



**THE REPUBLIC OF TÜRKİYE
SOCIAL SCIENCES UNIVERSITY OF ANKARA
GRADUATE SCHOOL OF SOCIAL SCIENCES**

**ANALYSIS OF PROTECTIONIST APPROACHES IN TÜRKİYE'S FOREIGN
TRADE POLICY**

Master's Thesis

Can Berat ÖZER

Economics

January 2023



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ABSTRACT

ANALYSIS OF PROTECTIONIST APPROACHES IN TÜRKİYE’S FOREIGN TRADE POLICY

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In this study, the protectionist policies implemented by Türkiye, which prefers the free trade approach in foreign trade, are examined and the results of these policies are evaluated. In the study, both the meanings of protectionism in the historical process and country examples were examined. Thus, protectionist policies are discussed in terms of their theoretical origins and practices. After the conceptual framework of protectionism was formed, Turkish foreign policy was tried to be analyzed. Considering the policies implemented during and after the crisis, it is observed that Türkiye is a country that applies foreign trade defense tools when necessary and tries to keep them within the boundaries of international law. The implementation of the anti-dumping measures against unfair competition in foreign trade by Türkiye in 2018 on a sectoral basis and the termination if the violation is corrected also supports this idea. It is observed that the Turkish foreign trade policy is result-oriented and the measures taken generally eliminate the damage caused by unfair competition. However, it is also understood that Türkiye's import-limiting policies to prevent unfair competition do not always support exports. For this reason, it is considered that Türkiye, acting on the basis of the principle of reciprocity in international trade, should focus on the fact that its protectionist foreign trade policy results in an increase in exports.

Keywords: Global Trade, Foreign Trade Policy, Protectionism, Non-Tariff Instruments, Anti-Dumping

ÖZET

Bu çalışmada, dış ticarete serbest ticaret yaklaşımını tercih eden Türkiye'nin yürürlüğe koyduğu korumacı politikalar incelenmekte ve bu politikaların sonuçları değerlendirilmektedir. Çalışmada hem korumacılığın tarihsel süreç içerisinde kazandığı anlamlar hem de ülke örnekleri incelenmiştir. Böylece korumacı politikalar teorik kökenleri ve uygulamaları itibarıyla tartışılmıştır. Korumacılığın kavramsal çerçevesi oluşturulduktan sonra Türk dış politikası analiz edilmeye çalışılmıştır. Kriz dönemlerinde ve sonrasında uygulanan politikalar dikkate alındığında Türkiye'nin dış ticaret savunma araçlarını zorunlu kaldığı durumlarda uygulayan ve uluslararası hukukun sınırları içerisinde tutmaya çalışan bir ülke olduğu gözlenmektedir. Türkiye'nin 2018 yılında dış ticarete haksız rekabete karşı yürürlüğe koyduğu anti damping tedbirlerinin sektörel bazda uygulanması ve ihlalin giderildiği durumda sonlandırılması da bu düşüncüyü desteklemektedir. Türk dış ticaret politikasının sonuç odaklı olduğu ve genel olarak alınan tedbirlerin haksız rekabetin yol açtığı tahribatı ortadan kaldırdığı gözlenmektedir. Ancak Türkiye'nin haksız rekabeti önlemeye yönelik ithalatı sınırlandıran politikalarının her zaman ihracatı desteklemediği de anlaşılmaktadır. Bu nedenle uluslararası ticarete karşılıklılık ilkesi temelinde hareket eden Türkiye'nin korumacı dış ticaret politikasının ihracat artışıyla sonuçlanmasına odaklanması gerektiği değerlendirilmektedir.

Anahtar kelimeler: Küresel Ticaret, Dış Ticaret Politikası, Korumacılık, Tarife Dışı Araçlar, Anti Damping

LIST OF ABBREVIATIONS

EU: European Union

AD: Anti-Dumping

CIF: Cost of goods, insurance and freight

WTO: World Trade Organization

GATT: General Agreement on Tariffs and Trade

FTA: Free Trade Agreement

IMF: International Monetary Fund

OECD: Organization for Economic Cooperation and Development

SCM: Subsidies and countervailing measures

SPS: Agreement on Sanitary and Phytosanitary Measures

T.R. : Republic of Türkiye

TurkStat: Turkish Statistical Institute

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CHAPTER I: INTRODUCTION

Protectionist policies in foreign trade always have been the subject of many academic studies. While part of these studies focused on the theory of protectionist policies, the other part focused on protectionist policy tools. Different contents and different methods that protectionism has acquired in the historical process have prevented the need for studies in this field from disappearing. In addition, protectionism has also existed as a policy choice in every period when the free market is dominant.

Some of the debates in this area have gathered on whether protectionism should be seen as a policy choice or as a sum of temporary regulations that are mandatory in cases of deviation from the free market. Moreover, the efforts of international organizations to remove barriers to trade prevent protectionist measures from being a policy tool.

Despite all this, protectionism continues to exist in international trade and transforms legal and political approaches by taking forms specific to the period. The differences between traditional protectionism based on the use of tariffs and new protectionism based on the use of non-tariff instruments force all stakeholders to produce new solutions for the establishment of free trade. Likewise, the difficulties in identifying technical barriers, the use of which is increasing day by day, has also entered the agenda of international law. Although the WTO requires nation states to notify, the difficulties in identifying technical barriers are not easily overcome. For this reason, it should be taken into account that the scope of the evaluations at the point of measuring the effectiveness of Türkiye's foreign trade policy against the protectionist policies examined in the study is limited. In addition, although the protectionist measures seem to be successful in bilateral trade, it should be stated that the evaluation of success performance ignores the substitution effect, since the impact of Türkiye's trade with another trading partner is not examined in the study.

What makes the thesis different from other studies is that current foreign trade data is included in the analysis, as well as the interpretation of current global crises such as the Ukraine-Russian war and the covid-19 epidemic in the context of protectionism. On the other hand, policy recommendations as well as evaluations about the performance of Turkish foreign trade support the originality of the study.

Moreover, in this study, it has come to the fore that criteria should be determined for the degree of protectionism and measuring the results of these approaches. The study should be read and evaluated in this context.

After the literature review, the use of foreign trade policy tools were examined. While making the analysis, official statistics in the databases of national and international organizations were used to a large extent and the data obtained were explained with the help of tables and charts.

CHAPTER II: LITERATURE REVIEW

Studies on protectionism in international trade are generally divided into two main approaches: theoretically examining protectionism or focusing on its applications as a policy choice. While an important part of the studies on protectionism as a policy focused on selected countries, another part was concerned with the measurement of protectionist policies. While the first method usually takes into account the unique situations of countries and limits comparisons, in the second method, researchers aim to show the policies of countries and country groups in a single list, based on universal principles and criteria, in a way that allows them to rank according to the degree of protectionism. There are many reasons why protectionist policies are such an area of intense scrutiny. One of the important reasons for this is that such a foreign trade policy is quickly felt in all areas of the economy. On the other hand, the measures taken against protectionist policies cause the economic effects of protectionist trade policies to deepen and spread to the international economy.

In this section, firstly, the theory of protectionism and its change in the historical process will be discussed. Later, "protectionism" will be examined in context of international law. The establishment and structure of the WTO, which is the most important reflection of international law in trade, will be examined in this section. In the section where the institutionalization of international trade is explained, international and regional agreements will be explained. In this context, discussions on the USA's withdrawal from WTO membership and the break from regional integration, as in the example of Brexit, will also be addressed. Finally, protectionism will be discussed through empirical studies and country practices.

2.1. Historical and Theoretical Origins of Protectionism Foreign Trade

In this section, where protectionism will be analyzed theoretically and historically under five headings, first of all, the different meanings that protectionism has gained in the historical process will be emphasized. In this direction, the chapter will start with the explanation of the theory of international trade, and then mercantilist policies, which is the first form of protectionism in international trade and which is a starting point of discussions on protectionism today, will be explained.

Analysis of protectionism as a trade policy is also included in this section. In this context, the reasons for the protectionist trade policy and the methods used by these methods will be explained. Then, the relationship between crisis and protectionism will be explained. Among the crises described in this section, the most striking one is the Covid-19 epidemic, due to its non-economic source. In addition, trade wars will be explained through the tensions between the USA and China, which is also a current example.

Finally, the concept of "digital protectionism", which is a form of protectionism specific to today's information society, will be mentioned. Although this form of protectionism is unique to the 21st century, the impact of technology in trade has been on the agenda as the driving force of international trade for a long time. For this reason, it is considered useful to include this issue in the context of discussion.

2.1.1. Theory of International Trade

Although the theory of international trade is built on that countries gain mutual benefit from trade, it does not deny that some economic units, especially producers or exporters with weak competitiveness in the face of global trade conditions will suffer from this trade (Krugman, Obstfeld, & Melitz, International Finance, 2018, p. 25).

There have been many studies examining and discussing the problems in international trade since the classical period, which started with the work of Adam Smith and David Ricardo. While most of these argue that free trade will provide prosperity studies, some studies have emphasized that this proposition is quite controversial. Similarly, many trade disputes have come to the fore, as well as great gains in global trade since the classical period.

Although the views that everyone will gain from international trade and that productivity will increase as trade is liberalized continue to dominate today, the ideas that international trade is a zero-sum game where one party wins and the other loses have not lost their currency (Mughwai, 2020, p. 97). Before summarizing the approach of modern economics to international trade and the details of it, it would be useful to mention that trade between countries is not only the subject of economics. International trade is a field of study mainly of economics, law and political science, which should be considered together with almost all of the social sciences. For this reason, it would be useful to summarize the evaluations to be made in this field with an interdisciplinary perspective.

In this context, it would be appropriate to introduce the theory of international trade with a work where political science and law intersect, before discussing the basic approaches and discussions about them. French thinker Montesquieu, who is also considered one of the founders of political science, put forward important views on trade in his famous work "The Spirit of Laws". Although we cannot include detailed views of Montesquieu, who enriches his assessments of international trade relations with country examples, the following trade-related evaluations regarding the interdependence relationship between countries and the benefits of trade are noteworthy:

“Peace is the natural effect of trade. Two nations who traffic with each other become reciprocally dependent; for if one has an interest in buying, the other has an interest in selling: and thus their union is founded on their mutual necessities... this commerce, in short, is a kind of lottery, and every one is allured with hopes of a prize.” (Montesquieu, 2001, p. 346)

In his work, Montesquieu, who defended the idea that international trade should be free and that the development of trade is for the benefit of everyone, also stated that trade is limited in some cases, and that it is beneficial for countries in a strong position to trade with countries that are in a position to comply with their own rules and import restrictions and become dependent. On the other hand, he emphasized that free trade does not give the trader the right to do everything (Montesquieu, 2001, p. 353). It should be noted that the thinker's evaluations on trade are not out of date. It is often discussed today that there should be a limit to free trade.

The idea that free trade will bring the demand and supply into balance in accordance with the realities of the market by putting an end to the protectionist approaches that negatively affect trade, and thus the idea that welfare will increase is sometimes ignored. In fact, interestingly, we see that countries first resort to protectionist measures to prevent the loss of welfare in their economies.

In Smith's analysis, which laid the foundations of the theory of international trade, it is the division of labor that provides labor productivity. According to him, the division of labor ensures specialization and thus creates profit. Smith emphasized that specialization will also create gains for the parties of international trade. According to him, international trade should be an area where both sides benefit (Kurz, 2017, p. 44). The basic propositions of the "free trade" theory put forward by Smith were later analyzed by Ricardo. In England of the period analyzed by Ricardo, there is an increase in large-scale industries and the existence of overseas colonies. Therefore, its analysis is more comprehensive. Free trade has been advocated by both as a way to achieve global production efficiency (Sen, 2005, p. 1012).

In this context, Smith's principle of absolute superiority tells that a country should concentrate and specialize in producing the goods that it can produce more efficiently, that is, at a lower cost, than other countries. Countries will also import other goods for which they do not have an absolute advantage. However, if a country does not have this superiority in the production of any good, then in theory, trade will not be possible. Similarly, in many areas where a country does not have an absolute advantage, its trade will not be profitable. This problem caused by the principle of absolute superiority was overcome by Ricardo, who states that it is profitable for countries to trade with other countries even when they do not have absolute superiority. According to him, a country that does not have absolute advantages should specialize in whichever product it produces more efficiently than the other, and import this product in areas where it does not have a comparative advantage (Seyidoğlu, 2017, p. 32).

Smith's division of labor and absolute superiority concepts explained much of the free market understanding, especially for countries with natural advantages in the production of certain goods (VanGrasstek, 2013, p. 15).

The principle of comparative advantage explains why countries produce in areas where they do not have an absolute advantage over other countries. As mentioned again, the fact that countries gain superiority in some goods and services in which they specialize in production allows them to trade with other countries. Because specialization allows countries to gain comparative advantage in different fields (Hubbard & O'Brien, 2013, p. 334).

Ricardo's principle of comparative advantage is still a theory that best defines functioning of international trade today. This principle requires countries to produce and specialize in goods that have a relative comparative advantage. The basic condition for the implementation of this principle is that trade is not restricted. Smith and Ricardo's analyzes are still at the center of all new thinking and research on international trade. The scientific nature of the analysis presented represents a differentiation from the previous period when international trade was not systematically analyzed.

Another issue that should be mentioned is that it has been discussed since the first day that the scientific approach to international trade needs improvement in many aspects. Although the evaluations made by Smith were largely the source of Ricardo's work, they were also criticized by Ricardo in many ways. Similarly, Ricardo's analysis of foreign trade was largely criticized by J. S. Mill, who had a Ricardian point of view. According to Mill, Ricardo's analysis cannot provide an explanation for the import and export quantities of products produced by many countries (Kurz, 2017, p. 59).

In addition, Nenovski (2021), who examined the validity of the principle of comparative advantage in the European Union, stated that this principle does not work for the benefit of EU member developing countries. In addition, he emphasized that the theory could not fully explain global trade due to constraints such as the change in consumer preferences and not taking into account the barriers to transportation in international trade. Before the period when a scientific point of view started with the writing of the book "The Wealth of Nations" by Smith, international trade continued to exist in parallel with the natural development of social needs and increased its impact depending on globalization. However, it should not be ignored that there is no foreign trade environment like today (Seyidoğlu, 2017).

Finally, the periodic and political nature of protectionism and free trade approaches in global trade should be emphasized. In this direction, it would be appropriate to draw attention to the views questioning the development of developed countries that advocate free trade. Because, according to this view, today's developed countries have followed a foreign trade policy contrary to free trade while reaching this stage. It is thought by some economists that the reason behind the unconditional defense of free trade by developed countries is their desire not to lose their competitive power. The German economist Friedrich List explained this situation with the concept of "kicking away the ladder". This concept was used to express that developed countries such as the UK and the USA preferred protectionist policies to a large extent when they were developing, but after they reached the level of prosperity, they started to support of free trade unconditionally (Chang, 2002, p. 5).

2.1.2. Origin of Protectionist Policies: Mercantilism

The contradictions of liberalization and protectionism or globalization and centralization that we observe as the main axes of discussion today are not unique to modern society and this conflict situation is always repeated by going further. Therefore, it is important to examine international trade in the historical process.

Before the classical period, which attributed a scientific quality to the place of international trade in the economy, the dominant thought in international economy was called mercantilism. Mercantilism, which emerged in the seventeenth century, is based on principles such as precious metals will give the country superiority, the state's intervention in the economy is necessary, and the flow of precious metals out of the country is stopped by preventing the imports of goods that can be produced in the country (Egilmez, 2008, p. 12). For this reason, mercantilists state that a trade policy should be followed to prevent precious metals from leaving the country and to ensure the flow of precious metals to the country.

According to the mercantilists, it should be aimed to give a permanent surplus in the balance of payments. David Hume said that mercantilists ignore the productive capacity of the economy, which is the true source of wealth. According to him, interfering in international trade will harm the economy (Krugman, Obstfeld, & Melitz, 2012).

As can be seen, the views that form the basis of protectionist approaches are not new. Likewise, criticism of protectionism is not new. The debate has been going on for many years, but in some periods it intensifies.

As stated above, in mercantilism, the balance of payments must have a surplus in order to increase the existence of the treasury. The main purpose of ensuring the increase in gold assets is to meet the needs of a strong army needed in case of war. While importing raw materials is allowed, prohibiting the import of finished goods stands out as the basic policy. However, there are many reasons why this thought ended and classical economic theory gained importance. The most fundamental view, which forms the basis of this thought and also directly targets the classical theory, is the view that countries cannot gain profit from trade together. According to mercantilist thought, global wealth is fixed and it is inevitable for countries to experience conflicts of interest (Seyidoğlu, 2017, p. 27).

Mercantilist thought will be tested first by the most important representatives of classical economics. Smith stated that the policy tools that mercantilism frequently benefited from were import restrictions and export incentives that distorted the resource allocation. He also stated that this system is based on an anti-freedom idea (Kurz, 2017: 45).

2.2. Protectionism as a Foreign Trade Policy

Free trade and the prosperity it brings to countries has long been one of the basic principles of international trade theory. One of the main aims of the theory was to abolish the numerous mercantilist regulations that limited international trade. According to liberal thought, real national income will increase by removing artificial barriers to trade and specialization. Many economists continue to defend this idea (Dunn & Mutti, 2004).

According to Aren (2013), a country's level of development is determined by the international division of labor it is in under free market conditions. This depends on the development of global trade, and as protectionist approaches increase, it does not seem possible for this division of labor to develop.

According to Krugman (1987), effective policy-making by governments in trade harms the efficiency of the economy and leads to a focused approach to resource allocation. With the rise of protectionism, reciprocal trade suffers in most cases.

However, some of those who support the protectionist approach interestingly see the free trade model as a disguised reverse protectionism, that is, using tax policy to protect foreign producers from domestic competition (Adele, 2012).

According to Mughwai (2020, p. 100), governments have to consider the effects of foreign trade policy on domestic trade. In addition, governments should make use of game theory when making product and sector-based analyzes and introducing measures such as tariffs and quotas. The famous concept of the prisoner's dilemma of game theory can also be developed for strategic decisions about which goods countries will specialize in and which goods will be exported and imported. Thus, according to the principle of comparative advantage, countries should produce goods and services for which they are efficient relative to other countries and should import goods for which they are disadvantaged against other countries.

Almost every country supports the development of newly developing industries that are thought to have an important place in today's economy. However, the preference of protectionist policy tools depends on the level of economic development of the countries and the extent to which the government participates in the implemented development policy (Drelich-Skulska & Domiter, 2018).

Protectionism in international trade is the opposite of free trade. However, it should not be forgotten that this opposition also points to a unity. It is not uncommon for governments that pursue protectionist policies in international trade to advocate free trade in their domestic policies. However, if protectionism is to be combated, governments have to change their foreign trade policy. Emphasizing that the protectionism created by the 1929 crisis is not possible today, but there are still areas that will lead to protectionist approaches, Capling (2008: 15) suggests that governments should strive to make free competition effective in foreign trade while following Keynesian policies in domestic trade. On the other hand, economic developments cause a change in the view of trade policy. Kolev (2019, p. 26) in his study examining the approaches of European Union citizens to protectionism, although he concluded that free trade ideas were dominant, interestingly, he concluded that EU citizens opposed the idea of protectionism in case of problems in the economy, while they were not against protectionist policies when the economy was in good condition. It is quite easy to give a general definition of

protectionism. However, as defined, protectionism should not be seen as a foreign trade policy that is easy to implement and understand. If we want to make a definition of protectionism in order to give an idea about protectionism before giving place to opinions and studies on protectionism, the following definition made by Hubbard and O'Brien (2013) will suffice: "Protection is the use of trade barriers to protect domestic companies from competition". In this definition, the method and purpose of protectionism are expressed. Protectionism is the removal of barriers to foreign trade in order to protect domestic producers or exporters. However, this definition is quite inadequate and misleading in terms of understanding protectionism, and it is true that it is only useful to start the discussion. Because the idea of protectionism was founded on the idea of protecting national trade and production, but has developed with many different meanings until today. In some cases, while the purpose is quite different, the methods are gaining new forms at a speed that cannot be followed.

Again in this context, it would be appropriate to state that protectionism is sometimes a means of retaliation in conflicts of interest in international relations, and sometimes a tool that contributes to the national political aims of governments that support the discourse of sovereignty. Protecting national industrial production from foreign competition, strengthening the country's economy by improving the terms of foreign trade, taking measures against dumping by competing countries, equalizing production costs are common economic reasons for protectionist approaches (Ekinci, 1997, p. 17). In addition, arguments such as national security and protecting high-paying jobs are also used to justify protectionist policies. (Hubbard & O'Brien, 2013). Especially today, national security concerns come to the fore in order to implement protectionist policies by governments.

The idea that the domestic producer and the industry is protected against unfair competition of imports, which is expressed as the main purpose of protectionist policies, is also highly controversial. This price increase will make investments in this field more profitable, as the introduction of additional tariffs for the product in the economy or increasing the tariffs will cause the prices of that product to increase in the domestic market. With increasing concentration of labor in this area, the production in this area will increase, but the production in other areas will decrease. In short, it should be taken into account that applying a tariff to a product does not only have an effect on that sector

(Corden, 1985, p. 70). Another point that should not be forgotten is that the cost of the tariffs remains on the consumers. Import duties are added to the price of the product exported by the exporting firm and goods are less demanded by consumers. Consumers who want to buy these goods have to put up with the tariff increase.

On the other hand, when we look at the protectionist policy tools, it is possible to divide the tools used by governments to intervene in foreign trade directly and indirectly. Indirect interventions are used to regulate economic relations that are not directly aimed at foreign trade, while direct intervention tools are used to define policies that have consequences on foreign trade. (Seyidoğlu, 2017, p. 149). It is also possible to classify trade policy instruments as tariffs and non-tariff instruments in general. This classification is very important for our study. Within the scope of the analysis to be made in the study, non-tariff vehicles will be focused on and evaluations will be made according to the results of this analysis. Therefore, it is necessary to know the distinction between tariff and non-tariff policies and explain why this distinction is meaningful.

Tariffs, a traditional instrument of trade policies, describe the tax applied to a product when it is imported. As a tax, tariffs that provide income to the country are also used to protect the exporter or producer within the country. Often this has been the main purpose. The "Corn Law" implemented by England in the 19th century can be given as an example of the tax policy implemented to protect the agricultural sector. In the same period, similar policies were implemented in other countries. However, today, when applying protectionist policies, the use of non-tariff tools is preferred rather than tariffs (Krugman, Obstfeld, & Melitz, 2012, p. 193). There are many political, historical, economic and legal reasons for this change in policy preference. However, the difficulties in tracking non-tariff instruments and measuring their effects are among the important reasons for this preference change. Developed countries that want free trade to dominate in global trade, while implementing protectionist policies, want this situation to be kept as secret as possible or to be seen as an exceptional situation. While the preference of non-tariff instruments instead of tariffs, among these, technical barriers, which are defined as invisible barriers, have the aim of hiding the implementation of protectionist policies, the need to find justified reasons is generally in question for tariffs and some non-tariff barriers.

In addition, the most important factor in the spread of non-tariff instruments is international agreements. These agreements aim to remove barriers to global trade. One of the most important agreements is Marrakech agreement, which was signed in 1994 at the end of the Uruguay Round and established the WTO. It will suffice to emphasize that it aims to remove the obstacles in front of global trade and creates a control mechanism.

The decrease in the weight of tariffs in foreign trade over time has also led governments to use non-tariff tools that try to protect domestic industry. In other words, although international organizations such as the WTO have reduced barriers to global trade, there is a widespread proliferation of non-tariff barriers to international trade today. (Aydın, Respectful, Respectful, & Yılmaz, 2010)

Again in this context, the fact that the establishment of the World Trade Organization led to the widespread use of non-tariff instruments can be considered as a presumption that the WTO is successful in breaking the effectiveness of tariffs, although it seems contradictory considering the main purpose of the organization. Today, the organization's anti-protection efforts are largely aimed at detecting and minimizing the use of non-tariff means. These policy instruments will be analyzed under the new protectionism heading.

2.3. The Relationship of Protectionism with International Law

The environment of conflict and competition in international trade in the mercantilist period resembles the "state of nature" expressed in Hobbes' famous work "Leviathan" published in 1651. In mercantilist thinking about international trade, competition is the only driving force. For this reason, it can be said that the international community did not form due to the absence of a contract, as in the state of nature mentioned by Hobbes, and points to a period when everyone was in competition with each other:

“...whatsoever therefore is consequent to a time of war, where every man is enemy to every man... In such condition there is no place for industry, because the fruit thereof is uncertain: and... no use of the commodities that may be imported by sea... no society; and which is worst of all, continual fear, and danger of violent death; and the life of man, solitary, poor, nasty, brutish, and short” (Hobbes, 1929: 78)

Again, Hobbes explains that the concepts of "justice" and "injustice" are not meaningful for the individual in the state of nature, and he also explains that it is natural for every individual who wants to protect himself to rely on his own power, and says that the difference between "law" and "right" is as clear as the difference between "obligation" and "freedom".

Bilateral and multilateral agreements have made it possible to remove international trade from the natural state. Promises made only on paper were not considered sufficient and international organizations responsible for auditing were established. However, it should be noted that the emergence of rules of international law is quite new. We should say that it is not surprising that in the mercantilist period, when it is not possible to talk about the rules of international law, the states' protective behavior for their own wealth and the measures they take against the states they compete with as a right. However, the criticism of this period has been the source of the idea that global trade should be based on law.

Today, the general opinion that international trade should be based on the rules of law is not a subject open to discussion. However, this situation should not be interpreted as the fact that international trade has been dependent on strict legal rules for many years. The devastation created on countries after the WWII has led to a general idea that possible tensions in the international environment should be prevented as much as possible and mutual relations should be developed. This paved the way for the initiation of international negotiations and thus the institutionalization of international relations. Undoubtedly, the institutionalization of economic relations is the first and most important development in this direction.

Accordingly, the GATT was signed by 23 countries in 1947. Its purpose is to ensure that international trade is subject to rules and to remove barriers. GATT is a general agreement created with the idea of eliminating the damage caused by the protectionist policies that increased after the 1929 crisis to global trade and preventing the reuse of these policies. As a result of the will of the US government, which emerged from the II. World War as a global power, for the institutions to be effective in international trade, GATT was established for the liberalization of trade (Baldwin, 2016, p. 97).

The 1990s can be expressed as the years when opinions on free trade were tried to be placed on a legal basis. During the period, governments made efforts to remove barriers to free trade. These efforts have enabled the establishment of institutions that try to guarantee the operability of international trade today. Accordingly, several major free trade agreements were negotiated in the first half of the 1990s. The most important of these is the so-called Uruguay Round agreement, which established the WTO in 1994 (Krugman, Obstfeld, & Melitz, 2018, p. 26).

The World Trade Organization (WTO) was established to resolve trade disputes and ensure compliance with standards and regulations regarding global trade. Considering that tensions in global trade, anti-integration movements and trade wars, which are the last stage of protectionism, are on the agenda, it is understood that the WTO has not fully achieved its goals (Mughwai, 2020, p. 97).

Although this criticism is justified, the source of the removal of barriers to international trade is the regulations made by the WTO. The fact that tariffs are tied in global trade means that countries commit not to raise the tariff they apply. The WTO system has increased the weight of the attached tariff rates in the total tariff rates in developed and developing country economies. On the other hand, practices such as import quotas are largely prevented by the WTO. These quotas can only be applied on condition that they are temporary (Krugman, Obstfeld, & Melitz, 2012, p. 188).

Although the WTO's purpose of removing the barriers to trade has not been realized, it is clear that it has fulfilled an important task by ensuring that trade operates on the basis of certain rules since its establishment. Since Foreign Trade Policy Tools will be explained in the second part of the study, relevant international agreements are not mentioned in this part.

2.4. The Traditional New: The New Protectionism

Customs tariffs and import quotas are foreign trade policy tools that have been used for a long time. Over time, many new foreign trade policy tools have emerged in addition to these tools. The increase in protectionist approaches, especially in the 1970s, brought about the differentiation in methods and protectionism is now called "new protectionism". These protectionist policies focused primarily on labor-intensive industrial products exported by underdeveloped countries. In addition, methods such as

voluntary export restrictions, technical standards and administrative regulations, and subsidies, which were not used much before, started to be used (Seyidoğlu, 2017, p. 212).

The foreign trade policy called "new protectionism" is gaining new forms every day, as it points to the differentiation from the foreign trade policy based on the use of customs duties, which is the traditional form of protectionism. Although many opinions have been put forward about the reasons for the emergence of the new protectionism, in general, protection of important sectors for the national economy, adaptation of structural change of trade by ensuring the development of industry based on high technologies and combating unfair competition. Therefore, we can say that there is a consensus on it (Ekinici, 1997, p. 38).

Today, protectionist policies mostly refer to the use of non-tariff instruments. Governments that wanted to regulate trade used to mainly use customs duties. Average tariff levels have fallen under the influence of multiple multilateral negotiations under the GATT. This has led governments to seek ways to restrict trade without violating agreements, and non-tariff barriers to trade have increased.

Non-tariff barriers are foreign trade policy instruments that reduce imports but do not similarly restrict import-substitution domestic production. These policy instruments have no limits except the borders of international law. Due to this feature, it is very difficult to follow and analyze its effect. Quotas are the most common non-tariff barriers. However, the administrative regulations that have come to the fore in recent years should be especially emphasized due to the difficulty of monitoring among non-tariff instruments. While these regulations seriously affect trade, they also eliminate the effectiveness of the international control mechanism. Despite being criticized by many countries, it maintains its place among foreign trade policy tools as a very useful method.

Countries sometimes use administrative processes to slow the passage of goods through customs. Dunn and Mutti (2004, p. 117) mentioned the administrative procedures applied by France regarding Japanese goods as an example of this practice. France's requirement for customs control at a location away from ports for part of the week was effective in keeping Japanese goods out of French markets. The Japanese restrictions on leather imports produced a similar result. Because it is stipulated that the necessary permits for leather import must be obtained one day a year.

Although non-tariff instruments appear under various names, it would be appropriate to mention some of them as widely used policy instruments. Non-tariff instruments also can be divided into financial and non-financial instruments. While non-financial ones appear as quantity restrictions, financial ones are listed as anti-dumping tax, compensatory tax, and protection measure tax (Parilti, 2015).

2.5. Controversial Relationship: Crisis and Protectionism

The relationship between crisis and protectionism can be established as strong as the cause and effect relationship. However, in this cause-effect relationship, it remains unclear which phenomenon is the cause and which phenomenon is the result. In other words, while protectionism sometimes triggers and deepens the effects of the crisis, sometimes the crisis causes an increase in protectionist policies. If we evaluate it from a different point of view, it can be said that the crisis requires protectionism. In this section, the relationship between crisis and protectionism will be discussed.

Soesastro (2008, p. 4) states that the sense of helplessness created by the crisis puts pressure on the economy to increase protectionist policies. In this context, governments need to have important resources and tools to prevent the crisis from deepening its effects and to show that the free market economy is sustainable.

On the other hand, applying protectionist policies should be interpreted as making a policy choice, not moving away from macroeconomic policies. In times of crisis, the aim is to maintain the external balance, which is one of the macroeconomic objectives. Especially in the crisis of 1929, some changes were detected in the basic form of protectionism. However, although the increase in non-tariff instruments is pointed out, resorting to tariff increases and quotas still constitute important trade policy tools. The changing form of protectionism, i.e. the increased use of non-tariff instruments, is partly due to multilateral trade rules, in particular the prohibition of binding caps on tariffs and certain quotas (Evenett & Vines, 2012, p. 198).

2.5.1. Great Depression

Although it is possible to start protectionist approaches from the mercantilist period, these approaches have changed in many ways until today. Such policies, which decreased in some periods, sometimes made their effects felt too much. The Great Depression of 1929 is seen as the most important of these fluctuations and is discussed in this context. In the 1929 crisis, the violence of protectionist policies was felt more than ever before. This is because the crisis has been experienced by almost the whole world.

It is not an unexpected process that the increase in protectionist approaches has made protectionism a policy choice. If the governments that want to take advantage of the protectionist measures to minimize the effects of the crisis do not have a goal of moving away from free trade, it should be remembered that they should temporarily implement the measures to be taken in the face of the crisis so that they do not leave permanent effects on the economy and also limit them with the negative effects of the crisis. If these issues are taken into account, the steps to be taken in this direction will relieve the governments in many respects. In this direction, in order not to ignore the cross-effects of policy measures between sectors, it is necessary to determine whether protecting one sector is risky for other sectors.

On the other hand, according to Kruger (2009), trying to overcome crisis periods by taking protective measures causes the effects of the crisis to increase and spread. For example, after the 1929 crisis, protectionist policies were put into practice by the United States of America, like many other countries. The enactment of the Smoot-Hawley tax law, in which import duties were increased by 20% in order to protect agriculture, is a measure taken in this direction. However, as a result of this measure, the reaction of Canada and the European Union, which are important trade partners of the USA, was to retaliate (Eichengreen & Irwin, 2010). As a result, while the crisis caused protectionist approaches, it was observed that these approaches increased the effects of the crisis. As mentioned before, this assessment is not based on the idea that the crisis is the cause and protectionism is the result. It is seen as a reflection of a mutual relationship.

This evaluation usually refers to the period after the II. World War. Because the world economy has experienced growth since 1945 and it is accepted that this growth is due to the increase in free trade. The economies of countries such as Korea, China and India have experienced great economic developments with the support of international trade and protectionist policies have decreased significantly compared to previous periods (Krueger, 2009). Although the effect of free trade on the said growth is clear, an assessment that protectionist policies have been abandoned is open to discussion.

2.5.2. Global Financial Crisis

The global financial crisis experienced in 2008 is the biggest crisis that had profound effects on the global economy after the great depression of 1929. Many banks in the world have become unable to stand alone and the weight of the state in the economy has increased significantly (Krugman, Obstfeld, & Melitz, 2018: 346). The 2008 crisis shows that the crises experienced in the developed countries quickly affected the developing countries and a mechanism emerged. The fact that the effects of the crisis on the economy were not supported by the increase in protectionist policies, as in the 1929 crisis, reduced the severity of the weakening in global trade (WTO, 2014, p. 186).

According to Kalaycı (2011, p. 96), who states that protectionism should not be interpreted as a paradigm shift in international trade and that today's protectionist policies are periodic, protectionism after the 2008 crisis is the result of a "herd psychology". The interventions of governments to reduce the effects of the crisis have led other governments to determine their policies in this direction.

Since governments actively implemented trade policies in the 2008 global financial crisis, these policies also need to be examined. As it is known, governments that can implement trade policies that temporarily limit imports to the extent permitted by the World Trade Organization (WTO) system have carried out policies for instance anti-dumping, safeguards and compensatory taxes in the 2008 crisis (Bown CP, 2011a). Ricardo's theory of trade, as mentioned earlier, is still critical in the analysis of today's global economy. However, the reason why this theory remains up-to-date should be sought in its development by researchers and economists. In addition, the crises faced by the global economy have led to the discussion of the theory and the reinterpretation of known concepts related to trade. The 2008 crisis also stands out with its transformative

effect on trade theory along with its impact on the economy (Krugman, Obstfeld, & Melitz, 2018, p. 22).

2.5.3. Global Health Crisis: Covid19

Although international trade is a platform where countries gain profit, each period carries risks specific to that period. The world economy of the 21st century is different from the previous one in many ways. In the 21st century, due to reasons such as the larger trade volume compared to previous periods and the rapid flow of information, an economic crisis has the potential to make its impact much more severe (Bown C. P., 2011a)

While tensions between the USA and China and problems regarding intellectual property continue to exist today, the Covid-19 epidemic, which emerged in 2019 and made its impact felt all over the world, has placed itself at the top of the risks on trade. With the Covid-19 epidemic, the uncertainty in international trade has gradually increased and accordingly, the visibility of protectionist approaches has begun to increase. Inequalities within the country caused by the epidemic, deterioration in employment conditions, on the other hand, the race in health services, where technology is decisive, directs governments to protective measures (IMF, 2021a: 15).

The effects of crises on global trade are generally long-term. The concept of crisis therefore refers to a period at a time. The epidemic that emerged in 2019 continues to affect today. However, even when this Covid-19 epidemic is completely under control, it still remains unclear what the traces it left on the economy will be. The effects of Covid-19, which is a global health crisis, on the economy are also very large. In order to combat the epidemic, governments have imposed restrictions on international travel as a first step. In addition, some sectors have come to the point of closing completely. The global economy faced the greatest recession since the 1929 crisis (OECD, 2020, p. 12).

The weakness of the first reaction of the international community in the face of the health crisis was remarkable. The European Union also failed to meet the expectations in this process. The spread rate of the epidemic also confirms this proposition (Welfens, 2020, p. 597).

The Covid-19 outbreak has caused a global recession with its effects varying from country to country. Global trade volume and economic growth expectations also decreased. Governments, on the other hand, are researching how to compensate for the economic losses caused by this crisis and developing policies. Historical examples indicate that such recessions cause long-term damage to productivity. On the other hand, the crisis created by the Covid-19 epidemic has not created financial instability so far. The reason for this is shown to have affected the services sector. However, the fact that the process is not over yet raises concerns (IMF, 2021a, p. 43).

Although the corona epidemic continues its effect, as a result of getting used to living with the epidemic, the pressure on the economy has eased. Global industrial production has continued to strengthen since the last quarter of 2020. Simultaneously, global trade in goods has returned to pre-pandemic levels, aided by strong demand for IT tools and medical supplies. Investments have also increased sharply, despite continued uncertainty and high corporate debt. However, the momentum in economic growth decelerated, which was caused by the slowdown in service sector activities (OECD, 2021, p. 6). While the Covid 19 crisis caused governments to increase their effectiveness in all areas of economic life, it also became a determining factor in foreign trade policy. In particular, the race on vaccines has moved protectionism to a different platform. From the travel restrictions of the countries to the regulations in the vaccine supply process, competition has increased in many areas and the exit from the crisis with less damage has been replaced by a profitable exit.

During the global health crisis, the focus of protectionist policies has been health services, food products and medical supplies. The report published by the World Trade Organization shows that the lowest average tariff among vaccine producing countries is applied by Switzerland with 1.5%, followed by the USA with 2% and Japan with 2.1%. The average tariffs of the EU member states differ due to the type and value of the vaccine inputs they import, and the lowest tariff rate belongs to Belgium (WTO, 2021, p. 2).

On the other hand, the increase in the need for hygiene products in the Covid 19 epidemic caused the removal of protective measures for some products and even incentives for the import of these products. During the epidemic in Türkiye, the protectionist policy instruments for some products were relaxed and the tariffs for some products were completely reset.

2.5.3.1. News by the Turkish press: Covid-19 crisis and Protectionism

It is observed that the Covid-19 epidemic, as a global health crisis, has shaken the functioning of global trade to its foundations and revealed new trends. This situation is clearly seen when the national press is examined. The importance of the covid-19 outbreak should be emphasized again in terms of showing the relationship between protectionism and crises.

Release Date	News Headline	Content	Source of News
11.05.2020	Covid-19 blow to global trade	While global trade is expected to fall between 13 and 32 percent this year with the effect of the covid-19 epidemic, experts state that protectionist policies in trade may increase after the epidemic.	Anadolu Agency https://www.aa.com.tr/tr/ekonomi/kuresel-ticarete-kovid-19-darbesi-/1836391
17.05.2020	'Globalization' is going, 'islandization' comes to the fore	According to Kearney's report, after Covid-19, global brands will be replaced by local services and products, and e-commerce will accelerate.	Cumhuriyet Newspaper https://www.cumhuriyet.com.tr/haber/ku-resellesme-gidiyor-adalasma-one-cikiyor-1739287
12.02.2021	Covid-19 hits stability in food prices	Another area where the covid-19 epidemic threatens human life is the food sector. The interruption of production in the agricultural	Anadolu Agency https://www.aa.com.tr/tr/analiz/kovid-19-gida-fiyatlarinin-

Release Date	News Headline	Content	Source of News
		sector, as in all sectors, causes product prices to become unstable.	istikrarina-darbe-vuruyor/2142432
11.03.2021	The world economy is trying to heal its wounds in the first year of the epidemic	In the year since the World Health Organization declared Kovid-19 a "pandemic" on March 11, 2020, global economic activity and trade have come to a standstill, while millions of people have lost their jobs.	Anadolu Agency https://www.aa.com.tr/tr/kategori-sayfasi-manset/dunya-ekonomisi-salginin-birinci-yilinda-yaralarini-sarmaya-calisiyor/2172443
09.05.2021	It is discussed to open intellectual property rights to the common use of humanity in covid-19 vaccines.	In order to end the covid-19 epidemic that threatens the world, international organizations such as the World Health Organization and the World Trade Organization take an extraordinary decision and open the vaccine licenses to the common use of humanity.	Anadolu Agency https://www.aa.com.tr/tr/koronavirus/kovid-19-asilarinda-fikri-mulkiyet-haklarinin-insanligin-ortak-kullanimina-acilmasi-tartisiliyor/2234448
29.10.2021	Vice President Oktay: We care about the effects of digital transformation	In fact, it is possible to say that many global companies follow the strategy of 'network enrichment in supply', with the effect of trade wars and protectionist approaches that emerged before the epidemic.	TRT News https://www.trthaber.com/haber/gundem/cumhurbaskani-yardimcisi-oktay-dijital-donusumun-etkilerini-onemsiyoruz-615427.html

2.5.4. The War in Ukraine

In addition to the devastating consequences of Russia's military intervention in Ukraine on human ity, its effects on the global economy have reached very serious dimensions. The fact that these countries are the world's commodity producers such as oil, gas, metals and wheat, and the war caused logistical problems, put upward pressure on global commodity prices. In addition to the price increases experienced after the pandemic, many countries turned to tight monetary policy as the effect of such disruptions in supply chains increased inflationary pressure. With this policy, it is aimed to minimize the effects of the war on domestic industry (IMF, 2022, p. 1).

This war has also caused changes in the forecasts of international organizations regarding the global economy. The table below shows this situation comparatively

Table 1: Global Trade Volume and Economic Growth (%)

<i>Forecasts of International Organizations</i>	Estimate (Change, %)				Forecast (Change, %)	
	2020		2021		2022	
	Trade Vol.	GDP	Trade Vol.	GDP	Trade Vol.	GDP
WTO* <i>Press Release: March 2021</i>	-5,3	-3,8	8,0	5,1	4,0	3,8
WTO <i>Press Release: April 2022</i>	-5,0	-3,4	9,8	5,7	3,0	2,8
World Bank <i>Global Economic Prospects: January 2021</i>	-9,5	-4,3	5,0	4,0	5,1	3,8
World Bank <i>Global Economic Prospects: June 2022</i>	-8,0	-3,3	10,3	5,7	4,0	2,9
IMF <i>World Economic Outlook: April 2021</i>	-8,5	-3,3	8,4	6,0	6,5	4,4
IMF <i>World Economic Outlook: April 2022</i>	-7,9	-3,1	10,1	6,1	5,0	3,6

**In the estimates and forecasts made by the World Trade Organization, global trade includes only trade in goods.*

The United States and the European Union (EU) have already announced plans to ban and phase-out fossil fuel imports from Russia, and Russia has cut off direct natural gas exports to Bulgaria, Finland, the Netherlands and Poland. Such policies are likely to lead to an increase in energy prices and put pressure on the global economy. High energy prices will lead to higher production costs and will have negative effects on the economies of energy importing countries. On the other hand, it will provide a partial balance in the drag on global growth by creating more favorable trade conditions in energy exporting emerging markets and developing economies (World Bank, 2022, pp. 81-82). The effects of the conflict between Ukraine and Russia on Türkiye's foreign trade policy will be explained under a separate heading in the last section.

2.5.4.1. News by the Turkish Press: War in Ukraine and Protectionism

When the reflections of the war between Ukraine and Russia on Turkish foreign trade are analyzed on the basis of news; It is emphasized that its negative effects on the Turkish economy come to the fore, but at the same time it points to a potential.

Release Date	News Headline	Content	Source of News
04.07.2022	Behind the scenes of the food crisis!	The international community is looking for ways to safely transport millions of tons of grain waiting in ports to the global market.	CNN Türk https://www.cnnturk.com/dunya/gida-krizinin-perde-arkasi-uzmanlar-yanitladi-kapidaki-tehlike-ne-boyutta
16.09.2022	Europe turned the route from China to Türkiye... "An ideal place for trade"	With the emergence of the coronavirus in China, the trade power of the Far East country began to gradually decrease. War broke out between Russia and Ukraine as European countries sought new routes. The search for a new trade center in Europe began to	Akşam Newspaper https://www.aksam.com.tr/trend/avrupa-rotayi-cinden-turkiyeye-cevirdi-ticaret-icin-ideal-bir-yer/haber-1303690

Release Date	News Headline	Content	Source of News
		increase day by day. German logisticians determined the new route as Türkiye. In the analysis published in the German press, Türkiye was defined as an ideal place for production and trade with its young and well-educated population.	
27.01.2023	Energy pressure in steel exports!	The steel industry, which lost its competitiveness in 2022 due to the struggle with protectionist measures and the pressure of increasing energy costs, closed 2022 with a negative export in terms of both quantity and value.	Dünya Newspaper https://www.dunya.com/sektorler/celik-ihracatinda-enerji-baskisi-cib-2023-hedefini-acikladi-haberi-684038
02.02.2023	Worrying data in steel: Production decreased by 20 percent, decreased to 2.7 million tons	The contraction in the markets caused by the Russia-Ukraine war, as well as the extraordinarily high increases in energy prices, made the industry unable to compete with its state-supported competitors in India, China, Japan, Russia and the Middle East countries, which do not experience the same conditions in the international market.	Dünya Newspaper https://www.dunya.com/sektorler/madencilik/celikte-endiselenendiren-veri-uretim-yuzde-20-azaldi-27-milyon-tona-indi-haberi-684651

2.6. Anti-Integration Policies

The idea of international integration is the dominant view in international trade, and the agreements made in this direction, as mentioned before, have placed the mutual relationship in trade on a legal basis. However, in recent years, it has been observed that policies that distort economic unity have emerged. Britain's departure from the European Union, called Brexit, and the US President Trump's threat to leave the WTO are prominent examples of protectionist policy measures that have gained significant influence recently. Similarly, the renegotiation of NAFTA is also considered in this context (Janeba & Schulz, 2020, p. 1).

In addition to all these, with the "Export Control Law" enacted on December 1, 2020, China has legally grounded any country's retaliation in case of threatening China's national security and interests in mutual trade. In addition, the "Anti-Sanction Law" adopted on June 10, 2021, in this direction, provided the Chinese government with a legal justification for retaliating against the protectionist policies applied to Chinese goods. Although it is commented that these regulations have been planned for many years and are not due to the effect of the tensions in the two trades, especially with the USA, the general opinion is that these regulations aim to protect China's position in global trade.

The decision taken in the UK to leave the European Union as a result of the referendum in 2016 is seen as a breaking point in global trade. The idea that leaving the European Union membership would be beneficial for England prevailed in the referendum, and the idea of the EU, which is a supranational economic and political integration, received a serious injury. Similarly, the debates and the views that global trade does not operate fairly have also received great support in the United States. This situation has caused concern in terms of the sustainability of free trade (Krugman, Obstfeld, & Melitz, 2018, p. 26).

Janeba and Schulz (2020, p. 46) examined the effects of economic fragmentation on trade policies and tried to show that leaving a single country from the economic union has effects not only for that union but also on a global scale. According to this study, while the break from the economic union increases the trade costs of the countries directly affected by this situation, it also affects the existing trade agreements. The same is true for non-tariff trade policies.

As a result, it has been emphasized in the study that the departure of a country from the economic union significantly affects not only the parties but also the global economy.

2.6.1. Break with Union: Brexit

“Brexit” entered the economic literature as a concept expressing the UK's departure from the union. This concept was used for the first time by Peter Wilding (2012) in his article in which he stated that if there is difficulty in creating Europe's largest single market, Britain's departure from the union may come to the fore. Following the decision to leave as a result of the referendum held in 2016, England, which became a member of the union in 1973, officially left the union on 31 January 2020. It is not surprising that the decision to leave the European Union which was built on the coal and steel partnership under the leadership of France and Germany, as a result of many waves of expansion and deepening, caused intense discussions.

The 2008 crisis had many reflections on global economy. The effects of the crisis were felt in the following years as well. Countries have developed and continue to develop policies against problems and structural changes created by the crisis. There are evaluations that the UK's response to this process is the demand to leave the EU. While this decision to leave is not seen as positive for EU member countries, considering that it will reduce their share in an export market like England, it is seen as an important opportunity for many countries outside the EU (Kaptan, 2021, p. 32).

The position of the UK in the European Union has been different since its membership. The UK did not support the establishment of the European Economic Community based on the Customs Union system. The reason behind this approach is the UK's close relationship with the USA and the British Commonwealth of Nations. England has taken a position in favor of a more comprehensive organization (Seyidoğlu, 2017, p. 288). However, England did not want this system, which includes countries outside of Europe, to impose rules that would limit the sovereign rights of countries to a certain extent. For this reason, it has kept its distance from the European Community, which is an international and even supranational organization based on the Customs Union model.

Even after Britain became a member, it was not satisfied with the economic performance of the EU. The most important reason for this is the EU's lagging behind in global competition. At a time when countries like China and India are increasingly becoming new center of global economy, it is not realistic for the UK to change this situation under strict rules, which thinks that the EU remains weak in competition with these countries, and that focusing on the economic problems of some member countries is putting the organization's place in the global economy at risk. As it is known, in many issues such as foreign trade policy, the decisions of EU institutions are primary. Countries can only bring secondary regulations in accordance with these regulatory rules. All these reasons formed the basis of the idea that the UK, which did not even want to change its currency while becoming a member, left the organization (Seyidoğlu, 2017, p. 288).

2.6.2. The Final Stage of Protectionism: Trade Wars

When governments implement protectionist policies, they usually want to show this as an exception. The most important reason for this is that such policies, which are contrary to liberal economy, are concerned about creating an unsafe situation for the other parties of the trade. Taking measures outside the borders drawn by international law is usually more than enough to create a perception in this direction. Another reason governments claim to have taken such measures as a result of necessity is the desire to prevent retaliation by third-party governments. The main reason for the countries with these concerns is that their national security is under threat.

In the process leading to trade wars, which can be seen as the most extreme form of protectionism, the claim that mutual trade has started to pose a threat is frequently emphasized. The current examples of this are the disagreements between the Trump administration and the Chinese government and the mutual policy measures. Before talking about trade wars, which are the most advanced stage of protectionism, it is necessary to question that these policy changes, which countries show as an exception, are not actually an exception. It should be noted that the same economic reasons are the driving force for governments to resort to such policy measures widely. It is also noteworthy that although the traditional forms of protectionism are left behind, the reasons are still the similar.

It should not be thought that the concept of trade wars is generally accepted by economists. With such a naming, it is explained that it is an exceptional situation where protectionist policies have increased to a great extent and the conflict of interest between the parties has become more evident than before. The trade war causes the output components of the nation to move towards the self-supporting position. Therefore, although the trade war may mean a gain for large states and a loss for small states in the short run, all parties are expected to lose in the long run (Kalsie and Arora, 2019)

Using the basic assumptions of game theory, the gains and losses as a result of the protectionism and free trade preferences of the two countries were analyzed by Krugman, Obstfeld, and Melitz (2012, p. 236). Japan and the USA were determined as the sides of the game. The table below shows the parties of the game and the results of the choices to be made:

Table 2: In the Context of Game Theory, Foreign Trade Policy Preferences of the USA and Japan

<i>Foreign Trade Policy</i>	USA Free Trade		USA Protectionism	
Japan Free Trade	10	10	-10	20
Japan Protectionism	20	-10	-5	-5

In the table above, it is seen that the application of a protectionist policy against free trade yields more profits than a free trade policy. Therefore, countries will want to choose the policy that is most profitable for them. However, in the face of protectionism, no free trade policy will want to continue its implementation. Therefore, mutual trade will turn into a trade war in which both sides will suffer. If countries were deciding together, they might be in a better position than they were by choosing free trade. The way to achieve this lies in the negotiation processes related to trade (Krugman, Obstfeld, & Melitz, 2012, p. 236).

In this section, the trade disputes between the USA and China, which have caused significant changes in Türkiye's trade policy, will be discussed, especially regarding steel and aluminum products. The reasons why these tensions between the two countries are called trade wars will be tried to be revealed. Although the discussions about the trade war between these two countries do not gain intensity, it is also possible to say that the

US is a trade war with the world. The Trump administration's war with the world has included many wars with allied and non-allied countries. Imports are presented as a threat to national security by the government to impose new tariffs and set quotas. (Bown & Kolb, 2021:1)

The competition between the USA and China on technologies such as artificial intelligence, robotics, and 5G has all the characteristics of a Thucydides Trap, according to Roubini (2019). This concept expresses that the party that is worried about the strength of its rival will turn to war, and it has been created on the basis of a saying in Thucydides' "Peloponnesian Wars": *“it was the rise of Athens and the fear that this instilled in Sparta that made war inevitable.”* (Allison, 2015).

The 21st century has been a time when the rise of China has been unquestionably accepted. However, this situation was met with reaction by the leading economies of the world. The traditional powers of the economy, such as the USA, the European Union, and Germany, have sought unorthodox answers in their foreign trade policy in the face of this rapid rise. It should be especially noted that the USA and China are separated from other countries as two great powers in both economic and military fields (Yılmaz, 2019). For this reason, the rivalry between them raises concerns beyond a metaphorical analogy.

In his article to Allison (2017), stating that war is inevitable when one great power endangers the current position of the other, he emphasized that there have been sixteen similar situations so far and twelve resulted in war. Despite this pessimistic interpretation, it is possible to say that the war between the USA and China is different from its historical examples. As a matter of fact, the war did not take place in the expected sense. The process we define as trade wars is mostly based on damaging the trade of the other party in order to gain an advantage in the negotiation process. Indeed, in the process leading up to the trade war, the issue that caused national security concern by the USA is the significant increase in the share of USA and China in global trade.

In the USA, which is portrayed as the most important defender of free trade, the government faced significant retaliation for raising import tariffs in 2018. It is interesting that the people who suffer the most from the repercussions of the protectionist policies implemented by the USA, where political concerns such as gaining the support of the

electorate are effective, are the republican voters, who are expected to benefit from these policies (Fajgelbaum, Goldberg, Kennedy, & Khandelwal, 2020: 5)

2.6.2.1. Trade Wars of US and Retaliation

In this section, the protectionist policies implemented by the US government will be tabulated and evaluated. Although there is a new regulation regarding the trade of many products, this section will focus on the protective measures brought to steel and aluminum, which are the areas that Türkiye is directly affected by. In addition, since trade tensions in technology products will be discussed under the title of digital protectionism, discussions on intellectual property rights will not be included here.

Table 3: US Policy and Retaliations in the Context of Trade Wars¹

COUNTRY	SUBJECT	POLICY	DATE
USA	Steel and Aluminum	Tariffs of 25% on steel and 10% on aluminum have been announced for all trading partners on the grounds of “national security”.	01.03.2018
EU	Cranberries, Harley Davidson motorcycles, blue jeans and more	EU announced that would apply a 25% tariff to 3.4 Billion Dollars of US products if the tariffs announced by the USA were implemented.	07.03.2018
USA	Steel and Aluminum	The announced tariffs have been approved. Mexico and Canada are exempted until the conclusion of NAFTA renegotiation. It has been stated that countries seeking	08.03.2018

¹ Bown, C. P., & Kolb, M. (2021, May 15). Trump’s Trade War Timeline: An Up-to-Date Guide. Trade & Investment Policy Watch Blog, 1-22. Peterson Institute for International Economics.

COUNTRY	SUBJECT	POLICY	DATE
		exemption can also request a meeting.	
USA	Steel and Aluminum	Expiring on 1 May 2018, the EU, South Korea, Brazil, Argentina and Australia are also included in the exemption.	22.03.2018
USA	Steel and Aluminum	Tariffs envisaged to be applied at a rate of 25% on steel imports worth 10.2 billion dollars and at a rate of 10% on aluminum imports of 7.7 billion dollars came into effect.	23.03.2018
USA – South Korea	Steel and Aluminum	South Korea has agreed to reduce its steel exports to the US in exchange for a permanent exemption. It accepted the implementation of a steel quota of 2.68 million tons.	28.03.2018
CHINA – USA	Aluminum waste, fruit, pork, nuts and other products	Based on steel and aluminum exports of 2.8 billion dollars in 2017, it applied tariffs to 2.4 billion dollars of product imports.	02.04.2018
USA	Steel and Aluminum	Exemptions (USA, Canada, Mexico) except Brazil and Argentina, which obtained permanent exemptions in exchange for quota, have been lifted. Australia is the only non-tariff trading partner.	01.06.2018

COUNTRY	SUBJECT	POLICY	DATE
EU – USA	Steel and Aluminum, Food Products, Other Products	It has decided to impose a 25% tariff against US products worth 3.2 billion dollars.	22. 06.2018
CANADA –USA	Steel and Aluminum, Food Products, Other Products	Canada has decided to impose tariffs on US products for a total of 12.8 billion dollars in 2017.	01.07.2018
USA – CANADA, CHINA, EU, MEXICO, TÜRKİYE	Steel and Aluminum	The United States sued the aforementioned countries before the World Trade Organization. All five countries collectively retaliated by imposing tariffs on US\$24 billion worth of exports in 2017.	16.07.2018
USA – TÜRKİYE	Steel and Aluminum	It has increased the tariffs from 25% to 50% on steel products imports to Türkiye. In addition, tariffs on aluminum products were increased to 20%. The depreciation of the Turkish Lira has been shown as the reason for this.	10.08.2018
USA – CANADA, MEXICO	Steel and Aluminum	The USA has abolished the tariffs it has applied under Section 232. Mexico and Canada also abolished tariffs in retaliation.	17.05.2019
USA	Steel and Aluminum	The Trump administration has introduced new tariffs on \$450 million worth of products to	24.01.2020

COUNTRY	SUBJECT	POLICY	DATE
		protect industries damaged by the tariffs. These tariffs primarily affected China, Japan, Taiwan and the EU.	
ABD – UAE	Steel and Aluminum	While leaving office, Trump announced that he removed the tariffs applied to the United Arab Emirates. However, after the Biden government took office, it announced that the 10% tariffs would continue.	01.02.2021
USA, EU - CHINA	Steel and Aluminum	The United States and the EU have agreed to act together against China and discuss ways to remove trade-distorting barriers.	17.05.2021

Source: Bown & Kolb, 2021

While trade wars have caused countries that want to avoid tariffs to reorient their trade, on the other hand, they have led to changes in the international supply chain. The tax burden caused by such tensions remained on importers and consumers (Amiti, Redding, & Weinstein, 2019, p. 22)

Populist policies, such as Trump's discussion of WTO membership based on "national security" concerns, protectionist trade policies and Brexit, which is expressed as the separation of the UK from the European Union, which is the most advanced economic and regional integration, have led to instability in the global economy. It seems inevitable that many countries and many global and regional organizations, including ASEAN, will be affected by the uncertainty created by these policies (Welfens, 2020).

2.7. Digital Protectionism

Competition in trade follows a course parallel to the fundamental changes in the economy. In trade policies, where traditional methods are still important, new methods are gradually increasing their impact. In addition, the product and service composition of foreign trade is changing, and the products and services to which the trade policy will be applied differ. The race is now experienced on the digital platforms of the “new economy”. With the change in consumer preferences, the increasing demand for technology products creates a new platform. As a period in which information is traded as never before, the way to make a profit in today's race is to follow innovations and to provide products and services to the market earlier and better than competitors.

Today, governments support the transition to the digital economy. It is observed that developing countries, like developed countries, follow the transformations in the global economy and governments adopt encouraging policies in order to ensure technological development. It is possible to reproduce digital products in an unlimited way, which will eliminate competition. For this reason, the importance of Intellectual Property Rights increases in the 21st century, which is called the "digital age" (World Trade Organization, 2020). Intellectual Property Rights aims to enable production and competition by establishing ownership of products and digital platforms. However, paradoxically, it forms the basis of protectionist approaches.

As mentioned in the previous section, an important dimension of the trade wars between the USA and China is competition in the field of technology. Especially this dimension of trade wars reminds us of the race between the USA and Russia during the Cold War.

While the Trump government aims to close the trade deficit, it also took into account the sectoral nature of the situation that poses a threat to the US economy. The US government is concerned that China is turning technology competition in its favour. For this reason, the USA has requested that the subsidies applied by China to the target sectors be stopped during the trade wars (Yılmaz, 2019: 11).

At the center of the trade disputes between the USA and China is China's rapid development in technology. Although international regulations on intellectual property rights are not very new, they are far from forming a legal framework for today's

commercial relations. The Trump administration has leveraged tariffs to protect intellectual property rights. This is how Trump tried to retaliate for Chinese companies' infringement of US intellectual property rights. However, cooperation in this field, where technological development is at the center, offers opportunities to the parties of trade (Mandelman & Waddle, 2019, p. 33)

Digital protectionism emerges as a separate field of study in the midst of all these developments and discussions. Because, although the form of protectionism harmonized with technology is seen as a sectoral reflection of protectionist policies, it points to a break from the traditional protectionism understanding in many respects.

Yüksel and Yalçıntaş (2020, p. 10) mention that the discussions on “Digital Protectionism” evoke the cold war at the international level and that the discussions of digital protectionism show that the cold war continues with a different form. Again, in the same study, we see that digital protectionism is defined as the reaction of nation states to data capitalism. In this study, it is stated that the citizens who produce the data are positioned as "consumers" in the digital protectionism race and that the citizens will have to choose whether the private property of the data belongs to the state or the private sector.

Aaronson (2017) discusses digital protectionism on five main axes. The first of these is that the information, which is the object of digital commerce, is intangible and this form of commerce requires different regulations than the trade of goods or services. Second, it is very difficult to establish international rules to limit digital protectionism. Thirdly, the efforts of countries such as the USA, EU and China to present other countries as protectionists on digital trade are concentrated around an understanding that is far from realism. Fourth, China uses illegal tools such as cyber-attacks for digital protection, and the WTO has not yet resolved this issue. Finally, it is stated that digital protectionism has a self-destructive structure. The rise of digital protectionism may weaken digital commerce by limiting the flow of information and reducing the effectiveness of the internet.

Another point that should be emphasized is that the imposition of institutional arrangements by developed countries on other countries to set standards on intellectual property should be read as a kind of “kicking the ladder” strategy of developing economies without restrictions on intellectual property (Chang, 2002, p.11).

CHAPTER III: EXAMPLES OF PROTECTIONIST APPROCHES

In this section, the foreign trade policies of selected countries, which have an important place in Türkiye's exports, will be briefly mentioned. Thus, it will be possible to make comparisons while evaluating our foreign trade policy.

3.1. European Union

As of 2020, EU has a share of 12.54% in world goods exports and 10.98% in goods imports. Considering the customs union and free trade agreements, it is considered that the EU is far from being protectionist while implementing its foreign trade policy. However, this proposition becomes open to discussion when a distinction is made between tariff and non-tariff instruments in foreign trade policy instruments.

Piekutowska and Marcinkiewicz (2020) argue that none of the EU member states can be said to follow a fully protectionist or completely liberal foreign trade policy. It is observed that protectionism continues, although to varying degrees among EU countries. Since the EU follows a common commercial policy, member states do not have a wide jurisdiction to take trade measures. For this reason, in the article in question, the defense tools applied at the national level are also emphasized. In the study, the degrees of protectionism of the member countries were listed and it was observed that there was no significant difference between the countries. However, exceptionally, it has been emphasized that while Germany differs from other countries with the weight of protectionist approaches in its foreign trade policy, the most liberal policies among the member states are implemented by the Netherlands.

In the study by Vandenbussche and Viegelaan (2011), in which the protectionist policies of the European Union were examined after the 2008 crisis, the tariffs were first examined, but since no application indicating a significant policy change was encountered, the focus was on anti-dumping protection from non-tariff instruments. It is concluded that the change in the EU's anti-dumping measures is limited. It has been determined that the number of countries where these measures are implemented has remained almost the same, while the measures have spread to all sectors. It was especially emphasized that this situation was not a result of the crisis, but rather the reflections of the policy that has been implemented since 2004. What stands out in the study is the

conclusion that anti-dumping attempts at the World Trade Organization are mostly made against China. In summary, in the aforementioned study, it was concluded that after the 2008 crisis, there was a moderate increase in the protectionist approaches in which there was no break in the EU's foreign trade policy.

3.2. USA

Since the founding of the United States, mercantilism and economic liberalism have coexisted. The USA does not owe its position in international trade to its implementation of free trade policies in every field. On the contrary, after the USA gained its independence, it has become a country where protectionist approaches in its foreign trade have become increasingly influential (Shanlin, 2019). In 1789, the USA is a newly created country with a developing economy. The Tariff Act, the first major law signed by George Washington, regulates the imposition of a 5% tax on imports. In 1828, the tariff applied to manufactured goods was determined at the rate of 50% and reached the highest level. This was followed by the Fordney-McCumber Act of 1922 and the Smoot-Hawley Act of 1930 (Popa, 2019).

After the 1930 crisis, the ideas and practices towards free competition were interrupted to a great extent. The Keynesian idea that governments should intervene in the economy also had an impact on foreign trade policies. This idea remained the dominant view in the USA until the 1970s, but from this date on, views on free competition began to gain weight.

As can be seen, when the economy deteriorates, as in the founding period of the USA, US politicians turn to protectionist tools, and when the process is left behind, they become advocates of free competition. Especially in the process from the end of the civil war to the first world war, protectionist policies accompanied the developments in the industry of the country. When the Bretton Woods system collapsed, the traditional form of protectionism was replaced by the use of non-tariff means, thus US mercantilism gained a new form (Shanlin, 2019).

Since the 1970s, the idea of free competition in the economy began to make itself felt. The Washington Consensus of 1989 is a statement of will to reduce government intervention in the economy. This understanding of free trade continued to exist in the USA as the dominant thought until it was shaken by the 2008 crisis (Popa, 2019).

3.3. China

In China, second largest economy in the world, foreign trade developments followed a different process. With China's membership in the WTO, global trade has gained a different dimension. Many countries had difficulties in the face of an importer/producer country like China and had to turn to protectionist policies. Examining China's use of non-tariff instruments is important for understanding its foreign trade policy. As it is known, protectionism in foreign trade is largely monitored through non-tariff instruments.

After the 2008 crisis, China used anti-dumping practices much more than surveillance and other non-tariff tools. China's increase in dumping investigations after the crisis pointed to a divergence from the policy implemented since 2003. In 2008-9, for the first time, China initiated investigations into many new products, including transportation equipment and animal products. What should be especially emphasized in the post-crisis period is that China's non-tariff tool use targeted developed countries rather than developing countries (Bown C. P., 2011, p. 260).

3.4. Russia

It would be correct to say that Russia's policy towards convergence with Europe and integration into the global economy is to protect its own position and sovereignty. Since Russia's foreign trade policy is determined on a sectoral basis, the coexistence and conflict of protectionist and liberal approaches continues. According to Miles, when the Global Trade data is analyzed, 20% of the protectionist policy measures worldwide were implemented alone in 2013.²

According to the report published in 2021, while the number of discriminatory interventions implemented by Russia was 73 in 2009, it is observed that this number was recorded as 996 in 2021. While the number of interventions for liberalization was 24 in 2009, this number increased to 375 in 2021 (Evenett & Fritz, 2021, p. 124).

² www.reuters.com/article/us-trade-protectionism, Access Date: 10.12.2021

3.5. Germany

Baudry (2019) in his study examining Germany's foreign trade policy emphasizes that Germany is a mercantilist country that implements protectionist policies. However, he states that instead of expressing Germany as a mercantilist country in the classical sense, it would be more appropriate to call it a neo-mercantilist or modern mercantilist country. As the justification for this approach, he points to the transformation of protectionist foreign trade policies after 1970. In his study, Baudry analyzed Germany's foreign trade policy by dividing it into two periods, West Germany as a semi-protectionist country between 1949-1973 and United Germany as a global mercantilist power between 2000-2015. According to him, Germany After World War II, it exhibits the appearance of an early mercantilist country. In this period, it was emphasized that West Germany was in great need of financial support (Marshall aid) from the USA. Faced with a different economic outlook as of 2000, the Berlin government was accused of being protectionist by other countries.

Today, Germany's attitude towards protectionist approaches causes the reaction of many countries, especially the USA, and many countries, including the European Union countries. Considering the analysis made by Piekutowska and Marcinkiewicz (2020), results supporting the assessment that Germany exhibits a mercantilist country appearance peculiar to the modern period in its foreign trade policy have been observed.

CHAPTER IV: STUDIES ON PROTECTIONISM

Due to its interdisciplinary nature, protectionist approaches have been the subject of many different sciences such as history, law, political science and international relations. In this study, it will be tried to benefit from the different perspectives provided by these disciplines. However, in terms of economics, protectionism has been seen as a much more central subject of study than other disciplines, and the studies are numerous and the analyzes are much more detailed. For this reason, the perspective of economics will be decisive when analyzing protectionist approaches in this study.

4.1. Studies on Protectionism in International Trade

The results obtained in the study of 41 country data by Lee and Swagel (1997), one of the empirical studies on protectionist policies, revealed that the degree of protectionism is high in terms of weak industries. It has been observed that protectionist approaches do not attract attention in sectors where exports are high. This study is important in terms of confirming the evaluation of the political economy on protectionism with econometric methods.

The idea that liberal economy or full protectionism is dominant in international trade does not go beyond an assumption. Since liberal views dominate the economy, it is generally possible to say that a state of complete freedom is the ideal situation. However, as we have stated, there has never been complete freedom. Countries have always found a reason to intervene in foreign trade, especially imports.

Worthington (2019) emphasized in his doctoral thesis that the idea that there is a complete liberalization in international trade as a result of the reduction of customs tariffs in international trade is not correct. In this study, which analyzes 3000 products using 2012 data on US trade, the limits of protectionism and its association with liberalism are questioned. It was also noted that despite the decrease in tariffs, non-tariff instruments became more visible and remained in existence.

Measuring protectionism will be of great benefit in analyzing the effects of this policy on the economy and producing a counter-policy. Thus, the scientific quality of the discussions will increase. In this direction, suggestions and new methods are being developed by many researchers.

Again in this direction, the short-term effects of tariff increases in the trade wars in 2018, which point to a serious policy change by the USA, were analyzed in the study by Fajgelbaum, Goldberg, Kennedy, & Khandelwal (2020, p. 7). The current official monthly import data obtained from the International Trade Commission (USITC) were used in the study. In addition, the retaliation tariffs against this policy have been obtained from official data of China, Canada and Mexico and from the World Trade Organization's data covering the EU, Russia and Türkiye. Elasticities regarding trade outcomes were used when measuring imports and retaliations against them. It has been revealed that tariff increases made by the USA face serious retaliation.

Measuring protectionism through tariffs is a method that is frequently used but also has some problems. The first problem with using average tariffs is that there are several different ways to calculate an average tariff rate. The simple average or the average calculated based on the trade weights will show different results. Another reason is that countries also benefit from non-tariff policy tools. These instruments can be quotas, import licenses, voluntary export restrictions, export duties, export subsidies. In addition, there is the problem of not taking into account the administrative regulations that will have important consequences on imports and exports (Suranovic, 2012). However, current research focuses on measuring the degree of protectionism by taking into account non-tariff policy instruments other than tariffs. A new method has been proposed by Marcinkiewicz and Piekutowska (2020), which is explained over European countries but claims to be universal. In this study, new method that can measure the protectionism degrees of countries and has universal validity is proposed. In this method, unlike other approaches, non-tariff instruments are also included in the scope of protectionist policies. Although this method was first applied to European Union countries, it was stated that it could be applied to all countries.

Another important study, Kee C. Neagu and A. Nicita (2013), examines the effects of the 2008 crisis on global trade. Some critically important results have been reached by the researchers for our study. According to the results obtained in the study, even in a few countries where protectionist approaches have increased, such as Türkiye, Russia, China, Argentina, tariff increases were not common except for some imported goods. It is a useful article in that it shows that the protectionist approaches did not tend to increase after the 2008 crisis and that Türkiye's foreign trade policy is compared with other

countries. The article in question also points out that protectionism has increased in Türkiye after the 2008 crisis, similar to our study. In this study, the Overall Trade Restrictiveness Indices (OTRI), which is an index that calculates the tariffs applied by a country on different goods as a single tariff applied on total imports, is used. The tariffs applied to the most favored countries (MFN) in 2008 and 2009 were used in the study. However, since this method tends to show a high degree of protectionism, the data obtained were combined with the World Bank's anti-dumping data. Thus, the results obtained reflected the changes in both tariffs and anti-dumping duties during the crisis period.

The Trade Restrictiveness Index (TRI) method, the theoretical foundation of which was laid by Anderson and Neary (1994, 1996), was used by Beaulieu and Cherniwchan (2014) to measure the degree of protectionism in Canada's trade policy. Based on customs data on a per product basis, the article demonstrates that the trade policy of Canada in the years of 1870 - 1910 was more protectionist than previous assessments, but at less cost than previously thought. The reason for this is that tariffs are applied to non-competitive goods with low elasticity.

In another study, Kolev (2019) analyzed the answers given to the questions directed to EU citizens and investigated the factors that support the protectionism and the inconsistency of the answers to the questions asked. Although the selection of the independent variables determined for the analysis and the evaluations made are open to discussion, it is thought that the results should be emphasized. Two of the variables used in the study are related to political issues. These are equality and immigration. It is assumed that people with a positive view of immigration are not against relations with the outside world and do not support protectionism. If equality is emphasized by the subjects, it is assumed that this indicates a positive approach to protectionist approaches. According to the author, free trade and globalization are assumed to cause inequality. Independent variables such as gender, education and age were also included in the study. For example, older people are expected to take an anti-protectionist approach as they experience the benefits of free trade.

However, the results of the analysis revealed that the answers given were inconsistent. Contradictory results have been obtained, as anti-immigration people have a positive attitude towards free trade. Similarly, the pro-free trade responses of those who prefer a right-wing policy and are expected to display protectionist approaches attracted attention. Kolev stated in his study that these inconsistencies were caused by the lack of knowledge on political issues.

Finally, the results obtained in the study prepared by Müller and Terem (2021), which examines the changes in EU foreign trade policies in the first eight months of the Covid-19 epidemic, which deeply affects the global economy and continues to be influential, are also noteworthy. In the study, it was stated that as of the first eight months of the epidemic, the EU foreign trade policy did not lead to an increase in protectionist policies, on the contrary, there was a development towards liberalization, but it is likely that there will be a pressure towards protectionism in the future.

4.2. Studies on Protectionist Approaches in Türkiye's Foreign Trade Policy

Protectionist approaches in Türkiye's foreign trade policy and their reflections have also been studied by many researchers and academics. According to Bown (2014), Türkiye's foreign trade policy draws attention with its complex and rich nature. In his analysis of Türkiye's import tariffs and the use of non-tariff instruments, he placed the 2008 crisis at the center of the study. The reason for this is that it is one of the countries most affected by the crisis, and as a result, the protective measures it has taken regarding imports have intensified. In the aforementioned study, it has been revealed that Türkiye is one of the developing countries that differed greatly from the developed economies in the post-2008 period, considering the weight of the temporary trade barriers applied by Türkiye in the areas permitted by the Customs Union and WTO rules in its total imports.

In the doctoral thesis prepared by Ekinçi (1997), protectionist policies were examined through world examples, Türkiye's trade policy was explained in detail and evaluations were made about Türkiye. In the study, he deepened his analysis through the perspective that economists and researchers generally accepted that the "new protectionism" period, which was left to non-tariff instruments instead of the decreasing importance of tariffs after 1970, started. However, this study was prepared before 2001, when China entered the World Trade Organization.

In addition, data on technical barriers could not be analyzed in the study. The reason for this is that it was not possible to detect technical obstacles at the time of the study. These measures are difficult to measure even today. However, it is tried to be followed by the WTO using the notification system.

Besides the master's thesis prepared by Tekbas (2014) touches on many issues that are still up to date, non-tariff instruments are explained in detail in the study, and then the regulations in Türkiye are mentioned. It was stated that there was no significant increase in protectionist measures in Türkiye's foreign trade after the 2008 crisis. A certain criterion was not used in country selection.

In the master thesis prepared by Intepe (2015), the course of protectionist policies in the world after the 2008 crisis was examined and it was tried to explain how Türkiye determined its trade policy against the crisis. Ceylan (2015), on the other hand, stated in his study that protectionist approaches increased similarly to the 1929 crisis after the 2008 crisis, but that the tools used differed, and that protectionist policies were most effective in the agricultural sector. In this study, the trade between the European Union and Türkiye has been tried to be analyzed within the scope of the policy in which non-tariff instruments called "new protectionism" are at the forefront.

Karas (2018) analyzed fiscal protectionist policies in his doctoral thesis. The 17 countries that were determined to use financial instruments the most between 1995 and 2016 were included in the scope of the analysis. As a result of the analysis, it has been determined that the macroeconomic indicators that the countries do not implement protectionist policies in order to prevent unfair competition are effective on these policies. In the study, non-tariff non-financial non-tariff tools are not included in the scope of the study.

Acul (2020) argued that protectionism increased after the 2008 crisis and that protectionist policies were implemented by the USA to reduce the effects of the 2008 crisis. In the study prepared by Tanrıverdi (2021), "protectionism" was examined from the perspective of international relations in the world and in Türkiye. In the study, it was stated that protectionism turned into trade wars in the 2008 crisis. In our study, the trade war in 2018 is seen as a direct result of the rise of China.

Most of these studies, after explaining protectionism, examined Türkiye's foreign trade historically. Unlike these, an important part of the theses that focus on the practice of protectionism, that is, the use of foreign trade policy tools, tried to explain the effects of these in detail by detailing the measures related to foreign trade. In the studies, the theoretical foundations of protectionism have been given wide coverage and Türkiye's foreign trade has been explained since the Republican years. In the context of "new protectionism", non-tariff barriers have been defined throughout the relevant studies and the effects of the measures taken on foreign trade have been examined by considering the legislation in Türkiye.

CHAPTER V: METHODOLOGY, RESULTS AND DISCUSSION

In the study, mainly qualitative methods were used. First of all, literature review was made and articles in international and national journals, reports of international organizations and prominent books in the field of foreign trade were used. Then, the historical and theoretical origins of protectionism were researched and then protectionism was explained and examined as a foreign trade policy.

In addition, after examining the academic texts on protectionism, it has been tried to give information about the application forms of protectionism by mentioning the examples of countries. Before discussing the place of protectionist policies in Türkiye's foreign trade, the outlook of foreign trade was also given on the basis of official data.

On the other hand, Türkiye's foreign trade policy has been evaluated together with current developments such as trade wars, covid-19 global health crisis and the war between Ukraine and Russia.

In the analysis part, the course of foreign trade policy and the use of foreign trade defense tools were examined. This thesis focuses especially on antidumping measures. The most important reason for this is that the decisions taken and their results can be easily observed and analyzed.

Firstly, anti dumping measures implemented recently by Türkiye will be determined. At the second stage, those measure will be further elaborated in line with the research questions:

1. Does Türkiye use protectionist measures effectively?
2. Is Türkiye moving away from free trade while using protectionist foreign trade policies?
3. Do anti dumping measures disrupt the foreign trade balance?

While making the analysis, official statistics in the databases of national and international organizations were used and the data obtained were explained with the help of tables and graphics.

5.1. Historical developments of Turkish foreign trade

Since the second half of the 20th century, the effects of international economic and commercial integrations on the international trade policy have been constantly increasing, while the two main integrations that have shaped Türkiye's foreign trade policies in the 1990s and 2000s have been WTO membership and entry into the Customs Union.

The policies implemented after the membership to the Customs Union with the EU draw an important framework in terms of shaping Türkiye's foreign trade policies. Another important economic integration that shapes Türkiye's foreign trade policies is its membership in the World Trade Organization. After its signing, GATT drew a general framework for world trade until 1994 and contributed to the liberalization of trade by connecting foreign trade to internationally accepted rules. GATT, which is an agreement aiming to liberalize international trade, was transformed into the WTO in 1995 by having an institutional structure.

Türkiye, which is among the developing countries, has realized tariff reductions in industrial products within a certain calendar in line with the requirements of WTO membership, and has made regulations in order to ensure that the agriculture and textile sectors operate in accordance with the existing rules gradually. It has also been included in the international trade system created by the WTO on issues such as trade-related investment measures, intellectual property rights, and trade in services.

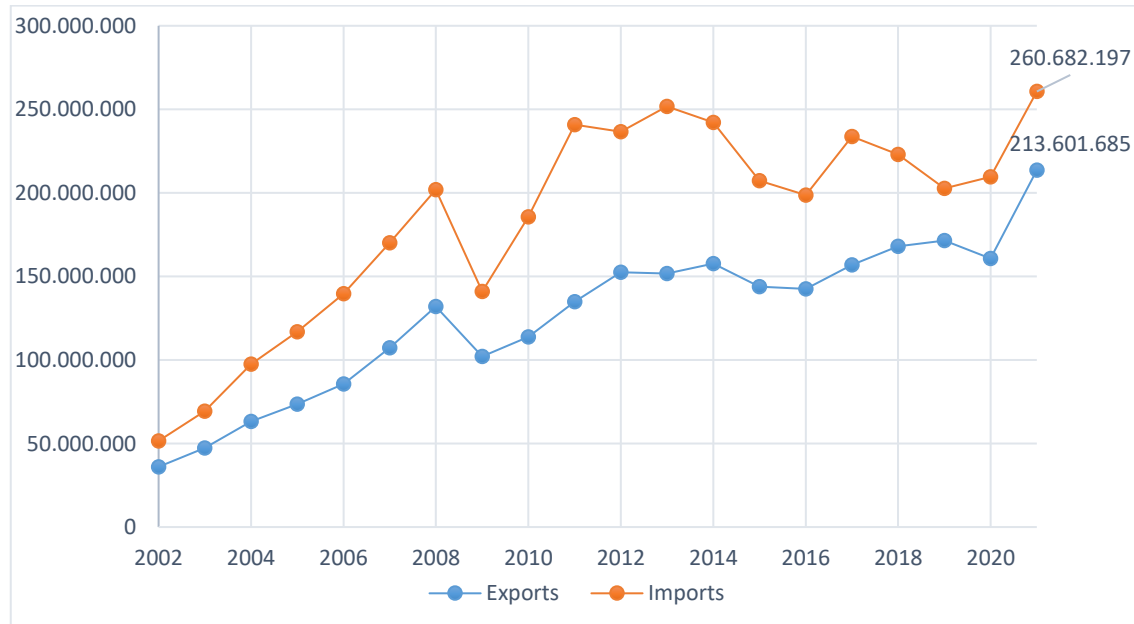
5.2. Composition and current outlook of Türkiye's foreign trade

The Turkish economy quickly recovered from the 2001 crisis as a result of a clear medium-term roadmap, IMF programmes and domestic reforms. Firstly, macroeconomic stability was ensured by tight fiscal and monetary policies. Structural reforms in the restructuring and privatization of enterprises, business environment, trade liberalization, and labor market have been implemented together with the comprehensive reform, especially in the banking sector. As a result, foreign and domestic investments, and labor productivity have increased and the sectoral transformation of the economy has accelerated (Macovei, 2009, p. 9).

The Turkish economy, which entered a rapid recovery period after the economic crisis in 2001, has also gained significant momentum in foreign trade. From 2002 to 2008, when the effects of the global financial crisis began, both exports and imports increased steadily. In the said period, total exports increased from 36 billion dollars to 132 billion dollars. In the same period, total imports increased more than exports and rose from 51 billion dollars to 201 billion dollars in 2008. While productivity growth and macroeconomic stability as a result of increased investments were behind the increase in exports in the 2002-2008 period, the increase in imports was mostly due to the dependence of exports on imports and strong domestic demand triggered by economic growth.

While there was an economic contraction in our country due to the global financial crisis, which reached its peak in the world in 2009, imports and exports decreased significantly. The global crisis affected the Turkish economy through foreign trade and financing channels and the economy contracted by 4.7% annually. In the given year, the ratio of exports to imports reached its highest level of 72.5 percent, as imports fell more than exports due to the contraction in domestic private consumption.

Chart 1: 2002 – 2021 Türkiye Foreign Trade Data



Source: TURKSTAT

After the global crisis, an increase in the rate of economic growth was observed in our country, and this situation brought along rapid increases in imports. On the other hand, due to the contraction in our export markets, which were affected by the global crisis, the ongoing political instability especially in the Middle East and North Africa region, and our inability to export high-tech products, our exports performed below the increase in imports.

The Turkish economy, which achieved a high growth performance of 6.8% on average in the 2010 - 2017 period, experienced a high current account deficit problem due to the deterioration in the foreign trade balance. In 2019, while imports decreased slightly due to the slowdown in the growth in the exchange rate, our exports reached a record level. The deterioration in the trade balance in 2020 left its place to recovery in 2021, and the foreign trade volume reached a record level, while the foreign trade deficit decreased by approximately 2 billion dollars compared to the previous year.

5.2.1. Exports

Increasing exports, which is an important source of economic growth, is one of the biggest economic goals of developed and developing countries. From the Second World War to the 2001 economic crisis, Türkiye's performance to catch up with developed economies was weak and unstable. There were important reasons for this, including low productivity growth and relative stagnation in the 1970s, primarily import substitution policies, subsidization of agriculture, and increased government intervention in the economy resulting in a suboptimal allocation of resources. In the 1980s, despite the reform and liberalization steps, in a period when the institutional structure was weak, the bad effects of the integration of the Turkish economy with the global economy began to be seen. The volatile growth characteristic, which reached its peak in the 2001 crisis, caused the exchange rate to be fixed to the US dollar, a sharp depreciation in the Turkish lira, and a real contraction of GDP by 5.7% in 2001. However, the strong stimulus created by the crisis for reforms allowed five years of economic recovery in the 2002-07 period (Macovei, 2009).

Türkiye is very familiar with financial crises and recessions, and the recent 2008-09 crisis was the fifth in the last 30 years. After the foreign debt crisis in 1979, Türkiye started a "stability and liberalization program" in January 1980. Since the 2008 global crisis, foreign trade has been an important channel affecting the Turkish economy. (Uygur, 2010).

Exports, which increased by an average of 24.3% between 2002 and 2008, increased by 5.6% annually in the 2009-2019 period as a result of the decreasing foreign demand after the 2008 global crisis. While our share in Türkiye's global goods exports was 0.55% in 2002, it increased to 0.86% as of 2019. While the number of countries to which we exported over 1 billion dollars in 2002 was 8, it increased to 38 countries in 2019. In export unit prices; in 2019, there was a strong increase of 48.9% compared to 2002. The export quantity index, on the other hand, increased by 218.6% in the 2002-19 period.

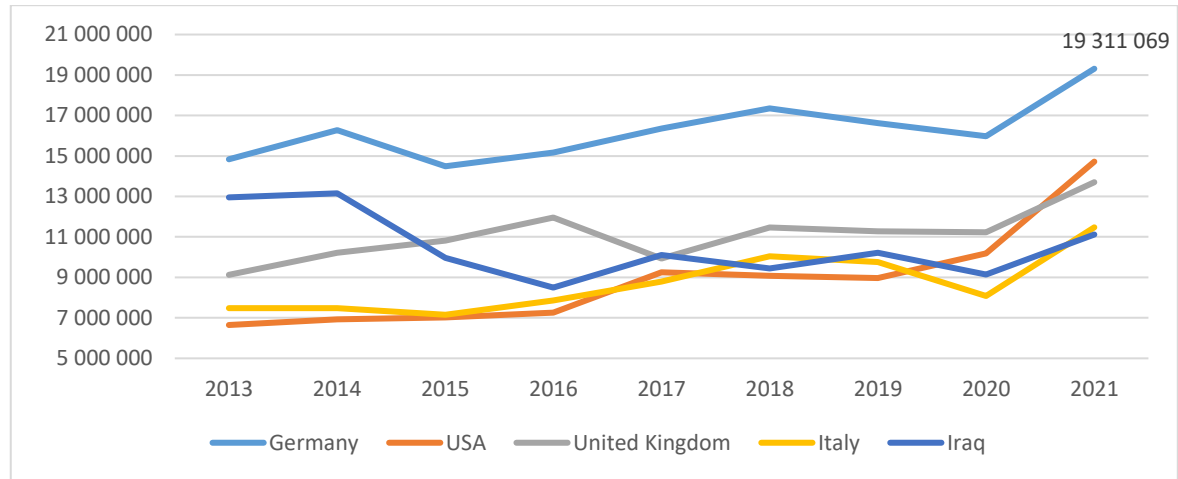
The ratio of exports to imports, according to the general trade system, reached 86.0%, the highest level in 2019 after 2001. It is considered that the increase in the coverage ratio in this period resulted from the increase in the exchange rate and the decrease in consumption and investment demand.

5.2.1.1.Export by Markets

Among Türkiye's traditional trade markets, Russia, the USA and parts of the Middle East, European Union has the highest share due to market size. Trade between Türkiye and EU has improved especially after Türkiye's accession to the Customs Union in 1995. Total trade volume reached 81 billion Euros (104 billion USD) in 2009. However, the Customs Union agreement was signed without signing the Free Trade Agreement. Therefore, Türkiye is still experiencing some losses due to the absence of a Free Trade Agreement or not being a full member of the EU (Babacan M, 2011). Despite the fact that the EU maintains its position as the most important country group in Türkiye's total exports, its share in total exports is gradually decreasing.

As developed countries' economies were more affected by the global financial crisis in 2008, the share of the Middle East, Africa, and Other Asian regions in Türkiye's exports increased. As of 2020, Germany ranks first among the 5 countries that have the largest share in Türkiye's exports, while countries such as England, Italy, USA, and Iraq stand out together with Germany.

Chart 2: Selected Countries in Türkiye's Foreign Trade



Source: TURKSTAT, GTS

Although exports to Germany, England, Italy, and the USA have shown a decreasing trend since 2002, these countries maintain their place among the top five exporting countries in terms of quantity and value. As of 2021, the share of the total exports of these countries in Türkiye's exports was recorded as 31.2%.

While exports to Germany accounted for 16.3% of total exports in 2002, this rate dropped to 9.4% in 2020. However, this rate was recorded as 8.6% in 2021. While exports to the USA corresponded to 9.3% of total exports in 2002, this rate decreased to 4.2% in 2014 and then recovered to 5.0% in 2019. After this year an upward trend has been observed. In 2021, the weight of exports to the USA in total exports increased significantly and reached 6.5%. The increase in the value of exports to these countries compared to 2002 and the decrease in their share in total exports is the result of the deepening of Türkiye's foreign trade and the widening of its scope. With the recovery in the Turkish economy, the increase in the quality and quantity of production and the supportive effect of globalization, the increase in export goods and the emergence of new markets have become inevitable.

Table 4: Share of Selected Countries in Türkiye's Total Exports (%)

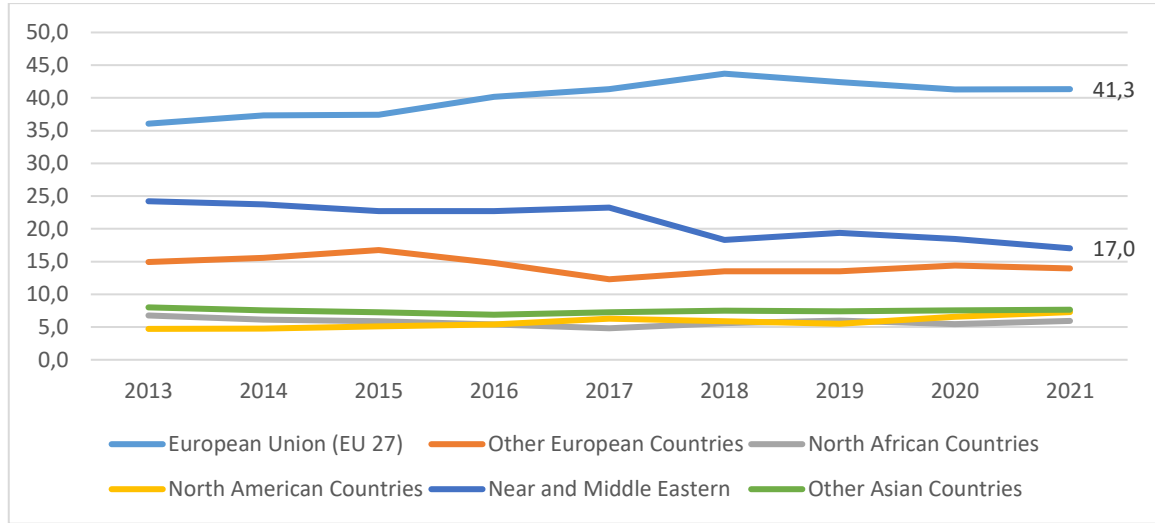
Share of Selected Countries in Türkiye's Total Exports (%)					
Years	Germany	Italy	Iraq	USA	UK
2002	16.3	6.6	-	9.3	8.4
2003	15.8	6.8	1.8	7.9	7.8
2004	13.8	7.4	2.9	7.7	8.8
2005	12.9	7.6	3.7	6.7	8.1
2006	11.3	7.9	3.0	5.9	8.0
2007	11.2	7.0	2.7	3.9	8.0
2008	9.8	5.9	3.0	3.3	6.2
2009	9.6	5.8	5.0	3.2	5.8
2010	10.1	5.7	5.3	3.3	6.4
2011	10.3	5.8	6.2	3.4	6.0
2012	8.6	4.2	7.1	3.7	5.7
2013	9.0	4.4	7.9	3.7	5.8
2014	9.6	4.5	6.9	4.0	6.3
2015	9.3	4.8	5.9	4.4	7.3
2016	9.8	5.3	5.4	4.6	8.2
2017	9.6	5.4	5.8	5.5	6.1
2018	9.6	5.7	5.0	4.9	6.6
2019	9.0	5.4	5.2	4.7	6.3
2020*	9.4	4.8	5.4	6.0	6.6
2021*	8.6	5.1	4.9	6.5	6.1

Source: TURKSTAT, STS

*General Trade System

According to the data in the table, the share of exports to Italy in Türkiye's total exports continued its downward trend in 2020 as well but this trend finished in 2021. When Türkiye's exports by country groups are analyzed; it is seen that the European Union countries (including the United Kingdom) have had a significant share for many years. Although the said export share has decreased from 60% to 50% over the years, it is clear that Europe is still Türkiye's most important export market when European countries outside the EU are taken into account. On the other hand, the share of exports to Near and Middle East countries and North Africa in total exports increased.

Chart 3: Regional Distribution of Türkiye's Exports 2013 - 2021



Source: TURKSTAT, GTS

After the 2008 crisis, it is observed that the share of Türkiye's exports to Europe in its total exports could not reach the pre-crisis level, 48.59% in 2007. However, the reason why the share did not increase despite the constantly increasing exports is that Türkiye's exports are distributed to more regions and the total export volume is higher than the increase in exports to the region. The global financial crisis, which affected the economies of developed countries after 2008, has been effective in Türkiye's exports from developed countries to Asian and African markets.

5.2.1.2.Export by Sectors

Table 5: Türkiye's Exports According to ISIC Revision 3 ve Revision 4 Classification

Years (Thousand US Dollar)	Manufacturing	Mining and quarrying	Agriculture and forestry	Wholesale and retail trade ³
2001	28.826.014	348.652	1.976.410	127.495
2002	33.701.646	387.193	1.754.287	147.246
2003	44.378.429	469.089	2.120.690	182.738

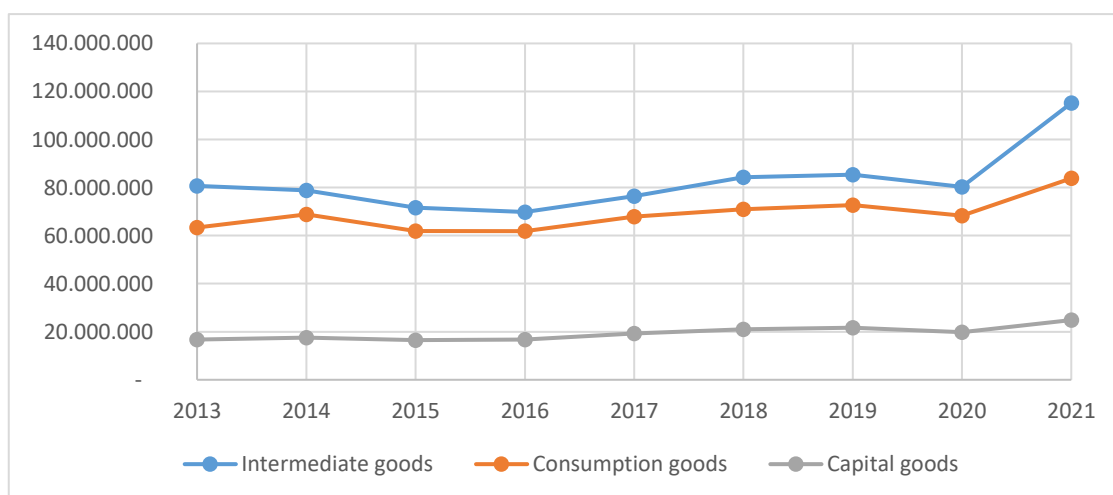
³ Until 2019, Revision 3 classification was used based on the Special Trade System. For the years 2020 and 2021, Revision 4 classification was used based on the General Trade System. Wholesale and Retail Trade title is not included in the Rev. 4 classification. Waste and Scrap, which has an important place in title of "Wholesale and Retail Trade" in Rev 3., is classified as "Water supply; sewerage waste management and remediation activities" in Rev. 4.

Years (Thousand US Dollar)	Manufacturing	Mining and quarrying	Agriculture and forestry	Wholesale and retail trade ³
2004	59.579.116	649.237	2.541.777	230.758
2005	68.813.408	810.241	3.328.814	279.812
2006	80.246.109	1.146.326	3.480.539	405.435
2007	101.081.873	1.660.895	3.725.213	473.923
2008	125.187.659	2.155.150	3.936.711	430.465
2009	95.449.246	1.682.915	4.347.483	330.550
2010	105.466.686	2.687.124	4.934.710	451.656
2011	125.962.537	2.805.449	5.166.596	631.901
2012	143.193.911	3.160.765	5.188.858	534.800
2013	141.358.199	3.879.449	5.653.323	605.984
2014	147.059.418	3.406.108	6.029.749	672.861
2015	134.389.890	2.798.896	5.756.596	445.282
2016	133.595.801	2.676.815	5.397.249	423.719
2017	147.138.203	3.509.311	5.287.137	510.030
2018	157.705.154	3.399.632	5.556.333	648.072
2019	161.552.342	3.194.715	5.515.507	563.485
2020*	159 952 829	2 932 245	5 956 937	572 008
2021*	212 812 331	4 059 721	7 156 041	780 841

Source: TURKSTAT, *GTS: Rev. 4, STS: Rev. 3

As of 2021, 51,14% of Türkiye's total exports are intermediate goods exports. This is followed by the export of consumer goods with a share of 37.23%. Despite the increase in investment goods exports in 2021, it remains low.

Chart 4: Türkiye's Exports According to BEC Classification Between 2013 – 2021



Source: TurkStat, GTS

5.2.2. Imports

Türkiye's imports increased continuously from 2002 to the 2008 global financial crisis. In 2008, our imports amounted to 201 billion dollars. Our imports, which decreased by 30% in 2009, increased again in the following years and an average of 5.2% growth was recorded in the 2010-2018 period. Imports, which decreased by 5.7% in the 2019 global health crisis, increased by 4.4% in 2020 and reached the level of 219.5 billion dollars. Thus, the average growth rate in the 2010 – 2020 period was 4.1%.

In addition, the import quantity index increased by 163.2% from its 2002 level of 50.1 to 131.8 in 2020. It should be noted that the sharp decreases in the quantity index were experienced after the 2001 crisis and the 2008 global financial crisis. Again, the upward trend in the index, which reached its peak in 2017, was interrupted, and the decline continued with the Covid-19 crisis. However, the recovery in the economy in 2020 stopped the decline in imports in terms of quantity.

5.2.2.1. Import by Markets

When the first 20 countries with the highest share of our total imports are examined, it is observed that the imports from these countries correspond to approximately 66,30% of our total imports. The share of the top 10 countries in our total imports is 47,94%. As can be seen, some countries stand out in our imports. It is inevitable that the effect of foreign trade policy measures to be applied to these countries will be more effective than in other countries.

Table 6: Türkiye's Imports by Countries as of 2021

Rank	Countries	2021 (Thousand US Dollars)	Share in 2021 Total Imports (%)	Share in 2020 Total Imports (%)
1	Germany	19 311 069	8,57	9,42
2	USA	14 721 090	6,54	6,00
3	United Kingdom	13 703 915	6,08	6,62
4	Italy	11 473 590	5,09	4,76
5	Iraq	11 125 660	4,94	5,39
6	Spain	9 619 975	4,27	3,94
7	France	9 111 152	4,05	4,24
8	Holland	6 764 928	3,00	3,06
9	Israel	6 355 783	2,82	2,77
10	Russian Federation	5 774 423	2,56	2,66
11	UAE	5 493 377	2,44	1,67

Rank	Countries	2021 (Thousand US Dollars)	Share in 2021 Total Imports (%)	Share in 2020 Total Imports (%)
12	Romania	5 175 163	2,30	2,30
13	Belgium	4 899 300	2,18	2,14
14	Poland	4 673 817	2,08	2,05
15	Egypt	4 513 693	2,00	1,85
16	Bulgaria	3 953 750	1,76	1,55
17	Chinese	3 662 752	1,63	1,69
18	Greece	3 118 808	1,38	1,06
19	Morocco	2 976 891	1,32	1,21
20	Ukraine	2 900 511	1,29	1,23

Source: TURKSTAT, GTS

The point that should also be emphasized here is the share of these import amounts within their own exports of the countries that have weight in our imports. This situation is critical for the effectiveness of the import measures to be implemented.

5.2.2.2. Import by Sectors

Table 7: Türkiye's Imports According to ISIC Rev. 3 and Rev. 4 Classification⁴

Years (Thousand US Dollar)	Manufacturing	Mining and quarrying	Agriculture and forestry	Wholesale and retail trade
2001	32.686.102	6.576.826	1.409.313	542.737
2002	41.383.030	7.192.305	1.702.642	1.138.651
2003	55.689.766	9.020.508	2.535.427	2.039.936
2004	80.447.302	10.980.937	2.757.392	3.319.794
2005	94.208.255	16.321.199	2.801.365	3.379.441
2006	110.378.826	22.033.762	2.902.369	4.194.758
2007	133.938.136	25.314.075	4.640.577	6.086.804
2008	150.252.335	35.649.704	6.391.914	9.578.987
2009	111.030.525	20.624.650	4.593.839	4.608.026
2010	145.366.975	25.932.549	6.456.707	7.703.896
2011	183.930.287	37.331.370	8.895.184	10.496.278
2012	176.235.027	42.246.825	7.446.641	10.258.094
2013	196.822.807	38.205.124	7.718.045	8.468.456
2014	187.742.215	37.126.090	8.588.523	8.153.867
2015	166.821.237	27.608.840	7.176.330	5.175.931
2016	167.243.395	19.008.899	7.041.368	5.010.752
2017	190.748.102	26.078.566	8.986.755	7.727.939

⁴ Until 2019, Revision 3 classification was used based on the Special Trade System. For the years 2020 and 2021, Revision 4 classification was used based on the General Trade System. Wholesale and Retail Trade title is not included in the Rev. 4 classification. Waste and Scrap, which has an important place in title of "Wholesale and Retail Trade" in Rev 3., is classified as "Water supply; sewerage waste management and remediation activities" in Rev. 4.

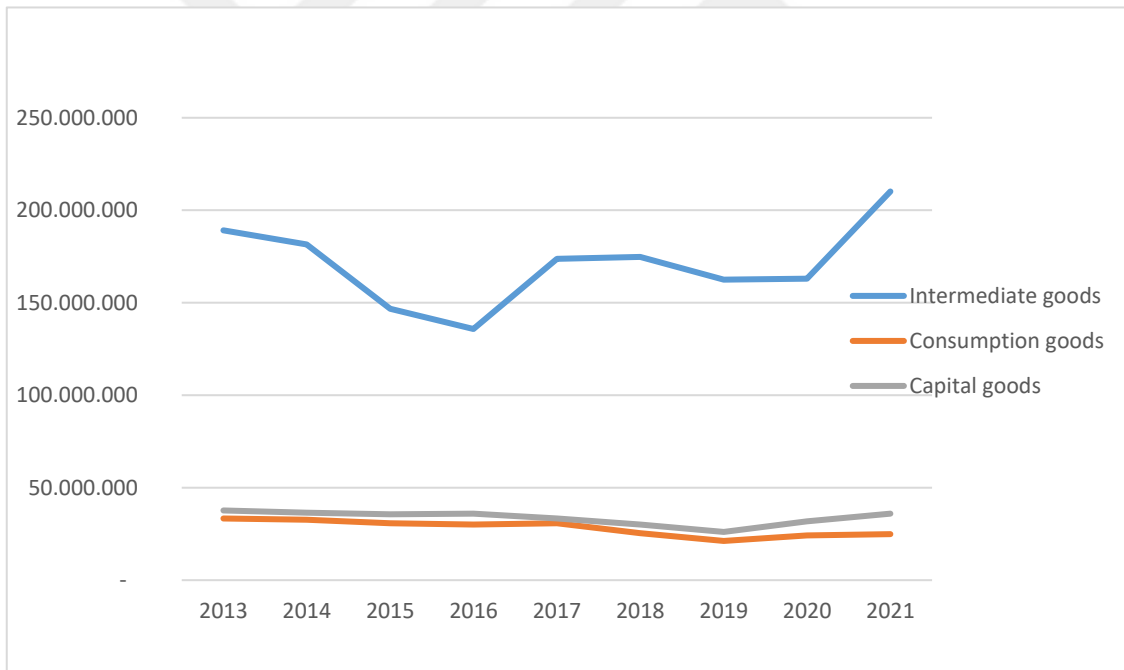
<i>Years (Thousand US Dollar)</i>	Manufacturing	Mining and quarrying	Agriculture and forestry	Wholesale and retail trade
2018	175.979.178	28.967.959	9.284.091	8.601.152
2019	154.254.057	31.747.903	9.466.458	7.091.338
2020	179.808.651	22.334.135	9.834.246	*7.324.165
2021	205.983.937	40.086.451	12.082.080	*13 019 757

Source: TURKSTAT, 2001-2019 STS, 2020-2021 GTS

* Water supply; sewerage waste management and remediation

Imports of intermediate goods have an important place in Türkiye's imports. Imports of investment goods and imports of consumption goods are close to each other. In 2021, imports of intermediate goods corresponded to 77.42% of total imports, while the share of consumption goods in the total was 9.9% and the share of investment goods imports was 13.24%.

Chart 5: Imports by BEC Classification



Source: TurkStat, GTS

The first 20 chapters in Türkiye's imports correspond to 83.97% of the total imports. The most imported section was “Mineral fuels, minerals oils and product of their distillation”. In 2021, its share in total imports was 18.68%. In the first five months of 2022, this rate increased to 27.27%, indicating that the share of energy imports in total imports has increased significantly.

Table 8: Türkiye's Import by Chapters

CODE	CHAPTERS	2021
27	Mineral fuels, minerals oils and product of their distillation	50 691 986
84	Boilers, machineries and mechanical appliances, parts thereof	30 966 633
72	Iron and steel	27 618 075
85	Electrical machinery and equipment, parts thereof	19 964 151
39	Plastic and articles thereof	17 590 482
87	Vehicles other than railway or tramway rolling-stock, parts thereof	15 595 857
29	Organic chemicals	9 341 411
71	Precious stones, precious metals, pearls and articles	7 073 922
30	Pharmaceutical products	6 874 839
76	Aluminium and articles thereof	6 592 847
74	Copper and articles thereof	5 265 610
90	Optical, photographic, cinematographic, measuring checking, precision	4 882 592
10	Cereals	4 248 703
52	Cotton,cotton yarn and cotton textiles	3 714 928
40	Rubber and articles thereof	3 578 936
38	Miscellaneous chemical products	2 902 672
73	Articles of iron and steel	2 845 430
88	Aircraft and parts thereof	2 832 409
48	Paper and paperboard,articles of paper pulp of paper or of paperboard	2 741 501
12	Oil seeds and oleaginous fruit,industrial plants,straw and fodder	2 593 949

Source: Turkstat

5.3. Analysis of protectionism on Türkiye's foreign trade policy

In this section, Türkiye's current foreign trade policy will be analyzed in the context of protectionism, and in this context, policy measures that were put into practice in 2018 and after and that are still in effect will be focused on. However, before starting the analysis, Türkiye's general foreign trade policy will be briefly mentioned, and then an evaluation will be made on Türkiye's use of defense tools in the context of the 2008 global financial crisis, trade wars and Covid-19 global health crisis.

Due to the Customs Union agreement between the EU and Türkiye, it is not possible for the parties to apply tariffs on imports of non-agricultural products. In addition, Türkiye applies a common tariff policy with the EU in imports from third party countries as per the agreement. In addition, customs duty is not collected by Türkiye in imports from countries with which a Free Trade Agreement (FTA) is signed.

According to the most recent data announced by the World Trade Organization (WTO), the simple average of the tariff applied by Türkiye within the scope of the Most Favored Nations (MFN) rule was recorded as 10.0% in 2019, and Türkiye's average tariff rate and the data of 131 member countries whose data were disclosed were recorded. It ranks 51st in the country. In 2018, this rate was 10.7. While this rate is 5.1% for the European Union, it is 6.7% for Russia, 7.6% for China and 3.3% for the USA. The bound tariff rate under the WTO was recorded as 50.5%. Again, while the tariff rate (MFN) applied to agricultural products imports was 42.3% in 2019, this rate was 4.5% for non-agricultural products.

5.3.1. 2008 Crisis and Türkiye's Foreign Trade Policy

Macroeconomic instability has long affected the Turkish economy. Identifying sources of instability and implementing macroeconomic policies in the pre-crisis period are considered easier in many respects compared to the post-crisis period. For this reason, Türkiye's macroeconomic deteriorations were largely corrected after the 2001 crisis and the effects of the crisis were eliminated as a result of the institutionalization of supervisory regulatory mechanisms. However, the 2008 crisis created financial vulnerabilities on an economy open to global markets. Although regulatory measures have been taken in the domestic market, it has been understood that a different policy should be followed in the face of developments in foreign markets (Rodrik, 2009).

In the period between 2008 and 2011, Türkiye's foreign trade policy is worth examining in many ways. The external shock brought by the global crisis and its effects over the years indicate the importance of examining this period. The decrease in the import demand of the EU, which is Türkiye's largest export market after the crisis, affected Turkish exporters very badly. Before the crisis, Türkiye differs in preferential trade relations, especially in terms of the tariff commitments it has undertaken through its membership in the Customs Union and the World Trade Organization. With the tariff policy it implemented in the 2008-11 period, it greatly affected imports. Despite the obligations arising from international law, Türkiye revised its most favored country (MFN) and preferential trade agreement (TTA) tariffs. For example, the possible increase in import tariffs applied only in the textile and steel industry in this period was such that it could affect 9% of Türkiye's manufacturing imports (Bown C. P., 2014, p. 194).

Türkiye continued to use anti-dumping, safeguard measures and compensatory tax policies intensively. Bown (2014), examining Türkiye's use of foreign trade defense tools based on data from the World Bank's "Temporary Trade Barriers" database, stated that Türkiye's use of anti-dumping and protection measures in foreign trade increased its trade in the first decade of the 2000s. proved to be affected. In addition, Bown emphasized that Türkiye's policy makers implemented many new trade policy measures during 2008-11, while largely resisting the protectionist pressure that necessitated sweeping changes to its relatively liberal import regime.

5.3.2. Anti-Dumping Measures

According to the current data of the World Trade Organization, the number of anti-dumping measures implemented by Türkiye and in force as of 2019 is 183. The table below also includes the decisions taken by years, and the fact that the sum of these decisions is not equal to the cumulative number is due to the fact that the decisions in force in the number of cumulative measures are taken into account.

Table 9: Anti-Dumping Decisions Implemented by Türkiye Over the Years

Years	Anti-Dumping Measures Cumulative Number	Anti Dumping Measures Annual Number
2000	14	8
2001	16	2
2002	27	11
2003	50	23
2004	65	15
2005	72	8
2006	97	25
2007	102	7
2008	107	15
2009	116	11
2010	125	10
2011	118	6
2012	118	2
2013	128	13
2014	134	9
2015	143	10
2016	156	15
2017	166	14
2018	182	19
2019	183	8

Source: WTO

According to the data of the Ministry of Trade, there are 87 anti-dumping measures implemented before 2018 and in effect as of 2020. While 20 of these measure decisions are for the continuation of the previous measures in the same way, 19 of them are related to the amendment of the previous decision and putting it into effect. Of the remaining 48 decisions, 31 were on the annulment of the measures, and 1 was put into effect against subsidies. 16 decisions were taken for the first time. Considering the scope and purpose of the study, it is not necessary to make a detailed examination of these decisions, and it is believed that the method determined in the study is sufficient in terms of bringing the targeted result, the relevant period will not be analyzed in this study. Instead, measures in 2018 and beyond will be examined, and evaluations and possible suggestions will be presented in this context.

Measures Implemented as of 2018 and Their Results

According to the data of the Ministry of Trade, the number of anti-dumping and subsidy measures implemented in 2018 and in force as of 2020 is 41. 22 of these measures are related to the continuation of the previously implemented measures. While the number of decisions made for the continuation of the measures by changing their ratios was 5, it was decided in 17 decisions that the previously determined measures should remain the same. 4 of the measures that were decided to be "continued by changing" are related to lowering the rates. Nine communiqués published in the Official Gazette in 2018 are about the precautionary decision taken at the end of the investigation regarding the ineffectiveness of the measures. The remaining 10 precautionary decisions were taken in 2018 and are in force today. In this section, the changes in our imports as a result of the decisions taken in 2018 will be analyzed.

Table 10: Measure Decisions Taken in 2018

HS NAME	HS CODE	COUNTRY	Notification No	Notification Date	Measure Rate (CIF %) / Amount	Expiry Date
Polystyrene	3903.19.00.00.00	Islamic Republic of Iran	<u>2018/40</u>	31.12.2018	11,3%	31.12.2023
Wires - Core Wires	8311.20.00.00.00	Vietnam	<u>2018/39</u>	27.10.2018	%21,15- %29,65	27.10.2023
Igniters	9613.80.00.00.11	People's Republic of China	<u>2018/22</u>	19.06.2018	24,55%	19.06.2023
Kraftliner Papers- Unbleached	4804.11.11.10.00 4804.11.15.10.00 4804.11.90.10.11 4804.11.90.10.12	Finland Russia Poland Brazil	<u>2018/12</u>	19.04.2018	11,34% %5,28- %11,19 %5-%11 %5,27- %11,21	19.04.2023
Tableware and Kitchenware from Porcelain and Ceramics	6911.10.00.00.11 6911.10.00.00.12 6911.10.00.00.19 6912.00.21.00.00 6912.00.23.00.00 6912.00.25.00.11 6912.00.25.00.12 6912.00.25.00.19 6912.00.29.00.00	People's Republic of China	2018/6	3.03.2018	8%	3.03.2023
Sodium Percarbonates	2836.99.90.10.00	Germany	<u>2018/7</u>	2.03.2018	%5-%12	2.03.2023
Sodium Percarbonates	2836.99.90.10.00	Kingdom of Sweden	<u>2018/7</u>	2.03.2018	12%	2.03.2023

5.3.2.1.Measures Applied to Imports from the Islamic Republic of Iran

The first measure decision to be examined is the definitive anti dumping decision against the Islamic Republic of Iran. As a result of the completion of the dumping investigation carried out by the Ministry of Trade General Directorate of Imports, the said precautionary decision was put into effect.

Attached to the decision is the Information Report on the Communiqué on the Prevention of Unfair Competition in Imports. According to this report, the import of the product under investigation, which was 9,215 tons in 2015, increased to 22,124 tons in 2016 and 41,589 tons in 2017. While the import of products originating in Iran was 17.117

tons in the January-June period of 2017, the said import increased to 19.657 tons in the January-June 2018 period. As a result of the examination, a causal link was also established between the damage of the dumping applied by Iran to the domestic production branch in Türkiye. Between the years 2015-2017, it has been determined that the production branch has been operating below its capacity. In the first six months of 2018, it was understood that the deterioration in the production branch was much more serious.

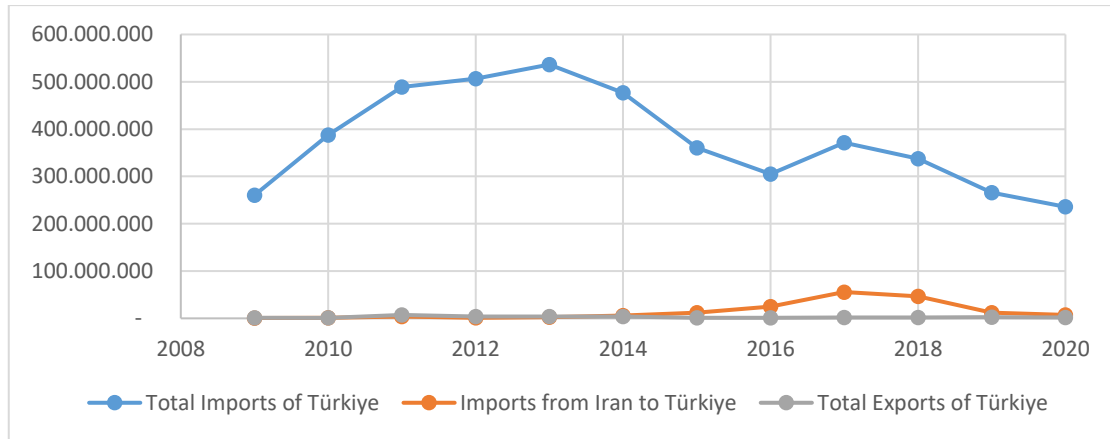
Table 11: The Course of “Polystyrene - Others” Trade by Years

<i>390.319.000.000 (US Dollar)</i>	Total Imports of Türkiye	Imports from Iran to Türkiye	Total Exports of Türkiye	Iran share in Türkiye's imports %
2001	63.074.335	2.748.742	361.160	4,4
2009	260.027.096	796.786	1.102.188	0,3
2010	387.339.090	998.411	998.243	0,3
2011	488.724.333	4.152.921	7.235.242	0,8
2012	506.850.390	1.126.220	3.675.748	0,2
2013	536.412.662	2.772.580	4.015.726	0,5
2014	476.761.317	5.871.941	3.596.624	1,2
2015	360.226.064	11.741.716	1.434.804	3,3
2016	304.827.837	24.892.073	1.158.039	8,2
2017	371.292.375	55.663.393	1.748.363	15,0
2018	337.355.186	46.371.525	1.755.984	13,7
2019	265.403.432	11.844.242	2.491.173	4,5
2020	235.736.035	7.154.809	1.603.566	3,0

Source: Turkstat, Trade Ministry

As can be seen, the weight of imports from Iran in Türkiye's Polystyrene imports until 2015 is not remarkably high. However, having a share of 8.2% in 2016, and then the share of imports from Iran in the total import of the aforementioned product increased to 15.0% in 2017. After the measure implemented in October 2018, imports from Iran decreased to normal levels.

Chart 6: The Course of Türkiye's Polystyrene Trade



The effect of the measure is clearly observed in the chart above. Although Iran's imports are decreasing in parallel with the weakening in Türkiye's imports, it is noteworthy that the share of imports from Iran in total imports has decreased to 3-4%.

5.3.2.2. Measure Applied to Imports From Vietnam

As a result of the investigation, with the decision of the Board evaluating the findings and the approval of the Minister of Trade "Hyundai Welding VINA Co., Ltd." It has been decided to apply a definite measure against dumping at a rate of 21.15% to the company with the title titled and 29.65% to other companies. When the Information Report of the Communiqué No. 2018/39 on the Prevention of Unfair Competition in Imports, which is attached to the Communiqué, is examined; It was understood that the import of the product subject to investigation from Vietnam was 2,537 tons, 3,116 tons and 3,577 tons, respectively, in the 2015-2017 period.

In addition, it has been determined that the average unit prices of Vietnam origin imports decreased in 2015, 2016 and 2017 and realized as 1.598 US Dollars/Ton, 1.391 US Dollars/Ton and 1.311 US Dollars/Ton, respectively.

Wires - Corrugated Welding Wires Import Course

Türkiye's "831120000000" HS coded product imports increased sharply in 2014. Imports from Vietnam also increased on this date. While the share of imports from Vietnam in Türkiye's total imports was at a very low level of 2.0% in 2010, it is noteworthy that this rate increased to 13.4% within a year. In 2014, this rate reached 27.9%.

Parallel to the decrease in total imports observed immediately after 2014, imports from Vietnam and the share of these imports in the total decreased.

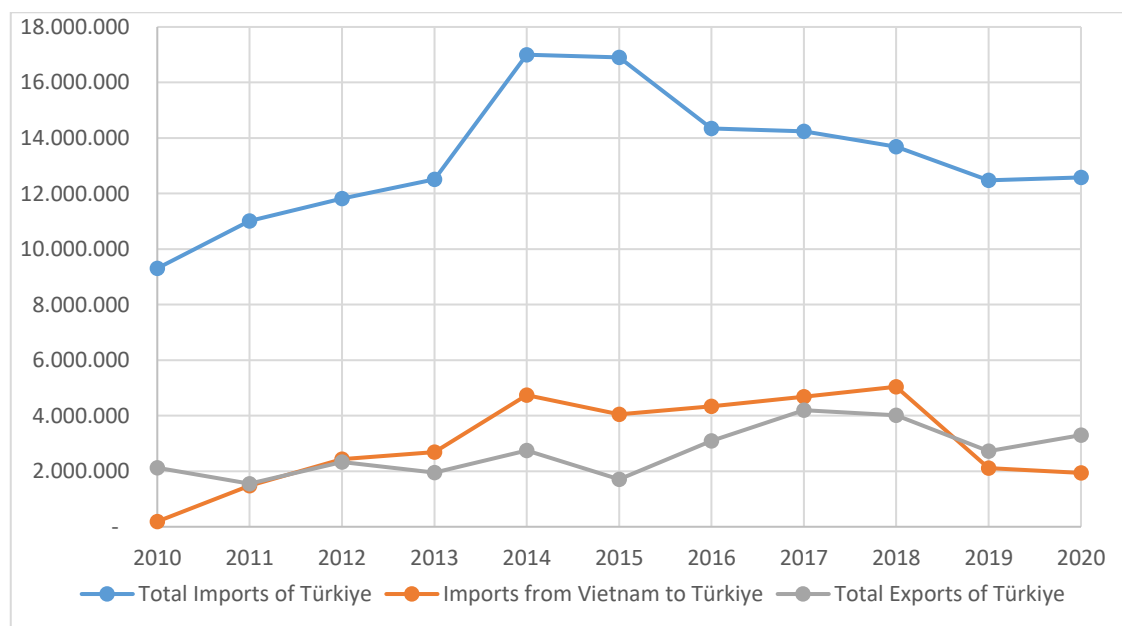
Table 12: Wires by Years - Cored Welding Wires Trade

8311.20.00.00.00 (US Dollar)	Total Imports of Türkiye	Imports from Vietnam to Türkiye	Total Exports of Türkiye	Vietnam share in Türkiye's imports %
2010	9.307.566	189.462	2.128.142	2,0
2011	11.006.990	1.474.770	1.552.939	13,4
2012	11.819.097	2.430.607	2.333.752	20,6
2013	12.509.132	2.685.941	1.956.663	21,5
2014	16.999.668	4.744.320	2.745.034	27,9
2015	16.899.791	4.054.835	1.708.898	24,0
2016	14.342.063	4.336.144	3.091.563	30,2
2017	14.243.852	4.688.678	4.198.827	32,9
2018	13.686.343	5.041.694	4.013.129	36,8
2019	12.472.209	2.118.082	2.724.454	17,0
2020	12.578.797	1.940.763	3.302.883	15,4

Source: TurkStat, Trade Ministry

However, the weight of Vietnam in Türkiye's total imports continued to rise despite the decrease in total imports experienced in the following years. By 2018, this rate reached 36.8%. When the course of foreign trade is analyzed as a result of the precautionary decision taken, it is observed that Türkiye's total exports started to increase after the decline in 2018, and the share of Vietnam in Türkiye's total imports decreased.

Chart 7: The Course of Türkiye's Wires - Cored Welding Wires Trade



5.3.2.3. Measures Applied to Imports of "Igniters" from the People's Republic of China

Pursuant to the Communiqué No. 2018/22 on the Prevention of Unfair Competition in Imports, the decision taken as a result of the completion of the dumping investigation carried out by the Ministry of Economy, General Directorate of Importation, for the import of products originating from the People's Republic of China under the customs tariff statistics position 9613.80.00.00.11 has been put into effect. Since the decision covers all imports of the product originating from China, it is not directed to a specific company.

When the information report attached to the Communiqué is examined, it is seen that the company, in which the investigation was initiated with the application of the local manufacturer company, is capable of representing the domestic production branch. It was decided to open an investigation with the establishment of a causal link between the damage and the import. As a result of the examinations made within the framework of the information obtained from TurkStat, the normal value and the export price were compared and the dumping margin was calculated as 24.55% of the CIF value for China.

Table 13: The Course of the “Igniters” Trade by Years

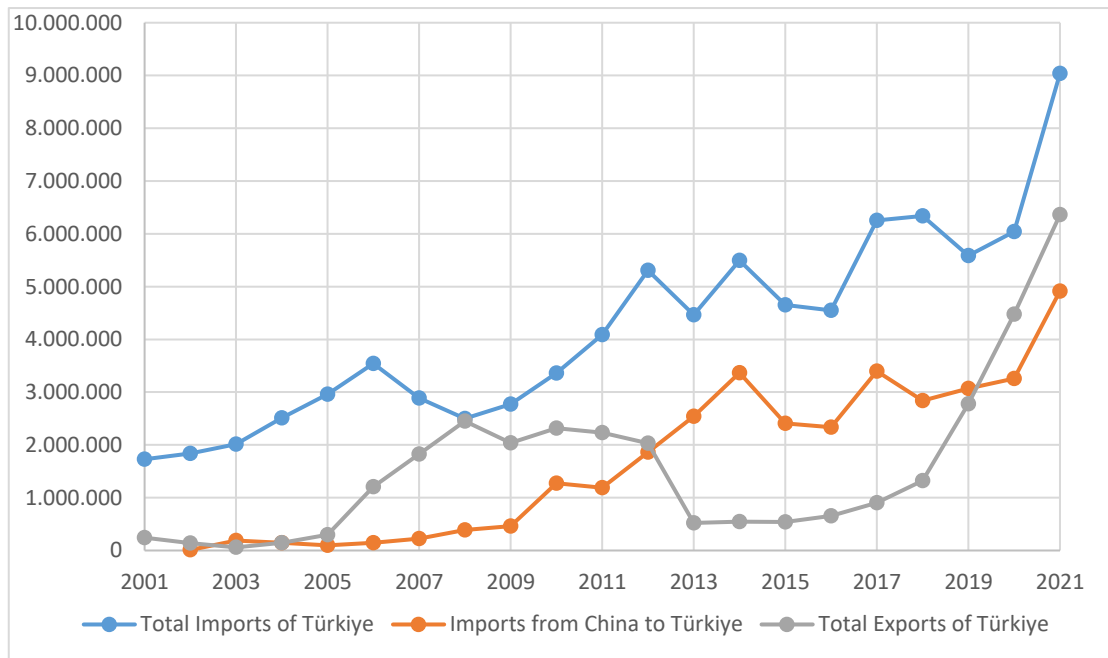
<i>9613.80.00.00.11 (US Dollar)</i>	Total Imports of Türkiye	Imports from China to Türkiye	Total Exports of Türkiye	China share in Türkiye's imports %
2001	1.728.708		243.255	-
2002	1.840.688	9.950	142.771	0,5
2003	2.016.681	185.450	59.251	9,2
2004	2.510.070	146.241	144.211	5,8
2005	2.958.388	98.838	295.053	3,3
2006	3.544.374	148.701	1.207.196	4,2
2007	2.886.661	227.473	1.824.184	7,9
2008	2.500.415	388.929	2.450.367	15,6
2009	2.769.454	461.620	2.039.796	16,7
2010	3.361.894	1.275.469	2.315.802	37,9
2011	4.089.803	1.190.327	2.230.235	29,1
2012	5.310.582	1.864.410	2.031.770	35,1
2013	4.463.952	2.542.625	520.874	57,0
2014	5.496.316	3.368.154	549.170	61,3
2015	4.652.593	2.410.438	539.001	51,8
2016	4.551.789	2.335.152	655.417	51,3
2017	6.252.869	3.394.947	901.986	54,3
2018	6.336.694	2.838.494	1.321.278	44,8
2019	5.587.589	3.070.126	2.777.923	54,9

9613.80.00.00.11 (US Dollar)	Total Imports of Türkiye	Imports from China to Türkiye	Total Exports of Türkiye	China share in Türkiye's imports %
2020	6.042.993	3.258.213	4.474.774	53,9
2021	9.036.114	4.914.749	6.362.029	54,4

Source: TurkStat, Trade Ministry

China's share in Türkiye's imports increased to 61.3%, the highest level in 2014. While there was a decrease in Türkiye's imports of the said product in 2015, China's share also decreased, but its weight in imports still remained high. In 2017, when the investigation was opened, imports from China had a share of 54.3% in total imports.

Chart 8: The Course of Türkiye's "Igniters" Trade and Imports from China



As can be seen from the chart above, the rate of increase in Türkiye's total imports slowed down in 2018 and decreased in 2019. Türkiye's imports from China decreased in 2018, but increased again in 2019 and this upward trend continued in the following years. The striking point is that Türkiye's exports, which have been on the rise since 2016, increased rapidly in 2018 and exceeded the imports from China in 2020 after 8 years. This situation continued in 2021 as well. However, it should not be overlooked that the effect of the precautionary decision is limited.

5.3.2.4. The Measure Decision Against Imports from Finland, Russia, Poland and Brazil

The measure decision was taken as a result of the investigation initiated based on the complaint filed by OYKA Kağıt Ambalaj Sanayi ve Ticaret Anonim Şirketi pursuant to the Communiqué No. 2016/46 on the Prevention of Unfair Competition in Imports. It has been determined that the complainant company has the qualification to represent the domestic production branch. As a result of the investigations, it was decided to open an investigation. Pursuant to the Communiqué no 2018/12, it was determined that the import of the product named “Unbleached Primary Fiber Surface (Kraftlayner) Papers Not Exceeding 175 Grams per Square Meter” originating from Finland, Russia, Poland and Brazil, which is the subject of the investigation, was dumped and caused the threat of damage in the domestic production. It has been decided to implement definite measures against dumping at the rates specified in Table 10 regarding the products.

As can be seen in the chart below, it is observed that imports from Poland increased slightly, while imports from other countries decreased sharply in the period from 2016, when the investigation began, to the decision to take action. It is also noteworthy that this decrease is of a seasonal nature in imports from the country. There is not enough data set for evaluations to be made in Poland. Since 2018, imports have decreased from all countries where measures were taken.

Chart 9: Progress of “48041111000” HS Code Imports by Countries

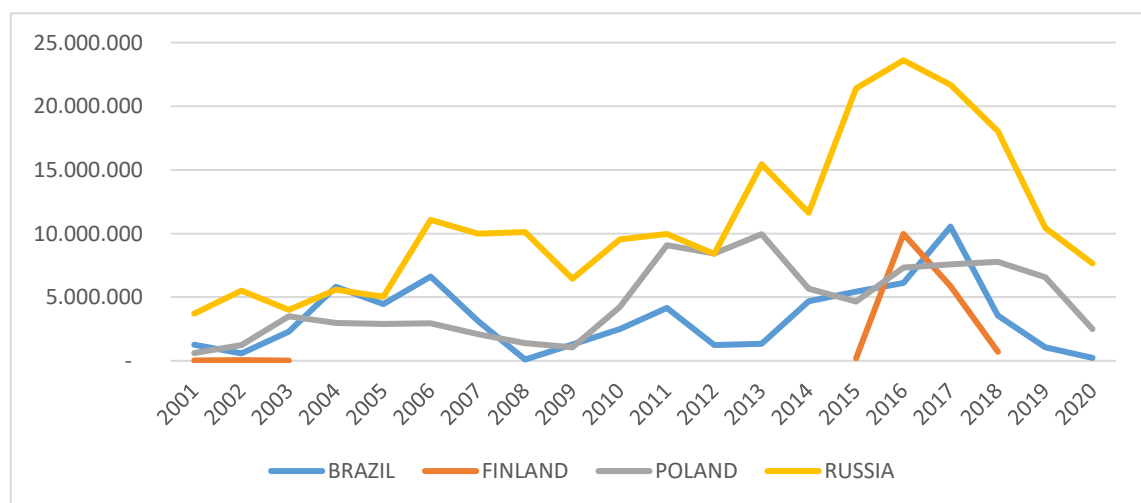


Table 14: Shares of Selected Countries in Türkiye's Imports Based on 48041111000 GTIP Code

48041111000	Brazil	Finland	Poland	Russia Federation
2001	12,8	0,2	6,2	37,7
2002	3,3	0,3	7,0	31,2
2003	7,7	0,1	11,8	13,5
2004	13,3	-	6,8	12,8
2005	9,7	-	6,3	10,9
2006	10,7	-	4,7	17,8
2007	4,6	-	3,0	14,6
2008	0,2	-	2,1	15,4
2009	3,0	-	2,5	15,2
2010	3,0	-	5,0	11,4
2011	3,5	-	7,7	8,4
2012	1,1	0,4	7,8	7,8
2013	1,0	-	7,6	11,8
2014	3,6	-	4,4	9,0
2015	4,6	0,2	4,0	18,2
2016	6,2	10,1	7,4	23,9
2017	11,0	6,1	7,9	22,6
2018	3,7	0,7	8,1	18,7
2019	3,3	-	20,1	32,1
2020	0,9	-	9,1	27,8

Source: Trade Ministry

As can be seen from the table, the decrease in Türkiye's total imports after the measure is largely due to the high share of these countries in total imports.

Chart 10: Progress of Türkiye's "48041111000" HS Code Imports



Imports, which were 96.6 million dollars in 2017, decreased to 32 million dollars in 2018. Brazil's share from 11% to 3.7%, Finland's share from 6.1% to 0.7%, Russia's share from 22.6% to 18.7%, while only Poland's share share has increased.

Table 15: Shares of Selected Countries in Türkiye's Imports Based on 480411151000 GTIP Code

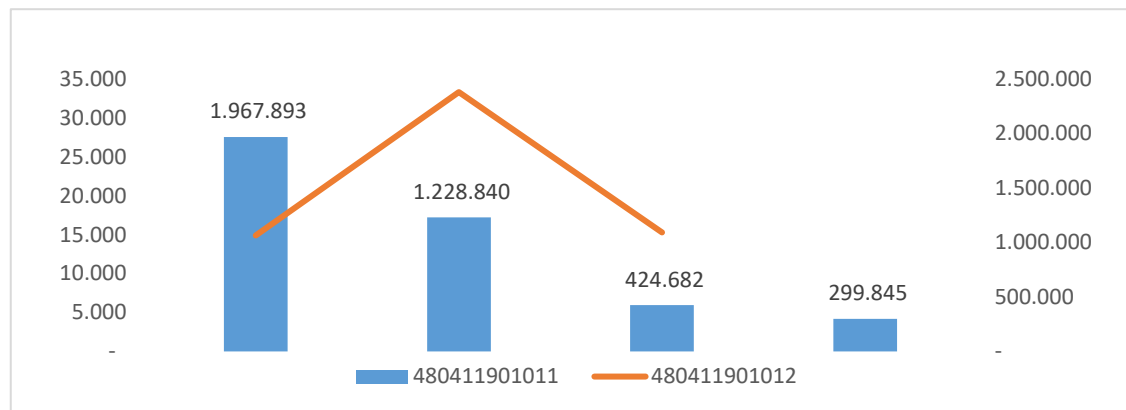
480411151000	BRASIL	FINLAND	POLAND	RUSSIA
2001	10,1	1,4	1,1	47,4
2002	-	-	14,1	24,1
2003	-	-	12,3	21,9
2004	0,8	-	13,7	12,3
2005	0,3	-	7,9	31,9
2006	4,0	-	5,3	13,1
2007	-	-	1,9	4,0
2008	-	0,1	0,3	2,7
2009	-	-	6,4	2,4
2010	-	-	1,2	-
2011	0,3	-	0,8	0,5
2012	-	-	0,6	0,6
2013	-	-	5,7	0,6
2014	4,5	-	5,8	3,2
2015	1,3	-	2,6	3,6
2016	-	52,4	16,3	7,8
2017	2,0	39,3	-	11,7
2018	1,1	1,8	11,7	14,1
2019	-	0,1	12,2	3,0
2020	0,3	3,1	8,0	4,4

Source: Turkstat

In the table above, Finland's share in total imports draws attention. The decrease of its share from 39.3% in 2017 to 1.8% in 2018 shows the effect of the measure. However, it should be emphasized that the sharp decline in the import of this product started in 2015 and there were serious fluctuations in the import of the product.

Chart 11: Progress of Imports of "480411901011" and "480411901012" HS Codes from Russia

Imports from Russia start from 2017. It is observed that imports, which were at the level of 1.9 million dollars in 2017, decreased to 439 thousand dollars in 2019. The evaluation made in Poland before is valid here as well, and it is thought that the data are not sufficient for analysis.



5.3.2.5. The Measure Decision Applied to Imports by the People's Republic of China

In accordance with the Communiqué No. 2018/6 on the Prevention of Unfair Competition in Imports, as a result of the investigation opened by the General Directorate of Imports, it has been decided to apply certain measures to the import of these HS Codes: "6911.10.00.00.11", "6911.10.00.00.12", "6911.10.00.00.19", "6912.00.21.00.00", "6912.00.23.00.00", "6912.00.25.00.11", "6912.00.25.00.12", "6912.00.25.00.19" and "6912.00.29.00.00".

Table 16: Imports of Selected Products from China

US Dollar	691200290000	691200250019	691200250012	691200250011	691200230000	691200210000
2016	2.541.930	7.682.279	203.725	374.100	1.422.773	28.260
2017	1.984.220	4.505.809	46.623	520.669	1.265.947	10.940
2018	2.369.447	4.858.349	91.516	608.183	470.896	58.756
2019	1.531.584	2.712.772		194.191	354.593	109
2020	1.624.819	3.404.300		590.615	242.388	721

Source: TurkStat Trade Ministry

First of all, evaluations will be made on the products with the HS code in the table above. However, since the import values of the products with HS codes “691200250012” and “691200210000” are low, evaluations regarding these products will not be included.

Table 17: Shares of Selected Countries in Türkiye's Imports Based on 691200290000 GTIP Code

691200290000	Total Imports of Türkiye	Türkiye's Imports from China	Total Exports of Türkiye	China's Share in Türkiye's Import %
2016	2.631.512	2.541.930	6.921.442	96,60
2017	2.111.233	1.984.220	9.221.549	93,98
2018	2.723.314	2.369.447	11.100.555	87,01
2019	1.794.420	1.531.584	13.130.076	85,35
2020	2.373.544	1.624.819	15.615.075	68,46

Source: Trade Ministry

The import of the product with the HS code “691200290000” reached its highest value in 2018. Similarly, imports from China reached its highest level. At this date, the share of imports from China in Türkiye's total imports was 87%. In the following years, while Türkiye's imports and accordingly China's share in total imports decreased, it is noteworthy that Türkiye's exports increased.

Table 18: Shares of Selected Countries in Türkiye's Imports Based on 691200250019 GTIP Code

691200250019	Total Imports of Türkiye	Türkiye's Imports from China	Total Exports of Türkiye	China's Share in Türkiye's Import %
2016	9.427.992	7.682.279	1.914.759	81,5
2017	5.846.809	4.505.809	1.985.567	77,1
2018	6.432.756	4.858.349	2.444.460	75,5
2019	4.020.259	2.712.772	3.647.201	67,5
2020	4.351.930	3.404.300	4.735.344	78,2

Source: Trade Ministry

While the import of the product with HS code “691200250019” followed a fluctuating course, its exports increased continuously. What is particularly striking here is that while China's share in Türkiye's imports was 75.5% in 2018, it decreased to 67.5% in the next year.

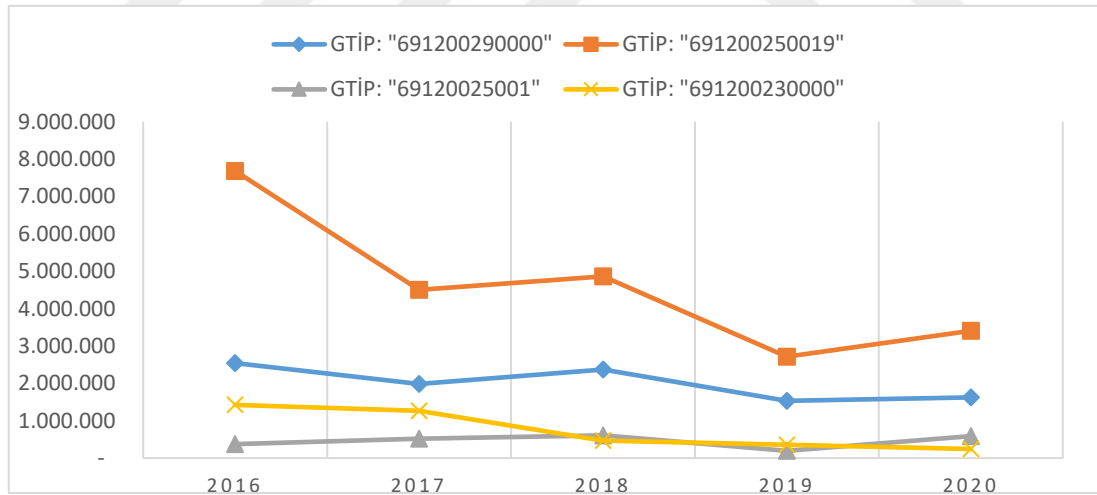
Table 19: Shares of Selected Countries in Türkiye's Imports Based on 691200250011 GTIP Code

691200250011	Total Imports of Türkiye	Türkiye's Imports from China	Total Exports of Türkiye	China's Share in Türkiye's Import %
2016	384.296	374.100	1.662.948	97,3
2017	527.247	520.669	4.528.512	98,8
2018	640.004	608.183	3.978.010	95,0
2019	349.038	194.191	2.307.917	55,6
2020	727.721	590.615	1.685.557	81,2

Source: Trade Ministry

A serious decrease was observed in the import of the 691200250011 HS Code product from China in 2019. It was also determined that this decrease did not cause an increase in exports while decreasing total imports. It is clear that the relationship between the production of this product and the import must be taken into account. It is debatable that reducing imports from China with a measure decision will generally contribute to the manufacturer.

Chart 12: Imports from China of Selected Products



5.3.2.6. Measure Applied to Imports from Germany and Sweden

As a result of the dumping investigation initiated for the import of "sodium percarbonates" originating from Germany and Sweden and carried out by the General Directorate of Import of the Ministry of Economy, with the Communiqué No. 2017/9 on the Prevention of Unfair Competition in Imports, published in the Official Gazette dated 24/3/2017 and numbered 30017, In March 2018, a precautionary decision was taken

regarding the import of these products. With the approval of the Ministry by the decision taken by the Board, it was decided to take measures against dumping at the rate of 5% over the CIF price for the imports made by the company named Solvay Chemicals GmbH for goods originating in Germany, to apply anti-dumping measures at the rate of 12% for imports from other companies, and to apply anti-dumping measures for imports from Sweden. It has been started to take definite measures against dumping at a rate of 12% without any discrimination.

Table 20: The Course of Imports of Products with HS Code 283699901000 from Germany

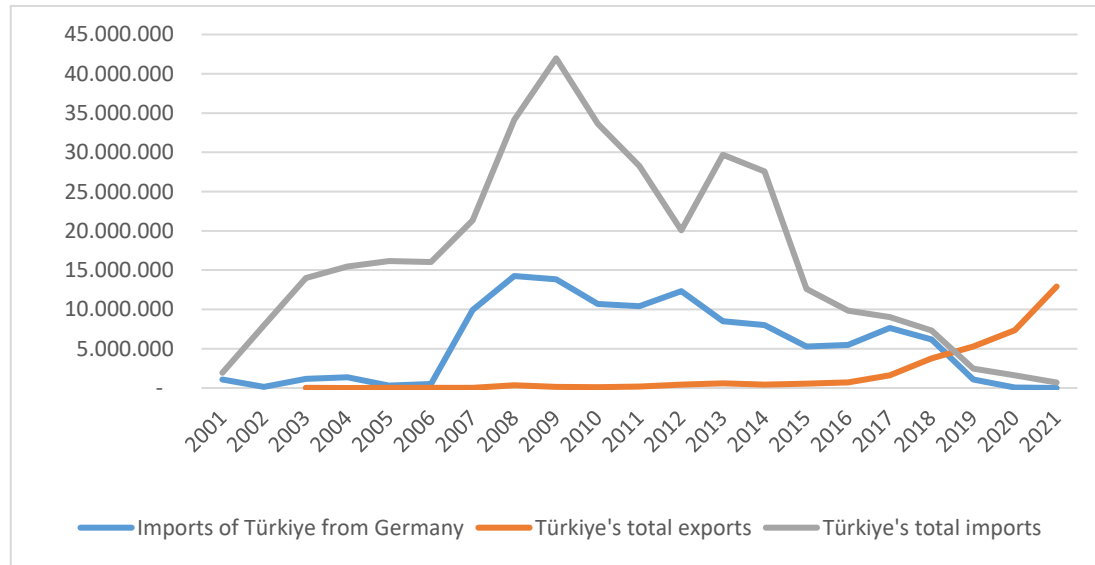
2836.99.90.10.00 (US Dollar)	Total Imports of Türkiye	Imports from Germany to Türkiye	Total Exports of Türkiye	Germany share in Türkiye's imports %
2001	1.933.023	23.071		1
2002	7.971.794	1.238		0,0
2003	13.979.935	3.336	13.776	0,0
2004	15.452.888	13.359	307	0,1
2005	16.165.698	30.573	21.977	0,2
2006	16.035.925	15.732	10.536	0,1
2007	21.323.998	83.265	32.691	0,4
2008	34.126.684	814.500	353.158	2,4
2009	41.970.711	699.244	164.033	1,7
2010	33.624.608	1.082.851	90.613	3,2
2011	28.265.351	1.641.798	172.256	5,8
2012	20.091.316	1.237.190	421.084	6,2
2013	29.683.648	88.961	602.688	0,3
2014	27.588.716	74.700	413.226	0,3
2015	12.616.394	53.219	547.364	0,4
2016	9.830.724	80.173	735.121	0,8
2017	9.032.645	339.953	1.593.062	3,8
2018	7.313.169	188.236	3.788.070	2,6
2019	2.183.934	257.817	5.298.577	11,8
2020	1.762.499	232.040	7.503.596	13,2
2021	698.014	329.370	11.487.690	47,2

Source: Trade Ministry

While total imports decreased in 2018, imports from Germany decreased more and the share of Germany in total imports decreased. On the other hand, exports increased sharply. Imports continued to decline in the following years, and the import, which was 9 million dollars in 2017, decreased to 698 thousand dollars in 2021. On the other hand, exports, which were at the level of 1.6 million dollars in 2017, increased to 12.9 million dollars in 2021.

It shows that this decision is very effective and supports production and export. Although imports from Germany did not reach the same level as in 2017, the increase in its share in total imports is due to the decrease in total imports and the decrease in imports from Sweden.

Chart 13: The Progress of 283699901000 HS Code Imports from Germany



Source: Turkstat

Table 21: The Progress of Imports of Products with HS Code 283699901000 from Sweden

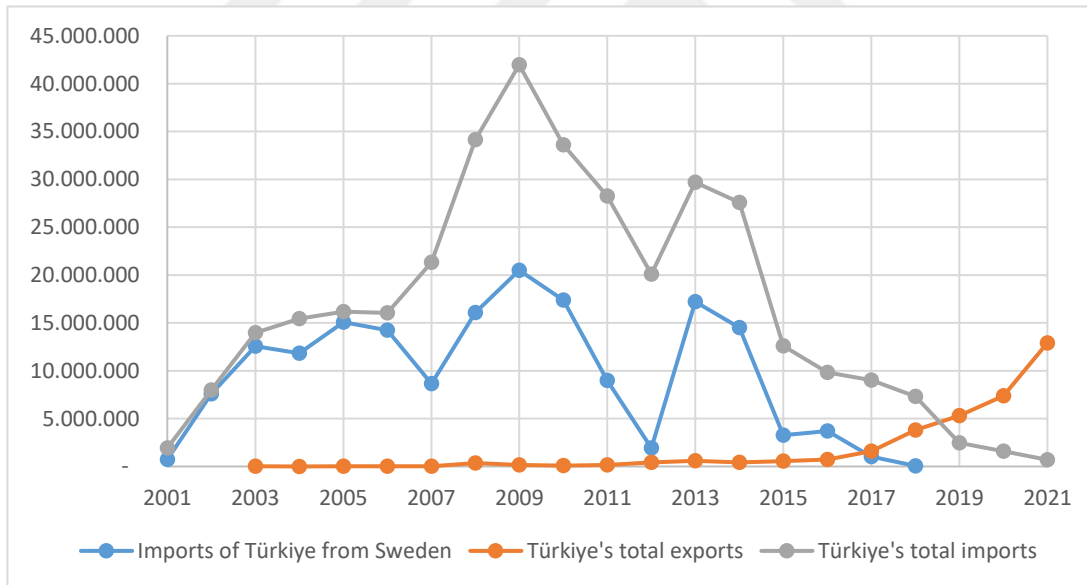
2836.99.90.10.00 (ABD Doları)	Total Imports of Türkiye	Imports from Sweden to Türkiye	Total Exports of Türkiye	Sweden share in Türkiye's imports %
2001	1.933.023	721.519		37
2002	7.971.794	7.579.995		95,1
2003	13.979.935	12.573.784	13.776	89,9
2004	15.452.888	11.821.301	307	76,5
2005	16.165.698	15.070.139	21.977	93,2
2006	16.035.925	14.224.523	10.536	88,7
2007	21.323.998	8.655.665	32.691	40,6
2008	34.126.684	16.072.438	353.158	47,1
2009	41.970.711	20.502.762	164.033	48,9
2010	33.624.608	17.377.779	90.613	51,7
2011	28.265.351	8.977.419	172.256	31,8
2012	20.091.316	1.944.621	421.084	9,7
2013	29.683.648	17.226.008	602.688	58,0
2014	27.588.716	14.522.286	413.226	52,6
2015	12.616.394	3.281.083	547.364	26,0
2016	9.830.724	3.706.730	735.121	37,7
2017	9.032.645	1.028.385	1.593.062	11,4

2836.99.90.10.00 (ABD Doları)	Total Imports of Türkiye	Imports from Sweden to Türkiye	Total Exports of Türkiye	Sweden share in Türkiye's imports %
2018	7.313.169	66.144	3.788.070	0,9
2019	2.183.934		5.298.577	-
2020	1.762.499		7.503.596	-
2021	698.014		11.487.690	-

Source: Turkstat

When the data is carefully examined, it is observed that Sweden was much more affected by the decision. The share of 11.4% in Türkiye's total imports decreased to 0.9. In the following years, imports from Sweden were completely cut off. As mentioned before, the increase in Germany's share despite the decrease in imports is due to the decrease in total imports and the weakening of competition.

Chart 14: The Progress of Imports of Products with HS Code 283699901000 from Sweden



5.3.3. Safeguards Measures

In the event that a product is imported in a way that poses serious harm or threat to domestic producers producing similar or directly competing goods, limited and temporary protection measures can be taken to eliminate the threat of such damage or damage.⁵ Safeguard measures are one of the foreign trade policy tools that are not used much in Türkiye as well as in the world. However, since it is a policy tool that still maintains its importance, it is briefly mentioned here. Türkiye also takes the consequences of the important decisions it implements against policies that will have a negative impact on domestic producers and exporters. For example, the panel established in the case Türkiye initiated in the WTO against the safeguard measures that the EU started to implement in steel products in 2018, supported Türkiye's arguments and ruled that the measures implemented by the EU were contrary to international trade rules. In the panel report published on April 29, 2022, it was decided that the EU should align its measures with the "Agreement on Safeguards".

Table 22: Safeguard Decisions Implemented by Türkiye over the Years

Date	Safeguards Measure (cumulative-number)	Safeguard Measure Taken by Years (Number)
2003	0	0
2004	0	0
2005	2	2
2006	6	4
2007	7	1
2008	9	4
2009	6	1
2010	5	0
2011	5	1
2012	4	0
2013	4	0
2014	5	1
2015	5	1
2016	2	0
2017	3	1

Source: WTO

⁵ <https://ticaret.gov.tr/ithalat/ticaret-politikasi-savunma-araclari/korunma-onlemleri>, Access Date: 10.06.2022

According to the data of the Ministry of Trade, the number of safeguard measures in effect as of February 28, 2022 is 7. Four of these measures are related to the extension of the precautionary decisions. The three measures are those that have been implemented for the first time. It was put into effect in 2018.

5.3.4. Foreign Trade in the Context of Trade Wars

Looking at the trade between the USA and Türkiye; As of the 2001-2020 period, which is the period examined, the trade volume shows an increasing trend, although there has been a decrease in some years. The foreign trade volume, which was 6.3 billion dollars in 2001, reached 20 billion dollars by 2020.

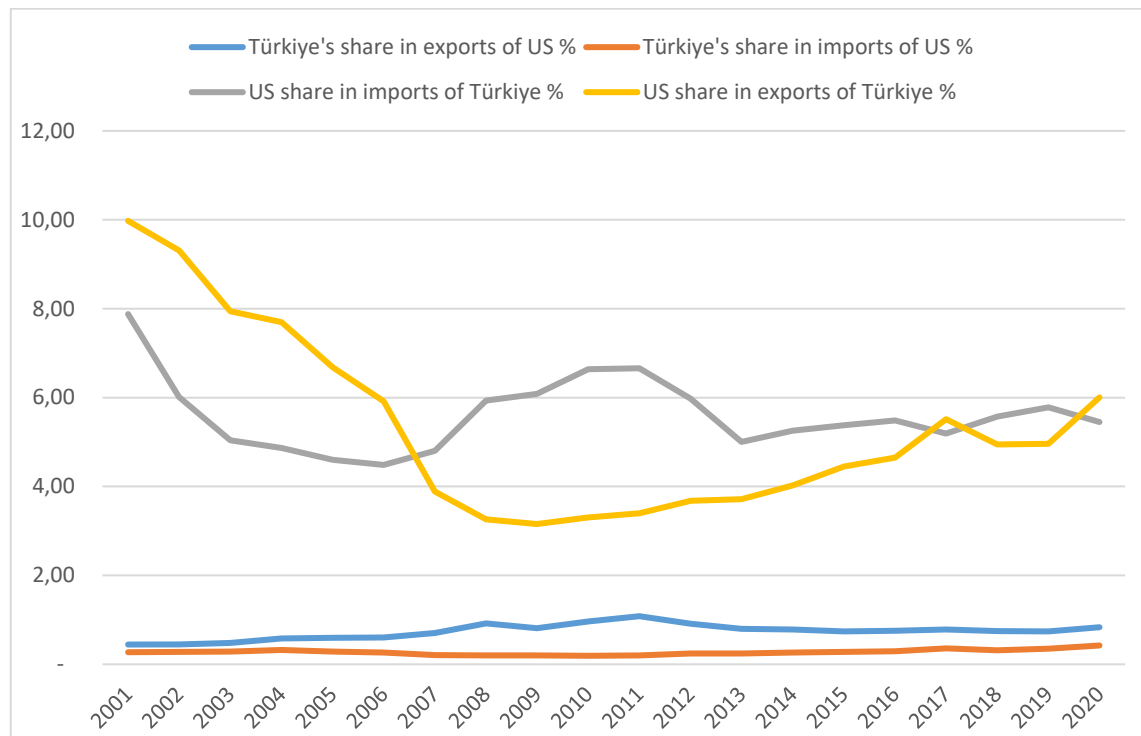
On the other hand, the increase in the trade volume was accompanied by the increase in the foreign trade deficit. It is observed that the two indicators showed completely similar trends until the 2008 crisis and 2011, when imports peaked. Since 2011, there has been a period in which exports have increased and imports have decreased. The point that should be emphasized is that while the trade deficit has decreased since 2011, the trade volume has not decreased in the same way and has maintained its high course.

In 2017, while the foreign trade balance improved in favor of Türkiye, an increase was observed in the trade volume. In 2018, when the trade wars began, the deterioration in the trade balance remained limited, as Türkiye's exports decreased and imports declined. As of the period of the 2019 global health crisis, the volume of foreign trade declined, however, it is observed that bilateral trade has improved in favor of Türkiye as of 2020. While the historical record was broken in exports, the foreign trade volume approached its historical peak with the decrease in imports compared to the previous year, and the foreign trade balance decreased to its pre-2007 level.

The share of the USA in Türkiye's imports decreased until 2007, but the increase experienced in 2007 accelerated after the global financial crisis. The weight of imports from the USA in Türkiye's total imports remained below the weight of exports to the USA in Türkiye's total exports until 2017. However, it is observed that the trend, which was observed to be reversed in 2017, was interrupted in 2018 and 2019, and as of 2020, the share of imports from the USA in Türkiye's imports started to decrease gradually, and the share of exports to the USA in Türkiye's exports began to decrease.

This trend indicates that the effect of the protectionist policies to be implemented by the USA on Türkiye's exports will decrease. On the other hand, considering the weight of Türkiye in the foreign trade of the USA, it is evaluated that the protectionist measures implemented by the USA aim to harm Türkiye's trade instead of preventing the deterioration in the foreign trade balance of the USA.

Chart 15: Bilateral Trade Between Türkiye and USA



5.3.5. Outlook of Türkiye's Foreign Trade In The Global Health Crisis of Covid-19

The downward pressure that the global economy has been exposed to in the period under the influence of the Covid pandemic, which is a global health crisis, has also had an impact on the Turkish economy. According to the International Monetary Fund World Economic Outlook report, the global economy, which grew by 3.6% in 2018, grew by 2.8% in 2019. This was recorded as the lowest growth rate since 2009 (IMF, 2021b).

While the Turkish economy grew by 0.9% in 2019, it grew by 1.8% in 2020. These rates point to the lowest growth rates since 2009. According to Turkstat data, Türkiye's exports decreased by 6.3% annually to 160.7 billion dollars in 2020, according to the private trade system. However, in 2021, exports increased by 33.0% compared to the previous year and were recorded as 213.7 billion dollars. In the same year, Türkiye's imports increased by 24,4% and reached 260.7 billion. According to the general trade system, exports increased by 32,8% compared to the previous year and were recorded as 225.2 billion dollars while imports reached by 271.4 billion dollar by increasing 23.6%.

As of 2020, the number of countries to which exports exceeded 1 billion dollars was 34, while this number increased to 46 in 2021. According to WTO data, the share of Türkiye's exports in world goods trade in 2020 was 0.96%, while the share of imports was 1.23%. In commercial services, these rates are much lower. While exports were 0.70%, imports were 0.54%. However, it should be emphasized that this period was under the influence of the Covid-19 epidemic.

According to the World Trade Organization data, Türkiye ranks third among the countries applying anti-dumping measures calculated cumulatively as of 2019. Countries that have taken 10 or more measures are included in the list.

Table 23: Anti-Dumping Measures in Effect by Country as of 2019 (Cumulative)

	Country	Anti-Dumping Measures
1	USA	388
2	India	252
3	Türkiye	183
4	Brazil	161
5	European Union	120
6	Chinese	107
7	Argentina	102
8	Canada	91
9	Mexican	76
10	Australia	72
11	Pakistan	49
12	Thailand	42
13	Republic of Korea	39
14	Indonesia	35
15	South Africa	30
16	Ukraine	23
17	Colombia	20
18	Malaysia	20

	Country	Anti-Dumping Measures
19	Russian Federation	19
20	Taiwan	16
21	Egypt	13
22	Morocco	11
23	Vietnam	10

Source: WTO

Türkiye follows an effective foreign trade policy against policies that create unfair competition. However, since these data are calculated cumulatively until 2019, they do not reveal the performance in the Covid process. As can be seen in the table below in 2019, the countries that implemented the most measures did not change, except for Brazil and Türkiye, which are among the top seven countries. India ranks first, followed by the USA.

Table 24: Anti-Dumping Measures Enforced in 2019 by Country

	Country / Region	Anti-Dumping Measure (Annual)
1	India	52
2	USA	33
3	Argentina	17
4	Chinese	14
5	European Union	11
6	Vietnam	9
7	Ukraine	8
8	Australia	7
9	Malaysia	7
10	Canada	6
11	Egypt	6
12	Indonesia	6
13	Mexican	6
14	Pakistan	6
15	Republic of Korea	5
16	Russian Federation	4
17	Kingdom of Saudi Arabia	2
18	Thailand	2
19	Türkiye	2
20	Brazil	1

	Country / Region	Anti-Dumping Measure (Annual)
21	Japan	1
22	Madagascar	1
23	Peru	1

Source: WTO

Table 25: Safeguard Measures as of 2019 – By Country

According to World Trade Organization data, very few safeguards were implemented in 2019. The number of countries implementing safeguard measures is 19.

Rank	Countries	Safeguards Measure (Annual)
1	Indonesia	2
2	Madagascar	2
3	Armenia	1
4	Kingdom of Bahrain	1
5	Canada	1
6	Egypt	1
7	Ethiopia	1
8	Kazakhstan	1
9	Kuwait	1
10	Kyrgyz Republic	1
11	Morocco	1
12	Oman	1
13	Philippines	1
14	Qatar	1
15	Russian Federation	1
16	Kingdom of Saudi Arabia	1
17	South Africa	1
18	Türkiye	1
19	United Arab Emirates	1

Source: WTO

Türkiye, which implemented only one protection measure in 2019, applied the most precautions after the 2008 crisis, as stated before. Even in this period, the number of protection measures was recorded as four.

Countervailing Tax Measure by Years (Cumulative) - By Country

The United States is at the top of the countervailing tax application. According to the World Trade Organization data, the USA, with a cumulative number of measures of 127, implemented 17 measures in 2019. The number of measures put into effect by the other 5 countries that implemented measures in 2019 is 19.

Türkiye's Foreign Trade Policy in the Context of the Covid 19⁶

Table 26: Foreign Trade Measures During the Covid19 Global Health Crisis

Measure	HS codes	Date
Temporary lifting of ethyl alcohol import tariffs	2207.20.00; 6307.90.98; 9019.20.00	25.03.2020
Application of temporary pre-export permit/registration	2207; 2208.90.91; 2208.90.99; 3303.00.90; 3402.90.10; 3808.94.10; 3808.94.20; 3808.94.90; 2905.12.00; 2847; 5603; 8481; 9019.20.00; 9018.90.84; 9026; 9027.10; 9018; 9018.90.60; 9018.39; 9019; 9019.20; 9018.19.10; 0805.50	
Termination of prior export authorization/registration for certain products	2207; 2208.90.91; 2208.90.99; 3303.00.90; 3402.90.10; 3808.94.10; 3808.94.20; 3808.94.90; 2905.12.00; 2847; 8481; 9019.20.00; 9018.90.84;	02.05.2020

⁶ https://www.wto.org/english/tratop_e/covid19_e/covid_details_by_country_e.htm?country=TUR
Access Date: 20.06.2021

Measure	HS codes	Date
	9026; 9027.10; 9018; 9018.90.60; 9018.39; 9019; 9019.20; 9018.19.10; 0805.50	
Temporary export permit for certain personal protective equipment	9020.00; 6204; 6210; 6211; 9004; 6307.90; 4818.90; 3926.20; 4015.11; 4015.19; 6116.10	08.04.2021
Temporary export registration for nonwovens (whether impregnated, coated, covered or laminated)	5603	08.04.2021

Source: WTO

Technical Barriers and Food and Phytosanitary Measures

During the Covid 19 global health crisis, a total of 171 notifications were sent to the World Trade Organization by 38 member countries. Of these, 106 are technical barriers and 65 are food and phytosanitary measures. Brazil, where the most notifications are sent, ranks first with 56 notifications, followed by the EU with 32 notifications and the USA with 22 notifications. Only 1 notification was made by Türkiye. The aforementioned regulation made by the Ministry of Agriculture and Forestry, which is the subject of the notification, was published in the Official Gazette on 7 May 2019 and entered into force⁷.

⁷<https://docs.wto.org/dol2fe/Pages/SS/directdoc.aspx?filename=q:/G/SPS/NTUR58A1.pdf&Open=True>,
Access Date: 10.12.2021

5.3.6. Türkiye's Foreign Trade Policy in the Context of the Ukraine War

In natural gas imports, Russia is the world's largest supplier as well as our country. Alternative supply sources are not preferred considering logistics costs. For this reason, it is expected that the problems to be experienced with Russia will put pressure on the domestic industry. In addition, Russia is the first supplier for our country in petroleum products and the second in hard coal imports. For this reason, as a country that depends on imported energy in energy production, Türkiye's application of protectionism in foreign trade comes to the fore as an area where it seems unlikely.

According to the report published by the World Bank, Türkiye's growth is expected to decline to 2.3% in 2022. In this case, it was stated that the Ukraine war increased the impact of the deterioration in the country's economy, such as high inflation and the decrease in investor appetite. While high commodity prices resulting from the Ukraine war are expected to exacerbate inflation, it has been stated that growth may be stronger if fiscal policy and tourism is more supportive than expected (World Bank, 2022, p. 102)

CHAPTER VI: POLICY RECOMMENDATION

First of all, it is necessary to accept that the protectionist trade approach is valid in every period as a foreign trade policy. Although protectionism remains in the background in some periods, governments do not completely give up on preferring protectionist policies.

In this study, protectionist approaches are examined and discussed. In the context of the results achieved, the following policy measures are recommended for policy makers:

- Türkiye implements protectionist policies in obligatory situations and within the framework of international law. However, the boundaries drawn by international law are usually exceeded through technical and administrative regulations. In this respect, it is considered that Türkiye should play an active role in international negotiations regarding the use of non-tariff instruments.
- It is understood that detailed sectoral and product-based analyzes should be made in order not to harm exports while using protectionist policy tools. Similarly, the import and export of products for which measures are applied should also be followed up by years after the injunction decision.
- It is thought that the relationship between crises and protectionism should be correctly evaluated by states and foreign trade policies that do not deepen the consequences of the crisis should be implemented. In addition, it is considered that the decisions to be taken by considering the economic and political consequences of protectionist approaches should be prevented from causing an increase in protectionist foreign trade policies.
- It is important to develop a measurement method with universal validity by supporting the studies on measuring the degree of protectionism in Türkiye's foreign trade.
- As a result of the protectionist measures regarding foreign trade, it is not desirable only the imports decrease. The foreign trade deficit should be taken into account as a criteria in the evaluation of the policies implemented.
- It is considered that Türkiye's acting with the awareness that international law is open to manipulation by developed countries and making reservations about liberal regulations that may create an unfair competition environment does not mean moving away from the idea of free trade.

- Finally, it is considered that Türkiye should keep its trade policy tools up-to-date and speed up legal regulations against unfair competition regarding intellectual property rights at the global level.



CHAPTER VII: CONCLUSION

As international competition increased, the policies implemented by states against each other changed. However, it is understood that states do more damage to their economies when they prefer a mutually protectionist foreign trade policy. The reason for this is that protectionist policies encounter protectionist policies in the same way. While this situation pushed the states to adopt free trade policies, it forced them to accept protectionist policies as an exceptional phenomenon. However, due to the competitive nature of international trade, liberalization and protectionism in international trade continued to exist at the same time. Protectionism in foreign trade, as a policy that has gained a different quality with the liberalization of international trade, has sometimes been the primary policy of countries, and sometimes it has remained in the background as a secondary policy tool. Today, protectionism is included within the boundaries of international law as a legitimate policy. One of the reasons for this is that it is understood that it is not possible to fully ensure free competition. Another reason is that in order to combat protectionist policies that create barriers to trade, these policies need to be understood by international law.

In the study, first of all, the concept of protectionism was tried to be examined from different perspectives and its changes and applications in the historical process were tried to be explained. In this context, it has been discussed how protectionist Türkiye's foreign trade policy is, and it has been observed that this policy is not a choice, and as a country that advocates liberalism in foreign trade policy, Türkiye acts on the basis of the principle of reciprocity while implementing protectionist policies. In this direction, it has been determined that Türkiye has implemented policies that will respond to all practices that will harm its competitiveness in international trade and weaken production in the country.

Today, protectionist approaches have changed form to a great extent. The reason for this is largely the rules determined by the member countries through the World Trade Organization platform. These rules were created in order to remove the barriers to foreign trade. However, all these rules also caused the member states that would resort to protective measures to turn to non-tariff instruments instead of the traditional policy of tariffs. Administrative regulations and technical obstacles stand out among non-tariff

instruments. This is because these defense tools are difficult to detect and measure. In this study, protectionist approaches in Türkiye's foreign trade have been analyzed largely through anti-dumping practices. It is possible to detect and monitor anti-dumping practices as a traditional policy tool of the new protectionism. In addition, it has been preferred in Turkish foreign trade because it is an applicable policy within the boundaries of international law rules.

In the study, it is observed that Türkiye uses protectionist policy tools in times of crisis or when unfair competition comes to the fore, but its general approach is to implement liberal policies. When the policy measures applied in Türkiye's foreign trade are examined; It is understood that actions are taken on a sectoral basis in order to eliminate unfair competition. It is noteworthy that Türkiye, whose primary policy is not protectionism even in times of crisis, is not the first to implement policy, but to react even during the so-called trade wars.

As a result, it has been observed that Türkiye takes protective measures when unfair competition conditions occur in international trade and to the extent permitted by law, and these measures result in success. Otherwise, it is thought that the measures to be taken will keep the desired benefit at a limited level, and while it will benefit the producer in the short run, it will adversely affect production and exports in the long run.

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RESUME

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Job Information:

- Ministry of Trade (Former Ministry of Economy)
Head of Protocol – Trade Expert
 - *General Directorate of Exports*
 - *DG of Consumer Protection and Market Surveillance*
 - *DG of Economic Research and Evaluation*
- Şekerbank T.A.Ş.
Assistant Auditor
Board of Audit (01.12.2016 – 23.03.2018)
- Central Bank of the Republic of Türkiye
Intern (2015)
- T.C. Mersin Yenişehir District Governorship
Intern (2014)

Education Information:

- Ankara Social Sciences University SBE - Economics in English (September 2019 - ongoing)
- Hacettepe University Faculty of Law - Public Law (February 2016-2017/ Only Scientific Preparation completed)
- Ankara University, Faculty of Political Sciences (Mülkiye) - Political Science and Public Administration-Graduated (10.01.2016), Graduation Grade: 3.06
- Charles University in Prague, Faculty of Social Sciences - Political Science (2014-Spring Semester, Average: 3.59)
- Mersin Chamber of Commerce and Industry Anatolian High School (2005-2009)

Exam Results:

- KPSS ranking by fields: P24: 91th of Türkiye, P29: 70th of Türkiye, P30: 17th, P33: 59th, P82: 178th, P86: 116th
- ALES: Verbal: 87, Quantitative: 84

Trainings/Seminars:

- International Monetary Fund (IMF): Macroeconomics Forecasting Online Tutorial (certified, 2020)
- Turkish Economic Association and Pamukkale University: Applied Panel Data Econometrics (certified) (2019)
- METU – Bilge İş: Foreign Trade