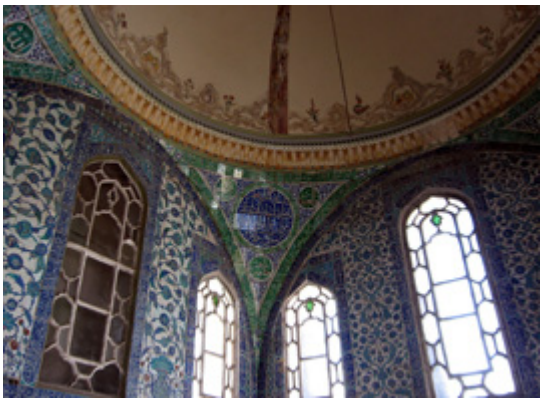
CIS CENTER FOR INFORMATION & SOCIETY
UNIVERSITY of WASHINGTON

Turkey

PUBLIC ACCESS LANDSCAPE STUDY SUMMARY



Overview

Turkey has low needs and high readiness with regard to improving public access to ICT; it should be poised to make steady gains in the coming years. The government is strongly committed to improving public access with the nationwide rollout of its Public Internet Access Centers (PIACs) well underway, particularly as integrated into the country's Public Training Internet Centers (PTICs). It would help to have a central authority in charge of this effort, however, and for more data to be available about the underserved populations these venues are trying to help.

PUBLIC ACCES LANDSCAPE	
Challenges ahead	Steady gains
Needs	Low
Needs (rank)	24/25
Readiness	High
Readiness (rank)	2/25

Findings

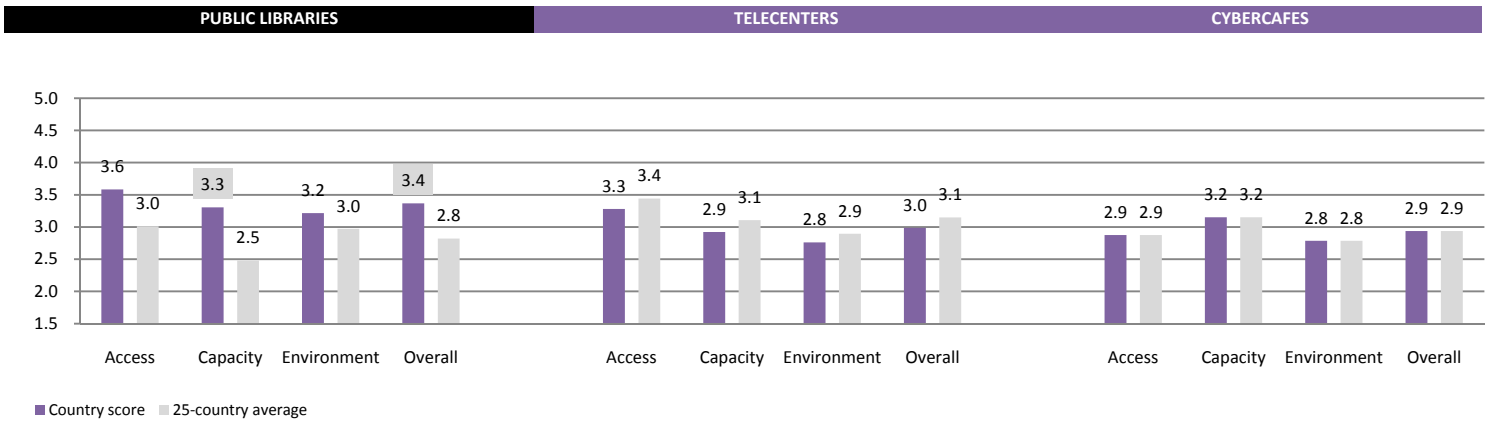
With the spread of the Internet, interest in ICTs has accelerated in Turkey's business world which in turn has led more individuals to own computers and use them in cybercafés. The government has prioritized ICT use in education, businesses, and the public sector, and encourages capacity-building among the population. Although there are regional and socioeconomic differences in adopting ICTs, the general trend seems to be positive and moving forward.

Until recently Turkey did not have any public venues where the citizens could access ICTs freely. Indeed, the culture of providing open public access to information did not exist in Turkey until recently, and this was especially true for government agencies charged with providing information to the public. The country's major ICT venues were cybercafés, schools and universities, workplaces, and households of people who could afford to own computers. Some libraries in district centers also had small computer labs with Internet access.

Today, there is strong political support to make ICTs available to citizens, businesses, and public sector organizations. In 2006, the government announced it would open 4500 new Public Internet Access Centers (PIACs) as part of a nationwide eTransformation effort. About half of these PIACs have already been established. PIACs generally consist of 10-20 Internet-connected computers plus printers and scanners, and some sort of training and support appropriate to the local community. These centers have been incorporated into libraries, municipal centers, and Public Training Centers (PTCs) throughout Turkey, transforming them into new Library Internet Centers (LICs), Municipality Internet Centers (MICs), and Public Training Internet Centers (PTICs).

Over 1300 PTICs currently exist in Turkey. The pre-Internet Public Training Centers first opened in the 1920s with the goal of reaching illiterate people. They have long been operating in rural and remote regions, especially in small towns or villages where they can best meet the needs of the underserved. PIACs have now been established in 86 percent of the country's PTICs (all PTCs except those that lacked adequate physical space).

ACE Scores



Shaded data points are outside standard deviation for 25-country set
See the last page for country-specific definitions of these venues
See the last page for a definition of the ACE scoring framework

Venue Distributions

	ALL PUBLIC ACCESS			PUBLIC LIBRARIES			TELECENTERS*			CYBERCAFES*			OTHER VENUES		
	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median	Total urban & non-urban	25-country average	25-country median
VENUES	5,729	10,017	5,489	1,161	1,111	1,062	1,343	1,273	366	3,225	8,693	3,225	0	398	46
number with ICT	2,261	9,802	5,122	267	349	96	1,155	1,149	257	839	8,507	3,251	0	146	13
% with ICT	39%	98%	87%	23%	31%	20%	86%	90%	100%	26%	98%	100%	NA	37%	92%
% OF PUBLIC VENUES	100%	100%	100%	20%	11%	20%	23%	12%	11%	56%	73%	67%	0%	4%	1%
POP. PER VENUE ('000)	13	8	5	63	93	37	54	205	68	23	52	9	NA	419	103
with ICT ('000)	32	15	6	273	2,093	208	63	242	119	87	62	10	NA	1,354	198

NA=Not applicable
*See the last page for country-specific definitions of these venues. For this country, telecenters are PTICs, and cybercafés are PIACs.
Data points are missing for some measures in some countries, which can result in oddities when comparing rows of data (for instance, the average number of venues with ICT appears to be greater than the average number of venues). For a complete overview of comparative country data, please see the summary paper for this study.

User Profiles

		PUBLIC LIBRARIES				TELECENTERS				CYBERCAFES			
		Urban	25-country average	Non-urban	25-country average	Urban	25-country average	Non-urban	25-country average	Urban	25-country average	Non-urban	25-country average
INCOME	Low income	55%	28%	57%	35%	50%	26%	65%	24%	ND	26%	ND	24%
	Medium income	45%	54%	32%	46%	50%	56%	35%	45%	ND	56%	ND	45%
	High income	0%	7%	11%	6%	0%	9%	0%	4%	ND	9%	ND	4%
EDUCATION	No formal education	0%	3%	0%	2%	10%	5%	10%	6%	0%	5%	0%	6%
	Only elementary	0%	16%	47%	21%	0%	14%	15%	13%	11%	14%	0%	13%
	Up to high school	100%	50%	35%	36%	90%	37%	75%	32%	59%	37%	47%	32%
	College or university	0%	28%	18%	19%	0%	40%	0%	28%	30%	40%	53%	28%
AGE	14 and under	0%	12%	0%	15%	5%	9%	0%	14%	ND	9%	ND	14%
	15-35	96%	72%	35%	51%	77%	74%	100%	57%	ND	74%	ND	57%
	36-60	4%	12%	65%	23%	18%	12%	0%	8%	ND	12%	ND	8%
	61 and over	0%	2%	0%	2%	0%	0%	0%	1%	ND	0%	ND	1%
GENDER	% female	55%	53%	30%	49%	42%	39%	25%	39%	ND	39%	ND	39%

ND=No data
Percentages may not add up to 100% in all cases
See the last page for country-specific definitions of these venues
Data collected through interviews conducted by research teams. See country reports for details with regard to methodology, locations, timing, and data collection issues.

Because PTICs are so widely distributed, they are easily accessible by underserved groups. The venues offer a set of standard training courses that are determined to be of greatest need in the local community. In addition, local communities can request other courses if a minimum number of people register for a class. If necessary, trainers, classrooms, and finances can then be provided. Such requests are often the result of evaluations of what might best meet the needs of the underserved in a particular area. In general, these courses are free. In some cases, voluntary donations are requested, although the donations are not requested in underserved areas or from poor members of the public.

ICT programs are often in demand in PTICs, and in most of these venues, basic IT skill courses are offered. These PTICs are equipped with new, top-quality computers, hardware, and software. The combination of the infrastructure, equipment, and trained and motivated staff members are largely the reason why so many of these venues have been successful.

In contrast to the widespread rollout of PIACs in Turkey's Public Training Centers, PIACs have been installed in only around 200 of Turkey's public libraries so far. Plans call for the installation of around 2000 PIACs in the country's municipal centers, but there is currently little data available on this relatively new program.

One shortcoming of Turkey's PIAC effort is that there has been no central authority responsible for opening and operating PIACs, and coordination efforts have often been slow and ineffective. Also, after these are established they become the responsibility of local organizations that often lack the skills, manpower, and funds to support and maintain them. Consequently, some are now closed or their use is strictly limited because of concern that maintenance and repairs may become too costly or impossible to arrange.

Other findings from this study include:

- Most individuals in the country have access to the Internet through personal computers or computers that belong to others.
- Public access to ICTs exists mostly through cybercafés. While there is not enough information to provide a complete picture of public use of ICTs at cybercafés, the perception is that these venues provide ICTs for "trivial" use and are places where unemployed people loiter.
- Public access venues are often used only by students for homework and e-mail, and in some cases, chats and Skype are allowed, but the venues are not reaching their full potential.
- Gender discrimination affects the ability of women to access ICTs, and cultural inequities prevent most women and young girls from accessing computers.
- The information needs of traditionally underserved people, especially minorities, are not met, and there are no initiatives to meet these particular needs.
- Mobile telephone coverage is extensive, and a large percentage of the population uses mobile devices.

Recommendations

- Turkey needs a Ministry of IT or ICT in order to better coordinate the efforts related to the eTransformation, modernization of Turkey's public and private sectors. There is also a need to move from implementations involving several organization where there is no clear indication who is actually in charge and responsible.
- PTICs need more investments, because these are the right venues for public access to information both in terms of their closeness to the users and ability to build capacity.
- The current efforts to open new PIACs all over the country should be supported by supplying qualified operators to the venues. Without plans for capacity-building and venue maintenance, many of these venues may not be sustainable.
- It is important to keep track of activities in the venues and their relationship to the equity variables. The venue owning organizations often do not have any data on the underserved and their needs. This makes it even more important to gather such information.
- Policymakers and the higher-level public organizations that are sponsoring venues need to know more about what actually is happening at the grass roots level in these venues. This can provide an effective feedback for better and long term planning and for organization of the responsibilities, costs, and sustainability

Geography & Economy

Turkey is located in southwestern Asia, bordered by eight countries and three seas. The climate is temperate and the land is mostly mountainous but arable, with a narrow coastal plain and a central high plateau.

Turkey is governed as a parliamentary democracy and has a strong tradition of secularism. The country moved toward a market-based economy in the 1980s. The economy now shows strong and stable growth with strong foreign investment due to improvements in the banking, retail, and telecommunication sectors. While it has some light industry and tourist income, most of its revenue comes from oil and natural gas production, as well as gold, copper, coal, and other minerals.

The population is approximately 80 percent Turkish and 20 percent Kurdish. Seventy percent of the country is concentrated in cities; the east and southeast are mostly rural. The poverty rate is about 20 percent. The literacy rate is considerably higher for men (95 percent) than women (79 percent). There are also differences in the education, social and economic status between the eastern and western parts of the country.

COUNTRY PROFILE	
Total population* (millions)	73.0
Urban population* (millions)	49.4
Literacy (%)	88
E-readiness	5.6
Gini coefficient	0.5

*World Bank 2006 data

Research Team

Ibrahim Kushchu
Phone: 44-781-326-4992
E-mail: ikushchu@gmail.com

CIS Contact

Prof. Ricardo Gomez
Center for Information & Society (CIS)
University of Washington
4311 11th Avenue NE, Suite 400
Box 354985
Seattle, WA 98195
cisinfo@u.washington.edu
www.cis.washington.edu

About this study

CIS's Public Access Landscape Study examined how people around the world access and use information and computers in public settings such as libraries, telecenters, and cybercafes. Understanding public access is particularly important in developing countries where there is often limited private access to information and communication technologies (ICTs).

This study covered a carefully-selected sample of 25 developing countries containing over 250,000 public access settings. Local research teams surveyed over 25,000 people and conducted interviews and focus groups in order to develop a detailed picture of the public access ICT landscape in each country. CIS collected, interpreted, and analyzed these detailed county-level results, and also conducted cross-country comparative analyses to uncover common themes, challenges and opportunities.

The goal of this work is to help strengthen public access to information and ICTs around the world.

This project was conducted in two phases. During the first phase, country-based research teams prepared draft reports describing the information access landscape, presented a national assessment, and compiled a preliminary set of recommendations. In the second phase, teams identified the principal locations where people seek information: public libraries, cybercafés, telecenters, and other locations (such as private and religious libraries).

Local research teams used a combination of research methods to: (1) observe how people access information; (2) conduct surveys in information venues where they interviewed operators and users; and (3) perform secondary research and analysis of existing reports and documents using both local and international sources. Teams combined site visits and interviews to review the physical infrastructure and human resources of a variety of venues, and to determine the information content, service usage patterns, communication, and knowledge development. Additionally, teams examined the effects of environmental factors such as government policies, geography, and ethnic and linguistic differences.

Definitions

ACE scoring framework: Developed by CIS based on a modified bridges.org Real Access framework. The scale goes from zero to five, with 5 being the best possible score. ACE scores are calculated by evaluating dozens of variables having to do with ICT access, capacity and environment in public access ICT venues. "Access" includes variables such as accessibility, suitability, affordability, and the availability of technology; "capacity" includes training, relevant content and services, social appropriation, and collaboration capacity; and "environment" includes socio-cultural factors, popular support, political will, and a country's legal and regulatory framework.

Challenges ahead (from table on front page): Estimates based on combinations of ACE scores indicating difficulty in improving country's public access to ICT. From the fewest challenges to most, categories are: quick wins, steady gains, slow gains, and significant.

CIS: University of Washington Center for Information & Society (CIS)

E-readiness: The ability to use ICT for economic development, as determined by measures of connectivity and technology infrastructure, business environment, social and cultural environment, legal environment, government policy and vision, and consumer and business adoption. E-readiness is scored on a scale from 1 to 10. In 2008, the global e-readiness score was 6.4, with the highest levels in North America and the lowest in Africa and Asia.

Gini coefficient: Measures the inequality of income distribution. A low coefficient indicates more equal income distribution, while a high Gini coefficient indicates more unequal distribution. The global average is around 0.6; the US Gini is around 0.45.

ICTs: Information and communication technologies (especially computers and the Internet)

Library Internet Centers (LICs): Conventionally the primary source of ICT based information access places; most of the information access limited to research and support for students; have their own funding scheme and are widespread throughout the country

Municipality Internet Centers (MICs): Open to all, but very effective in rural areas

Needs & Readiness indexes (from table on front page)**:** The needs index is comprised of three indicators: inequality, ICT usage and ICT cost. The readiness index is also comprised of three indicators: politics, skills and ICT infrastructure. Proxies are used for all indicators. See "Information Needs & Watering Holes" on the CIS Landscape Study website (www.cis.washington.edu/landscape) for a more detailed discussion of these indexes and proxies.

NGO: Non-governmental organization

Non-urban: Commonly labeled a rural area, but definitions of rural or periurban vary by country

Public Internet Access Centers (PIACs): Government-sponsored Internet centers generally located in Public Training Centers, municipal centers, or public libraries, offering Internet-connected computers plus scanners, printers, training, and other related services. About 4500 of these centers are currently planned.

Public Training Internet Centers (PTICs): Primary aim to serve adults by providing them with skills to improve their quality of lives via new job opportunities and social development programs

Front photo: Inside the library of the Topkapi Palace, built around 1465 AD. Photo courtesy of Sofia Sweetman.