits of borax, wolfram and chromite are internationally significant. Turkey is the world's second-largest producer of boron and a leading exporter of chrome. Etibank controls 60 per cent of all mining activity.

Hydrocarbons

Proven oil reserves were 300 million barrels in January 2009, located mainly in the southeast. Production has fallen by almost a half, from its peak of 85,290 barrels per day (bpd) in 1991 to 46,120bpd in 2008. Consumption was 675,950bpd in 2008 so Turkey relies on imported petroleum products, notably from Russia as well as Middle Eastern countries such as Libya and Algeria. The state-owned Turkish Petroleum Corporation (TPAO) is responsible for exploration, distribution, trading, services and storage of oil and gas. There are five oil refineries processing over 714,000bpd.

Turkey has a strategic position as a hub and transit country for oil and gas pipelines. The Baku-Tbilisi-Ceyhan (BTC) 1,760km oil pipeline was opened in 2005, it carries oil from Azerbaijan's port of Baku, through Georgia, then across Turkey to its Mediterranean port of Ceyhan. The pipeline has a capacity of one million bpd. The Nabucco natural gas pipeline is planned to follow this and branch off towards Europe at Erzurum in central Turkey. A conference was convened in Prague, in May 2009, for gas exporting countries in Central Asia and the Middle East including Turkey and hosted by the EU. The purpose was to state the EU's seriousness as a buyer of natural gas and its commitment to new gas pipelines and trade between the EU

and gas exporters and to end the wrangling that has halted progress on the 3,300km Nabucco pipeline. Other proposed gas pipelines to transit Turkey originate in Egypt, Iraq, Iran and Saudi Arabia.

Turkey has natural gas reserves of 8.5 billion cubic metres (cum) in 2009, with production at 906 million cum per day and consumption at 36.6 billion cum the balance must be imported. Turkey's domestic gas consumption has quadrupled since 1992, reflecting government policy of increasing use of gas. Gas is cleaner, plentiful in neighbouring countries and allows Turkey to diversify energy sources and increase energy security. Turkey can charge transit fees, as well as bring neighbouring post-Soviet republics into its sphere of influence.

Exploration of gas fields centres on the western Black Sea, off Turkey's coast. Proven coal reserves were 1.8 billion tonnes, of mostly sub-bituminous and lignite (brown) coal which is typically used for power generation and which is generally of poor quality and highly polluting. Since production levels fell in 2003–04 to 10.5 million tonnes of oil equivalent (mtoe), as a result of a lack of investment in the industry, output has grown steadily to 15.8mtoe in 2007 as global oil and gas prices rose.

Energy

Total installed generating capacity was 40.6GW in 2007, almost doubling from the 21.3GW in 1997. Hydropower provides 12.8GW in the energy mix, 3.2GW was under construction with an addition 21GW planned at a later date. Turkey is a net energy importer (about 60 per cent of its energy requirements) and is Europe's fastest-growing energy market. Demand still outstrips supply and the country experiences blackouts and industrial losses as a result of the energy bottleneck.

The electricity is generated by coal-fired plants and hydropower. There has been rapid expansion of hydroelectricity capacity with over 100 power plants in operation. There are plans to develop nuclear energy (possibly by 2020) as a source of electricity.

The Ministry of Energy and Natural Resources has responsibility for overseeing the private energy companies which generate, distribute and supply electricity wholesale and retail.

On 3 April 2011, the Kurdistan ministry of electricity signed a US\$18 million contract with the Turkish energy company Shar to connect electricity power lines between the provinces of Sulaimaniya (Iraq) and Erbil (Turkey).

Financial markets

Stock exchange

Istanbul Menkul Kıymetler Borsası (IMKB) (Istanbul Stock Exchange)

Commodity exchange

The Istanbul Gold Exchange (IGE) includes silver and platinum spot trading.

Banking and insurance

Central bank

Türkiye Cumhuriyet Merkez Bankası (TCMB) (Central Bank of the Republic of Turkey)

Time

GMT plus two hours (daylight saving, late March to late October, GMT plus three hours)

Geography

Turkey is mostly situated in Asia Minor on the Anatolian peninsula, which is bordered to the north-east by Georgia and Armenia, to the east by Iran, and to the south by Iraq and Syria. Part of the country reaches into Europe, occupying eastern Thrace (Trakiya), which is separated from the rest of Turkey by the inland Sea of Marmara and is bordered to the west by Greece and Bulgaria. Turkey has an extensive coastline with the Black Sea to the north, the Mediterranean Sea to the south and the Aegean Sea to the west. The Sea of Marmara links the Black Sea and the Aegean Sea.

Turkey is a mountainous country, over three-quarters of which exceeds 500m elevation and averages 1,130m. The highest point is Mount Ararat (Agri Dagi) in the east, reaching 5,165m. There are two major ranges: the North Anatolian mountains in the north and the Taurus mountains in the south. Many short, fast rivers flow down from the mountains, as well as the great Tigris and Euphrates rivers, which rise in the mountains of eastern Turkey, where practically all the water they carry down to the Persian Gulf is generated. There are numerous lakes, the largest of which is Lake Van to the east near the Iranian border.

Hemisphere

Northern

Climate

Coastal regions have a Mediterranean climate, with mild, moist winters and hot, dry summers. The interior plateau has low and irregular rainfall, cold and snowy winters and hot, almost rainless summers. Ankara: 0–23 degrees Celsius (C) (Jan–Jul); annual rainfall 367mm. Istanbul: 5–23 degrees C (Jan–Jul); annual rainfall 723mm. Ismir: 8–27 degrees C (Jan–Jul); annual rainfall 700mm.

Dress codes

Although the population is predominantly Muslim, Turkey is a secular state and for

the visitor daily life in cities and tourist areas is similar to that in Europe. However, in rural areas, standards are much more conservative and women should be cautious in their dress. They should wear clothing which covers most of the body and probably also a headscarf, or at least be able to cover their hair if the need arises. Topless bathing is illegal but tolerated on southern and Aegean tourist beaches.

Dress for formal occasions is conservative and men normally wear a dark business suit or formal dress. Ties are almost always worn for business meetings. Turkish women dress formally for most social occasions.

Entry requirements

Passports

Required by all, valid for at least three months from date of departure, with exception of nationals of Belgium, France, Germany, Greece, Italy, Luxembourg, Malta, the Netherlands and Spain.

Visa

Required by all, except nationals of some EU and other European, Latin American, Middle East and Asian countries and New Zealand. Details of requirements for individual countries can be found at www.turkishconsulate.org.uk/en/visa.htm.

Currency advice/regulations

There are no restrictions on the import of local or foreign currencies. Visitors bringing in a large amount of foreign currency should have it recorded in their passports by the Turkish authorities. Export of local and foreign currencies is restricted to US\$5,000. Currency exchange slips should be retained.

Travellers cheques can be cashed in banks, but cash in euros or US\$ is preferred.

Customs

Personal effects and gifts up to the value of eur255.65 may be brought in duty-free. It is advisable to retain invoices and foreign currency exchange slips to cover value of purchases. Export of antiques is prohibited.

Health (for visitors)

Mandatory precautions

Cholera certificate required if travelling from an infected area.

Advisable precautions

Anti-malaria and anti-cholera precautions are advisable. Hepatitis and rabies are prevalent in all areas, and there have been outbreaks of cholera in eastern Turkey. Malaria tablets should be taken for travel to the Adana area and inoculation against cholera and typhoid for travel to the south-eastern region is advised. A tetanus booster if travelling to central and eastern Anatolia is recommended.

Tap water is unpalatable due to heavy chlorination. Bottled water is easily obtainable in food stores. Medicines are easy to purchase without prescription in local pharmacies. The location of a nearby all-night pharmacy is displayed in any pharmacy window. Medical services are adequate in main city hospitals like Istanbul's American and German hospitals.

Hotels

Classified into five categories – deluxe and first- to fourth-class. Prices vary and many hotels reduce their rates between mid-Oct and mid-Apr. A service charge of 15 per cent usually added and tipping is extra; 18 per cent VAT is also added. Advance reservations are advisable. Tap water is safe in major hotels.

Credit cards

Access, Diners Club, Visa, American Express and Eurocard are accepted in most hotels, restaurants and shops, and can be used to withdraw money from automatic cash dispensers at banks.

Public holidays (national)

Fixed dates

1 Jan (New Year's Day), 23 Apr (National Sovereignty/Children's Day), 19 May (Atatürk Commemoration/Youth and Sports Day), 30 Aug (Victory Day), 29 Oct (Republic Day).

Variable dates

Eid al Adha (four days), Eid al Fitr (three days).

Islamic year 1434 (15 Nov 2012–05

Nov 2013): The Islamic year contains 354 or 355 days, with the result that Muslim feasts advance by 10–12 days against the Gregorian calendar. Dates of feasts vary according to the sighting of the new moon, so cannot be forecast exactly.

Working hours

Banking

Mon–Fri: 0830–1230; 1330–1700.

Business

Mon–Fri: 0830–1200; 1300–1730.

Government

Mon–Fri: 0830–1230; 1330–1730.

Shops

Mon–Sat: 0900–1300; 1400–1900.

Many flower shops open late. Pharmacies display the location of one opening late. Many food shops open on Sun.

Telecommunications

Mobile/cell phones

GSM 1800 and 900 services are available throughout most of the country.

Electricity supply

220V AC, 50Hz (110V in parts of Istanbul).

Social customs/useful tips

Hospitality is very important. Turkey is a Muslim country and religion plays an

important part in Turkish life. Practically all business entertaining is conducted in restaurants and clubs.

Personal contact is the key to doing business. Bureaucracy tends to be the greatest obstacle for foreigners. Information is most easily and efficiently obtained by going directly to the top of any organisation, government or private.

It is polite when visiting the home of a business associate to bring a gift of chocolates, flowers or cake. When entering you may be asked to take off your shoes and put on slippers. Do not be critical of Atatürk, the founder of the Republic, and avoid discussion of Kurds, Armenians and other minorities.

Security

Levels of petty crime in main cities are comparable to those in most Western European cities.

Ultra-leftist and Kurdish terrorists are active in Istanbul and other western cities but do not constitute more than a minor threat. Visitors to south-eastern Turkey are advised to travel only during daylight hours and on major roads. The police monitor checkpoints on roads throughout the south-eastern region. Drivers and all passengers in the vehicle should be prepared to provide identification if stopped at a checkpoint.

Getting there

Air

National airline: Turkish Airlines

International airport/s: Ankara-Esenboga (ESB), 35km north-east of the city; duty-free shop, bank, restaurants and bars.

Istanbul-Atatürk (IST), 24km west of the city; duty-free shop, bank, restaurant, bar and car hire.

Istanbul-Sabiha Gökçen (SAW), 32km east of the city. With bank, duty-free shop, restaurants and business centre.

Airport tax: None

Surface

Road: Coach services are available from Austria, France, Germany and Switzerland, as well as a number of countries in the Middle East.

There are connecting routes from the CIS, Greece, Bulgaria and Iran. It is possible to select the northern route via Belgium, Germany, Austria or the southern route through Belgium, Austria and Italy with a car-ferry connection to Turkey.

Rail: Express rail services from Munich, Vienna, Budapest and Bucharest.

Connections are available from London (Liverpool Street) via the Hook of Holland and Cologne to Istanbul on the Istanbul Express, which also transports cars from other European cities.

Water: Turkish Maritime Lines (TML), the national shipping organisation, and

several other cruise lines operate services to Turkey. There are ferry connections with Italy, Cyprus and Greece. For the one-day ferry from the Greek island of Rhodes to Marmaris, a visa is not required.

Getting about

National transport

Air: Turkish Airlines operate regular services between Istanbul, Izmir, Ankara and other major towns. Bodrum regional airport offers internal flights and connections to other nearby Mediterranean destinations. Travelling by air within Turkey is relatively inexpensive.

Road: The Tarsus-Pozanti-Ayrimi-Gaziantep (Tag) motorway connects the southern Antolian region with the rest of Turkey, providing a vital link for the future growth of the region. There has been an extensive road building and maintenance programme in operation since 1999 involving over 1,400km of motorway.

Buses: Many private companies operate day and night services between all cities. Services are generally quicker than trains and prices are competitively low.

Rail: There is 8,542km of rail track. Most major cities and towns are linked by regular rail services.

Water: There are steamship services between Istanbul and most major coastal towns. Car ferries that offer cabins are highly sought-after and should be booked in advance.

City transport

Taxis: Metered taxis available in major towns and cities. Also available are the much cheaper *Dolmus* taxis, which have fixed routes and carry 8–12 passengers. Tipping not customary. For longer journeys the fare should be agreed beforehand. Drivers rarely speak much English and may be new to the city, so advisable to carry a road map.

Buses, trams & metro: Metros run in three of Turkey's main cities — Ankara, Istanbul and Izmir — and are planned for Bursa and Adana.

Car hire

All international companies are represented. Available at main hotels, airports and travel agents but expensive. International driving licence preferred, but most foreign licences accepted. Driving is on the right.

BUSINESS DIRECTORY

The addresses listed below are a selection only. While World of Information makes every endeavour to check these addresses, we cannot guarantee that changes have not been made, especially to telephone numbers and area codes. We would welcome any corrections.

Nations of the World: A Political, Economic and Business Handbook

Telephone area codes

The international direct dialling code (IDD) for Turkey is +90, followed by area code and subscriber's number:

Adana	322	Istanbul (Thrace)	Ankara	312
	212			
Bursa	224	Izmir		232
Diyarbakir	412	Kayseri		352
Gaziantep	342	Konya		332
Istanbul (Anatolia)		Malatya		422
	216	Samsun		362

Chambers of Commerce

Adana Chamber of Commerce, 52

Abidinpaşa Caddesi, Adana (tel:

352-0052; fax: 351-8009; e-mail:

basanlik@adan-to.org.tr).

American-Turkish Business Association,

Emlak Kredi Blokları, Levent, 80620 İstan-

bul (tel: 270-6718; fax: 279-0031;

e-mail: taba@taba.org.tr).

Ankara Chamber of Commerce, 2

Sogutozu Mahallesi, 06530 Ankara (tel:

285-7950; fax: 284-2314;

info@atonet.org.tr).

British Chamber of Commerce in Turkey,

18 Mesrutiyet Caddesi, Galatasaray,

34435 İstanbul (tel: 249-0658; fax:

252-5551; e-mail:

buscenter@bcct.org.tr).

İstanbul Chamber of Commerce,

Resadiye Caddesi, Eminonu, 34378 İstan-

bul (tel: 455-6000; fax: 513-1565;

e-mail: ito@ito.org.tr).

Izmir Chamber of Commerce, 126

Ataturk Caddesi, Pasaport, 35210 Izmir

(tel: 441-7777; fax: 446-2251; e-mail:

info@izto.org.tr).

Kayseri Chamber of Commerce, 6

Tennuri Sokak, 38040 Kayseri (tel:

222-4528; fax: 232-1069; e-mail:

kaytic@kayserito.org.tr).

Konya Chamber of Commerce, 1 Vatan

Caddesi, 42040 Konya (tel: 353-4850;

fax: 353-0546; e-mail: kto@kto.org.tr).

Samsun Chamber of Commerce and In-

dustry, Hancerli Mahallesi, 8 Abbasasa

Sokak, 55020 Samsun (tel: 432-3626;

fax: 432-9055; e-mail:

samsunto@samsunto.org.tr).

Turkey Union of Chambers of Commerce,

Industry, Maritime Trade and Commodity

Exchanges, 149 Ataturk Bulvarı,

Bakanlıklar, Ankara (tel: 413-8000; fax:

418-3268; e-mail: info@tobb.org.tr).

Banking

Akbank, Sabancı Center, 80745 4. Levent,

İstanbul (tel: 270-2666/0044; fax:

269-7383/8081).

Demirbank, Büyükdere Caddesi 122,

80280 Esentepe, İstanbul (tel: 275-1900;

fax: 267-4794/2786).

Esbank, Eskisehir Bankasi, Mesrutiyet
Caddesi 141, 80050 Tepebasi, İstanbul
(tel: 251-7270; fax: 243-2396).

Garanti Bank, 63 Büyükdere Caddesi,
Maslak 80670 İstanbul (tel/fax:
335-3535).

Koçbank, Barbaros Bulvarı, Morbasan

Sokak, Koza İş Merkezi C Blok, 80692

Besiktas, İstanbul (tel: 274-7777; fax:

267-2987).

Pamukbank, Büyükdere Caddesi 82,

80450 Gayrettepe, İstanbul (tel:

275-2424; fax: 275-8606).

Türkiye İş Bankası, Atatürk Bulvarı 191,

06684 Kavaklıdere, Ankara (tel:

428-1140; fax: 425-0750/2).

Yapı ve Kredi Bankası, Büyükdere Caddesi

Yapı Kredi Plaza, A Blok, 80620 Levent,

İstanbul (tel: 280-1111; fax:

280-1670/1).

Central bank

Türkiye Cumhuriyet Merkez Bankası,

Ystiklal Caddesi 10 Ulus, 06100 Ankara

(tel: 310-3646; fax: 310-7434; e-mail:

info@tcmb.gov.tr).

Stock exchange

İstanbul Menkul Kıymetler Borsası (İMKB)

(İstanbul Stock Exchange)

www.ise.org

Commodity exchange

The İstanbul Gold Exchange (IGE) in-

cludes silver and platinum spot trading.

Travel information

Turkish Airlines, General Administration

Building, Ataturk Airport Yesilkoy, İstanbul

(tel: 463-6363; fax: 465-2121; e-mail:

turkishairlines@thy.com).

Ministry of tourism

Ministry of Culture and Tourism, Atatürk

Bulvarı 29, 06050 Opera, Ankara (tel:

309-0850; fax: 312-4359; e-mail: kul-

tur@kultur.gov.tr).

National tourist organisation offices

Tourism Information Office, Gazi Mustafa

Kemal Bulvarı 121, Ankara (tel:

488-7007; fax: 231-5572).

Ministries

President's Office, Cankaya, Ankara (tel:

468-5030; fax: 427-1330; internet site:

www.cankaya.gov.tr).

Prime Minister's Office, Bakanlıklar, An-

kara (tel: 419-5896; fax: 417-0476;

internet site: www.basbakanlik.gov.tr).

Ministry of Agriculture and Rural Affairs,

Ataturk Bulvarı 153, Ankara (tel:

417-6000; fax: 417-7168).

Ministry of Defence, Ankara (tel:

425-4596; fax: 418-1795).

Ministry of Education, Ataturk Bulvarı, An-

kara (tel: 419-1410; fax: 417-7027).

Ministry of Energy and Natural Resources,
Inonu Bulvarı 27, Ankara (tel: 212-6915;
fax: 212-3816).

Ministry of the Environment, Eskisehir

Yolu, Ankara (tel: 287 9965; fax:

285-2742).

Ministry of Finance, Ankara (tel:

425-0080; fax: 425-0058; internet site:

www.maliye.gov.tr).

Ministry of Foreign Affairs, Balgat, Ankara

(tel: 287-1665; fax: 287-8811).

Ministry of Forestry, Ataturk Bulvarı 153,

Ankara (tel: 417-6000; fax: 213-2610).

Ministry of Health, Sıhhiye, Ankara (tel:

431-4820; fax: 431-4879).

Ministry of Industry and Trade, Eskisehir

Yolu, Ankara (tel: 286-0365; fax:

285-4318).

Ministry of the Interior, Ankara (tel:

418-1368; fax: 418-1795).

Ministry of Justice, Ankara (tel:

419-6050; fax: 417-3954).

Ministry of Labour and Social Security,

Inonu Bulvarı, Ankara (tel: 212-9700;

fax: 215-4962).

Ministry of Public Works and Housing,

Vekaletler Cad 1, Ankara (tel:

417-9260; fax: 418-5540).

Ministry of Transport, Ankara (tel:

212-4416; fax: 212-4930).

Other useful addresses

Borsa Komisierligi (stock exchange),

Menkul Kıymetler ve Kambiyo Borsası,

Rihtim Caddesi 245, 80030 Karakoy, İstan-

bul (tel: 298-2100; fax: 298-2500;

internet site: <http://www.ise.org>).

British Consulate General Ankara,

Merutiyet Caddesi No 34, Tepebasi,

Beyoglu PK33, Ankara (tel: 293-7450;

fax: 245-4989).

British Embassy, Sehit Ersan Caddesi

46/A, Cankaya, Ankara (tel:

468-6230/42; fax: 468-3214).

Customs Modernisation Project, Gümrük

Müstesarlığı, Anafartalar Cad No 6 Kat

14, 06100, Ulus, Ankara (tel: 306-8532,

306-8439; fax: 306-8535).

Director General of Mining, Ankara (tel:

287-9750; fax: 287-9152).

Director General of Press and Publica-

tions, Ankara (tel: 468-4967; fax:

468-4966).

Director General of State Water Affairs,

Ankara (tel: 418-3415; fax: 418-3409).

Director General of Telecommunications,

Ankara (tel: 313-1121; fax: 313-1919).

Embassy of the United States of America,

110 Ataturk Blvd, Ankara (tel: 426-5470,

468-6110; fax: 467-0057/19).

Export Promotion Centre (IGEME), Mithatpasa Cad No 60, Kısılay, Ankara (tel: 418-5351; internet site: <http://www.igeme.org.tr>).

General Directorate of Foreign Investment, İnönü Bulvarı, 06510 Emek, Ankara (tel: 212-8914/5; fax: 212-8916).

Housing Development Administration, Project Implementation Unit, Bilkent Plaza, B1 Blok Kat 1, Bilkent 06530, Ankara (tel: 266-7764, 266-7774; fax: 266-7733).

Modern Tercüme Bürosu (translation service), Karanfil Sokak 21/4, Yenisehir, Ankara (tel: 417-8122).

Privatisation Administration, Ziya Gökalp Street No 80, Kurtulus 06600 Ankara (tel: 430-0194, 430-4560; fax: 430-6930; e-mail: hascili@oib.gov.tr).

State Institute of Statistics, Necatibey Caddesi 114, Ankara (tel: 417-6440; internet site: <http://www.die.gov.tr/ENGLISH/index.html>).

State Planning Organisation, Necatibey Caddesi 108, Ankara (tel: 417-6440; internet site: <http://www.dpt.gov.tr>).

Türk Argus Ajansı (translation service), Lamartin Caddesi 32/4 Taksim, İstanbul (tel: 250-5200).

Türk Haberler Ajansı (news agency), Turkocagi Caddesi 1/4, Çagalolu, İstanbul (tel: 511-4200).

Turkish Embassy (USA), 2525 Massachusetts Avenue, NW, Washington DC 20008 (tel: (+1-202) 612-6700; fax: (+1-202) 612-6744; e-mail: info@turkey.org).

Turkish International Co-operation Agency, Kizilirmak Caddesi 31, Kocatepe, Ankara (tel: 417-2790).

Türkiye Radyo Televizyon Kurumu, Nevzat Tandoğan Caddesi 2, Kavaklıdere, Ankara (tel: 428-2230; fax: 414-2767).

Türk Sanayicileri ve İşadamları Derneği (association of Turkish industrialists and businessmen), Cumhuriyet Caddesi, 233/9-10 Harbiye, İstanbul (tel: 246-2412, 240-1205).

National news agency: Anadolu Agency Anadolu Ajansı, Genel Müdürlüğü, Gazi Mustafa Kemal Bulvarı 128/C,

Tandoğan, Ankara (tel: 231-7000; internet: www.aa.com.tr).

Other news agencies: Anka News Agency (www.ankaajansi.com.tr)

Turkish News Agency (www.turkishnewsagency.com)

Internet sites

Foreign Trade Secretariat: <http://dtm.gov.tr>

Republic of Turkey: <http://www.turkey.org>

State Institute of Statistics: <http://www.die.gov.tr>

Treasury Secretariat: <http://www.treasury.gov.tr>

Turkish Foreign Trade and Tourism Centre: <http://www.turkex.com>

Turkish highways: <http://www.kgm.gov.tr/indexe.htm>