

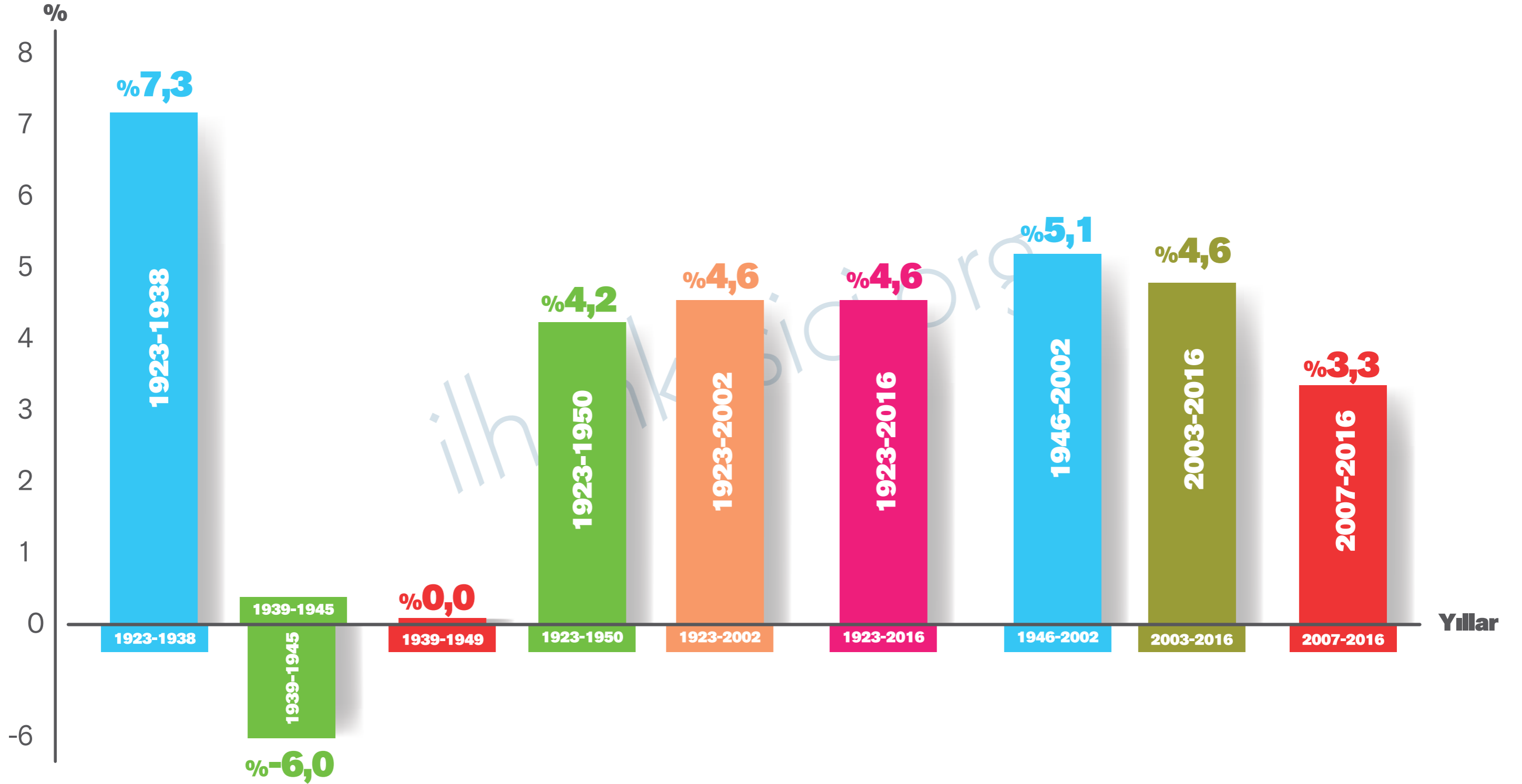
AKP DÖNEMİ: 2003-2016
TEMEL EKONOMİK GÖSTERGELER

“NEREDEN NEREYE?”

İlhan Kesici
1 ARALIK 2016

1

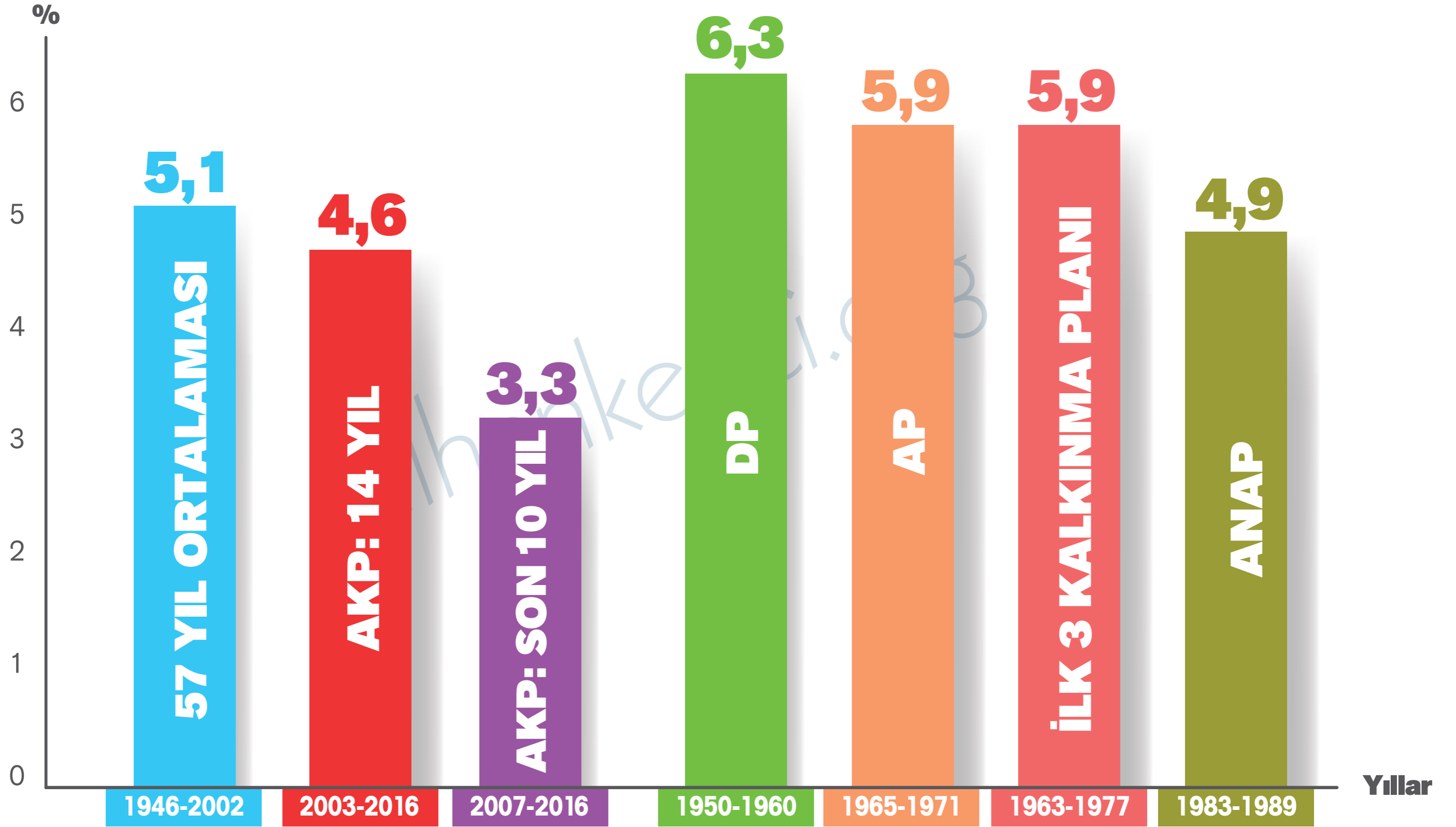
CUMHURİYET DÖNEMİ, 1923-2016, DÖNEMLER İTİBARIYLA ORTALAMA YILLIK BÜYÜME HIZLARI, (%)



İK

2

ÇOK PARTİLİ DÖNEM, 1946-2016, DÖNEMLER İTİBARIYLA ORTALAMA YILLIK BÜYÜME HIZLARI, (%)



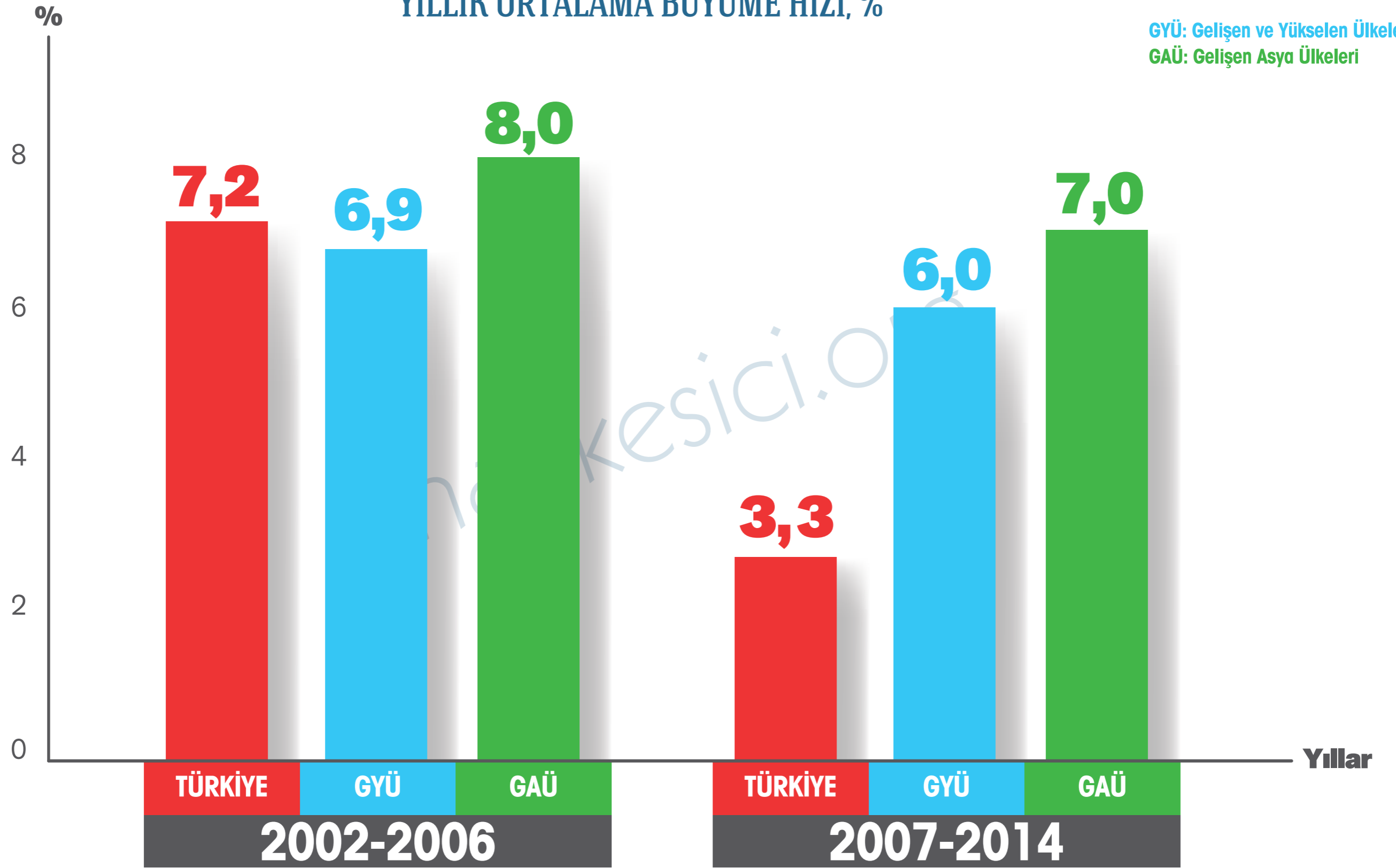
İK

3

BİZE BENZER ÜLKE GURUPLARIYLA KARŞILAŞTIRMA

YILLIK ORTALAMA BÜYÜME HIZI, %

GYÜ: Gelişen ve Yükselen Ülkeler
GAÜ: Gelişen Asya Ülkeleri



İK

4

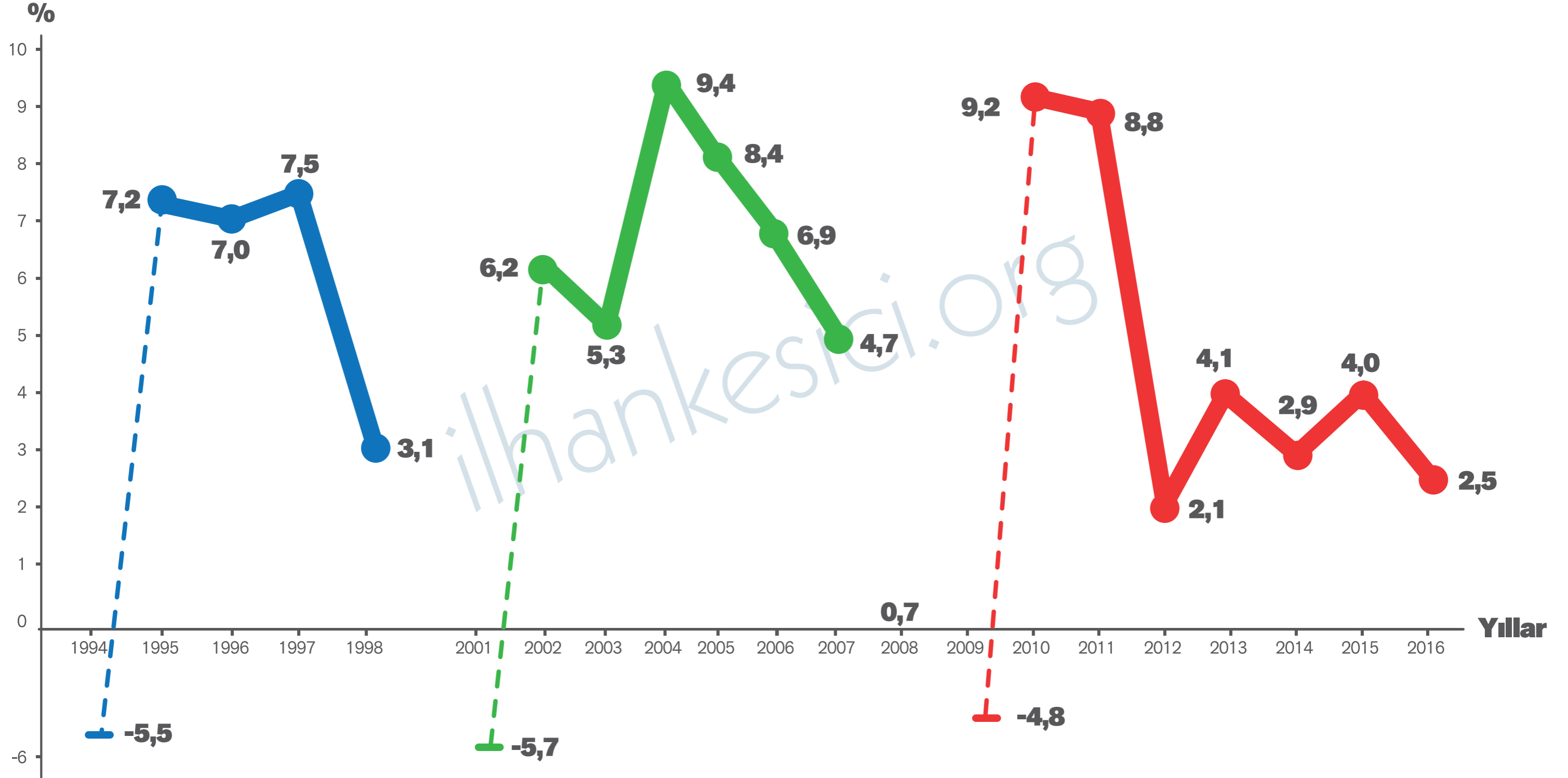
AKP DÖNEMİ, 2003-2016, YILLIK BÜYÜME HIZLARI, (%)



İK

5

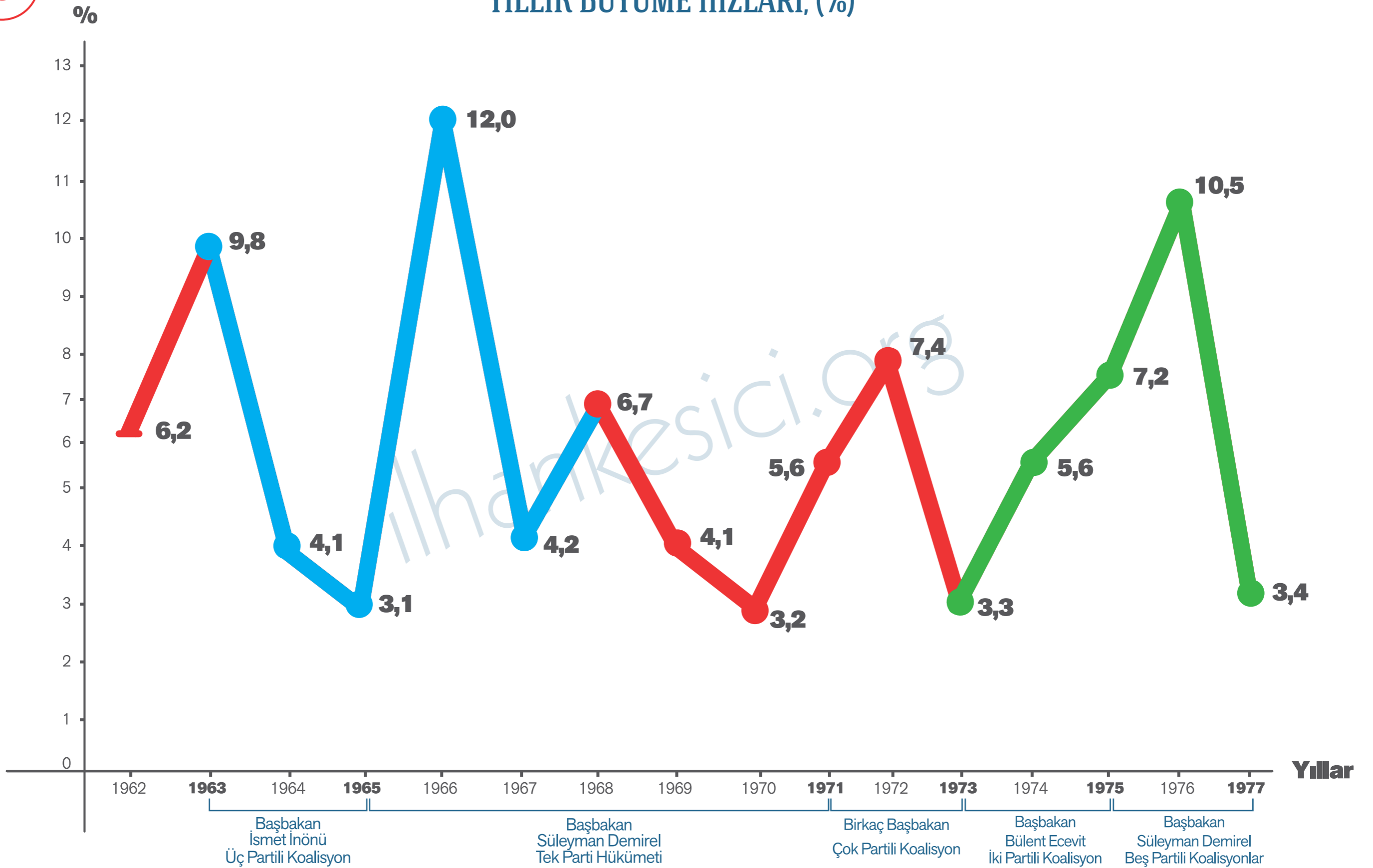
EKONOMİK KRİZLER ERTESİ (1994, 2001, 2009) YILLIK BÜYÜME TRENDLERİ, (%)



İK

6

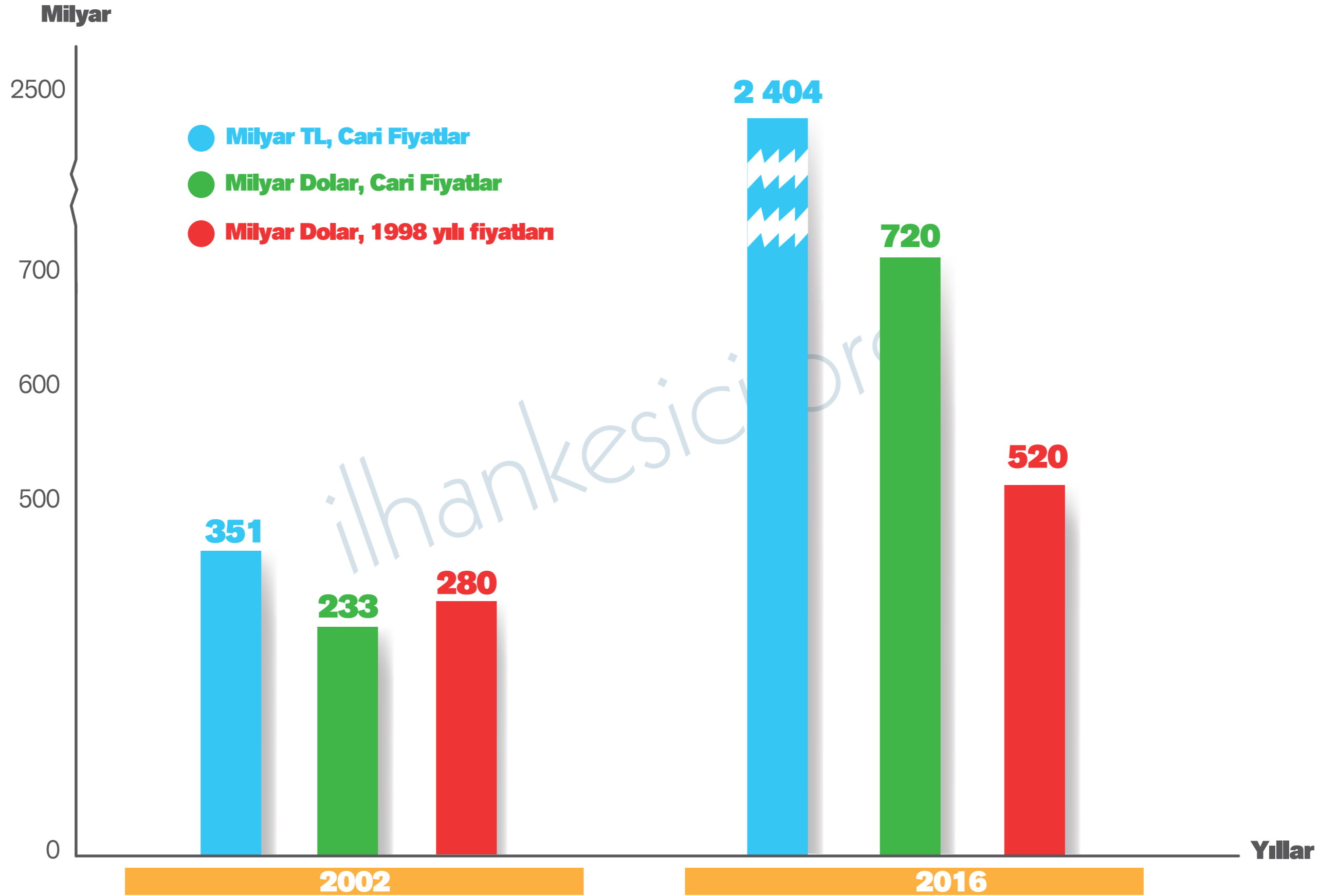
İLK ÜÇ BEŞ-YILLIK KALKINMA PLANI DÖNEMİ, 1963-1977, YILLIK BÜYÜME HIZLARI, (%)



İK

7

MİLLİ GELİR, GSMH

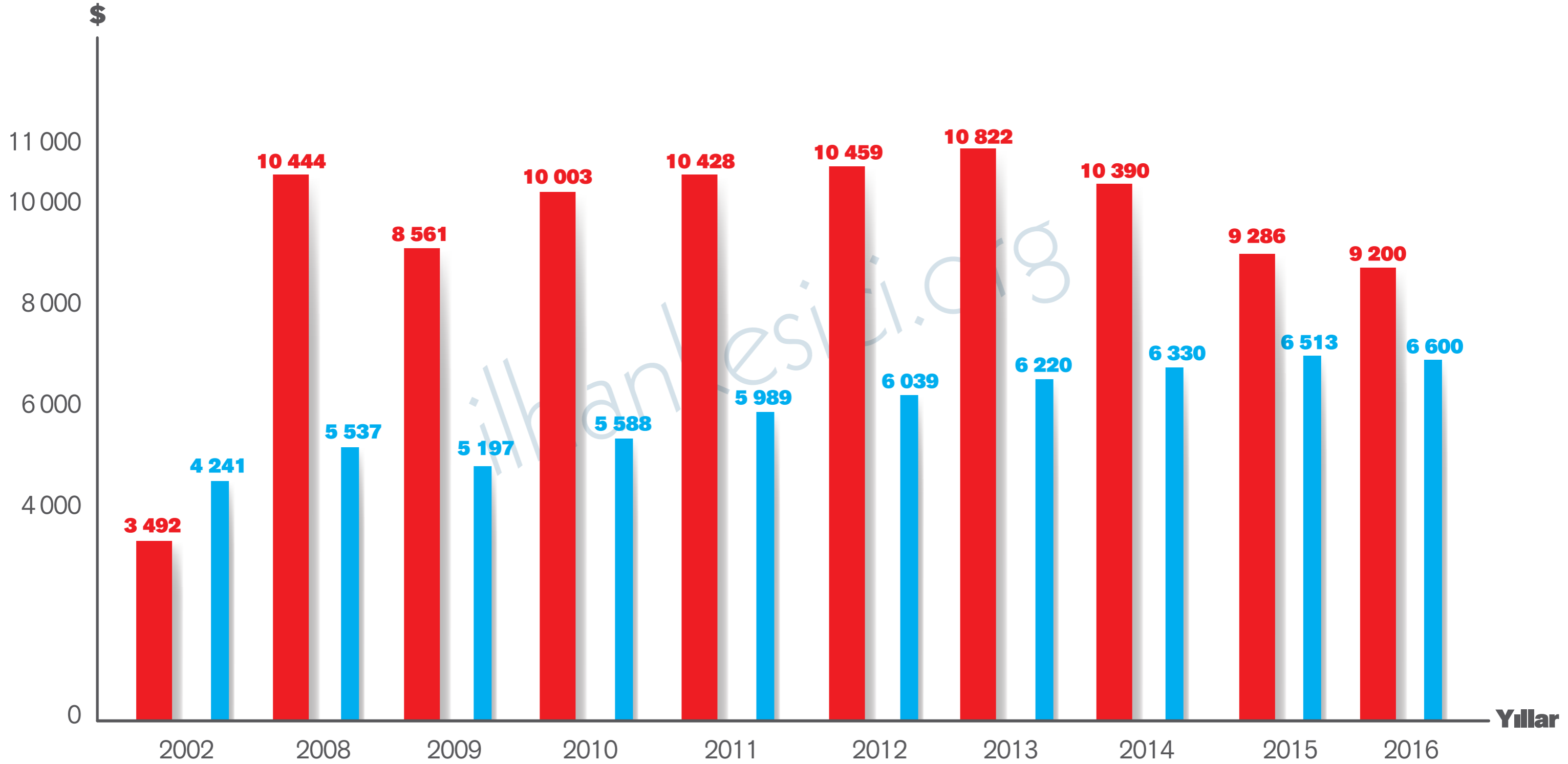


İK

8

KİŞİ BAŞINA MİLLİ GELİR

Cari Dolar Fiyatlarıyla **1998 Yılı Dolar Fiyatlarıyla**



İK

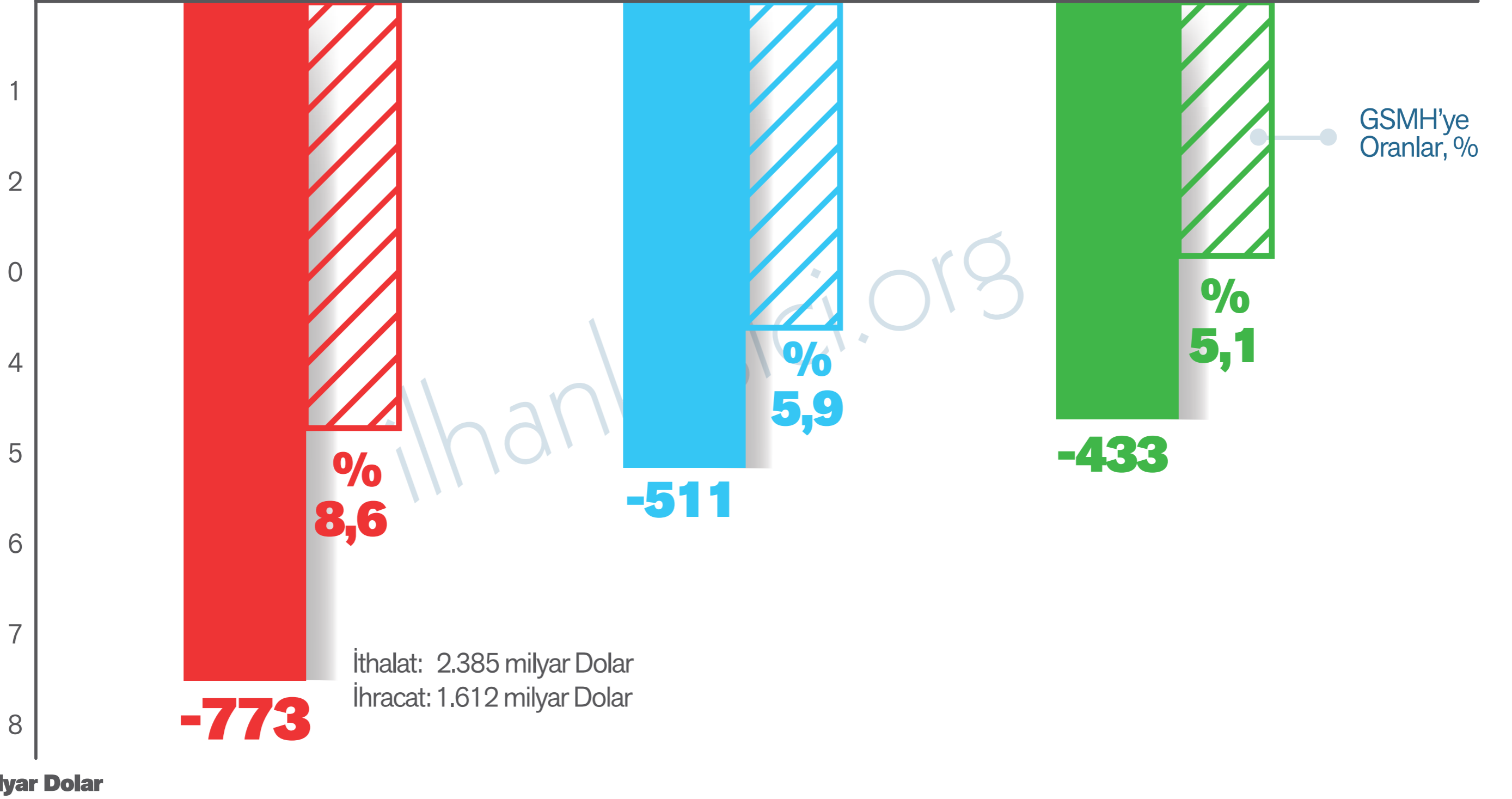
ÖNEMLİ BAZI AÇIKLAR: 2003-2016

MİLYAR DOLAR

DIŞ TİCARET

CARİ İŞLEMLER

FAİZ



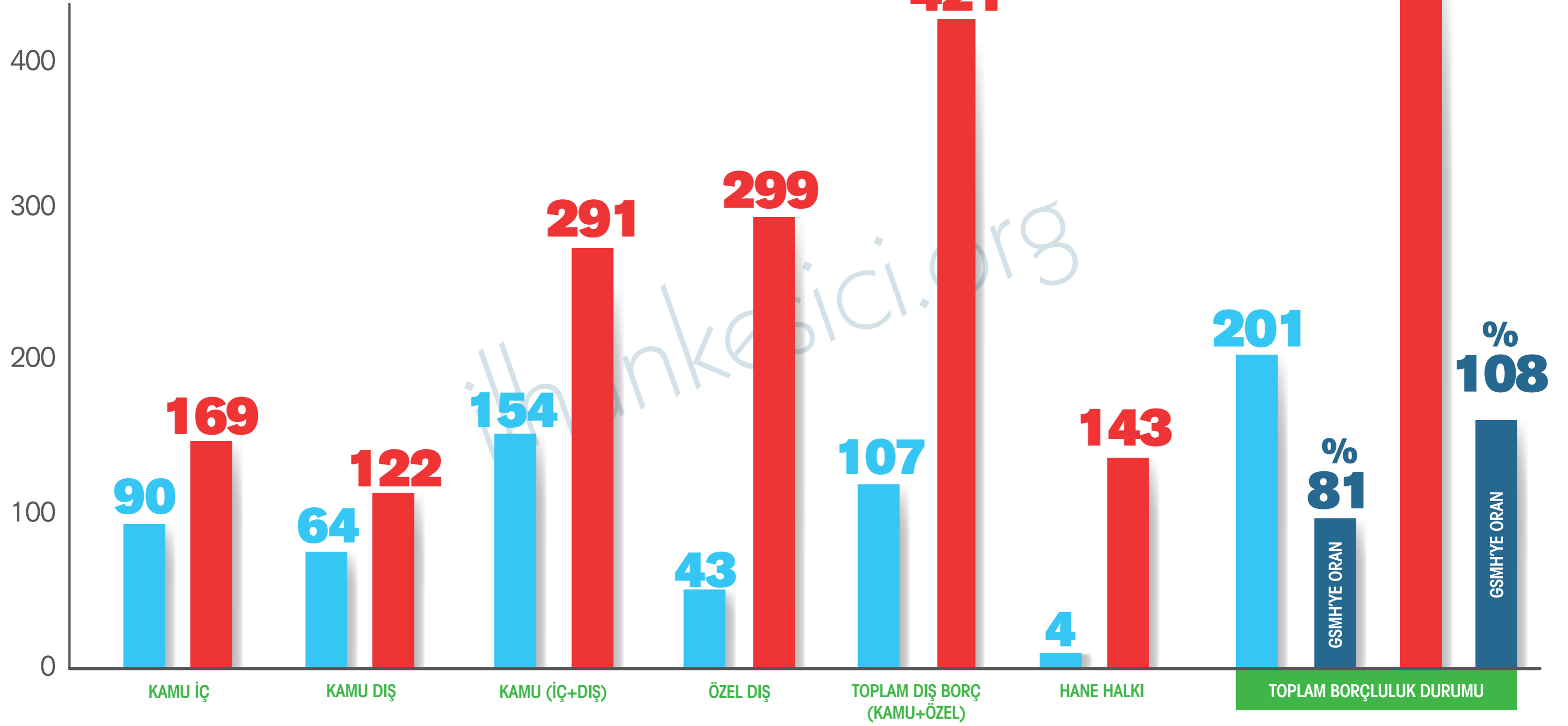
BORÇ DURUMU

MİLYAR DOLAR

Milyar Dolar

2002

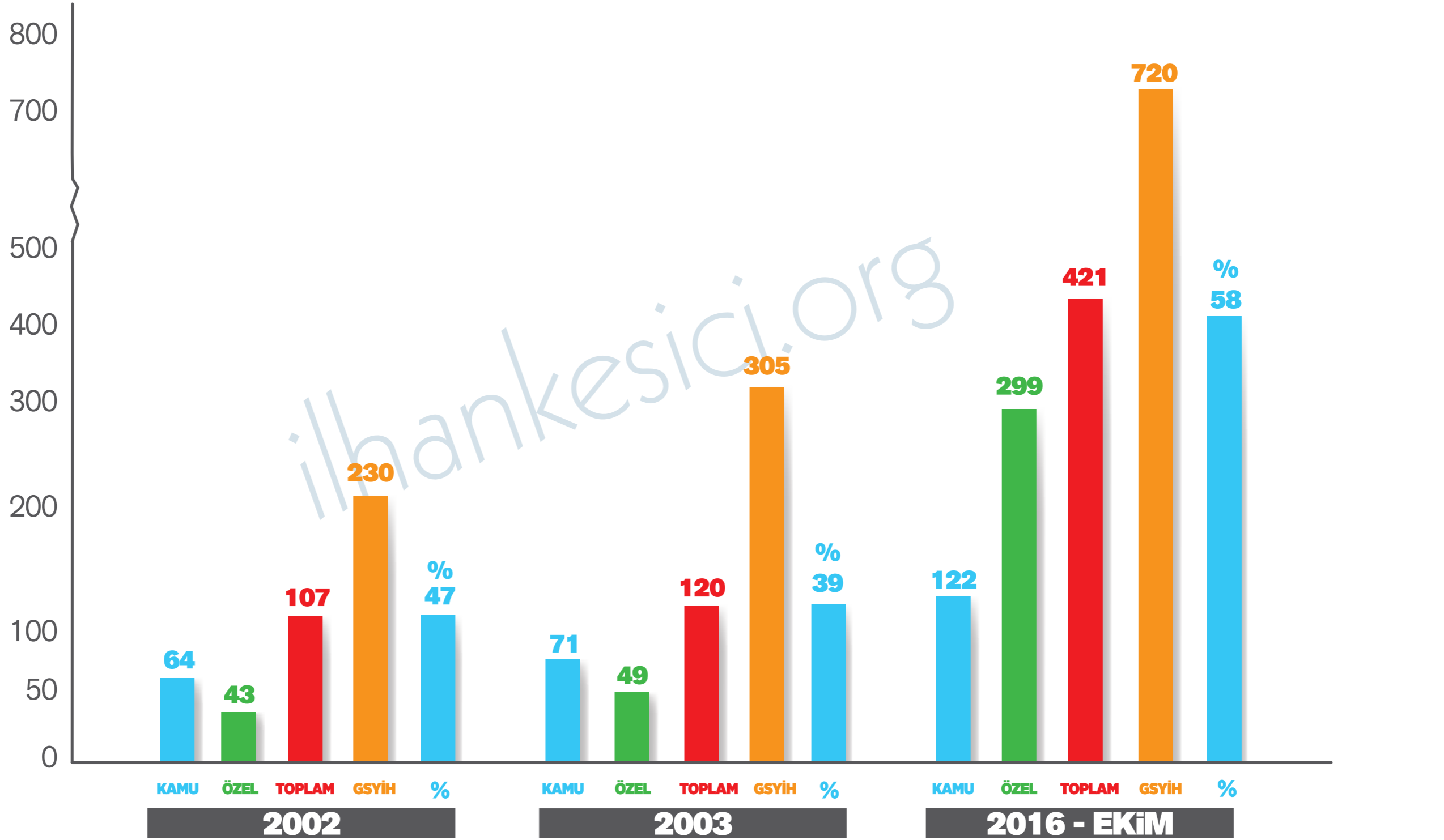
2016 EKİM



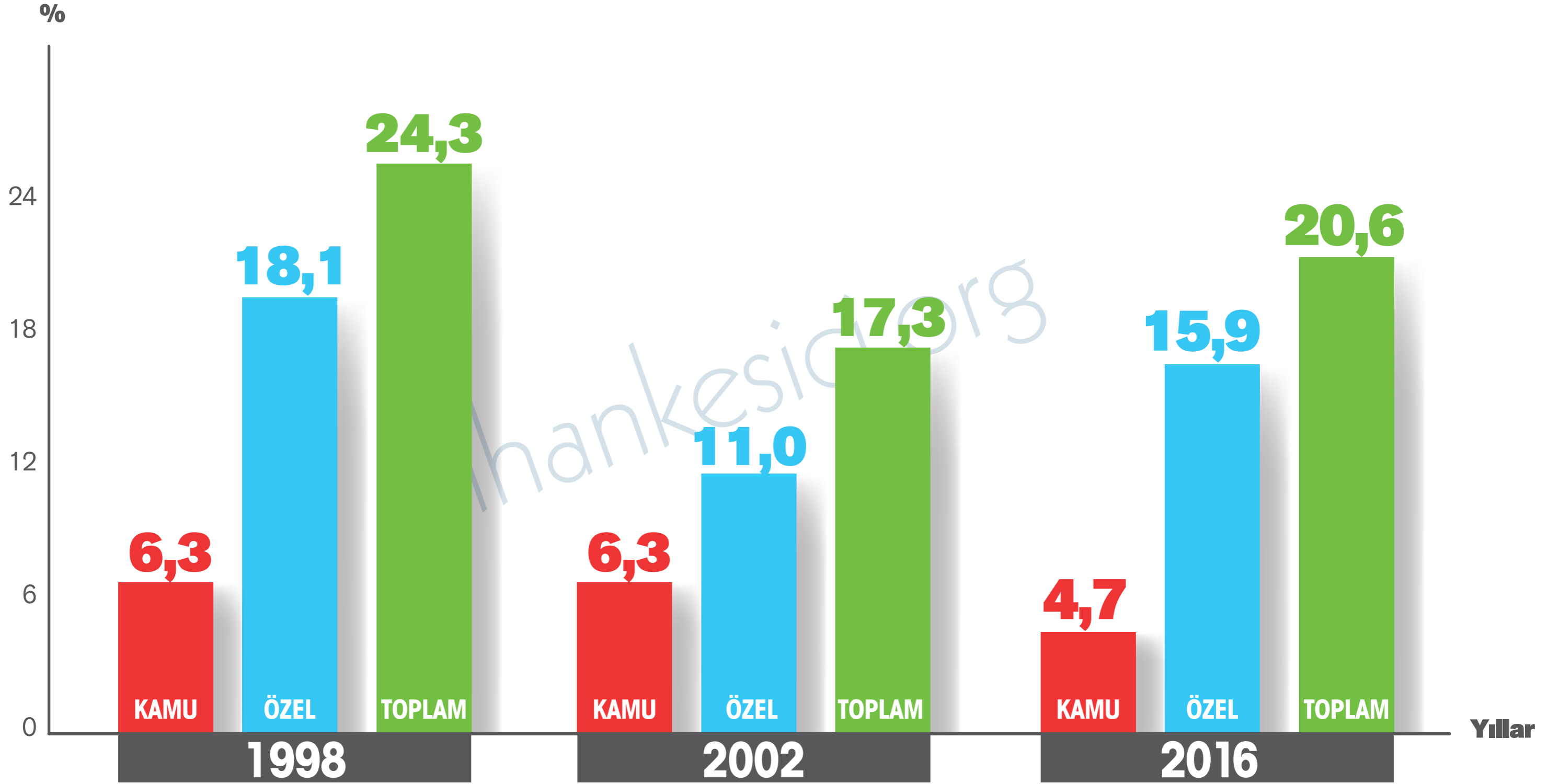
DIŐ BORÇ DURUMU

MİLYAR DOLAR

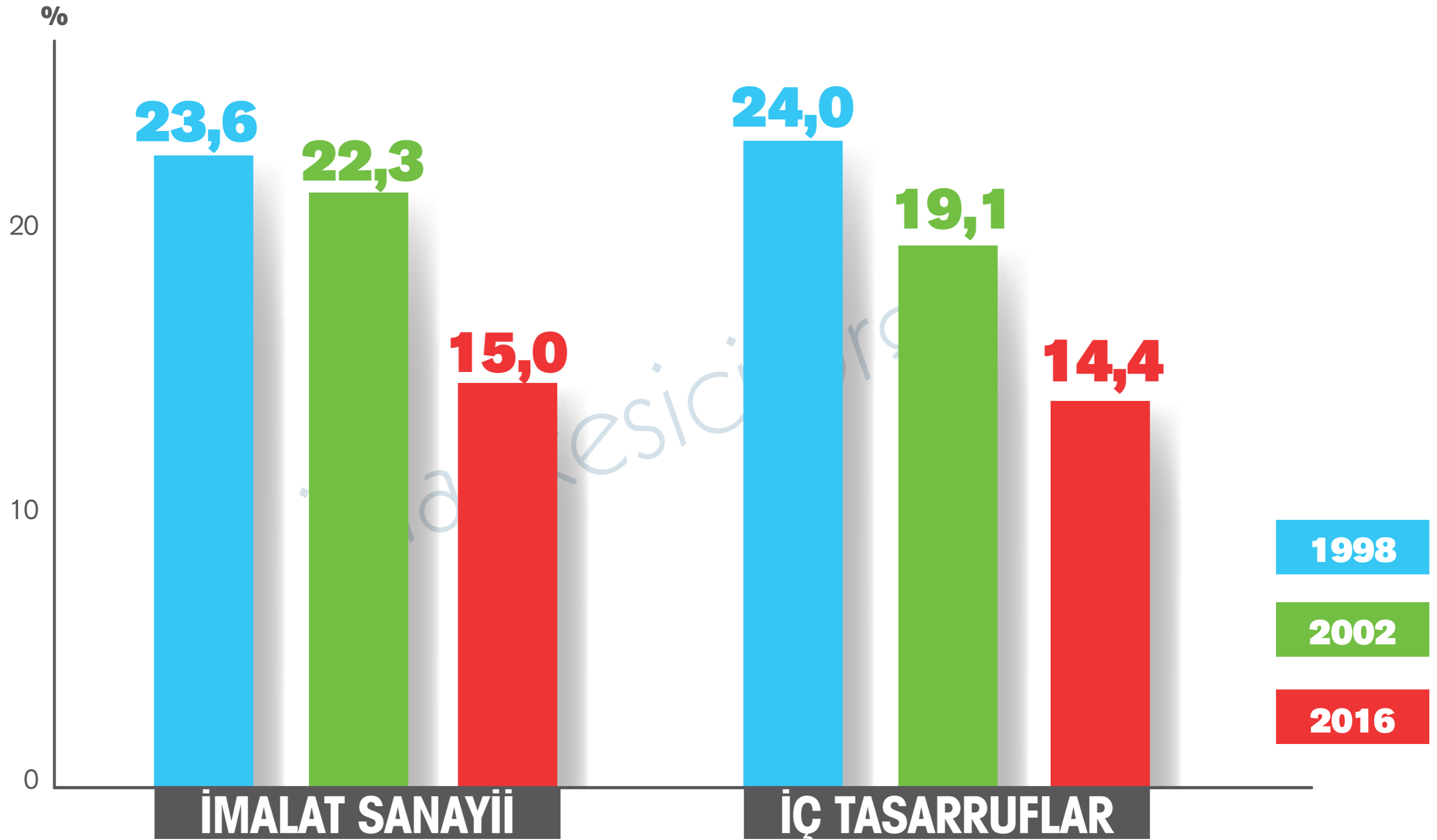
Milyar Dolar



YATIRIMLAR GSMH'YE ORANLAR (%)

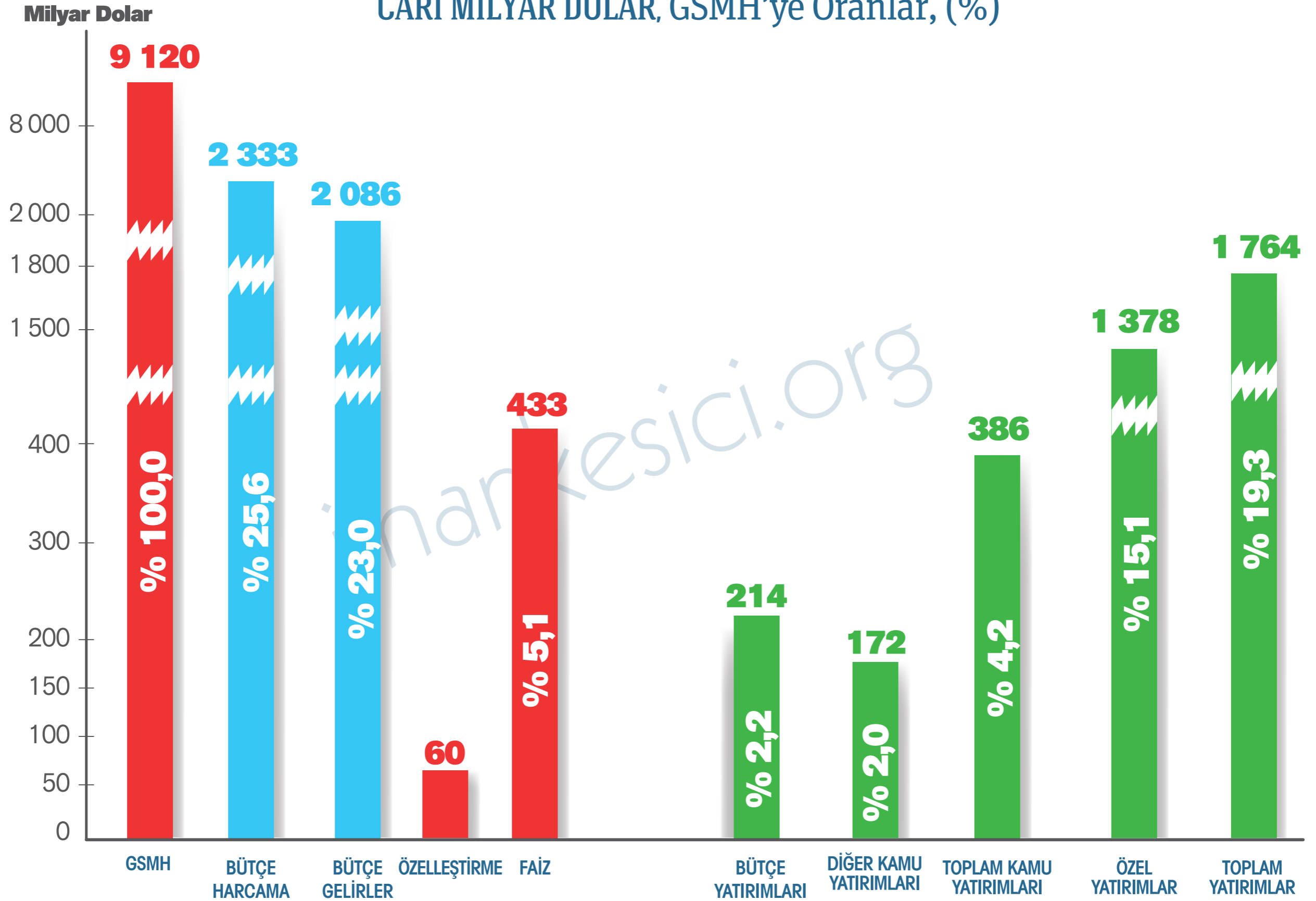


İMALAT SANAYİİ VE İÇ TASARRUFLAR GSMH'YE ORANLAR (%)



GSMH, BÜTÇE, YATIRIMLAR: TOPLAM: 2003-2016

CARİ MİLYAR DOLAR, GSMH'ye Oranlar, (%)

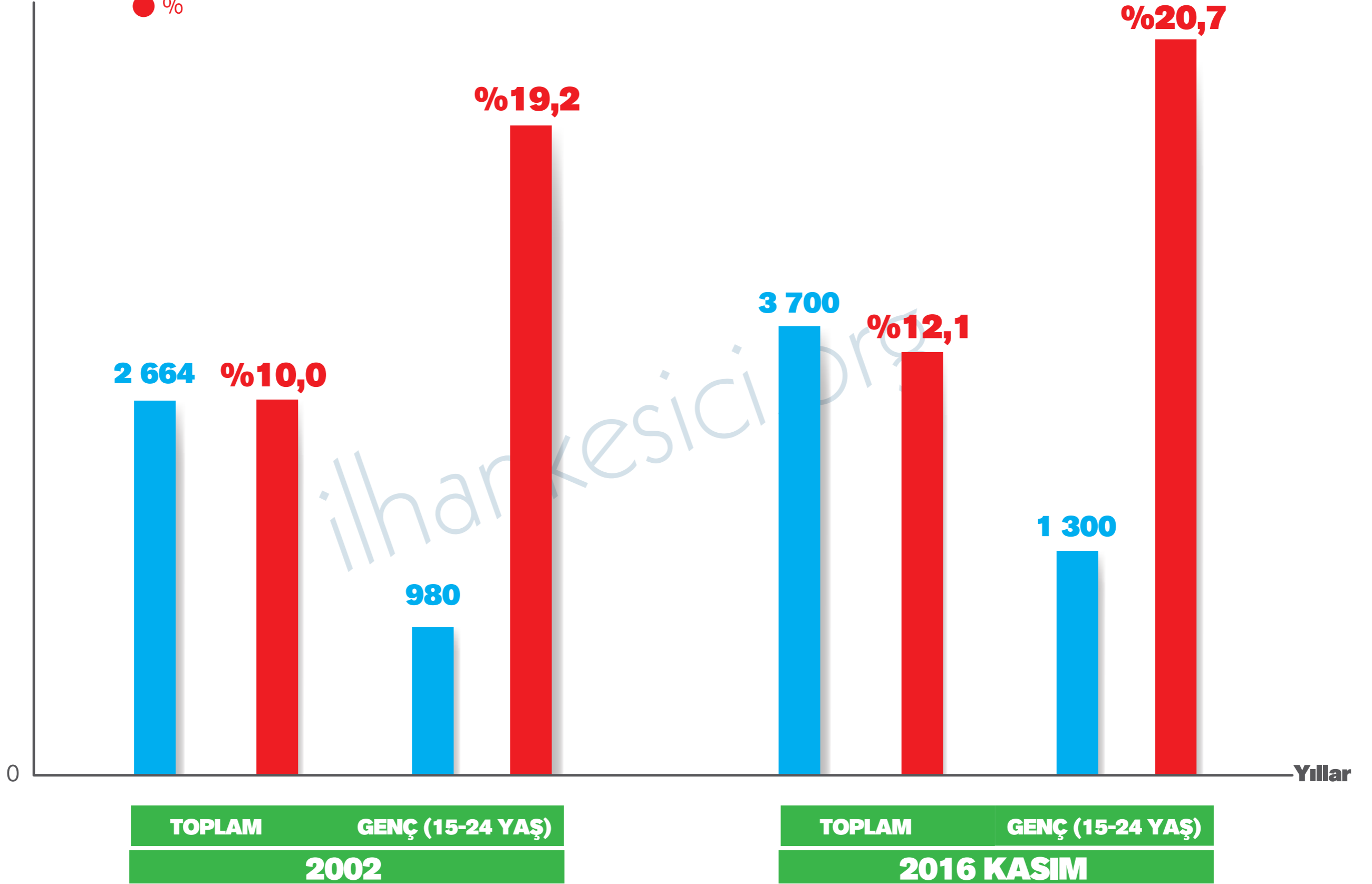


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İŞSİZLİK

BİN

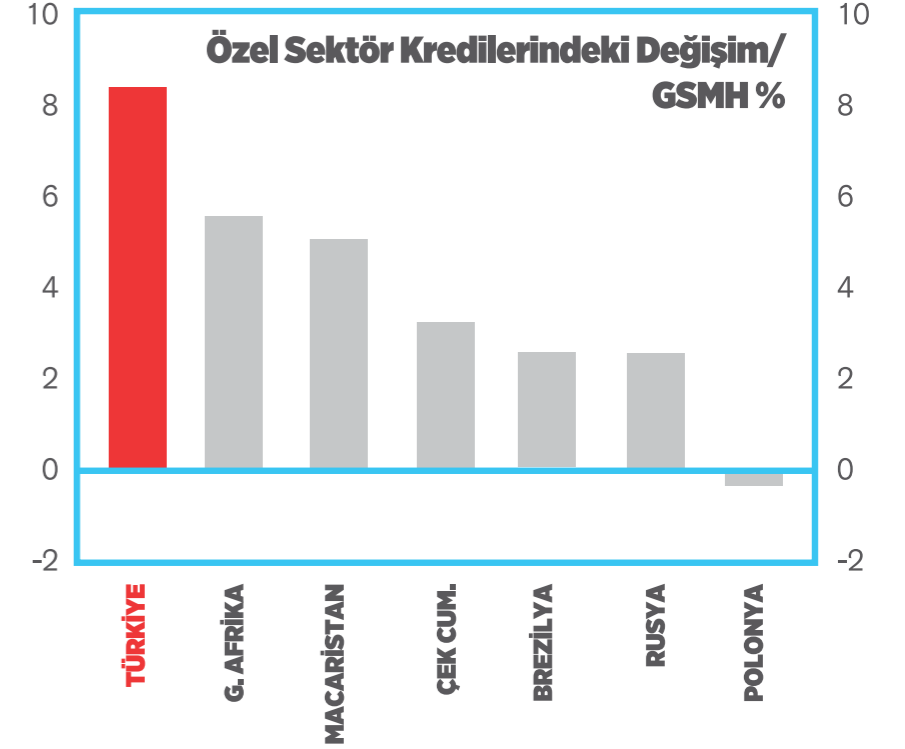
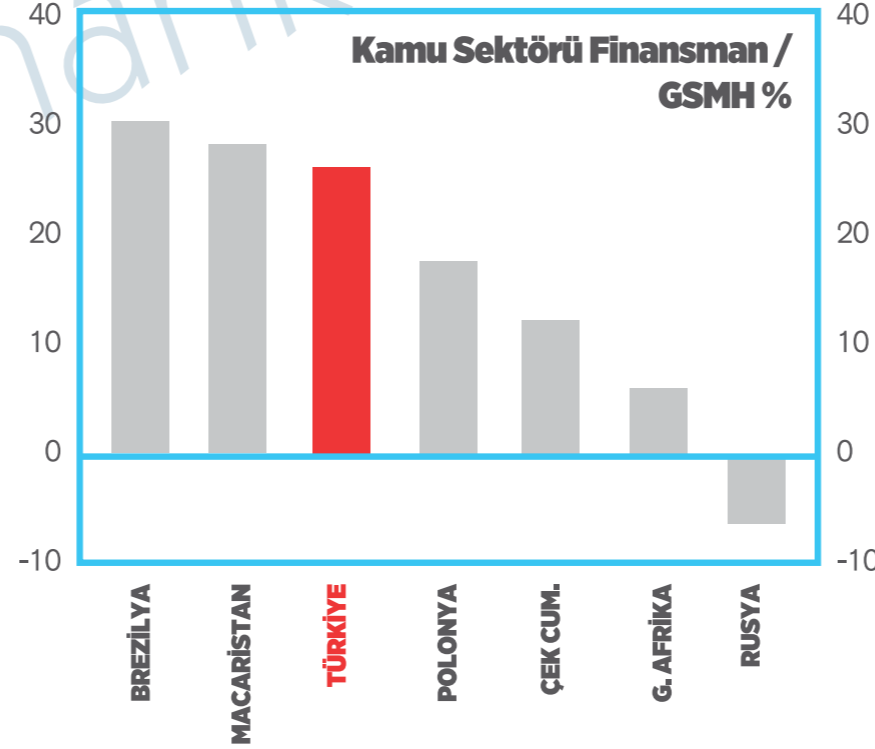
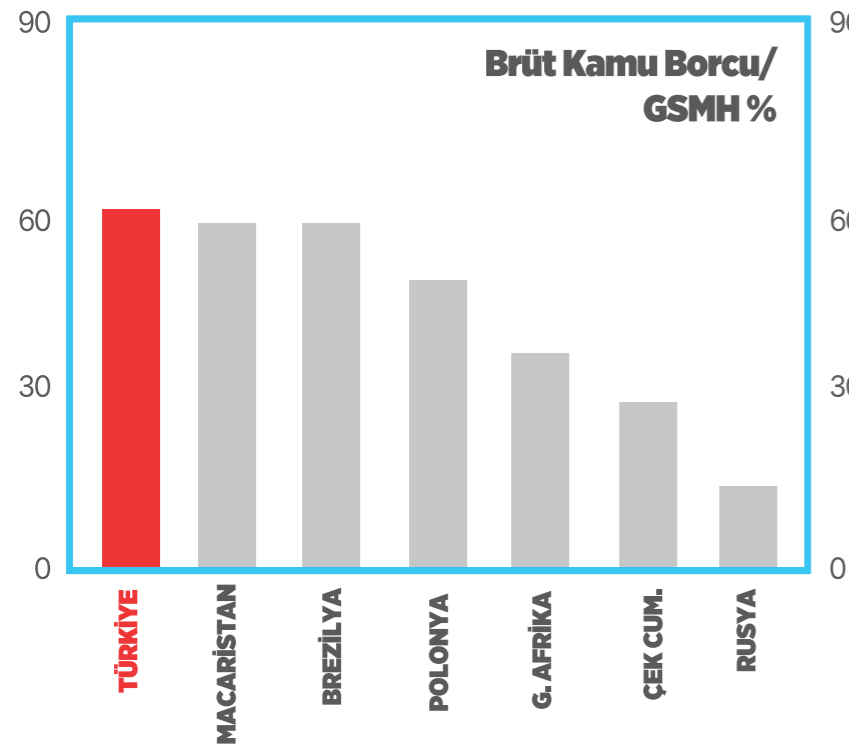
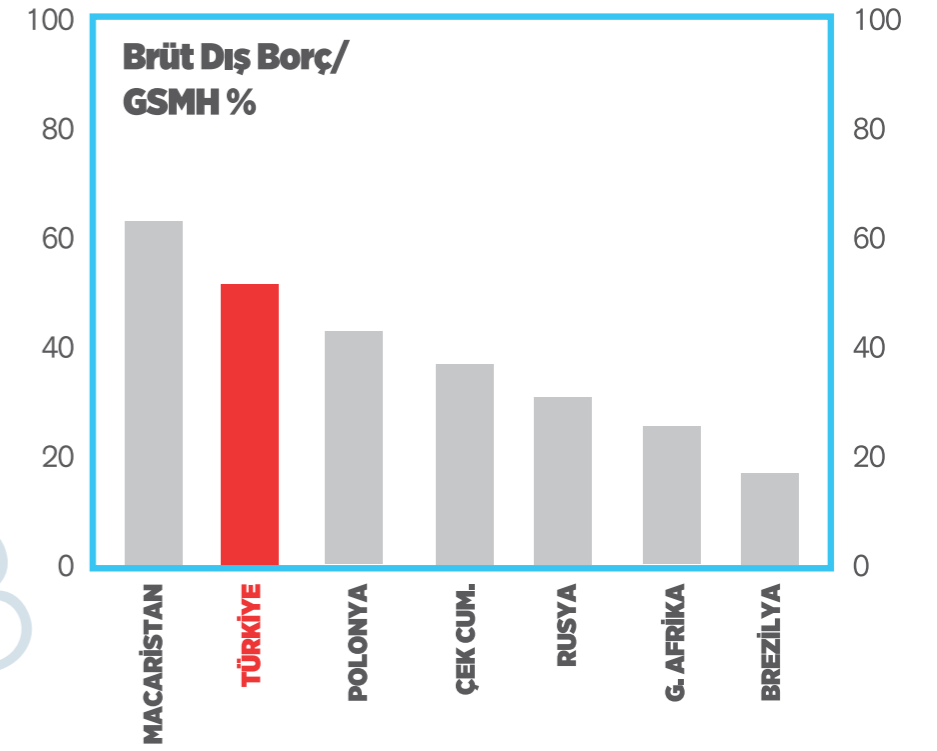
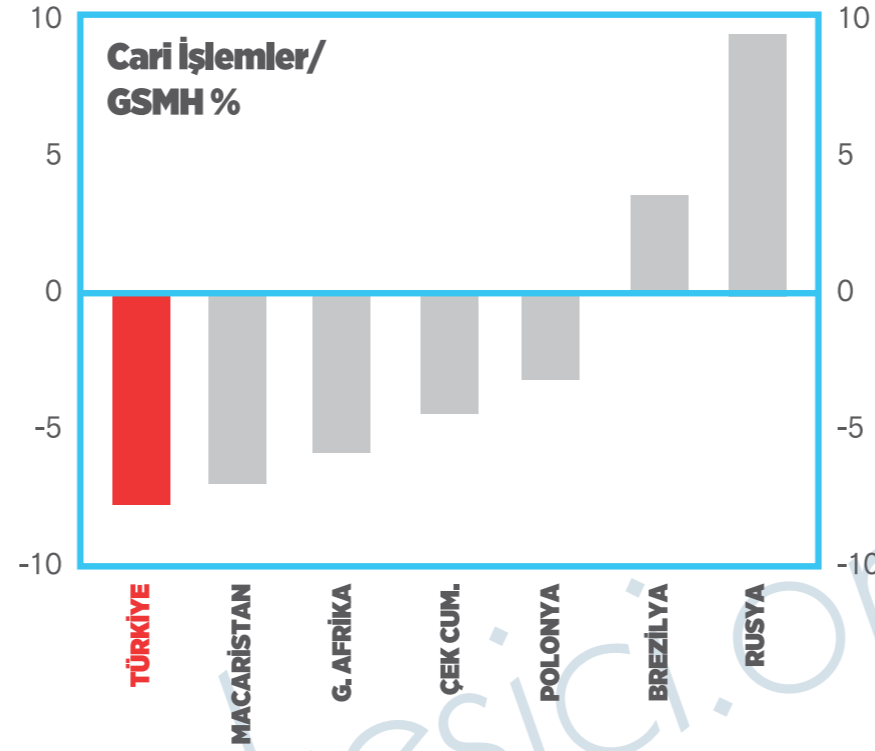
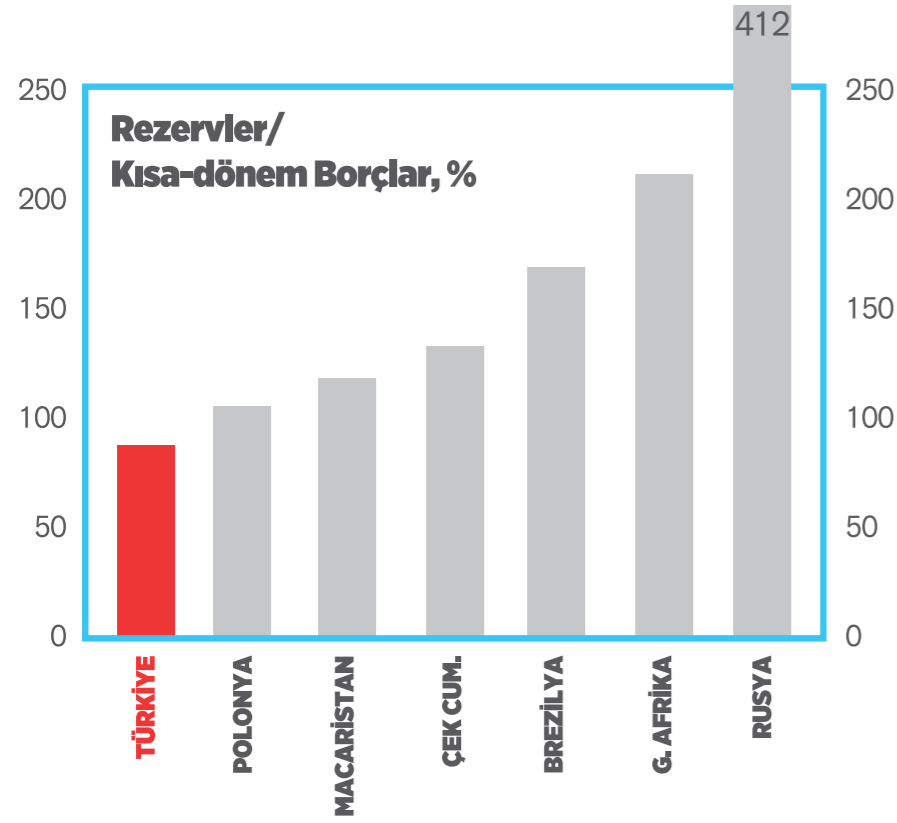
● Sayı (bin)
● %



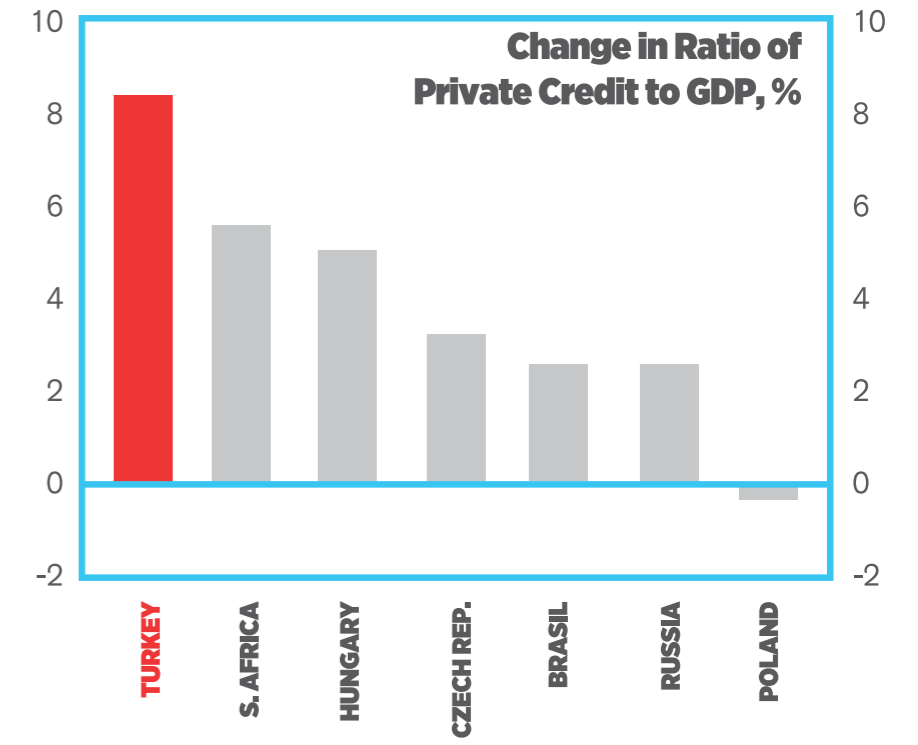
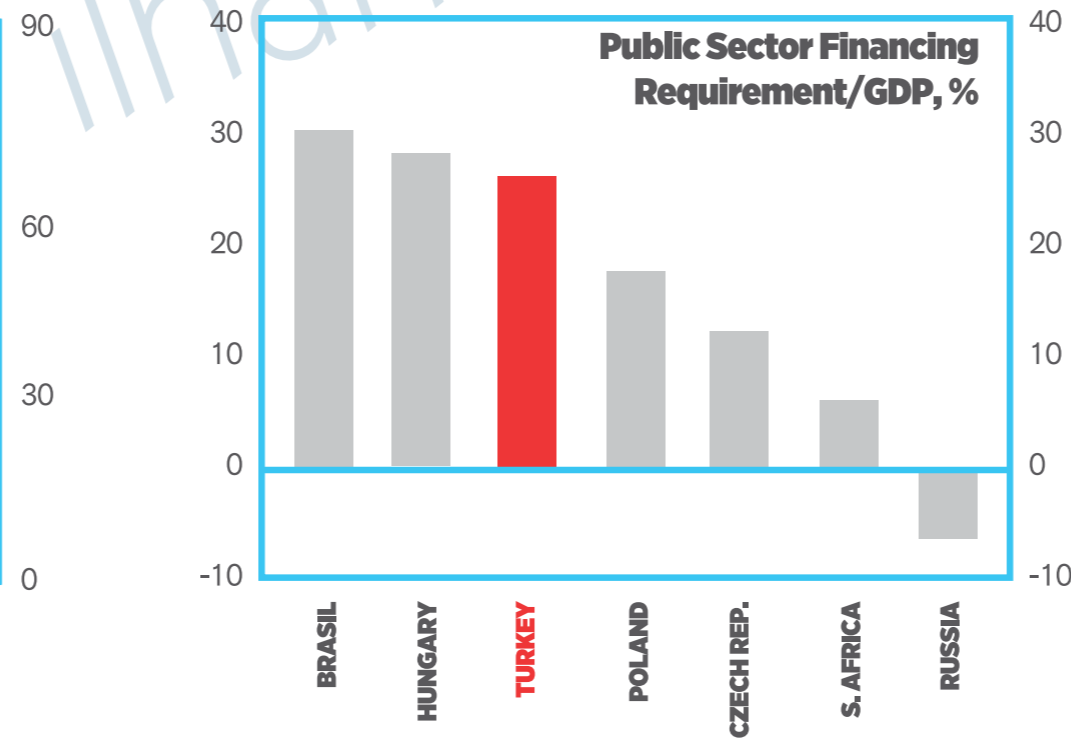
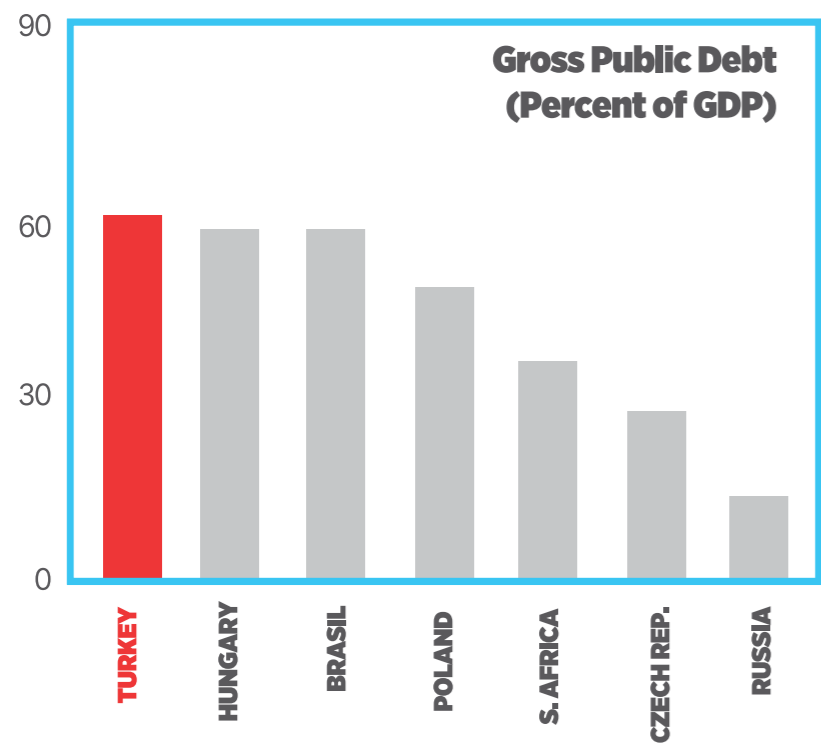
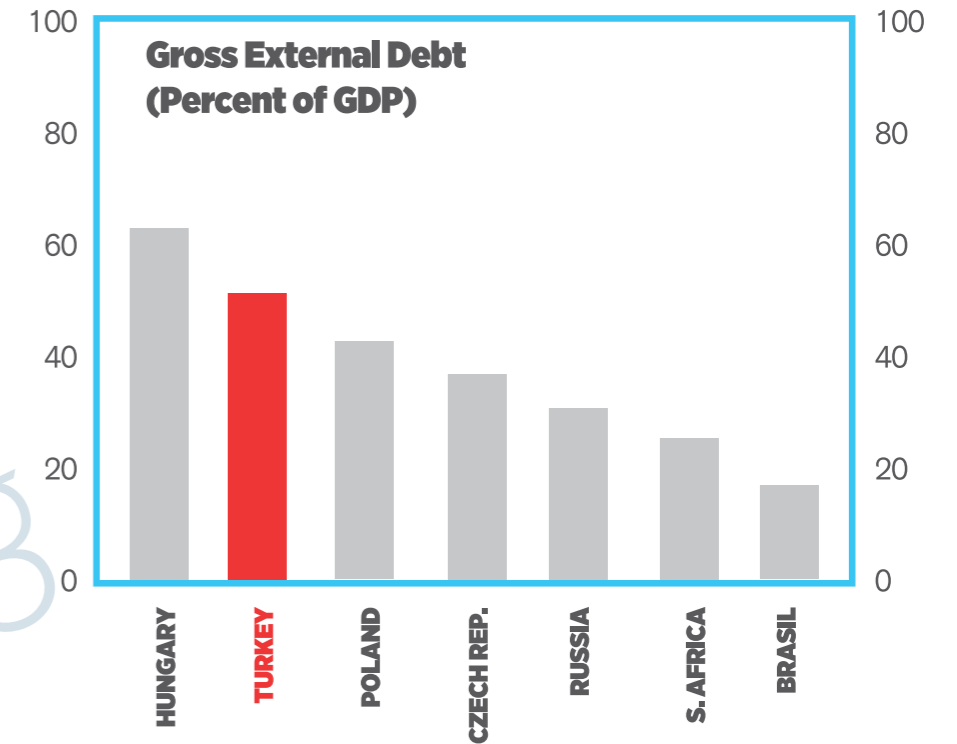
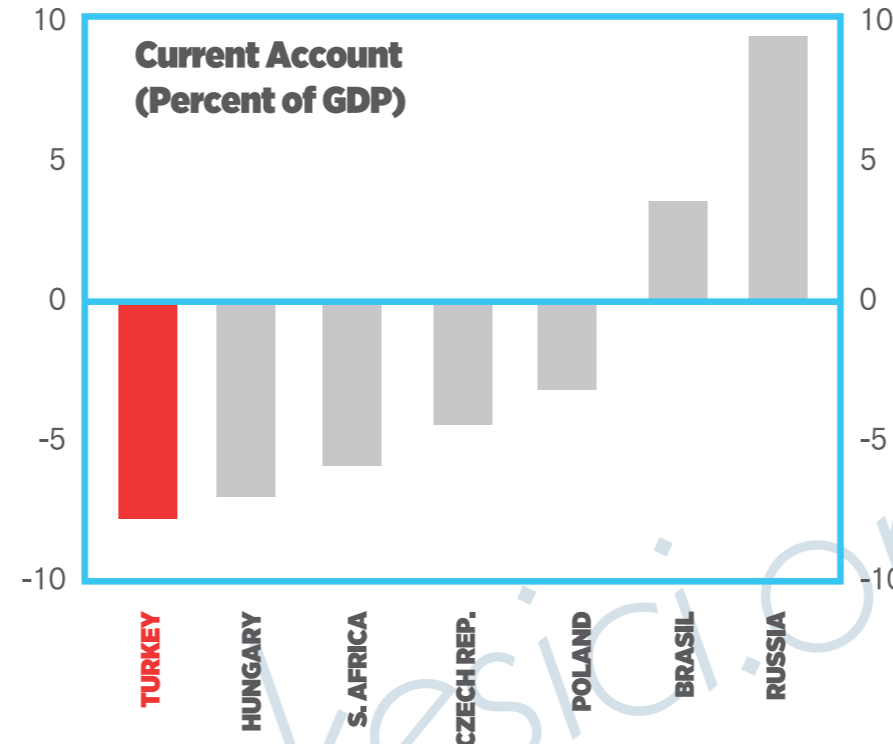
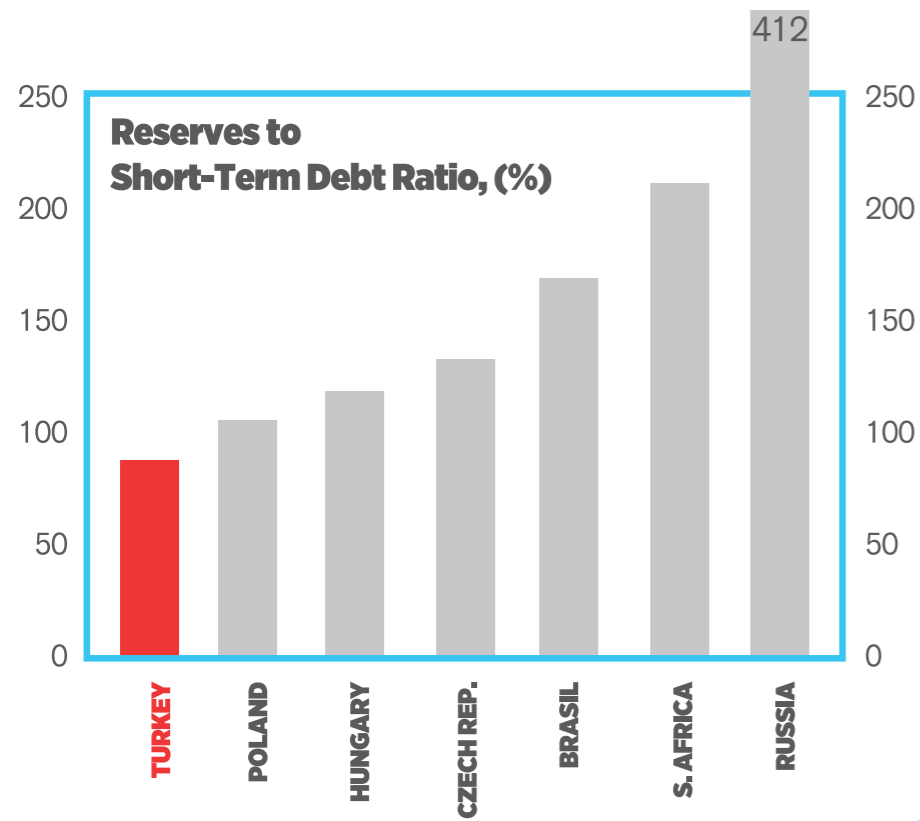
İK

EKONOMİK KIRILGANLIK GÖSTERGELERİ:

SEÇİLMİŞ YÜKSELEN PİYASA ÜLKELERİ: IMF, 07.11.2007, TÜRKİYE RAPORU



ECONOMIC VULNERABILITY INDICATORS: SELECTED EMERGING MARKET COUNTRIES: IMF, 07.11.2007, COUNTRY REPORT



IMF: 2014 ARTICLE IV CONSULTATION-STAFF REPORT:

Press Release; December 05, 2014

Summary: Key Issues Context: Country Report No. 14/329

- Growth: depended on persistently large external deficit making the economy sensitive to changes in external financing conditions.
- Inflation: high and above the authorities' target, and real policy interest rates remain negative.
- The exchange rate: continues to be stronger than suggested by fundamentals.

Policies should focus on:

- Rebalancing the economy:
- Reducing the external deficit-by boosting savings rather than decreasing investment
- Lowering inflation to preserve competitiveness.

Over the medium term:

Implementation of the ambitious structural reform agenda is critical to raising potential growth.

Key policy recommendations:

- Fiscal policy should be tighter, raising domestic savings by increasing the primary surplus by 2 percent of GDP by 2017.
- Renewing the focus of monetary policy on the inflation target, by setting and sustaining a positive real policy interest rate.
- Expanding the (macro) prudential toolkit to contain risks to financial stability, in particular the banking system's wholesale external foreign exchange funding.

Traction of past Fund advice:

- The authorities and staff agree that the external imbalance should be reduced, and that this should be done while preserving investment.
- They also concur that lowering inflation is a key objective.
- Moreover, to preserve financial stability, the authorities introduced well-targeted macro prudential measures to slow the rise in household leverage and encourage banks to increase core funding.
- They plan to tackle structural issues through the 10th Development Plan.

However, the authorities believe risks are lower than what staff believes.

IMF: 2014, IV. MADDE KAPSAMINDA DEĞERLENDİRME RAPORU:

Basın Bildirisi: 5 Aralık 2014

Özet: Ana Konular, Ülke Raporu No. 14/329

- . Büyüme: ekonominin sürekli olarak büyük dış finansman ihtiyacına olan bağımlılığı, ekonomiyi dış finansman şartlarındaki değişikliklere çok hassas hale getirmektedir.
- . Enflasyon: yüksektir ve yetkililerin de hedeflerinin üstündedir; reel politika faizleri negatif olmaya devam etmektedir.
- . Döviz kuru: TL, ekonominin icap ettirdiği değerden daha yüksek bir değerde seyretmeye hala devam ettirilmektedir.

Politikalar şu noktalarda yoğunlaşmalıdır:

- . Ekonominin yeniden dengelenmesi.
- . Dış açığın azaltılması: yatırımların azaltılması ile değil tasarrufların artırılması yoluyla yapılması.
- . Enflasyonun düşürülmesi: ekonominin rekabet edebilirliğinin sürdürülebilirliği için.

Orta-dönemli politikalar:

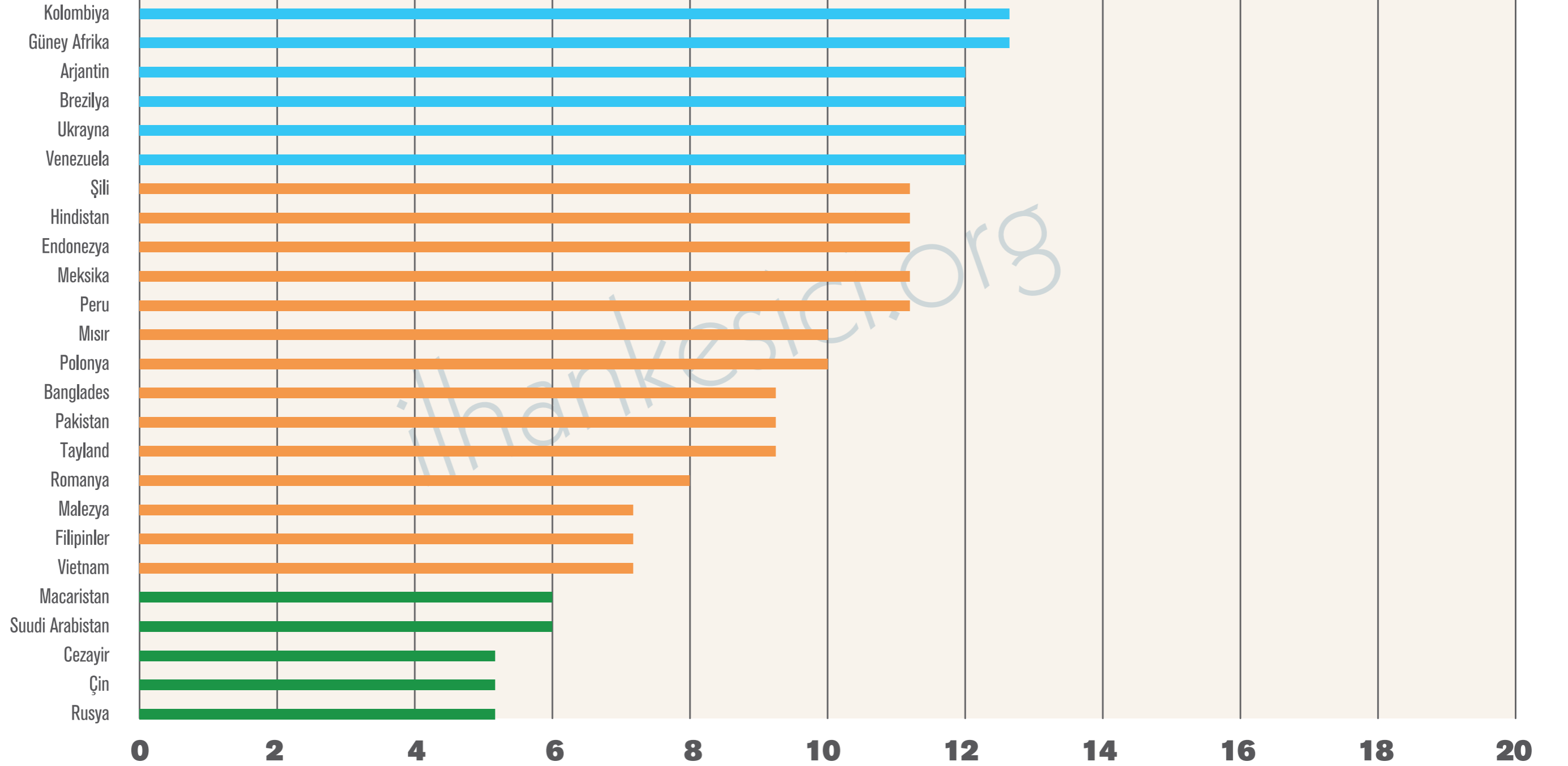
- . Kuvvetli bir yapısal reform programı uygulanması ile potansiyel büyümenin artırılması.
- . Yurtiçi tasarrufunun artırılması.

Ekonominin karşı karşıya bulunduğu riskler konusunda yetkililer riskleri bizden daha düşük görmektedirler.

THE CAPITAL-FREEZE INDEX

DIŐ SERMAYE AKIMINDA BİR AKSAMA OLURSA "EN ÇOK SIKINTIYA DÜŐECEK ÜLKELER ENDEKSİ"

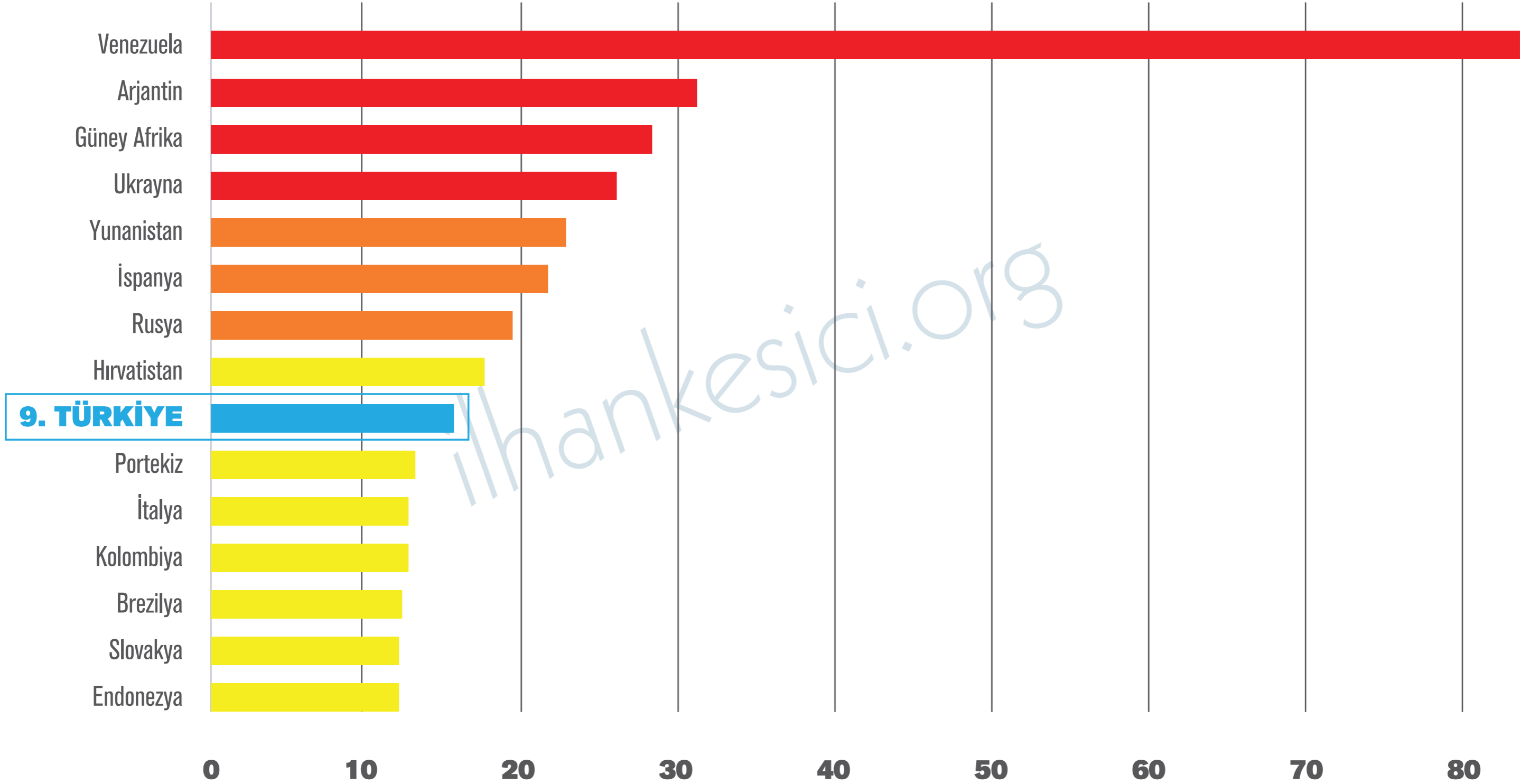
1. TÜRKİYE



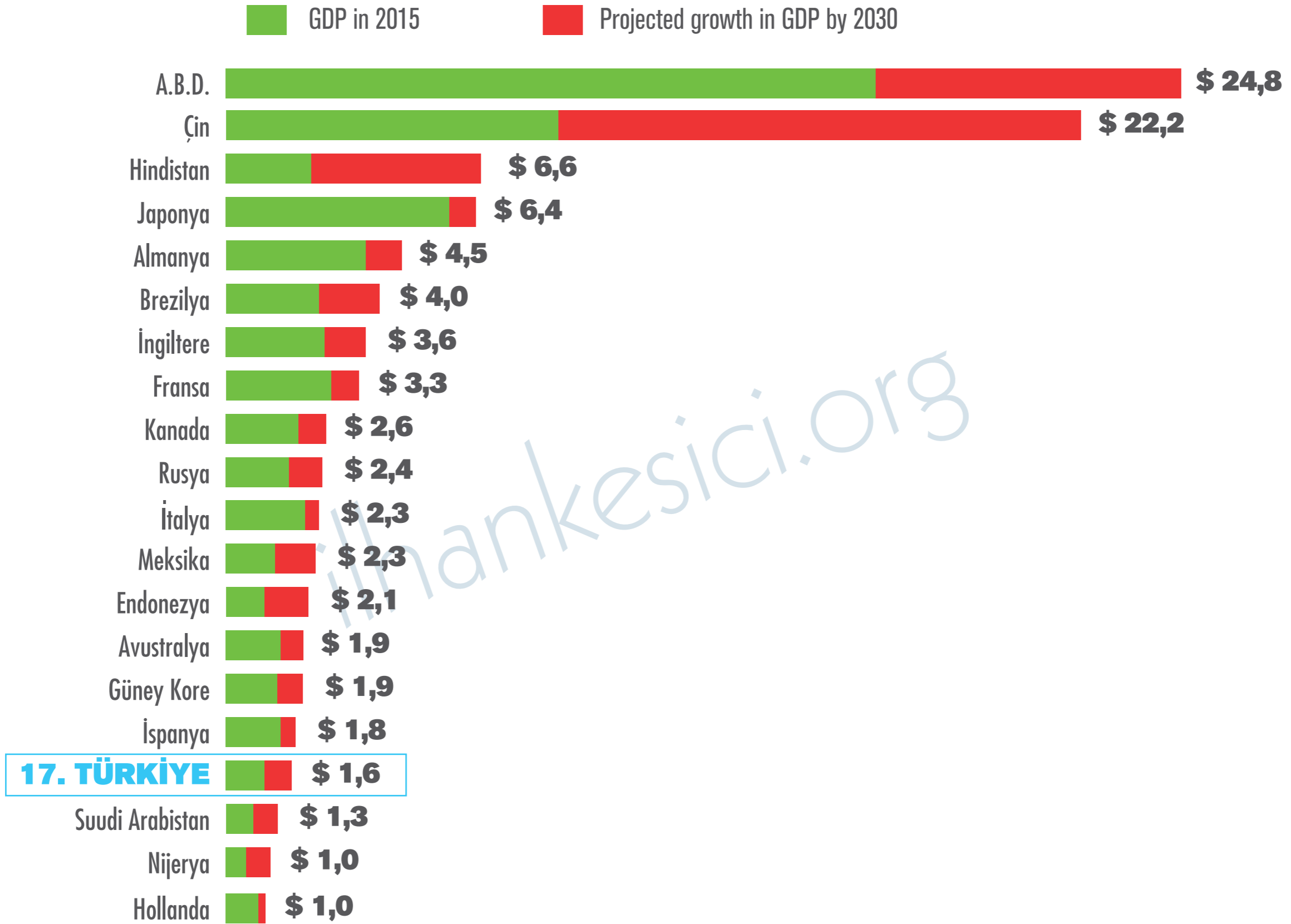
Kaynak: The Economist, 20 Eylül 2013

DÜNYANIN EN KÖTÜ DURUMDAKİ 15 EKONOMİSİ

THE 15 MOST MISERABLE ECONOMIES IN THE WORLD.



WORLD'S LARGEST ECONOMIES IN 2030



Kaynak: U.S. Department Of Agriculture